

Royalty Software Manual

A Part of AnyOrder:
Order Processing & Fulfillment



2018

Great Rift Software - Innovation & Excellence

Royalty Software Manual

AnyOrder

Order Processing & Fulfillment

by Great Rift Software

We are delighted that you have chosen AnyBook! We're very proud of AnyBook and its reception by the publishing and software industries - and we're pretty pleased with the many software awards that it has won through the years.

But what's most important to us is that it works well for you. There's a lot under the AnyBook hood, and we want to make sure that you are able to use the program to its full capability. Thus, this manual has been created. You'll find everything you'll need right here - everything you'll need to help make your business run efficiently and successfully!

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Part



1 Welcome



Welcome to the help documentation for Royalty Functions. To find information on this portion of the program, select from the "Table of Contents" or the "Index" tabs found to the left.

Also here are some commonly used help pages:

Primary Functions:

[Main Menu](#)

[Set-up Royalty Information](#)

[Generate Royalty Reports](#)

[View Royalty Reports](#)

[Royalty Statements](#)

[Cash Reserves Report](#)

Other Topics:

[Menu Bar on the Set-up Screen](#)

[Royalty Set-up Methods \(Counting, Calculation, and Structuring\)](#)

[Menu Bar on the Royalty Report Screen](#)

[Printing Reports](#)

[Menu Bar on the Royalty Statements Screen](#)

[Running Tally Feature](#)

[Backing-up Royalty Database Files](#)

[Restoring Back-up Files](#)

[Networking](#)

NOTE: This help documentation is also available as a PDF manual which can be printed. The content is exactly the same as what is found here, except that it's been organized in manual form. You can download the manual from this link: [PDF Manual](#)

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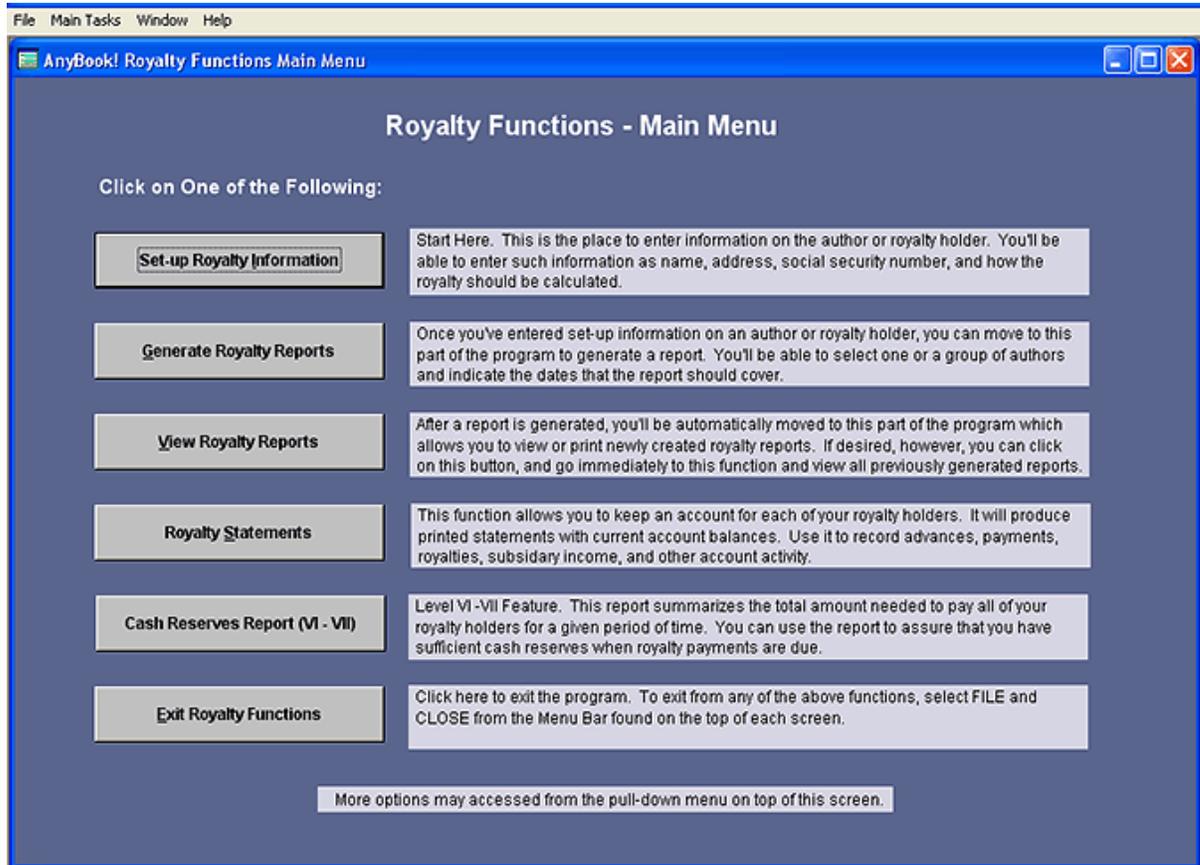
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Part



2 Main Menu

When Royalty Functions starts, the Main Menu appears.



You can move to the different parts of the program by clicking on the appropriate button. You can also reach different parts of the program by pressing ALT on your keyboard and the underlined letter on the button. For example, pressing ALT+ S activates the Set-up Royalty Information function.

Another way to move about the program is make selections from the MAIN TASKS menu found in the Menu Bar which runs across the top of the screen. The Menu Bar is activated by clicking on it with the mouse, or by pressing ALT on the keyboard and the underlined letter of the menu name. For instance, pressing ALT+M activates the MAIN TASKS menu.

Other choices available from the Menu Bar include a [back-up](#) feature which makes a copy of the important database files containing royalty information. The back-up feature is reached by selecting FILE and BACK-UP ROYALTY FILES.

If you encounter a problem with one of your database files, you can [restore](#) saved files from a back-up disk by selecting FILE and RESTORE ROYALTY FILES from the Menu Bar.

Re-indexing is also available for Royalty Statement files. You'll rarely use this feature, if ever, but it is available if the processes in the Statement portion of the program seem to be slowing considerably. It's accessed by selecting FILE and RE-INDEX ROYALTY FILES/

The Menu Bar also enables you to select any of the windows that may be open while you are running the program. To do so, click on WINDOW. The names of any open windows will be listed. To access one, click on the desired name.

Help information can be reached from the Menu Bar by selecting HELP. Help can also be reached by pressing F1 on the keyboard. Information on the program's version number, system resources, and other information is available by selecting HELP and ABOUT.

Click on any of the following for more information on the primary functions of the Royalty program:

[Set-up Royalty Information](#)

[Generate Royalty Reports](#)

[View Royalty Reports](#)

[Royalty Statements](#)

[Cash Reserves Report](#)

2.1 Backing Up Files

Like your invoice files, the database files that hold your royalty information are critically important, and you'll want to keep them regularly backed-up. In Basic Set-up (accessed from the Main Invoice Screen), you can indicate that you want the program to automatically back-up your files each time you exit. This setting also applies to royalty files. The automatic back-up feature is turned on by default--and, as long as you don't turn it off in Basic Set-up, it will stay that way.

You can back-up your royalty files when the main AnyOrder program exits by placing a checkmark beside "Include Royalty Files" in the Back-up dialog box.

To back-up files, make sure your back-up disk is inserted in the drive.

Drive / Directory for Back-up:

D:\BackUp1

Place all files in one zip file named MyBackUp.zip
Zip file set-up information:

Press <ENTER> or the OK button to start the back-up process.

You may cancel out of this procedure by clicking on CANCEL below, but please don't. Backing up your files each time you exit is extremely important. For more info: click HELP.

It's highly recommended that you use two back-up disks (or media) and alternate the disks for each back-up (see more information in HELP). For this back-up, use the following disk: **1**

To back-up CD's, see special help instructions (click on Help below). The default back-up drive & directory shown above can be changed in Basic Set-up.

Options:

Include Royalty Files (Leave unchecked if you don't use Royalty Functions.)

Include AnyPO: Purchase Order System Data Files (Leave unchecked if you don't use AnyPO)

If you have limited disk space, however, you may want to back-up your royalty files on a separate disk. The back-up feature in the Royalty Functions allows you to do that. Royalty files can be backed on a

different drive or directory than is used for invoice files. The directory that you designate when the Royalty Back-up file dialog box appears will be remembered for subsequent sessions.

We highly recommend that you use two disk system. Alternate the use of disks each day. In other words, one day, you would use disk # 1. Then next day, you would use disk # 2. Keep alternating the disks each time you do a back-up. This, of course, provides protection if one of the disks goes bad, but more importantly, it protects you in the event of a computer or operating system malfunction. If you do a back-up to recover from a malfunction, the data on your back-up disk may end up garbled. Moreover, at the same time, the malfunction may have garbled the data that AnyOrder uses on your hard drive. If you depend solely on one back-up disk, you'll have no data left. Think of that: all of your business data gone! However, if you alternate back-up disks, you'll have everything except the current day's data. Reconstructing one day's data is world of difference from reconstructing several years.

In addition to regular back-ups which occur when you exit, you may also want to back up files at other times. If you are entering a lot of royalty information, you can periodically back them up on the fly by selecting FILE and BACK-UP ROYALTY FILES from the Menu Bar at the top of screen.

The Back-up File dialog box appears whenever a back-up is done. Your default back-up drive (and/or directory) will appear in the box. If you want to change the drive, click on "Browse" (or double-click in the drive blank) and list of drives and directories will appear.

The type of files (dBase Files) used by this program have been time tested over the years and are some of the most stable and reliable in the business. Under normal conditions, you shouldn't experience problems. Your files, however, can be damaged from one of the following events: a power spike or power outage occurs, the computer is turned off without exiting the program, or the hard drive containing your files malfunctions.

If any of the above potentially damaging events occurs, and if your program is still running, exit the program, but *do not do a back-up*. *If your data files have been damaged, you'll not want to back-up the damaged files*. When it's safe, re-start the program. If the program starts with no problems, take a close look at your royalty information: page through a number of your set-up records and royalty reports and make sure that all the information is there and that the information is lined up correctly in the proper blanks. Generally, if there's a problem with the files, the program will detect it right away before the Main Menu appears.

A special module has been built into the royalty program that is automatically activated when file problems are detected. The detection process occurs when the Royalty Functions Main Menu is first started, and the module will appear if it finds a file problem. It will, then, analyze the problem and lead you through some steps to try to correct it. If it is unable to correct the problem, it will ask you to put your back-up disk in a drive. The back-up files will be restored. As long as your back-up files are not corrupted, that should be the end of it, and you'll be able to use your royalty files. You may end up losing some of the work you did when the damaging event occurred, but the remainder of your files should be intact.

2.2 Restoring Back-up Files

Restore is used to move your royalty files from the back-up disk to AnyOrder's program directory. Use Restore after you've re-installed the program or moved the program to a different computer.

In order to use Restore, you must regularly back up your files each time you exit from the program. The program is set up to back up files in this manner, and as long as the back up procedure hasn't been turned off in Basic Set-up, you'll keep your back-up disk updated and ready for a Restore if it becomes necessary.

If you ever have a serious file problem that is caused by a file damaging event (such as a power outage, power spike, a defective disk drive or by turning off the computer when the program is on), the Restore feature can help get you up and running again. Indications of damaged files are the following: odd characters and gibberish appearing in the blanks of the Set-up Screen, information that is missing,

or information that is not properly lined up in the blanks.

When you restore in the main AnyOrder program, all long as "Include Royalty Files" is checked, then AnyOrder will restore the royalty files along with all of its other data files.

RESTORE BACK-UP FILES

Use this function if you are restoring your original files after transfer the program to a new computer or directory, or after doing a re-install of the program, or in the event of a hard disk problem and/or file corruption.

To restore files from your back-up disk to hard drive, indicate their location:

Back-up Files Drive/Directory:

Check here if the back-up files are contained in a zip file (MyBackUp.zip)

Zip file set-up information:

Select Browse or double-click for a list of drives and directories. Press <ENTER> to start the process. Press <ESC> to cancel the process. The most recently used back-up disk is #1.

Options:

- Include Royalty Files (Leave unchecked if you don't use Royalty Functions.)
- Include AnyPO: Purchase Order System Data Files (Leave unchecked if you don't use AnyPO)

You can also restore directly from the Royalty module. To access it, go to the Main Menu in Royalty Functions and select FILE and RESORE ROYALTY FILES from the Menu Bar. The following dialog box appears:

Restore Royalty Files From Back-up Disk

Use this function if you are restoring your original files after doing a re-install of the program or when you've had hard disk problems or file corruption.

To restore files from your back-up disk to hard drive, indicate their location:

Back-up Files Drive/Directory:

Select Browse or double-click for a list of drives and directories. Press <ENTER> to start the process. Press <ESC> to cancel the process.

You don't want to indiscriminately use Restore since you can lose any reports that have added since your last back-up. However, if no reports have been added or changed since the last back-up, then you won't lose anything.

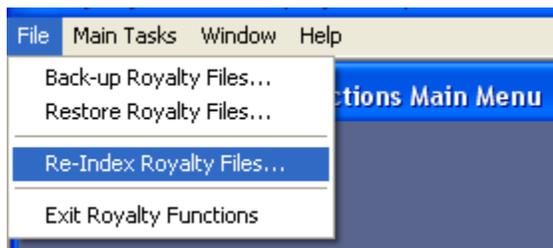
The Restore dialog box will appear and will list your default back-up drive. If you need to change to another drive, click on "Browse" (or double-click in the drive blank) and a list of available drives will appear. When the correct drive is listed, make sure your back-up disk is inserted, and click on OK. Your back-up files will overwrite the problem files on your program disk, and you'll be ready to

continue.

2.3 Re-index Royalty Files

The Royalty Statements portion of the program uses a type of database file called an index file. Index files provide rapid access to information. Re-indexing these files may help clear up the following problems: 1) The Royalty Statement portion of the program seems to be slowing significantly; 2) Some of the names of royalty holders are not lining up properly in their blanks.

To re-index files select FILE >> REINDEX



After selecting Re-index, a dialog box will appear which explains the process. When you are ready, press OK. Once the files are re-indexed, the royalty program will re-start.

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Part



3 Set-up Royalty Information

The Set-up Royalty Information Screen is reached by clicking on the appropriate button on the Main Menu or choosing MAIN TASKS >> SET-UP ROYALTY INFORMATION from the Menu Bar.

This is the place to get everything ready for royalty accounting. On the Set-up Screen, you enter such things as the royalty holder's name, address, social security number, and all the details on how the royalty is to be calculated.

You can move from blank to blank on the Set-up screen by using the Tab key on your keyboard or by clicking with your mouse.

You can move to different royalty holders by pressing Page Up or Page Down on your keyboard. To go to the first record, press Ctrl+Page Up on your keyboard. To go to the last record, press Ctrl+Page Down. You can also move from record to record by clicking on one of the navigation buttons on the right center of the screen. The navigation buttons resemble the buttons on a VCR, CD or tape player. The right arrow button (>) goes to the next record and the left arrow button (<) goes the previous record. The right arrow with a line (>|) goes to the last record, and the left arrow with a line (|<) goes to the first record.

For more information on the parts of the Set-up Screen, click on any of the following (in order of how they are placed on the screen, top to bottom):

[Menu Bar](#)

[Name, Address, and Phone Blanks](#)

[Email, Product, and Catalog Number Blanks](#)

[Summary Name, Social Security, Active, and Code](#)

[Keep Running Tally Box](#)

[Counting, Calculation and Structuring Methods](#)

[Options \(Net and Profit Calculation Methods\)](#)

[Vary Rate Based on Pricing Level](#)

For more information on setting up a royalty with a Variable Structure:

[Indicating the Number of Quantity Breakpoints](#)

[Indicating the Number of Discount Ranges](#)

[Entering Breakpoints & Royalty Rates for Variable Structure \(Quantity\)](#)

[Entering Discount Ranges & Royalty Rates for Variable Structure \(Discount\)](#)

[Entering Breakpoints, Ranges & Rates for Variable Structure \(Quantity & Discount\)](#)

3.1 Details: Parts of the Royalty Set-up Screen

The sub-categories under this section provide details on each of the parts of the [Royalty Set-up](#) screen.

The screenshot displays the 'Royalty Set-up' window with the following details:

- Name:** William Shakespeare (SAMPLE) L
- Catalog #:** BK/NTBP1 L
- Retail:** \$14.95
- Active:**
- Address:** (To generate a report, use the dates: 01/01/11 to 12/31/11)
- Product:** Never Turn Back-Paper
- Code:**
- City / ST:** Stratford
- Abbreviated Product Name:** Never Turn Back-Pap
- Country:** ENGLAND
- Summary Name:** Shakespeare--Never Turn Back
- Phone:** 1-219-555-1212
- Email:** Shakespeare@Globe.com
- Soc. Security (Or Other ID #):**

Select One of the Following Counting Methods:

- CASH Method (Count only those books for which payment has been received).
- ACCRUAL Method (Count all books invoiced whether payment has been received or not).

Select One of the Following Calculation Methods:

- RETAIL Amount. Calculate royalty as a percentage of the book's retail price. **Label to Use:** []
- NET Amount. Calculate royalty as a percentage of the amount after discount is removed.
- FLAT Amount. Royalty not based on a percentage but is a flat amount, i.e. \$2.00 per book.
- PROFIT. Royalty is based on a percentage of gross profit (revenues minus cost).

Options: Net & Profit Calculation Methods
Before calculating royalties, remove the following:

- Credit card fees [0.0000]
- Unpaid shipping (VII)
- Sales rep commissions
- Other fees (Level VII): []
- Invoiced fees ("F" Sales Code) [0.00 %]

Keep Running Tally: Total Number Sold [0]
More Information: [Info] As of [12/31/10]

Select One of the Following Structuring Methods:

- SIMPLE Structure. Only one percentage (or flat) amount, no matter how many books sold or at what discount.
If the structure is SIMPLE, type in the percentage (or flat amount) here: [10.0000 %]
(Type in percentage as a whole number. Example: 10.0000 means 10%. Type in flat rate as a monetary amount. Example: 5.250000 means \$5.25.)
- VARIABLE Structure. Percentage varies depending on quantity and/or discount.
If the structure is VARIABLE, select one (or both) of the following:
 - Quantity. The royalty percentage changes as more books are sold. Returns: [R] Apportion: []
How Many Quantity Breakpoints (Maximum of 5): [0]
 - Discount. The royalty percentage depends on how much the book is discounted.
How Many Discount Ranges (Maximum of 4): [0]

Pricing Levels (Level 7)
 Vary rate based on Pricing Level
[Pricing Level Set-up]

Notes:

Record # 1/1 | Look-up | Search | [Home] [Left Arrow] [Right Arrow] [End] | Close | Help

For more details, select one of the following:

- [Name, Address, and Phone Number](#)
- [Summary Name, Social Security, Active & Code](#)
- [Email, Product, and Catalog Number Blanks](#)
- [Royalty Calculations for a Category](#)
- [Options](#)
- [Counting, Calculation and Structuring Methods](#)
- [Cash-based Counting](#)
- [Keep Running Tally Box](#)
- [Basic Information on the Set-up Screen](#)
- [Pricing Levels](#)

3.1.1 Set-Up Screen: Name, Address, and Phone Number

In the Name blank, enter the name of the royalty holder. Unless you have lots of royalty holders, it's fine to enter the first name first.

Name	William Shakespeare (SAMPLE)	L
Address	(To generate a report, use the dates: 01/01/11 to 12/31/11)	
Address		
City / ST	Stratford	
Country	ENGLAND	
Phone	1-219-555-1212	Dial
Email	Shakespeare@	

If the individual is a previous royalty holder (if you've already entered his or her name into the file), double click with your mouse in the name blank and a list of all entered royalty holders will appear. Select the proper name from the list and the royalty holder's address, city, state, social security number, etc. will be automatically entered for you. (Note that you can also activate the list of previous royalty holders by selecting EDIT and PASTE FROM LIST from the Menu Bar or pressing CTRL+L on the keyboard.)

The royalty holder's name blank has a special speed menu, accessed by clicking the right mouse button. You can paste or copy entire addresses. For example, you can copy an royalty holder's name and address from an email message and paste everything into the report screen. There are some format limitations, of course, but, all in all, it's a very useful tool. You've probably used it before. It's found on the Main Invoice Screen. For more information, see "Speed Menu" in the AnyOrder's main HELP documentation.

If the royalty holder has a one-line address, fill in the Address1 blank. Use Address2 if the royalty holder's address requires more than one line. Fill in the City, State (or province), and Country blanks. Zip or city codes go in the zip blank. The zip blank is long enough for Canadian or other Country codes. Zip extensions, if any, are typed-in the box just under the zip code. The zip code blank also has a special speed menu (accessed by right clicking).

Phone

Enter the royalty holder's phone number in this blank. Just to the right of the phone number is button

with "D" (for Dial) on it. By clicking the button, AnyOrder's internal Phone Dialer program will be activated.

Note that you can determine how you want the button to function. You may wish to change the function of the button from dial to copy. In the copy mode, the button copies the phone number to the clipboard. Once in the clipboard, you can paste it in the phone dialer that comes with Windows or some other third party telephony program. The button's function is set in Basic Set-up which is accessed from AnyOrder's Main Invoice Screen. More information on AnyOrder's phone dialer can be reached from the Help Menu on the Invoice Screen.

Other parts of the Set-up Screen include:

[Menu Bar](#)

[Name, Address, and Phone Blanks](#)

[Email, Product, and Catalog Number Blanks](#)

[Summary Name, Social Security, Active, and Code](#)

[Keep Running Tally Box](#)

[Counting, Calculation and Structuring Methods](#)

[Options \(Net and Profit Calculation Methods\)](#)

[Vary Rate Based on Pricing Level](#)

For more information on setting up a royalty with a Variable Structure:

[Indicating the Number of Quantity Breakpoints](#)

[Indicating the Number of Discount Ranges](#)

[Entering Breakpoints & Royalty Rates for Variable Structure \(Quantity\)](#)

[Entering Discount Ranges & Royalty Rates for Variable Structure \(Discount\)](#)

[Entering Breakpoints, Ranges & Rates for Variable Structure \(Quantity & Discount\)](#)

3.1.2 Set-Up Screen: Summary Name, Social Security, Active & Code

Summary Name

The Summary Name blank is found on the upper right of the Set-up Screen. You'll want to make sure you have a Summary Name entered. It's used for listing purposes in the [Report Generator](#), and without it, you won't be able to access your royalty holders. Once you've entered a product's name, the program will automatically enter a Summary Name for you, but you should check the name and make sure it is correct.

A Summary Name should consist of the royalty holder's last name followed by the product name. In this way when you pick from the report list, you'll be able to see the royalty holder's name and the associated product. It's important to include both the royalty holder's name and the product since you may have the same royalty holder receiving royalties on several different products.

Note, if you make a change the product's name, you'll need to manually alter the Summary Name to reflect the change.

Catalog # BK/NTBP1 L Retail \$14.95 Active
Product Never Turn Back-Paper Code
Abbreviated Product Name Never Turn Back-Pap
Summary Name Shakespeare--Never Turn Back
lobe.com Open Soc. Security (Or Other ID #)

Social Security

Enter the royalty holder's Social Security number in this blank. It's helpful to have the social security number on file since, at the end of the year, you'll need this information for tax reporting purposes.

Active

Keep this box checked as long you are actively issuing royalty checks to the individual. When the product is discontinued, and you're no longer selling it, remove the checkmark.

Code

This is an optional field, but you can use this field to categorize or group your royalty reports (and statements). The "[Filter Reports](#)" feature on the [View Report Screen](#) allows you to filter by a code and limit the display to only those reports to a certain code. This may also be used if you are using an add-on feature which allows you to separate your business into two or more divisions or companies.

Other parts of the Set-up Screen include:

[Menu Bar](#)

[Name, Address, and Phone Blanks](#)

[Email, Product, and Catalog Number Blanks](#)

[Summary Name, Social Security, Active, and Code](#)

[Keep Running Tally Box](#)

[Counting, Calculation and Structuring Methods](#)

[Options \(Net and Profit Calculation Methods\)](#)

[Vary Rate Based on Pricing Level](#)

For more information on setting up a royalty with a Variable Structure:

[Indicating the Number of Quantity Breakpoints](#)

[Indicating the Number of Discount Ranges](#)

[Entering Breakpoints & Royalty Rates for Variable Structure \(Quantity\)](#)

[Entering Discount Ranges & Royalty Rates for Variable Structure \(Discount\)](#)

[Entering Breakpoints, Ranges & Rates for Variable Structure \(Quantity & Discount\)](#)

3.1.3 Set-Up Screen: Email, Product, and Catalog Number Blanks

Email

Enter the royalty holder's email address in this blank. Just to the right of the email address is a light blue button. By clicking on the button, AnyOrder will activate your email program and insert the address in the "TO" blank. Like the phone button, you can change the function of the email button so that it copies to the clipboard. The button's function is set in Basic Set-up. More information on the AnyOrder's email features can be found in the Help Menu accessed from the Main Invoice Screen.

Product, Catalog Number, Price

In the product blank, enter the name of the product from which the royalty holder will be receiving royalties. The best way to enter the product's name is to click on the "L" button beside the Catalog Number blank. This will bring up the Product Pop-up list and a list of products. Pick the correct product and press Paste. The product name, catalog number and retail price will be entered in the blanks automatically for you. (Note that you can also activate the list of products by double clicking in Product Name or Catalog Number, selecting EDIT and PASTE FROM LIST from the Menu Bar or pressing CTRL+L on the keyboard.)

The screenshot shows a software interface with the following fields and values:

- Catalog #: BK/NTBP1 (with an "L" button next to it)
- Retail: \$14.95
- Active:
- Product: Never Turn Back-Paper
- Code: (empty)
- Abbreviated Product Name: Never Turn Back-Pap
- Summary Name: Shakespeare--Never Turn Back
- lobe.com (with an "Open" button)
- Soc. Security (Or Other ID #): (empty)

Category

You can also produce a royalty report for a product category instead of an individual product. To do so, the category feature needs to be turned on and the prefix of the category entered in the Catalog Number blank and the category name entered in the Product blank. To turn on the feature, select TOOLS and ROYALTY BASED ON A CATEGORY from the Menu Bar. [More Information](#)

Abbreviated Product Name.

The abbreviated product name is used for listing purposes. In this blank, type in a shortened or abbreviated version of the product name. You have 20 characters of space to work with. AnyOrder will attempt to shorten the name when you paste a catalog number and product name from the Product Pop-up list, but you'll want to review and re-work it to your satisfaction.

Other parts of the Set-up Screen include:

[Menu Bar](#)

[Name, Address, and Phone Blanks](#)

[Email, Product, and Catalog Number Blanks](#)

[Summary Name, Social Security, Active, and Code](#)

[Keep Running Tally Box](#)

[Counting, Calculation and Structuring Methods](#)

[Options \(Net and Profit Calculation Methods\)](#)

Vary Rate Based on Pricing Level

For more information on setting up a royalty with a Variable Structure:

[Indicating the Number of Quantity Breakpoints](#)

[Indicating the Number of Discount Ranges](#)

[Entering Breakpoints & Royalty Rates for Variable Structure \(Quantity\)](#)

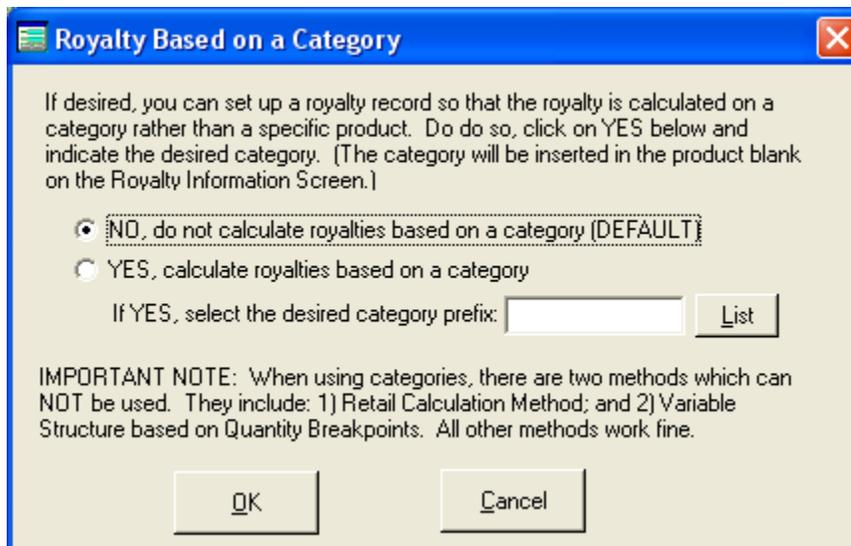
[Entering Discount Ranges & Royalty Rates for Variable Structure \(Discount\)](#)

[Entering Breakpoints, Ranges & Rates for Variable Structure \(Quantity & Discount\)](#)

3.1.4 Set-up Screen: Royalty Calculations for a Category

If desired, you can have AnyOrder calculate royalties for a category. In other words, royalties can be calculated for a group of products (identified by their category prefix) rather than a specific product. You might use this method to group products by royalty holders. For instance, you might group all books by an author into a category. Or you might group all paintings by an artist in another category. This method can also be employed to group licensed products together. For example, you may pay royalties for a group of products that use a university logo on sweat shirts.

To use the Category option, you need to turn it on. To do so, select TOOLS and ROYALTY CALCULATIONS FOR A CATEGORY from the Menu Bar.



In the dialog box that appears, select YES and enter the prefix for the category. To pick from a list, click on the "List" button. The category prefix will be entered in the Catalog Number blank and category name in the Product blank.

To indicate that the category feature is turned on, "Catalog #" on the Royalty Set-up Screen will be replaced by "Category" and the lettering will turn to light blue.

There are some limitations associated with this function. Since the retail price of products in a category can vary, you *can not* use the "Retail Amount" Calculation method. You also can't utilize a Variable Structure based on quantity. The best way of calculating royalties on a category is to use the

"Net Amount" Calculation method. Thus, royalties will be figured upon a percentage of net sales, the amount that you receive for the goods after any discount.

The other limitation is that the royalty report produced by this method shows the accumulative total number of products sold and the total accumulative net amount. It does not provide an individual breakdown of the totals of each product. If desired, you can obtain an individual product breakdown by running an inventory from the Main Invoice Screen (MAIN TASKS and INVENTORY FUNCTIONS), but the information would be contained in a separate report and is not integrated into the royalty report.

Other parts of the Set-up Screen include:

[Menu Bar](#)

[Name, Address, and Phone Blanks](#)

[Email, Product, and Catalog Number Blanks](#)

[Summary Name, Social Security, Active, and Code](#)

[Keep Running Tally Box](#)

[Counting, Calculation and Structuring Methods](#)

[Options \(Net and Profit Calculation Methods\)](#)

[Vary Rate Based on Pricing Level](#)

For more information on setting up a royalty with a Variable Structure:

[Indicating the Number of Quantity Breakpoints](#)

[Indicating the Number of Discount Ranges](#)

[Entering Breakpoints & Royalty Rates for Variable Structure \(Quantity\)](#)

[Entering Discount Ranges & Royalty Rates for Variable Structure \(Discount\)](#)

[Entering Breakpoints, Ranges & Rates for Variable Structure \(Quantity & Discount\)](#)

3.1.5 Set-Up Screen: Options

If you select either Net or Profit as the calculation method, you have three additional options to select from. You can select one, two, or all three.

Options: Net & Profit Calculation Methods

Before calculating royalties, remove the following:

Credit card fees Unpaid shipping (Vll)

Sales rep commissions Other fees (Level Vll):

Invoiced fees ("F" Sales Code)

Remove Credit Card Fees. This will remove credit card fees from net sales (if you selected the "Net Amount" Calculation Method) or gross profit figure (if you selected the "Profit" Calculation Method). AnyOrder removes the fees before the royalty calculation is made. Two prerequisites are required to obtain credit card fees. First of all, you need to indicate a credit card discount rate in Basic Set-up (FILE >> BASIC PROGRAM SET-UP). Secondly, a credit card number should have been entered in the Card # field on the Main Invoice Screen. You can either type the full credit

number or the last 4-digits of the customer's card number. As long as there is a number, AnyOrder will interpret the invoice as a credit card sale. That provides AnyOrder with the necessary information to calculate total card fees. AnyOrder totals up the amount paid for the product (if paid by credit card). It multiplies this figure by the discount rate that you have entered in Basic Set-up and subtracts the result from Gross Profit. If you have not yet entered an average credit card discount, you can click on the "L" button for more information, and to enter the rate.

Remove Invoiced Fees. This removes Invoiced Fees from net sales (if you selected the "Net Amount" Calculation Method) or gross profit figure (if you selected the "Profit" Calculation Method). AnyOrder removes the fees before the royalty calculation is made. Invoiced fees are often storage or service fees that you pay to have your products warehoused with a distributor. Two prerequisites are required. First, the fees must be recorded on invoices by use of the 'F' sales code. Secondly, the catalog number of the product (for which the royalty report is being prepared) must appear along with the "F" code. If you've met those two prerequisites, AnyOrder can remove them from the gross profit figure. Note that Fees are removed based on the date of the invoice. This the same whether you use a Cash or Accrual Counting Method.

Remove Commissions to Sales Representatives. This will remove any payments made to sales representatives. AnyOrder will run through each of the invoices and calculate the proportion of the commission payment which is allocated to the product (for which the royalty report is being prepared.) The amount will be deducted from the gross profit figure prior to making the royalty calculation.

Remove Unpaid Shipping (Level 7 feature). This removes shipping charges that have not been paid by your vendors, rather it's shipping charges you have paid for. In order to use this, you must have used the feature on the Main Invoice Screen which turns the shipping charges a blue color (meaning that you picked up the charges). AnyOrder will apportion the shipping charges between the various products listed on the invoice in proportion to their amounts. For example, let's say the shipping charges are \$10 and the total of product A is \$40 and the total of product B is \$60. In that case, AnyOrder will assign \$4 to product A and \$6 to product B. When royalties are being calculated for product B, AnyOrder will remove \$6 from the net proceeds.

Remove Other Fees (Level 7 feature). In addition to the fees associated with credit cards, you can also remove fees from other payment services. One common one is PayPal which extracts a fee each time a customer makes a payment. In order to use it, you must indicate that the payment was made by PayPal (or another payment service) in the Payment Box on the Main Invoice Screen. You can turn the feature on by clicking on the "L." Follow the directions on the dialog box that appears.

Other parts of the Set-up Screen include:

[Menu Bar](#)

[Name, Address, and Phone Blanks](#)

[Email, Product, and Catalog Number Blanks](#)

[Summary Name, Social Security, Active, and Code](#)

[Keep Running Tally Box](#)

[Counting, Calculation and Structuring Methods](#)

[Options \(Net and Profit Calculation Methods\)](#)

[Vary Rate Based on Pricing Level](#)

For more information on setting up a royalty with a Variable Structure:

[Indicating the Number of Quantity Breakpoints](#)

[Indicating the Number of Discount Ranges](#)

[Entering Breakpoints & Royalty Rates for Variable Structure \(Quantity\)](#)

[Entering Discount Ranges & Royalty Rates for Variable Structure \(Discount\)](#)

[Entering Breakpoints, Ranges & Rates for Variable Structure \(Quantity & Discount\)](#)

3.1.6 Set-Up Screen: Counting, Calculation and Structuring Methods

General Information on Counting, Calculation and Structuring Methods

The way royalties will be calculated are determined by the selections you make in each of the three method boxes which occupy the bottom half of the Set-up Screen: Counting, Calculation and Structuring. Choices are made by clicking on the appropriate radio button. In the third box (Structuring Method), you'll also enter the desired royalty rate. If you choose Simple Structure, it's just a matter of entering the royalty rate in the blank provided.

If you choose Variable Structure, however, you'll need to enter several royalty rates depending upon the number quantity breakpoints or discount ranges you've chosen. To enter the rates, click on the button on the bottom right hand corner of the screen.

The royalty will be calculated based on the selections you make from the method boxes. For example, you can calculate a royalty based on cash received, the retail amount and a simple rate of 10%. Or you can calculate a royalty based on accrual accounting, the net amount, and a rate that varies with number of products sold. Many combinations are possible. Having the ability to choose different combinations and rates helps you fine tune royalty payments to match the royalty holder and the product.

<p>Select One of the Following Counting Methods:</p> <p><input type="radio"/> CASH Method (Count only those books for which payment has been received).</p> <p><input checked="" type="radio"/> ACCRUAL Method (Count all books invoiced whether payment has been received or not).</p>	<p>Options: Net & Profit</p> <p>Before calculating royalties:</p> <p><input type="checkbox"/> Credit card fees</p> <p><input type="checkbox"/> Sales rep commission</p> <p><input type="checkbox"/> Invoiced fees ("Fees")</p>
<p>Select One of the Following Calculation Methods:</p> <p><input checked="" type="radio"/> RETAIL Amount. Calculate royalty as a percentage of the book's retail price. <input type="text" value="10.0000"/> <input type="button" value="H"/></p> <p><input type="radio"/> NET Amount. Calculate royalty as a percentage of the amount after discount is removed.</p> <p><input type="radio"/> FLAT Amount. Royalty not based on a percentage but is a flat amount, i.e. \$2.00 per book.</p> <p><input type="radio"/> PROFIT. Royalty is based on a percentage of gross profit (revenues minus cost).</p>	<p><input checked="" type="checkbox"/> Keep Running Time</p> <p>More Information</p>
<p>Select One of the Following Structuring Methods:</p> <p><input checked="" type="radio"/> SIMPLE Structure. Only one percentage (or flat) amount, no matter how many books sold or at what discount. If the structure is SIMPLE, type in the percentage (or flat amount) here: <input type="text" value="10.0000"/> % (Type in percentage as a whole number. Example: 10.0000 means 10%. Type in flat rate as a monetary amount. Example: 5.250000 means \$5.25.)</p> <p><input type="radio"/> VARIABLE Structure. Percentage varies depending on quantity and/or discount. If the structure is VARIABLE, select one (or both) of the following:</p> <p><input type="checkbox"/> Quantity. The royalty percentage changes as more books are sold. <input type="text" value="0"/> <input type="button" value="Returns: R"/> <input type="button" value="Apportion"/></p> <p><input type="checkbox"/> Discount. The royalty percentage depends on how much the book is discounted. <input type="text" value="0"/> <input type="button" value="Returns: R"/> <input type="button" value="Apportion"/></p> <div style="border: 1px solid black; padding: 5px; width: fit-content; margin-left: auto;"> <p>Variable Structure: After Indicating Quantity and/or Discount Set-up</p> <p><input type="button" value="Quantity Or Discount Set-up"/></p> </div>	

More information on each of the three Method boxes is found below:

Counting Methods

Counting Method refers to the way in which the products are inventoried for a royalty report: based on accrual accounting or cash received.

Before explaining the Counting Method in more detail, it's important to understand that when royalty reports are generated, they are created for a given time period. You'll indicate the desired time period of the report in the [report generator](#). For instance, if you do royalty reports on an annual basis and your fiscal year is based on the calendar year, you might indicate that time period of the report will be from 01/01/14 to 12/31/14.

More information on the two Counting Method choices follows:

Cash. If you select CASH, then the products counted will be those products sold and *for which you have received payment* during the designated time period of the report. This is a common way for a business to set-up a royalty payment system since they want to make sure they've been paid before paying royalties to the royalty holder. A cash-based counting method enables you to do this. For more information on how items are counted, see [Cash-based Counting](#).

Accrual. If you select ACCURAL, then the products counted will be those products *invoiced* during the designated time period *whether or not they have been paid*. Some businesses prefer to handle royalties this way since it matches the way they do their annual inventory for tax purposes. The total numbers of goods sold on inventory reports will match the numbers appearing on royalty reports. Using the Accrual Method means that you may not have received payment on all the products reflected on the royalty report. Those who use this method, however, feel that the amount required for royalty payment balances itself out, particularly as more time passes and more products are sold.

Calculation Method

The Calculation Method determines how the formula for royalty calculations will be factored. Calculation factors include retail price, net amount, flat amount, or profit:

Retail Amount. If you select Retail Amount, then royalties will be *based on the retail price* of the product. If a product's retail price is \$20, then \$20 will be used in the royalty calculation formula. For example if you sold 100 copies of a product priced at \$20 and you have a simple royalty of 8%, the royalty formula would be: $100 \times .08 \times 20 = \160

Retail Amount has often been used by businesses because it is easy to work with. All that is necessary is to get a total count of products sold, and the royalty is derived by taking the number sold times the rate and the retail price.

Retail Amount Option: You can change the term that AnyOrder uses on the printed royalty report. In the "Calculation Method" box on the Royalty Set-up Screen, just to the right of "RETAIL Amount" is a field called "Label to Use" which allows you to enter a substitution for the word: "Retail."

Select One of the Following Calculation Methods:

- RETAIL Amount. Calculate royalty as a percentage of the book's retail price. Label to Use:
- NET Amount. Calculate royalty as a percentage of the amount after discount is removed.
- FLAT Amount. Royalty not based on a percentage but is a flat amount, i.e. \$2.00 per book.
- PROFIT. Royalty is based on a percentage of gross profit (revenues minus cost).

First some background information: under the default configuration of the program, the printed

royalty report includes the label: "Retail." For example, if you select the "Retail" calculation method, the report would include the following:

$$\text{Royalty} = \text{Net Total} \times \text{Retail Price} \times \text{Rate} (.05)$$

If desired, you can change "Retail" to another modifier by typing the desired alternative word in the "Label to Use" field. For example, you might type in "List." In that case the report would include:

$$\text{Royalty} = \text{Net Total} \times \text{List Price} \times \text{Rate} (.05)$$

Keep in mind that only the adjective "Retail" is changed. The word "Price" remains. Whatever you designate should modify "Price" as in "List Price." Note also that there's a limit of 10 characters.

To change the name on *this royalty record*, type the desired name in the "Label to Use" blank.

If you'd like, the default can be changed so that *EACH time a new royalty record is created*, the program will use the label you designate. To change the default, first click on the "H" button. You'll see a place to enter the new label. It's recommended that you use title case: capitalize the first letter and keep the rest lower case. All new set-up records created will use the new label.

Net Amount. If you select Net Amount, then royalties will be based on the *amount you receive for the product minus the discount*.

For example, let's say during the year you sold 100 products. The product has a retail price of \$20. Among the products you sold, 50 were sold at retail (\$20) and 50 were sold at 50% off (\$10). That means that the net amount you received was \$1500 (50 x 20 + 50 x 10).

Let's also say you have simple royalty of 8% on net. Thus, the royalty formula would be: 1500 x .08 = \$120.

Net Amount is often favored by businesses in calculating royalties since it reflects what the business actually receives for the products. Many books in the publishing trade, for example, are sold through distributors which require large discounts. By using the net method, the amount going to the royalty holder automatically adjusts to the discount.

The advantage of using a net amount system can be readily seen when it is compared with the retail method (described above). With the retail calculation method, the discount has no bearing on what goes to the royalty holder. The royalty holder receives the same amount whether the product is sold at the retail price or whether is sold at a 65% discount. With the Net Amount system, however, the amount going to the royalty holder is higher when most products are sold near or at retail and it is lower when most products are sold at a discount.

In the past, many small businesses didn't use the Net Amount method since it mean extra accounting time keeping track of the sales of each product. With AnyOrder, however, calculating royalties on net is just as easy as using the Retail Method.

Flat Amount. If you select Flat Amount, then royalties will be based on a constant dollar amount per unit sold. Let's say, you agree to pay the royalty holder \$1.00 per unit sold. That's a flat amount. Calculations are easy. You take the total number of units sold times the flat amount.

As an example, let's say you sold 100 copies of a product and the flat amount is \$1.00 per unit. The royalty is: 100 x \$1.00 = \$100.

Flat amounts don't take in account the amount of discount that you provide to your customers, and thus they don't reflect the amount you actually receive. The advantage of a flat amount, however, is its simplicity. It is easy to calculate, and it is easy to understand.

Profit. The profit method bases royalties on gross profit. Gross profit is the difference between

revenues and the cost of the goods sold.

A quick note on terminology. The terms net and gross profit are often used interchangeably. Some people may use the term "net profit" to refer to this type of royalty calculation. Technically, however, "net profit" refers to profit after deducting all operating expenses, notably fixed costs or fixed overheads. "Gross profit," on the other hand, refers to the difference between sales and direct cost of product or service sold--which is the situation in this case.

To calculate gross profit, AnyOrder subtracts the cost of the product from revenue. The revenue figure is the actual amount that you've received (in other words, after any discounts), and before any tax or shipping is added.

Once AnyOrder finishes with those calculations, it takes the Gross Profit figure and multiplies it times the royalty percentage. For example, let's say one of your products generates a gross profit of \$3,000 and the royalty percentage is 10%. The royalty formula is: $\$3000 \times .10 = \300 .

You can make adjustments to the gross profit figure by removing invoiced fees, sales commissions, and/or credit card fees. That's done by selecting the appropriate choices in the "[Options](#)" box.

Note that the Profit Calculation method is only available with Simple Structure.

Structuring Methods

The Structuring Method is the last of the three methods making up a royalty payment system. You have two basic choices: Simple and Variable.

Simple Structure. Simple Structure, as its name suggests, is the easiest. You simply type in a percentage rate or flat amount into the blank provided.

If you are dealing with a percentage amount, type it in as a whole number. For instance, let's say you're paying an 8% royalty on cash sales on the retail amount. It should be entered as 8.00% in the box, not .08%. You can fine tune your rate up to one hundred of a percentage point. For example, the program will calculate royalties based on 8.55% if desired.

If you're entering a flat amount in the simple rate blank, enter it in dollars and cents (i.e. \$1.25).

If you have chosen a simple structure and you've selected a Counting and Calculation method, then you're all finished. You can move on to the next royalty holder--or generate a report for the royalty holder you have just entered.

Variable Structure. In a Variable Structure the percentage or flat amount varies depending on the quantity of products sold. It may also vary depending on the discount offered to your customers, or it may vary based on a combination of quantity and discount.

Variable structuring allows you to further refine a royalty payment system. As a product sells more and your costs drop, you may want reward the royalty holder with a higher royalty. Or you may wish to decrease the amount of royalty paid, the more the product is discounted to your customers. Variable structuring allows you to make either of these adjustments.

Quantity. To vary the royalty amount depending on quantity sold, click on the "Quantity" check box. You'll need to enter the [number of breakpoints](#). (Quantity also has an [additional option](#) which directs how you wish to deal with returns.)

Discount. To vary the royalty amount depending on discount, check on the "Discount" check box. In addition to checking the box, you'll need to enter the [number of discount ranges](#).

Both Quantity and Discount. To combine the two, click on both check boxes. When you check both boxes, you'll need to enter the number of breakpoints *and* the number of discount ranges. Click on the links above for more information on either quantity breakpoints or discount ranges.

Other parts of the Set-up Screen include:

[Menu Bar](#)

[Name, Address, and Phone Blanks](#)

[Email, Product, and Catalog Number Blanks](#)

[Summary Name, Social Security, Active, and Code](#)

[Keep Running Tally Box](#)

[Counting, Calculation and Structuring Methods](#)

[Options \(Net and Profit Calculation Methods\)](#)

[Vary Rate Based on Pricing Level](#)

For more information on setting up a royalty with a Variable Structure:

[Indicating the Number of Quantity Breakpoints](#)

[Indicating the Number of Discount Ranges](#)

[Entering Breakpoints & Royalty Rates for Variable Structure \(Quantity\)](#)

[Entering Discount Ranges & Royalty Rates for Variable Structure \(Discount\)](#)

[Entering Breakpoints, Ranges & Rates for Variable Structure \(Quantity & Discount\)](#)

3.1.7 Set-up Screen: Cash-based Counting

One of the ways that you can count products for royalty reporting is to do it on a cash basis. Items are counted only if you have received payment for them. (For more information on counting methods, see [Counting, Calculation and Structuring Methods](#).) For the best results, it's highly recommended that you use AnyOrder's Mark Paid feature. By marking invoices paid, the program knows which items to include in its counts.

Select One of the Following Counting Methods: <input type="radio"/> CASH Method (Count only those books for which payment has been received). <input checked="" type="radio"/> ACCRUAL Method (Count all books invoiced whether payment has been received or not).		Options: Net & Profit Before calculating royalties: <input type="checkbox"/> Credit card fees <input type="checkbox"/> Sales rep commissions <input type="checkbox"/> Invoiced fees ("F") <input checked="" type="checkbox"/> Keep Running Total More Information
Select One of the Following Calculation Methods: <input checked="" type="radio"/> RETAIL Amount. Calculate royalty as a percentage of the book's retail price. Label to Use: <input type="text" value="H"/> <input type="radio"/> NET Amount. Calculate royalty as a percentage of the amount after discount is removed. <input type="radio"/> FLAT Amount. Royalty not based on a percentage but is a flat amount, i.e. \$2.00 per book. <input type="radio"/> PROFIT. Royalty is based on a percentage of gross profit (revenues minus cost).		
Select One of the Following Structuring Methods: <input checked="" type="radio"/> SIMPLE Structure. Only one percentage (or flat) amount, no matter how many books sold or at what discount. If the structure is SIMPLE, type in the percentage (or flat amount) here: <input type="text" value="10.0000"/> % (Type in percentage as a whole number. Example: 10.0000 means 10%. Type in flat rate as a monetary amount. Example: 5.250000 means \$5.25.) <input type="radio"/> VARIABLE Structure. Percentage varies depending on quantity and/or discount. If the structure is VARIABLE, select one (or both) of the following: <input type="checkbox"/> Quantity. The royalty percentage changes as more books are sold. Returns: <input type="text" value="R"/> Apportion How Many Quantity Breakpoints (Maximum of 5): <input type="text" value="0"/> <input type="checkbox"/> Discount. The royalty percentage depends on how much the book is discounted. How Many Discount Ranges (Maximum of 4): <input type="text" value="0"/>		

When you create royalty reports based on Cash-based Counting, AnyOrder reviews each invoice. If the first paid date ("Date1") on the invoice falls within the start date and end date of the royalty report - and the author's book is listed in the Item Area, then AnyOrder will include the total amount on the royalty report. (The total amount is the price of the book times the quantity minus any discount) . AnyOrder always uses the total amount. If two payments (or more) were made on the invoice, AnyOrder still uses the book's total. It doesn't divide it up according to payment. This avoids discrepancies and it prevents the situation where an item might be counted twice when a second payment is made.

A major question that arises concerns credited items (such as returns and damages) is when should the credit be applied? Should it be applied during the same time period in which the original sale occurred? Should it be applied when the return occurred? Or should it be applied when the customer makes a lump sum payment in which the amount of the return has been subtracted?

In order to provide consistency in royalty reports, AnyOrder uses the following rule: *returns or damages are credited at the time the invoice is issued*. It doesn't matter when the invoice is paid or when the credit on the invoice is applied against the customer's account. What matters is the *invoice date*. Thus, any returns with an invoice date which fits within the designated time period will be counted for a cash-based royalty.

This rule applies to both accrual *and* cash-based counting methods.

This same rule also applies to fee invoices if you have [indicated on the set-up screen](#) that you want fees removed from net sales. Fee invoices are those in which you have coded the book with a sales code of "F."

Other parts of the Set-up Screen include:

[Menu Bar](#)

[Name, Address, and Phone Blanks](#)

[Email, Product, and Catalog Number Blanks](#)

[Summary Name, Social Security, Active, and Code](#)

[Keep Running Tally Box](#)

[Counting, Calculation and Structuring Methods](#)

[Options \(Net and Profit Calculation Methods\)](#)

[Vary Rate Based on Pricing Level](#)

For more information on setting up a royalty with a Variable Structure:

[Indicating the Number of Quantity Breakpoints](#)

[Indicating the Number of Discount Ranges](#)

[Entering Breakpoints & Royalty Rates for Variable Structure \(Quantity\)](#)

[Entering Discount Ranges & Royalty Rates for Variable Structure \(Discount\)](#)

[Entering Breakpoints, Ranges & Rates for Variable Structure \(Quantity & Discount\)](#)

3.1.8 Set-Up Screen: Keep Running Tally Box

Keep Running Tally Box

The Running Tally feature keeps track of accumulated sales. When this feature is turned on, each time you do a royalty report, the number of products sold will be updated, and you'll always know how many total units have been sold.

To turn on the Running Tally feature, click on the check box:

The screenshot shows a software interface for setting up a royalty report. At the top, there is a section titled 'Keep Running Tally: Total Number Sold' with a checkbox that is checked and circled in red. To the right of the checkbox is a text input field containing the number '0'. Below this section, there is a 'More Information:' label followed by an 'Info' button and an 'As of' label followed by a date input field containing '12/31/10' and a clear button. Below this is a section titled 'Pricing Levels (Level 7)' with a checkbox for 'Vary rate based on Pricing Level' which is unchecked, and a 'Pricing Level Set-up' button.

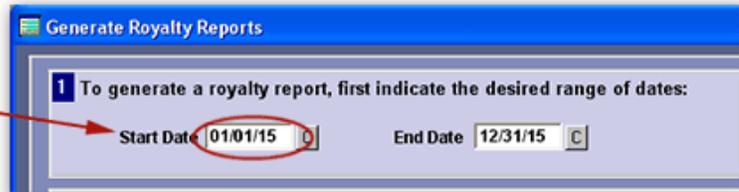
If you will be using the Running Tally feature, you may find it easiest to enter the "As Of Date" before the making an entry in the "Number Sold" blank.

In the "As Of Date" blank, enter the ending date of your last royalty accounting period. For instance, let's say that you will be doing reports for 2015. If you provide royalty accounting reports at the end of the calendar year, the "As of Date" will be 12/31/14. If you'll be doing reports for 2016, the "As of Date" will be 12/31/15.

Here is an example of Running Tally turned on (Running Tally is found on the Royalty Set-up Screen.) Notice the "As of" date.



When generating a report, you must use a Start Date one day later the "As Of" Date

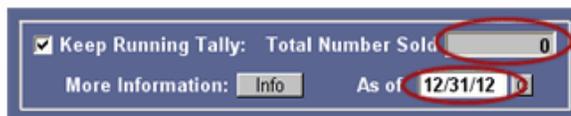


Running Tally keeps a record of how many books or products have been sold over the life of the product. The "Total Number Sold" figure is updated each time you run a royalty report. Because of this, it's important when you use Running Tally to create royalty reports using a regular interval. If, for example, you create annual reports at the start of the calendar year, always use a Start Date of 01/01. If you were to change the Start Date and create a report starting 01/15, you would miss 15 days of sales and the running tally of accumulated sales would be inaccurate. A Running Tally Wizard is built into the Report Generator to warn you if the Start Date is not aligned with the "As of" date

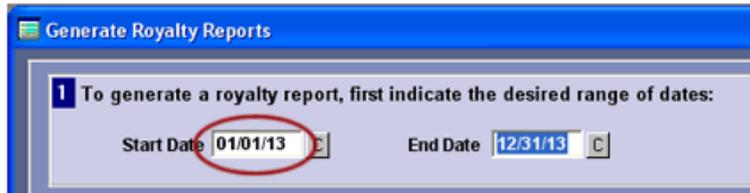
Now that you have the "As of Date," enter the number of products sold in the "Total Number Sold" blank as of that date.

If you're entering information for a new royalty holder and his or her product has just started to sell, the total number sold will be Zero (0). So if, as of 12/31/12, you've sold no products yet, you would enter a "0" in the blank. See below for an example:

When you first start selling a book or product. Set the Running Tally "As of" date to the end of the previous royalty report period - and set "Total Number Sold" to zero (0)



In this example, sales of the book began some time in 2013. When the report is generated, the Start Date is correctly set one day later than the "As of" Date.



You can access additional information about the Running Tally feature if you click on "More" button in the Running Tally box. This brings up the [Running Tally](#) dialog box. The dialog box has an insertion feature which will automatically insert the "As Of Date" for you. The program, of course, is guessing at the "As Of Date," and after it inserts it, you should double check the date to make sure it is correct.

The Running Tally feature is optional *unless you have a royalty holder with a Variable Structure (Quantity Option)*. In such cases, "Total Sold" and "As Of Date" are necessary since the royalty paid depends on accumulated totals.

If the royalty system you have chosen is *not* Variable Structure (Quantity Option), it's up to you whether or not you want to keep a running tally. Keeping a running tally requires no effort on your part if you provide royalty reports to royalty holders on a regular basis. AnyOrder will automatically update it and keep track of the total as you issue reports.

But if you generate royalty reports at odd intervals, keeping a running tally becomes more complicated. A [Running Tally Wizard](#) has been built into the program to assist you when you go out of order, but it

does require some extra work on your part. As long as you are not using Quantity Breakpoints, you can turn it off (by removing the checkmark) if you find the feature is not useful.

If you find that you have an inaccurate Total Number Sold figure, here more information: [Fixing An Inaccurate Total Sold Figure](#).

For more information on Running Tally and specific examples, see [Running Tally Dialog Box](#).

Other parts of the Set-up Screen include:

[Menu Bar](#)

[Name, Address, and Phone Blanks](#)

[Email, Product, and Catalog Number Blanks](#)

[Summary Name, Social Security, Active, and Code](#)

[Keep Running Tally Box](#)

[Counting, Calculation and Structuring Methods](#)

[Options \(Net and Profit Calculation Methods\)](#)

[Vary Rate Based on Pricing Level](#)

For more information on setting up a royalty with a Variable Structure:

[Indicating the Number of Quantity Breakpoints](#)

[Indicating the Number of Discount Ranges](#)

[Entering Breakpoints & Royalty Rates for Variable Structure \(Quantity\)](#)

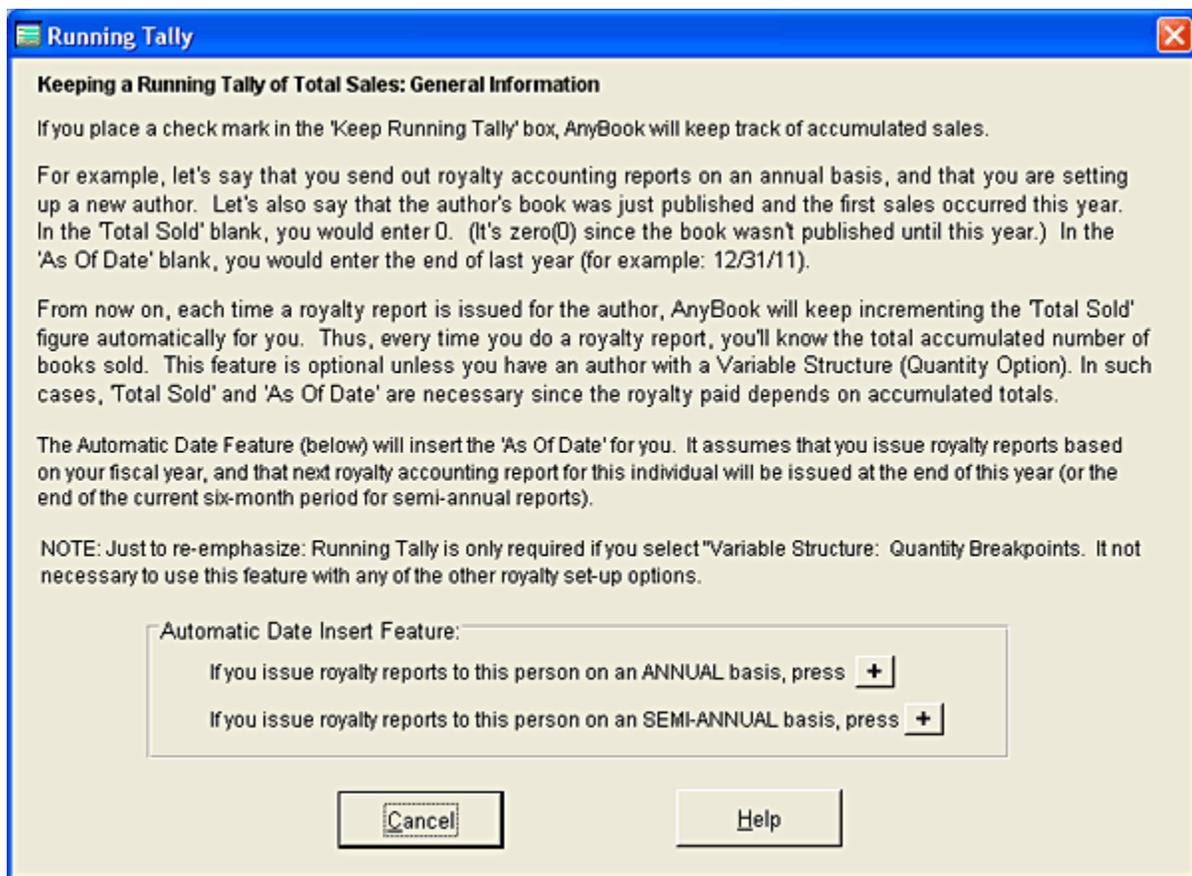
[Entering Discount Ranges & Royalty Rates for Variable Structure \(Discount\)](#)

[Entering Breakpoints, Ranges & Rates for Variable Structure \(Quantity & Discount\)](#)

3.1.8.1 Running Tally Dialog Box

Running Tally is a feature which is turned on or off from the [Royalty Set-up Information Screen](#). It allows you to keep track of accumulated sales. When it's turned on, each time you do a royalty report, the number of products sold will be updated, and you'll always know how many total units have been sold.

The Running Tally Dialog Box appears if you click on the "More" button in Running Tally box on the Set-up Screen. It also can be accessed by selecting TOOLS and INSERT RUNNING TALLY DATE from the Menu Bar on top of the screen.



An Example: Setting Up a New Royalty Holder.

Let's start with setting up a new royalty holder. Let's assume that you send out royalty accounting reports on an annual basis. Let's also say that the royalty holder's product started selling some time in the year 2013.

If you want to keep track of accumulated totals, you would place a checkmark beside Running Tally on the Set-up Screen. In the "Total Sold" blank on the Set-up Screen, you would enter 0. It's zero(0) since the product wasn't released until this year.

In the "As Of Date" blank, you would enter the end of your previous royalty accounting year. Since in this example, we are issuing royalty accounting reports at the end of the calendar year, and the product started selling some time in the year 2013, we would use enter 12/31/12 in the "As Of Date" blank (shown below).

The royalty report will cover sales which occurred in 2013. That means we need to wait until 2013 is finished (so we have all the sales accounted for), and then sometime early in 2014 we can actually generate the royalty report.

When you first start selling a book or product. Set the Running Tally "As of" date to the end of the previous royalty report period - and set "Total Number Sold" to zero (0)

In this example, sales of the book began some time in 2013. When the report is generated, the Start Date is correctly set one day later than the "As of" Date.

Another Example

In this next example, let's assume that we have been selling the book for a while. Each time a royalty report is created the Running Tally Figure (Total Number Sold) is updated. In the example, below, the last royalty report generated covered up to 12/31/14. That means, the next report, the report covering sales occurring in 2015 must start at 01/01/15. The Start Date of the report should always be one day later than the "As Of" date.

Here is an example of Running Tally turned on (Running Tally is found on the Royalty Set-up Screen.) Notice the "As of" date.

When generating a report, you must use a Start Date one day later the "As Of" Date

Running Tally keeps a record of how many books or products have been sold over the life of the product. The "Total Number Sold" figure is updated each time you run a royalty report. Because of this, it's important when you use Running Tally to create royalty reports using a regular interval. If, for example, you create annual reports at the start of the calendar year, always use a Start Date of 01/01. If you were to change the Start Date and create a report starting 01/15, you would miss 15 days of sales and the running tally of accumulated sales would be inaccurate. A Running Tally Wizard is built into the Report Generator to warn you if the Start Date is not aligned with the "As of" date

Date Insertion Feature

The Running Tally dialog box has a feature to help you enter the "As Of Date." It assumes that you base your royalty reports on the fiscal year (the same fiscal year that you set-up in Basic Set-up). It also assumes that the first (or next) royalty report that you issue to the royalty holder will be the end of the current year. Here's an example of how the insert feature works using 2016 as the current year:

If you do reports annually and the current year is 2016, the first report would cover through 12/31/16. Thus, when you click on the insert button (+), 12/31/15 will be inserted in the "As Of Date."

If you do reports every six months and it's in the first half of 2016, the first report will cover through 6/30/16, and when you click on the insert button (+), 12/31/15 will be inserted in the "As Of Date." If it's the second half of 2016, the first report will cover through 12/31/16. When you click on the insert button (+), 6/30/16 will be inserted in the "As Of Date."

If you use the insert feature, be sure to check the "As of Date" after it's been inserted. The insert feature assumes that you'll be issuing the royalty holder's first (or next) royalty report at the end of current year (that's year that you are entering set-up information). The "As Of Date" year will need to be adjusted if you're setting up information some time after the ending date of the first report. For example if the first report covers through 12/31/15 and the current year is 2016 (the year you are entering information), then you'll manually need to subtract one year from the "As Of Date."

A Running Tally is Required Only for Variable Structure (Quantity Option)

If the royalty system you have chosen is not Variable Structure (Quantity Option), it's up to you whether or not you want to keep a running tally.

Generating Reports at Odd Intervals

Keeping a running tally requires no effort on your part if you provide royalty reports to royalty holders on a regular basis. AnyOrder will automatically update it and keep track of the total as you issue reports.

But if you attempt to generate royalty reports at odd intervals, AnyOrder will ask for additional information. Whenever AnyOrder detects a period of time out of the ordinary, the [Running Tally Wizard](#) will be triggered. The Wizard will guide you on how to proceed.

Generate Reports after End of Reporting Period

It is best to wait until some time after the royalty period to do your reports. If you do reports at the end of the year, wait until December 31st has past before generating reports. If you do a report on December 15, you may be missing some sales that occurred between December 15 and December 31. Doing your report after the end of the report period also makes it easier to use the Running Tally feature. The "As Of" date in the Running Tally is the last day of the report period. When you run a report for the next year, your starting date for the Report Generator is January 1st.

Information on "As of Date" and "Total Number Sold" and How They are Updated

The "As of Date" and the "Total Number Sold" figure are updated each time you run a royalty report. It's helpful to look at this in more detail.

Let's say you do royalty reports *twice a year* and you want to run a report for the last half of 2012. The "As of Date" must be 6/30/12. The "Total Number Sold" needs to be the total number of units sold as of 6/30/12. Let's say the total number sold as of 6/30/12 is 1,000 units.

AnyOrder then calculates how many units were sold between 7/1/12 and 12/31/12 and figures the royalties based on your quantity breakpoints. In addition to producing the royalty report, AnyOrder will also update the Running Tally figures. It will change the "As Of Date" to 12/31/12. And if you sold 500 products during this period, it will update the Total Sold figure to 1,500.

Now when it comes time to run the next report, for the first half of 2013, it has the required running tally information to work with. So, you can see that the running tally has to be updated when you run a report.

Recalling the Previous Running Tally Total and Date

The question that often comes up is: What if I want to *re-run* the report for the last half of 2012? Won't there be a problem, because after all, the running tally has now been updated to end of 2012 and the

program will need the data from the middle of 2012 to run? AnyOrder remembers the previous running tally figures. So if you re-run the report for the last half of the 2012, it is smart enough to pull out the mid year figures and use those. (You can look at previous running tally figure that AnyOrder uses by selecting TOOLS and RECALL PREVIOUS RUNNING TALLY TOTAL & DATE.)

Generating Old Reports or Reports at Odd Intervals

The Running Tally feature works fine as long as you go in order and keep report periods the same. If, however, you attempt to run an old report or select a different period of time from normal, you'll need provide AnyOrder with additional information. AnyOrder will guide you through the process by the use of the [Running Tally Wizard](#).

What to Do if You've Lost Track (or Have an Inaccurate) "Total Number Sold" Figure

One possible problem that may occur is that you lose track of the "Total Number Sold" figure - or you have an inaccurate figure. This may have resulted from inadvertently deleting the number - or you may have run a report for an odd range of dates and neglected to follow the directions in the Running Tally Wizard ending up with an erroneous number. However the problem may have resulted, there is way you can get back on track. The following describes how to do it.

The best way to describe the following procedure is to use a scenario. Let's assume that you are running annual reports from January 1st to December 31. It's now mid January of 2015, and you're trying to run a report for January 1, 2014 to December 31, 2014. You discover that the Total Number Sold is not accurate or non-existent.

We know from the discussion above that if we are trying to run a report from 01/10/14 to 12/31/14, then the "As of Date" should be 12/31/2013. (The "As of Date" should be the day before the start date of your royalty report.)

Based on the above scenario, here's what you need to do . . .

1. First determine how long you've been selling the book (or product). Let's say you started selling it in 2010.

One thing you want to ask yourself is this question: did you sell the book before you started using AnyOrder? If the answer to that question is yes, then you need an additional piece of information. You'll need to know how many were sold up to the time when you first began using AnyOrder. We'll call the "Pre-AnyOrder Sales Figure." You'll need to add that to Total Number Sold figure which results from the following process. If the book was not sold prior to using AnyOrder then you don't have to worry about it.

2. Now that you know when you started selling the book, go to the Report Generator (MAIN TASKS and GENERATE ROYALTY REPORTS). We need to know how many books were sold as of 12/31/2013 (that's our "As Of" date). To do so, enter the following dates in the Report Generator:

Start Date: 01/01/10

End Date: 12/31/13

3. In the Report Generator, place a checkmark beside the proper book or product

4. Click the "Generate Report" button.

5. The "[Running Tally Wizard](#)" will appear. AnyOrder thinks we are trying run a normal report, but we doing something different here. We're trying to correct the Total Number Sold figure. To trick AnyOrder into doing what we want, click on the "Run With Errors" button.

If you don't have the "Run With Errors" button on the wizard, it means that you haven't configured the royalty holder with Variable Structure Quantity. That's fine. You can still make the proper adjustment. In that case a slightly different Running Tally Wizard appears. You won't see the "Run With Errors" button, and because of that you'll need to following a slightly different procedure. You'll need to look at the report that appears at the end of the generation process and copy down the number of books sold figure. Then return to the Royalty Set-up Screen for the royalty holder and manually enter that figure into "Total Number Sold" field. Also make the proper adjustment in the "As Of" date, that goes along with Total Number Sold. In our example, we would change it to 12/31/13.

6. When the report generation is complete you'll be taken to the Royalty Report Screen. You will have created a royalty report for the period 01/01/10 to 12/31/13. You really don't need this report. We did this to update the Total Number Sold figure. You can delete the report by selecting EDIT >> DELETE THIS ROYALTY REPORT.

7. Now return to the Royalty Set-up Screen for the royalty holder. Both the "Total Number Sold" figure and the "As of Date" (which in our example will be 12/31/13) will updated. Both will be correct. You're ready to proceed as normal with running a report for the royalty holder.

Other Parts of the Set-up Screen include:

[Menu Bar](#)

[Name, Address, and Phone Blanks](#)

[Email, Product, and Catalog Number Blanks](#)

[Summary Name, Social Security, and Active Check Box](#)

[Keep Running Tally Box](#)

[Counting, Calculation and Structuring Methods](#)

[Options \(Net and Profit Calculation Methods\)](#)

[Vary Rate Based on Pricing Level](#)

For more information on setting up a royalty with a Variable Structure:

[Indicating the Number of Quantity Breakpoints](#)

[Indicating the Number of Discount Ranges](#)

[Entering Breakpoints & Royalty Rates for Variable Structure \(Quantity\)](#)

[Entering Discount Ranges & Royalty Rates for Variable Structure \(Discount\)](#)

[Entering Breakpoints, Ranges & Rates for Variable Structure \(Quantity & Discount\)](#)

3.2 Variable Structure

The sub-categories under this section provide details on Royalties involving Variable Structure (found on the [Royalty Set-up screen](#)).

VARIABLE Structure. Percentage varies depending on quantity and/or discount.
If the structure is VARIABLE, select one (or both) of the following:

Quantity. The royalty percentage changes as more books are sold. Returns: Apportion
How Many Quantity Breakpoints (Maximum of 5):

Discount. The royalty percentage depends on how much the book is discounted.
How Many Discount Ranges (Maximum of 4):

Variable Structure:
After Indicating
Quantity and/or
**Quantity Or
Discount Set-up**

- [Variable Structure \(Discount\) Entering Discount Ranges and Royalty Rates](#)
- [Variable Structure \(Discount\) Indicating the Number of Discount Ranges](#)
- [Variable Structure \(Quantity\): Entering Breakpoints and Royalty Rates](#)
- [Variable Structure \(Quantity AND Discount\) Entering Breakpoints, Discount Ranges and Royalty Rates](#)
- [Variable Structure \(Quantity\) Indicating the Number of Quantity Breakpoints](#)
- [Variable Structure \(Quantity\) Dealing With Returns](#)

3.2.1 Variable Structure (Discount) Entering Discount Ranges and Royalty Rates

Variable Structure (Discount): General Information

The "Royalty Information (Page 2)" dialog box will appear after you've done three things on the [Royalty Set-up Screen](#): 1) selected Variable Structure (Discount Option); 2) entered the number of discount ranges desired; and, 3) clicked on the "Quantity or Discount Set-up" button in the bottom right hand corner of the Set-up Screen.

VARIABLE Structure. Percentage varies depending on quantity and/or discount.
If the structure is VARIABLE, select one (or both) of the following:

Quantity. The royalty percentage changes as more books are sold. Returns: Apportion
How Many Quantity Breakpoints (Maximum of 5):

Discount. The royalty percentage depends on how much the book is discounted.
How Many Discount Ranges (Maximum of 4):

Variable Structure:
After Indicating
Quantity and/or
**Quantity Or
Discount Set-up**

After entering the information, above, the "Page 2" dialog box appears:

Royalty Information (Page 2): Variable Royalty Structure

Fill in the blanks below. (Use whole numbers for all percentages, i.e. 8.00% instead of .08)

DISCOUNT RANGE #1: Pay a royalty of: % for the discount range of: % through %

DISCOUNT RANGE #2: Pay a royalty of: % for the discount range of: % through %

DISCOUNT RANGE #3: Pay a royalty of: % for the discount range of: % through %

HELP INFORMATION. Indicate royalties and percentage discounts as whole numbers, i.e. FROM 0% TO 40% means the discount ranges from 0% (no discount) to 40% discount. The first discount range should always start with 0% and the final range should always end with 100%. When you type-in a number in the right column, AnyBook will automatically insert the starting number in the next range. Here's an example:

DISCOUNT RANGE #1: Pay a royalty of: % for the discount range of: % through %

DISCOUNT RANGE #2: Pay a royalty of: % for the discount range of: % through %

The above example means that you'll be paying a royalty of 9% when the books sold are discounted between 0% (no discount) through 40%. For any discount greater than 40%, you'll be paying a royalty of 8%.

The "Page 2" dialog box is used to enter the high and low values making up the discount ranges and the amount of royalty associated with each range. Information on the dialog box follows:

Discount: Entering Royalty Rates

Depending on the number of discount ranges you have entered on the previous page, two or more rows will appear on which you can enter information. In DISCOUNT RANGE #1, type in the royalty rate in the first blank

The royalty rate should be indicated as a whole number. If you will be paying 7% royalty when the discount ranges from 0% to 40%, then indicate it as "7" *not* .07. You can fine tune your rate up to one hundred of a percentage point. For example, the program will calculate royalties based on 7.55% if desired.

You can use either percentages or flat rates with discount ranges. Percentage is by far the most common, but the program will handle flat rates. Flat rates should be indicated in dollars and cents (i.e. 12.35 means \$12.35).

Discount: Entering Ranges

After you have entered the royalty, type in a number for the end of the discount range in the blank provided. The first discount range always starts with 0 which is entered for you, but you will designate the end of the range. You might enter 30%, 40% or whatever number you desire.

After you enter a number in the right hand column, AnyOrder will automatically insert the next starting range number. The starting number will always be .1 greater than previous number.

The use of .1 in the first column is actually a slight simplification to help make the dialog box easier to understand. To assure that all discounts are covered, AnyOrder, in reality, works on a "greater than" basis. FROM 40.1% TO 50.0% means that the range will actually extend from discounts of *greater than 40%* up to and including 50%. Or another way saying it is that range is greater than 40% but less than or equal to 50%.

The percentage of the last discount range must be 100%. In this way all discounts are covered, no

matter what the discount. Note that you may have some sales situations in which you provide deep discounts to a customer and because of the amount of discount, it's not appropriate to pay royalties. One example of this in the book trade is when books are remaindered for a small fraction of their cost. The best way of leaving such sales out of royalty calculations is to click on the "No Royalty" check box on the Main Invoice screen. All products on an invoice with No Royalty checked will be left out of royalty calculations. On royalty reports, they will be itemized as "Ineligible for Royalty."

If need be, you can reduce or increase the number of discount ranges. It's just a matter of returning to the Main Royalty page and changing the number.

Sample Entry. Here's an example of a discount set-up:

DISCOUNT RANGE #1: Pay a royalty of: 8% for the discount range of: 0% through 40.0%

DISCOUNT RANGE #2: Pay a royalty of: 7% for the discount range of: 40.1 through 50.0%

DISCOUNT RANGE #3: Pay a royalty of: 6% for the discount range of: 50.1% through 55.0

DISCOUNT RANGE #4: Pay a royalty of: 5% for the discount range of: 55.1% through 100.0%

The above example means a royalty of 8% will be paid when the discount provided to customers ranges from 0% through 40%. A 7% royalty will be paid when the discount provided to customers ranges from greater than 40% through 50%. A 6% royalty will be paid when the discount provided to customers ranges from greater than 50% through 55%. And a 5% royalty will be paid when the discount provided to customers is greater than 55%.

Other parts of the Set-up Screen include:

[Menu Bar](#)

[Name, Address, and Phone Blanks](#)

[Email, Product, and Catalog Number Blanks](#)

[Summary Name, Social Security, Active, and Code](#)

[Keep Running Tally Box](#)

[Counting, Calculation and Structuring Methods](#)

[Options \(Net and Profit Calculation Methods\)](#)

[Vary Rate Based on Pricing Level](#)

For more information on setting up a royalty with a Variable Structure:

[Indicating the Number of Quantity Breakpoints](#)

[Indicating the Number of Discount Ranges](#)

[Entering Breakpoints & Royalty Rates for Variable Structure \(Quantity\)](#)

[Entering Discount Ranges & Royalty Rates for Variable Structure \(Discount\)](#)

[Entering Breakpoints, Ranges & Rates for Variable Structure \(Quantity & Discount\)](#)

3.2.2 Variable Structure: (Discount) Indicating the Number of Discount Ranges

Number of Discount Ranges

If you select a Variable Structure based on "Discount," you'll also need to indicate how many discount

ranges you want to set up.

VARIABLE Structure. Percentage varies depending on quantity and/or discount.
 If the structure is VARIABLE, select one (or both) of the following:

Quantity. The royalty percentage changes as more books are sold. Returns: Apportion
 How Many Quantity Breakpoints (Maximum of 5):

Discount. The royalty percentage depends on how much the book is discounted.
 How Many Discount Ranges (Maximum of 4):

Variable Structure:
 After Indicating
 Quantity and/or
 Quantity Or
 Discount Set-up

For example, you might set up a royalty rate of 8% for all discounts between 0% and 40% and a royalty rate of 7% for all discounts between 40.1% to 55%, and a rate of 6% for all discounts from 55.1% and over. Thus, since you have 3 discount ranges, you would enter "3" in the blank.

The limit is 4 discount ranges. Royalty reports start getting very complex once you exceed 4 discount ranges, particularly when you combine quantity and discount structures. Keeping the limit at 4 ranges helps keep the report readable and understandable for both you and the royalty holder. As long as you don't exceed the limit, you're not locked into the number you enter here. It can be changed if you later decide to reduce or increase the number.

Other parts of the Set-up Screen include:

[Menu Bar](#)

[Name, Address, and Phone Blanks](#)

[Email, Product, and Catalog Number Blanks](#)

[Summary Name, Social Security, Active, and Code](#)

[Keep Running Tally Box](#)

[Counting, Calculation and Structuring Methods](#)

[Options \(Net and Profit Calculation Methods\)](#)

[Vary Rate Based on Pricing Level](#)

For more information on setting up a royalty with a Variable Structure:

[Indicating the Number of Quantity Breakpoints](#)

[Indicating the Number of Discount Ranges](#)

[Entering Breakpoints & Royalty Rates for Variable Structure \(Quantity\)](#)

[Entering Discount Ranges & Royalty Rates for Variable Structure \(Discount\)](#)

[Entering Breakpoints, Ranges & Rates for Variable Structure \(Quantity & Discount\)](#)

3.2.3 Variable Structure (Quantity): Entering Breakpoints and Royalty Rates

Variable Structure (Quantity): General Information

The "Royalty Information (Page 2)" dialog box will appear after you've done three things on the [Royalty Set-up Screen](#): 1) selected Variable Structure (Quantity Option); 2) entered the number of breakpoints desired; and, 3) clicked on the "Quantity or Discount Set-up" button in the bottom right hand corner of the Set-up Screen.

VARIABLE Structure. Percentage varies depending on quantity and/or discount.
 If the structure is VARIABLE, select one (or both) of the following:

Quantity. The royalty percentage changes as more books are sold.
 How Many Quantity Breakpoints (Maximum of 5):

Discount. The royalty percentage depends on how much the book is discounted.
 How Many Discount Ranges (Maximum of 4):

Returns: Apportion

Variable Structure:
 After Indicating
 Quantity and/or

After entering the information, above, the "Page 2" dialog box appears:

Royalty Information (Page 2): Variable Royalty Structure

Fill in the blanks below. (Use whole numbers for royalty percentages, i.e. 8.00% instead of .08)

QUANTITY BREAKPOINT #1: Pay a royalty of: % which starts with this quantity of books sold:

QUANTITY BREAKPOINT #2: Pay a royalty of: % which starts with this quantity of books sold:

QUANTITY BREAKPOINT #3: Pay a royalty of: % which starts with this quantity of books sold:

QUANTITY BREAKPOINT #4: Pay a royalty of: % which starts with this quantity of books sold:

HELP INFORMATION. Indicate royalty as a whole number. Except in rare cases, the first quantity breakpoint should always start with zero (0) books sold, and then build up from there. Here's an example:

QUANTITY BREAKPOINT #1: Pay a royalty of: % which starts with this quantity of books sold:

QUANTITY BREAKPOINT #2: Pay a royalty of: % which starts with this quantity of books sold:

The above example means that a royalty of 8% will be paid until the total number of books sold reaches 5,000. When the 5,000 point is reached, the royalty changes to 9%.

The "Page 2" dialog box is used to enter the actual breakpoint numbers and the amount of royalty associated with each. Information on the dialog box follows:

Quantity: Entering Breakpoints and Royalty Rates

The Royalty Information (Page 2) dialog box appears if you have selected Variable Structure (Quantity Option) and click on the Quantity/Discount Set-up button.

Depending on the number of quantity breakpoints you have entered on the previous page, two or more rows will appear on which you can enter information. In QUANTITY BREAKPOINT #1, type in the royalty rate in the first blank and type the quantity at which that rate should start. The quantity is easy in this first breakpoint. The first quantity should always be zero (0). (The only time it is not is if you have renegotiated a royalty contract with an individual and you want the total number of units sold from past activity reflected on the royalty reports.)

In the second row (QUANTITY BREAKPOINT #2), indicate the next royalty rate and the quantity that this next rate starts at. Continue doing this for all of your quantity breakpoints. The last quantity breakpoint means that the royalty rate you've indicated will be paid when the total number of products sold reaches and exceeds the breakpoint number. If you decide you need to reduce or increase the number of breakpoints, return to the Main Royalty page and make the adjustment.

Royalty rates should be indicated as a whole number. If you will be paying a 7% royalty when the total

number of units sold reaches 5,000, then indicate it as "7" not ".07". You can fine tune your rate up to one hundred of a percentage point. For example, the program can calculate royalties based on 7.55% if desired.

You can use either percentages or flat rates with quantity breakpoints. Percentage is the most common, but the program will also handle flat rates. Flat rates should be indicated in dollars and cents (i.e. 12.35 means \$12.35).

Sample Entry. Here's an example of a quantity breakpoint set-up:

QUANTITY BREAKPOINT #1: Pay a royalty of 5% which starts with this quantity of units sold: 0
QUANTITY BREAKPOINT #2: Pay a royalty of 6% which starts with this quantity of units sold: 5000
QUANTITY BREAKPOINT #3: Pay a royalty of 7% which starts with this quantity of units sold: 10000
QUANTITY BREAKPOINT #4: Pay a royalty of 8% which starts with this quantity of units sold: 25000

The above example means that a royalty rate of 5% will be paid for the first 4999 units sold. When the total number of units sold reaches 5,000, the rate changes to 6%. When the total number of units sold reaches 10,000, the rate changes to 7%. When the total reaches 25,000 or greater, the rate will be 8%.

Other parts of the Set-up Screen include:

[Menu Bar](#)

[Name, Address, and Phone Blanks](#)

[Email, Product, and Catalog Number Blanks](#)

[Summary Name, Social Security, Active, and Code](#)

[Keep Running Tally Box](#)

[Counting, Calculation and Structuring Methods](#)

[Options \(Net and Profit Calculation Methods\)](#)

[Vary Rate Based on Pricing Level](#)

For more information on setting up a royalty with a Variable Structure:

[Indicating the Number of Quantity Breakpoints](#)

[Indicating the Number of Discount Ranges](#)

[Entering Breakpoints & Royalty Rates for Variable Structure \(Quantity\)](#)

[Entering Discount Ranges & Royalty Rates for Variable Structure \(Discount\)](#)

[Entering Breakpoints, Ranges & Rates for Variable Structure \(Quantity & Discount\)](#)

3.2.4 Variable Structure (Quantity AND Discount) Entering Breakpoints, Discount Ranges and Royalty Rates

The "Royalty Information (Page 2)" dialog box will appear after you've done three things on the [Royalty Set-up Screen](#): 1) selected Variable Structure (Quantity and Discount Options); 2) entered the number of breakpoints and discount ranges; and, 3) clicked on the "Quantity or Discount Set-up" button in the bottom right hand corner of the Set-up Screen.

Select One of the Following Structuring Methods:

SIMPLE Structure. Only one percentage (or flat) amount, no matter how many books sold or at what discount.
If the structure is SIMPLE, type in the percentage (or flat amount) here: %
(Type in percentage as a whole number. Example: 10.0000 means 10%. Type in flat rate as a monetary amount. Example: 5.250000 means \$5.25.)

VARIABLE Structure. Percentage varies depending on quantity and/or discount.
If the structure is VARIABLE, select one (or both) of the following:

Quantity. The royalty percentage changes as more books are sold. Returns: Apportion
How Many Quantity Breakpoints (Maximum of 5)

Discount. The royalty percentage depends on how much the book is discounted.
How Many Discount Ranges (Maximum of 4)

Variable Structure:
After Indicating
Quantity and/or
Quantity Or
Discount Set-up

After entering the above information, the "Page 2" dialog box appears:

Royalty Information (Page 2): Variable Royalty Structure

Fill in the blanks below. (Use whole numbers for percentages, i.e. 8.00% instead of .08)

QUANTITY BREAKPOINT #1: Pay the following royalties starting with the following quantity of books sold:

DISCOUNT RANGE #1: Pay a royalty of: % for the discount range of: % through %

DISCOUNT RANGE #2: Pay a royalty of: % for the discount range of: % through %

DISCOUNT RANGE #3: Pay a royalty of: % for the discount range of: % through %

QUANTITY BREAKPOINT #2: Pay the following royalties starting with the following quantity of books sold:

DISCOUNT RANGE #1: Pay a royalty of: % for the discount range of: % through %

DISCOUNT RANGE #2: Pay a royalty of: % for the discount range of: % through %

DISCOUNT RANGE #3: Pay a royalty of: % for the discount range of: % through %

QUANTITY BREAKPOINT #3: Pay the following royalties starting with the following quantity of books sold:

DISCOUNT RANGE #1: Pay a royalty of: % for the discount range of: % through %

DISCOUNT RANGE #2: Pay a royalty of: % for the discount range of: % through %

DISCOUNT RANGE #3: Pay a royalty of: % for the discount range of: % through %

HELP INFORMATION. Indicate royalties and percentage discounts as whole numbers, i.e. FROM 0% Through 40.0% means the discount ranges from 0% (no discount) to 40% discount. The first discount range always starts with 0% and the final range always ends with 100%. Type-in a number in the right column, and AnyBook will automatically insert the next starting number. Also note that for quantity breakpoints, the first breakpoint should always start with zero (0) books sold.

The "Page 2" dialog box is used to enter breakpoints, discount ranges, and the amount of royalty associated with the ranges. Information on the dialog box follows:

Quantity and Discount: Entering Breakpoints, Ranges and Royalty Rates. The Royalty Information (Page 2) dialog box appears if you have selected Variable Structure (Both Quantity and Discount Options) and click on the Quantity/Discount Set-up button.

Depending on the number of breakpoints and discount ranges you have entered on the previous page, two or more quantity breakpoint rows will be offset and underneath each quantity row will be a set of

discount ranges.

First Enter the Information for Quantity Breakpoints. Start with the quantity rows and enter appropriate information in the blanks. In QUANTITY BREAKPOINT # 1, type-in the quantity. The first quantity is easy. It should always be zero (0). (The only time it is not is if you have renegotiated a royalty contract with a royalty holder and you want the total number of units sold from past activity reflected on the royalty reports.)

Move down to the next breakpoint row (QUANTITY BREAKPOINT #2). Indicate the quantity that the next set of rates start at. Continue doing this for all of your quantity breakpoints. If you decide you need to reduce or increase the number of breakpoints, return to the Main Royalty page and make the adjustment.

If you have over three Quantity Breakpoints, you'll need to continue to fill out information on one additional page. Click on the "More Breakpoints on Next Page" button, and finish up the last of the breakpoints.

Next, Enter Information for Discount Ranges. Depending on the number of discount ranges you have entered on the previous page, two or more rows will appear under each Quantity Breakpoint.

In DISCOUNT RANGE #1 just under QUANTITY BREAKPOINT #1, type in the royalty rate in the first blank. The royalty rate should be indicated as a whole number. If you will be paying 7% royalty when the discount ranges from 0% to 40%, then indicate it as "7" *not* .07. You can fine tune your rate up to one hundred of a percentage point. For example, the program will calculate royalties based on 7.55% if desired.

You can use either percentages or flat rates with discount ranges. Percentage is by far the most common, but the program will handle flat rates. Flat rates should be indicated in dollars and cents (i.e. 12.35 means \$12.35).

After you have entered the royalty, type in a number for the end of the discount range in the blank provided. The first discount range always starts with 0 which is entered for you, but you will designate the end of the range. You might enter 30%, 40% or whatever number you desire.

After you enter a number in the right hand column, AnyOrder will automatically insert the next starting range number. The starting number will always be .1 greater than previous number.

The use of .1 in the first column is actually a slight simplification to help make the dialog box easier to understand. To assure that all discounts are covered, AnyOrder, in reality, works on a "greater than" basis. FROM 40.1% TO 50.0% means that the range will actually extend from discounts of *greater than 40%* up to and including 50%. Or another way saying it is that range is greater than 40% but less than or equal to 50%.

The percentage of the last discount range must be 100%. In this way all discounts are covered, no matter what the discount. Note that you may have some sales situations in which you provide deep discounts to a customer and because of the amount of discount, it's not appropriate to pay royalties. One example of this in the book trade is when books are remaindered for a small fraction of their cost. The best way of leaving such sales out of royalty calculations is to click on the "No Royalty" check box on the Main Invoice screen. All products on an invoice with No Royalty checked will be left out of royalty calculations. On royalty reports, they will be itemized as "Ineligible for Royalty."

When you have finished entering the first set of discount ranges under QUANTITY BREAKPOINT #1, the ranges will be copied to all other Quantity Breakpoints.

After you have the discount ranges set up, enter the royalty rates for all discount ranges. Make sure you cover all of the breakpoints.

If you decide you need to reduce or increase the number of discount ranges, return to the Main Royalty page and change the number.

Quantity and Discount Example:

QUANTITY BREAKPOINT #1: Pay the following royalties starting with this quantity of units sold: 0

DISCOUNT RANGE #1: Pay a royalty of: 6% for the discount range of: 0% through 40.0%

DISCOUNT RANGE #2: Pay a royalty of: 5% for the discount range of: 40.1 through 50.0%

DISCOUNT RANGE #3: Pay a royalty of: 4% for the discount range of: 50.1% through 55.0

DISCOUNT RANGE #4: Pay a royalty of: 3% for the discount range of: 55.1% through 100.0%

QUANTITY BREAKPOINT #1: Pay the following royalties starting with this quantity of units sold: 5000

DISCOUNT RANGE #1: Pay a royalty of: 7% for the discount range of: 0% through 40.0%

DISCOUNT RANGE #2: Pay a royalty of: 6% for the discount range of: 40.1 through 50.0%

DISCOUNT RANGE #3: Pay a royalty of: 5% for the discount range of: 50.1% through 55.0

DISCOUNT RANGE #4: Pay a royalty of: 4% for the discount range of: 55.1% through 100.0%

QUANTITY BREAKPOINT #1: Pay the following royalties starting with this quantity of units sold: 10000

DISCOUNT RANGE #1: Pay a royalty of: 8% for the discount range of: 0% through 40.0%

DISCOUNT RANGE #2: Pay a royalty of: 7% for the discount range of: 40.1 through 50.0%

DISCOUNT RANGE #3: Pay a royalty of: 6% for the discount range of: 50.1% through 55.0

DISCOUNT RANGE #4: Pay a royalty of: 5% for the discount range of: 55.1% through 100.0%

Other parts of the Set-up Screen include:

[Menu Bar](#)

[Name, Address, and Phone Blanks](#)

[Email, Product, and Catalog Number Blanks](#)

[Summary Name, Social Security, Active, and Code](#)

[Keep Running Tally Box](#)

[Counting, Calculation and Structuring Methods](#)

[Options \(Net and Profit Calculation Methods\)](#)

[Vary Rate Based on Pricing Level](#)

For more information on setting up a royalty with a Variable Structure:

[Indicating the Number of Quantity Breakpoints](#)

[Indicating the Number of Discount Ranges](#)

[Entering Breakpoints & Royalty Rates for Variable Structure \(Quantity\)](#)

[Entering Discount Ranges & Royalty Rates for Variable Structure \(Discount\)](#)

[Entering Breakpoints, Ranges & Rates for Variable Structure \(Quantity & Discount\)](#)

3.2.5 Variable Structure (Quantity) Indicating the Number of Quantity Breakpoints

Note that, in addition the information Quantity structure has an [additional option](#) which directs how you wish to deal with returns.

If you select a Variable Structure based on "Quantity," you'll also need to indicate how many quantity breakpoints you want to set up.

VARIABLE Structure. Percentage varies depending on quantity and/or discount.
If the structure is VARIABLE, select one (or both) of the following:

Quantity. The royalty percentage changes as more books are sold.
How Many Quantity Breakpoints (Maximum of 5):

Discount. The royalty percentage depends on how much the book is discounted.
How Many Discount Ranges (Maximum of 4):

Returns: Apportion

Variable Structure:
After Indicating
Quantity and/or

Quantity Or
Discount Set-up

Quantity breakpoints are numbers that you designate at which the royalty rate changes. For instance, you might set up a royalty rate of 5% for the quantity breakpoint of 5,000, and a royalty rate of 6% for the quantity breakpoint of 10,000. That means you'll pay 5% royalty for quantities of 5,000 or greater and 6% for quantities of 10,000 and greater.

Quantity breakpoints always start at zero (0) and work up. Decide how many breakpoints you want and enter the number in the blank. The limit is 5. As long as you don't exceed the limit, you're not locked into the number you enter here. It can be changed if you later decide to reduce or increase the number.

If you decide to use quantity breakpoints, then the program will need to keep track of accumulated sales from royalty report to royalty report. That means you'll want to check the [Keep Running Tally](#) box. If you forget to check it, AnyOrder will remind you before you exit or move to another record.

Whenever you use the Running Tally feature, you'll want to make sure that you issue regular reports to the royalty holder. AnyOrder will use the sales figures from the last report to update the figures in the current report. If you miss a report, then AnyOrder has no way of knowing what the figures are, and you'll have to manually update them yourself.

Quantity Breakpoints and Returns

Just to the right of where you indicate the number of quantity breakpoints, you'll see a small light colored box with "Returns" and an "R" button. If you click on the "R" button, a dialog box appears. The dialog box describes two methods which deal with how returns are treated when sales span two or more quantity breakpoints. The methods are: "Apportioned" and "Off the Top." More information on the method and how to select either one is found here: [Breakpoints and Returns](#).

Other parts of the Set-up Screen include:

[Menu Bar](#)

[Name, Address, and Phone Blanks](#)

[Email, Product, and Catalog Number Blanks](#)

[Summary Name, Social Security, Active, and Code](#)

[Keep Running Tally Box](#)

[Counting, Calculation and Structuring Methods](#)

[Options \(Net and Profit Calculation Methods\)](#)

[Vary Rate Based on Pricing Level](#)

For more information on setting up a royalty with a Variable Structure:

[Indicating the Number of Quantity Breakpoints](#)

[Indicating the Number of Discount Ranges](#)

[Entering Breakpoints & Royalty Rates for Variable Structure \(Quantity\)](#)

[Entering Discount Ranges & Royalty Rates for Variable Structure \(Discount\)](#)

[Entering Breakpoints, Ranges & Rates for Variable Structure \(Quantity & Discount\)](#)

3.2.6 Variable Structure (Quantity) Dealing With Returns

Quantity Breakpoints are found on the Royalty Set-up Screen. This information covers how returns are calculated when a royalty report includes two or more breakpoints.

• **VARIABLE Structure.** Percentage varies depending on quantity and/or discount.
 If the structure is VARIABLE, select one (or both) of the following:

Quantity. The royalty percentage changes as more books are sold.
 How Many Quantity Breakpoints (Maximum of 5):

Discount. The royalty percentage depends on how much the book is discounted.
 How Many Discount Ranges (Maximum of 4):

Returns: Apportion

Variable Structure:
 After Indicating
 Quantity and/or
**Quantity Or
 Discount Set-up**

Compensating for Returns When Total Sales Cover More Than One Breakpoint.

One of the variable structure methods used in royalty calculations is based on the "quantity" of the units sold. You can select this method from the various options found on the [Royalty Set-up Screen](#) screen. When using this method, you establish "quantity breakpoints" where the amount of royalty paid increases with more units sold.

When the total sales of a product extend across more than one quantity breakpoint, AnyOrder has to compensate for any returns or damages that are involved. There are two different ways to deal with this situation

1. Apportion Returns. In this method returns & damages are apportioned to each breakpoint. To make the needed calculations, AnyOrder uses the running tally figure as the starting number of units sold. The total number of sales in the current royalty period are added to the starting number to determine which breakpoints are required. If more than one breakpoint is required, AnyOrder then calculates the number of units which fall into each breakpoint.

Once it's done that, it can calculate the proportion of the total sales found in each breakpoint. Using the same proportions, it takes the total number of returns and divides them among the breakpoints. For instance, let's say that 75% of the total units sold fall in the first breakpoint and 25% fall in second. If there were 100 returns, the first breakpoint would be reduced by 75 units, and the second reduced by 25.

Reason for using this approach: Fairness to Royalty Holder. The ability to reach a higher breakpoint is based on total sales. The royalty holder is not compensated for more units than those minus returns, but is rather compensated for a fair proportion of the total at the higher breakpoint rate.

Let's say that 1090 book are sold, and first 1,000 are allocated to the first breakpoint and 90 books are allocated to the second breakpoint. If there were 100 returns, under this method, the royalty holder is still able to reach the second breakpoint (thus obtaining a higher royalty rate).

However, under second method, described below, the royalty holder would not reach the second breakpoint. He or she would not move into the second breakpoint, until the first breakpoint was completely filled. Yet, technically the royalty holder has reached the second breakpoint based on sales figures. Unless, the contract is worded otherwise, this method probably the fairest way of determining royalty when sales covers two or more breakpoints.

Apportion Returns is the default method that AnyOrder has used in the past. Some companies have requested more flexibility in this regard, and to provide that flexibility, a second option has been

provided.

2. Take the Returns off the Top. In this second method, AnyOrder removes returns and damages from the total number of books sold in the royalty period. Using this number along with the running tally figure, it determines which breakpoints are required.

Since returns have already been removed, they are not divided between the breakpoints. Rather, the returns have "come off the top." Each breakpoint required is filled to their maximum amount unless except for the last breakpoint which holds any left over items after the previous breakpoints have been filled.

Reason for using this approach: Maximize profits. By not apportioning out returns, each breakpoint is filled to the maximum number before the next breakpoint is reached. When this method is employed, royalty holders earn less when royalty cover two or more breakpoints.

For example, let's say that we have total sales of 1,000 with 100 returns (net total of 900). Let's also say, that our breakpoint holds 750. We'll use a flat rate of \$1.00 to make things simple.

Using the apportion method, the total royalties are: $(750 - 75) * \$1.00 + (250 - 25) * \$1.00 = \$850$.

But using the "Off the Top" method, total royalties are: $750 * \$1.00 + 150 * \$1.00 = \$800$.

There is one drawback for using the "Returns off the Top" method which is not a problem for the "Apportioned" method. The drawback occurs when one accounting period has high sales and few returns followed by the next accounting period with low sales and high returns. It is possible for the returns in the next accounting period to outnumber sales and drop the royalty rates into the previous breakpoint. But to drop the royalty holder's rates clearly would be unfair to the royalty holder since that person has already reached the higher breakpoint and should continue to receive compensation accordingly. The chances are unlikely, but you can avoid it by utilizing the first method.

Breakpoints normally have wide spreads, and overlap between them is not a frequent occurrence. When it does occur, however, an understanding of how the adjustments are made makes it much easier to interpret the finished royalty report.

How to Select from the Two Methods

To select one of two methods, start at the [Royalty Set-up Screen](#). Look for "Variable Structure" and "QUANTITY." Just to the right of where you indicate the number of quantity breakpoints, you'll see a small light colored box with "Returns" and an "R" button.

VARIABLE Structure. Percentage varies depending on quantity and/or discount.
 If the structure is VARIABLE, select one (or both) of the following:

Quantity. The royalty percentage changes as more books are sold.
 How Many Quantity Breakpoints (Maximum of 5):

Discount. The royalty percentage depends on how much the book is discounted.
 How Many Discount Ranges (Maximum of 4):

Returns: **R**
 Apportion

Variable Structure:
 After Indicating
 Quantity and/or
 Quantity Or
 Discount Set-up

If you click on the "R" button, a dialog box appears on which you can indicate what method you wish to use for that royalty holder. You can also select a default method.

Additionally, there is a quick way of selecting the method. If you double-click in the small light colored box, the method will toggle back and forth between "Apportion" and "Off the Top."

Note also that on the [View Royalty Reports](#) Screen, you can see which method has been used. If "Off the Top" has been used, the abbreviation OTT will appear on the upper right of the screen, at the end of the "Structure" line. No abbreviation appears if the "Apportion" method has been used.

Other parts of the Set-up Screen include:

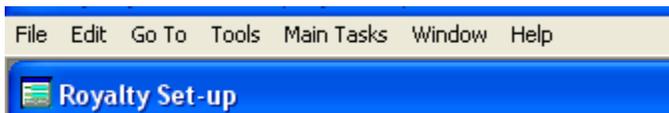
- [Menu Bar](#)
- [Name, Address, and Phone Blanks](#)
- [Email, Product, and Catalog Number Blanks](#)
- [Summary Name, Social Security, Active, and Code](#)
- [Keep Running Tally Box](#)
- [Counting, Calculation and Structuring Methods](#)
- [Options \(Net and Profit Calculation Methods\)](#)
- [Vary Rate Based on Pricing Level](#)

For more information on setting up a royalty with a Variable Structure:

- [Indicating the Number of Quantity Breakpoints](#)
- [Indicating the Number of Discount Ranges](#)
- [Entering Breakpoints & Royalty Rates for Variable Structure \(Quantity\)](#)
- [Entering Discount Ranges & Royalty Rates for Variable Structure \(Discount\)](#)
- [Entering Breakpoints, Ranges & Rates for Variable Structure \(Quantity & Discount\)](#)

3.3 Menu Bar

Printed across the top of the [Royalty Set-up Screen](#) is the Menu Bar. It consists of FILE... EDIT... GO TO... TOOLS... MAIN TASKS... WINDOW... HELP. You select menu items by clicking them with the mouse or by pressing Alt on the keyboard and the first letter of the menu item, i.e. pressing Alt+F opens the file menu.



Note: menu items which have a V, VI or VII are features of the Level 5, 6, or 7 programs. For example: "View/Print Records from Spreadsheet (V)" which is found under the FILE menu is a Level 5 and above feature. If there's no Roman numeral, then the feature is available in all levels (Levels 4 - 7).

For more information on any aspect of the Royalty Set-up Menu Bar, click on the individual menu item below:

FILE

- [Back-up Royalty Files](#)
- [File Maintenance \(VII\) - Level 7](#)
- [Print](#)
- [View/Print Records from Spreadsheet \(V\) - Level 5 and Above](#)

[Close](#)

EDIT

[Undo](#)

[Cut](#)

[Copy](#)

[Paste](#)

[Paste From List](#)

[Address Lines: Change Case \(V\) - Level 5 and Above](#)

[Delete This Royalty Record](#)

GO TO

[Previous Record](#)

[Next Record](#)

[First Record](#)

[Last Record](#)

[New Record](#)

[Search Royalty Records](#)

[Find Record from Look-up List](#)

[Find Record by Scanning Barcode \(V\) - Level 5 and Above](#)

TOOLS

[Insert Running Tally Date](#)

[Recall Previous Running Tally Total & Date](#)

[Copy Values From Previous Entry](#)

[Royalty Calculations for a Category](#)

[Quantity Breakpoint Options](#)

[Alternative Label for Retail](#)

MAIN TASKS

[Generate Royalty Reports](#)

[View Royalty Reports](#)

[Royalty Statements](#)

[Combined Totals / Cash Reserves Report \(VI\) - - Level 6 - 7](#)

[Main Menu](#)

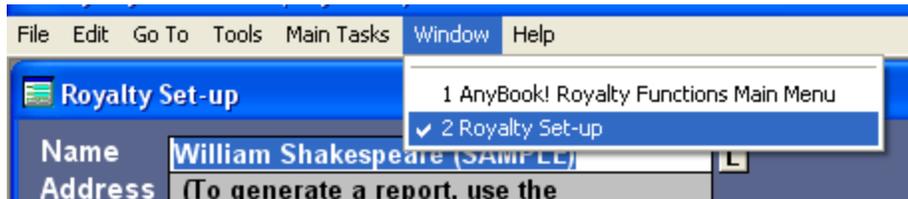
WINDOW

[Moving Between Different Windows](#)

HELP

3.3.1 Using Window from the Menu Bar

One of the choices found on the Menu Bar that runs across the top of the screen is WINDOW. When you click on WINDOW, a list of available windows appears.



The current window may be the only one on the list, but as you move to different parts of the program, other windows will be included on the list. You can move back and forth between different windows by clicking on the appropriate window from the list.

3.4 Basic Information on Set-up Screen

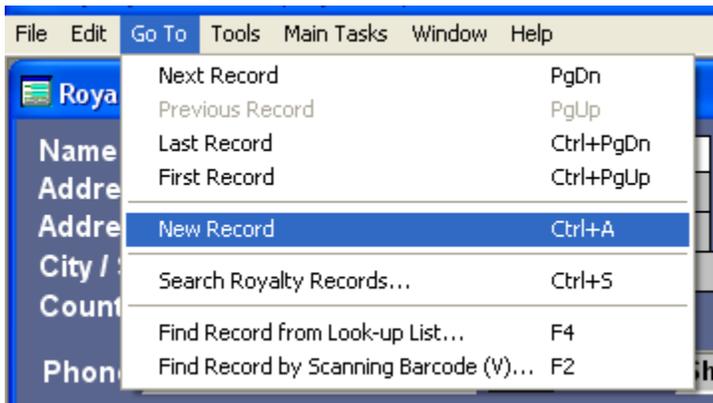
This chapter includes details on basic functions associated with the Set-up Royalty Information Screen. The Screen is reached by clicking on the appropriate button on the Main Menu or choosing MAIN TASKS >> SET-UP ROYALTY INFORMATION from the Menu Bar.

The sub-categories under this section provide details on the basic functions of the Royalty Set-up screen.

- [Adding New Set-up Records](#)
- [Alternative Label for Retail](#)
- [Change Case](#)
- [Copy Values From Previous Entry](#)
- [Cut, Copy, Paste, Undo](#)
- [Delete This Royalty Record](#)
- [Look-up List](#)
- [Move Data to Spreadsheet](#)
- [Moving from Record to Record](#)
- [Paste From List](#)
- [Print \(Royalty Information Screen\)](#)
- [Search](#)

3.4.1 Adding New Set-up Records

When you are working with the [Royalty Information Set-Up Screen](#), you can add new records in one of two ways. The first is to select GO TO and NEW RECORD from the Menu Bar.



The other way of adding a new record is to go to the last record in the file and press Page Down. The program will ask if you want to add a record. Select YES and a blank record will appear on the screen.

3.4.2 Alternative Label for Retail

In the "Calculation Method" box on the Royalty Set-up Screen, just to the right of "RETAIL Amount" is a field called "Label to Use" which allows you to enter a substitution for the word: "Retail."

You can change the term that AnyOrder uses on the printed royalty report. In the "Calculation Method"

box on the Royalty Set-up Screen, just to the right of "RETAIL Amount" is a field called "Label to Use" which allows you to enter a substitution for the word: "Retail."

The screenshot shows a dialog box titled "Select One of the Following Calculation Methods:". It contains four radio button options:

- RETAIL Amount. Calculate royalty as a percentage of the book's retail price.
- NET Amount. Calculate royalty as a percentage of the amount after discount is removed.
- FLAT Amount. Royalty not based on a percentage but is a flat amount, i.e. \$2.00 per book.
- PROFIT. Royalty is based on a percentage of gross profit (revenues minus cost).

 To the right of these options is a text field labeled "Label to Use:" containing the text "Retail" and a small "H" button. A red circle highlights the "Label to Use:" field.

First some background information: under the default configuration of the program, the printed royalty report includes the label: "Retail." For example, if you select the "Retail" calculation method, the report would include the following:

$$\text{Royalty} = \text{Net Total} \times \text{Retail Price} \times \text{Rate} (.05)$$

If desired, you can change "Retail" to another modifier by typing the desired alternative word in the "Label to Use" field. For example, you might type in "List." In that case the report would include:

$$\text{Royalty} = \text{Net Total} \times \text{List Price} \times \text{Rate} (.05)$$

Keep in mind that only the adjective "Retail" is changed. The word "Price" remains. Whatever you designate should modify "Price" as in "List Price." Note also that there's a limit of 10 characters.

To change the name on *this royalty record*, type the desired name in the "Label to Use" blank.

If you'd like, the default can be changed so that *EACH time a new royalty record is created*, the program will use the label you designate. To change the default, first click on the "H" button. You'll see a place to enter the new label. It's recommended that you use title case: capitalize the first letter and keep the rest lower case. All new set-up records created will use the new label.

3.4.3 Change Case

This feature is only available on Level 5 (or higher) programs.

The Change Case feature is used to format address information on an invoice in a consistent manner. Address information includes any information in the following blanks: Billing Name, Shipping Name, City, State/Province, Country and the two address lines for both billing and shipping.

To reach this feature, select EDIT >> ADDRESS LINES: CHANGE CASE from the menu bar on top of the screen.

You have three choices: Title Case, Upper Case, and Lower Case.

Upper Case capitalizes all letters. For example 3456 South Main will be converted to 3456 SOUTH MAIN.

Lower Case removes all capital letters: 345 South Main Street NW will be converted to 345 south main st nw.

Title Case capitalizes the first letter of each word, but it also has a series of built-in instructions to apply a consistent address style to names and addresses. The following are some examples:

1St STREET nw >> 1st Street NW

2ND avenue se >> 2nd Avenue SE

po box 3459 >> PO Box 3459

cmr 345, Box 12334, apo AE 09250 >> CMR 345, Box 12334, AP AE 09250

rogerson printing, llc >> Rogerson Printing, LLC

mcafee graphics >> McAfee Graphics

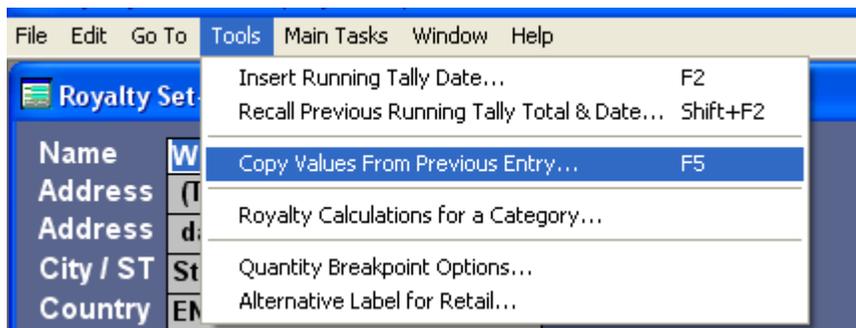
Amazon.COM >> Amazon.com

When you select this feature all address lines (billing name, address, city, etc.) are formatted at same time. In other words, it is not necessary to format each line separately.

Note that Title Case is unable to distinguish abbreviations specific to universities, government agencies and businesses. You'll need to format those by hand.

3.4.4 Copy Values From Previous Entry

This helpful dialog box is found in the [Royalty Information Set-up Screen](#). It is reached by selecting TOOLS and COPY VALUES FROM PREVIOUS ENTRY from the Menu Bar.



It is used when you want to copy the royalty values from one royalty holder to another. Since you'll probably use the same royalty system for most of your royalty holders, this provides you with a way of copying royalty information from royalty holder to royalty holder without having to re-enter it each time you make a new entry.

Before using it you'll need to get at least one royalty holder entered in the Set-up file. Once you do, you can access this dialog box by selecting TOOLS and COPY VALUES FROM PREVIOUS ENTRY from the Menu Bar. In the dialog box that appears will be a list of all previously entered royalty holders.

From the list, select the name of the royalty holder. When you click on OK, all values will be transferred to the current record.

The values which are copied include counting, calculation and structuring method choices. It will also copy the simple rate amount in the case of royalty systems with simple structures. For royalty systems with a variable structure, it will copy all breakpoints and/or discount ranges and associated royalty rates. This is particularly handy if you have fairly complex royalty payment systems since all discount ranges, breakpoints and royalty rates will be copied.

This feature only copies royalty values. It doesn't copy names, addresses, products or social security numbers. If you wish to copy a name and address, double click in the name blank.

Other Parts of the Set-up Screen include:

[Menu Bar](#)

[Name, Address, and Phone Blanks](#)

[Email, Product, and Catalog Number Blanks](#)

[Summary Name, Social Security, and Active Check Box](#)

[Keep Running Tally Box](#)

[Counting, Calculation and Structuring Methods](#)

[Options \(Net and Profit Calculation Methods\)](#)

[Vary Rate Based on Pricing Level](#)

For more information on setting up a royalty with a Variable Structure:

[Indicating the Number of Quantity Breakpoints](#)

[Indicating the Number of Discount Ranges](#)

[Entering Breakpoints & Royalty Rates for Variable Structure \(Quantity\)](#)

[Entering Discount Ranges & Royalty Rates for Variable Structure \(Discount\)](#)

[Entering Breakpoints, Ranges & Rates for Variable Structure \(Quantity & Discount\)](#)

3.4.5 Cut, Copy, Paste, Undo

The Cut, Copy, and Paste routines use something called the Clipboard. The Clipboard is a storage area for text that you want to move or copy from one location to another. You can move text from one blank to another on the [Set-up Screen](#)--or you can move it to another program altogether.

Cut. (Select EDIT and CUT from the Menu Bar on top of the screen.) Cut removes the selected text and places it in the Clipboard. Use this command to move text from one place to another. Once the Clipboard contains text, you can **paste** it elsewhere using EDIT and PASTE.

The content of the Clipboard is not deleted when you paste, so you can paste many times. The Clipboard holds only one entry. Each time you Cut, the previously cut or copied entry is replaced.

Undo (EDIT and UNDO) reverses the effect of this command. The Cut command is not available if no text is selected.

Copy. (Select EDIT and COPY from the Menu Bar.) Copy copies the selected text to the Clipboard without removing it from its original location. Use this command to copy text to another location. Once the Clipboard contains the text, you can **paste** it elsewhere using EDIT and PASTE.

The content of the Clipboard is not deleted when you paste, so you can paste many times. The Clipboard holds only one entry. Each time you Copy, the previously cut or copied entry is replaced.

Undo (EDIT and UNDO) reverses the effect of this command. The Copy command is not available if no text is selected.

Additionally, you can use the following key combinations:

Cut Ctrl+X

Copy Ctrl+C

Paste Ctrl+V

Undo Ctrl+Z

3.4.6 Delete This Royalty Record

From either the [Set-up](#) or [Royalty Reports Screen](#), you can delete one or more records. To do so, select EDIT and DELETE THIS ROYALTY RECORD or DELETE THIS ROYALTY REPORT from the Menu Bar. A warning message will appear asking whether you are sure you want to delete the record or report. If you say YES, then the record will be deleted.

From the Royalty Reports Screen, you also have the choice of using the Multi-Record Delete feature. Use it when you need to delete two or more records at a time. To reach it, select EDIT >> MULTI-RECORD DELETE.

Both the Set-up and Royalty Report screens have a record counter located underneath the navigation buttons (which resemble VCR buttons). You won't notice an immediate change in the total number of records on the counter. In order to provide the highest level of security for your data files, the actual deletion of the record(s) occurs when you exit from the program when it is much safer to do so. When you eventually return to the royalty program, you'll see that the total count has been updated.

3.4.7 Look-up List

Each of the major Royalty functions (Set-up Royalty Information, Royalty Reports and Royalty Statements) includes a Look-up List feature. It is accessed by selecting GO TO and FIND FROM LOOK-UP LIST. Or you can click the "Look-up" button at the bottom of the screen:

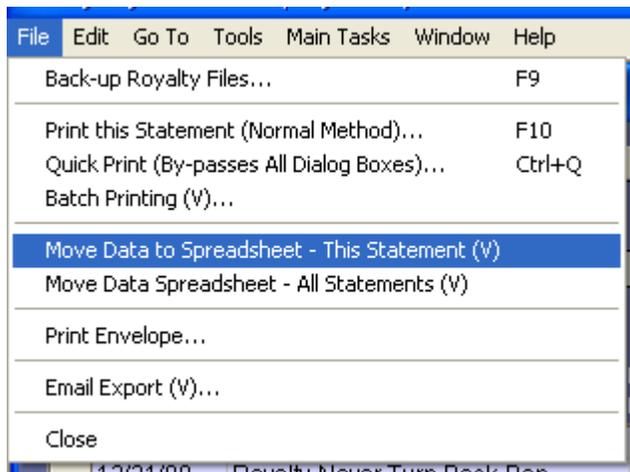


The Look-up dialog box consists of an alphabetized list of names or reports. Make a selection from the list and you will be taken the appropriate record.

3.4.8 Move Data to Spreadsheet

This feature is only available with Level 5 (or higher) programs.

Data from each of the three major parts of Royalty Functions (including Royalty Set-up, Royalty Reports, and Royalty Statements) can be accessed by a spreadsheet program. To do so, select the FILE and MOVE DATA TO SPREADSHEET. (In the Royalty Set-up Screen, it is accessed by selecting FILE and VIEW/PRINT RECORDS FROM SPREADSHEET.)



Important: In the Royalty Report portion of the program, page through each of the reports before moving them to the spreadsheet. (This is not necessary in Royalty Set-up and Royalty Statements) So many calculations going on in the Royalty Report part of the program that the final set of calculations are not done until each report comes up on the screen. Once the report has appeared on the screen just once (a fraction of a second is all it needs), all the calculations are done and you can use View/Print from Spreadsheet.

If you haven't used the spreadsheet option in other parts of the program, you'll first be prompted to enter the path to your spreadsheet program. Once you've entered the path, AnyOrder will automatically start your spreadsheet program with the data in place.

This feature provides you with an additional way of viewing the data. You can sort the data in various ways, manipulate it and print it. Feel free to make whatever changes you desire. When you use this option, data is placed in a separate report file and any changes made will not affect the original database.

Note: If you are using this function with Royalty Reports, you must have paged through the reports first. (If you've already looked at each of the reports on the screen, then it's not necessary to do this). The export function requires some additional data calculations which only occur when the report is visible on the report screen. Once you page through the reports, all calculations will complete and you'll full access to the data in the spreadsheet.

3.4.9 Moving from Record to Record

If want to move to the next record in your file, select GO TO and NEXT RECORD from the Menu Bar on top of the [Set-up](#) screen. (Note that this also applies to the [Royalty Report Screen](#). In the following description, just substitute word "Report" in the place of "Record.") You can also press Page Down on your keyboard which does the same thing. So does clicking on the right arrow (>) navigation button on the bottom of the screen, shown below:



If you are on the last record and you select NEXT RECORD, the program will notify you that it's the last record and will ask whether you would like to add a new record or not (Set-up Screen only).

If you select GO TO and PREVIOUS RECORD the previous record will appear. This is the same as pressing Page Up, or clicking on the left arrow (<) navigation button* on the bottom of the screen.

If you select GO TO and LAST RECORD, the program will go to the last record in the file. This is the same as pressing Ctrl+Page Down or clicking on the right arrow and a line (>|) navigation button* on the bottom of the screen.

If you select GO TO and FIRST RECORD, the program will go to the first record in the file. This is the same as pressing Ctrl+Page Up or clicking on the left arrow and a line (|<) navigation button* on the bottom of the screen.

3.4.10 Paste From List

"Paste From List" is one of the options available on the EDIT menu of the [Royalty Information Set-up Screen](#). In order to access it, your cursor must be in either the Name or Product blank. With your cursor in one of these two blanks, select EDIT and PASTE FROM LIST from the Menu Bar and a dialog box will appear.

The contents of the dialog box will vary depending on the location of your cursor. If your cursor is in the Name blank, a list of all previously entered royalty holders will appear. Select the proper name from the list and the individual's address, city, state, etc. will be automatically entered for you. Note that you can also activate the list by double clicking in the name blank or pressing CTRL+L on the keyboard.

If your cursor is in the Product blank, a list of products will appear. Pick the correct product and press OK. The product name, catalog number and retail price will be entered in the blanks automatically for you. Note that you can also activate the product list by double clicking in the product blank or pressing CTRL+L on the keyboard.

3.4.11 Print (Royalty Information Screen)

To print a copy of the [Royalty Information Screen](#), select FILE and PRINT from the Menu Bar. The printing process is quite simple. AnyOrder reproduces the screen display and sends it to the printer. The printing process is a bit more involved when creating royalty reports from the [Royalty Reports Screen](#). For royalty reports, AnyOrder does a considerable amount of formatting depending on the royalty payment system. For more information, see [Printing Royalty Reports](#).

If desired, you can add a logo or other graphic elements to your royalty reports. The dialog box which enables you to add graphics to invoices is reached by clicking the "Invoice Graphics" button.

The procedure for including graphics on royalty reports is the same as the procedure for invoice graphics. For more details, search for the word "Graphics" in help system accessed from the Main Invoice Screen.

Other Parts of the Set-up Screen include:

[Menu Bar](#)

[Name, Address, and Phone Blanks](#)

[Email, Product, and Catalog Number Blanks](#)

[Summary Name, Social Security, and Active Check Box](#)

[Keep Running Tally Box](#)

[Counting, Calculation and Structuring Methods](#)

[Options \(Net and Profit Calculation Methods\)](#)

[Vary Rate Based on Pricing Level](#)

For more information on setting up a royalty with a Variable Structure:

[Indicating the Number of Quantity Breakpoints](#)

[Indicating the Number of Discount Ranges](#)

[Entering Breakpoints & Royalty Rates for Variable Structure \(Quantity\)](#)

[Entering Discount Ranges & Royalty Rates for Variable Structure \(Discount\)](#)

[Entering Breakpoints, Ranges & Rates for Variable Structure \(Quantity & Discount\)](#)

3.4.12 Search

Each of the major Royalty functions (Set-up Royalty Information, Royalty Reports and Royalty Statements) has a search feature. It is accessed by selecting GO TO and SEARCH from the Menu Bar. Or you can click the "Search" button at the bottom of the screen:



In the blank on top of the Search dialog box, you can enter a partial word or phrase. AnyOrder will search the name and address blanks for a match.

3.5 Pricing Levels

This is a Level 7 Feature

You can use pricing levels to vary royalty rates. Pricing levels are set-up in the product database: PRODUCT TOOLS >> PRODUCT INFORMATION & CATALOG NUMBERS. If you have established pricing levels, you can use this method to vary royalties.

For example, you might have a pricing level for domestic sales (which would be the default pricing level of zero (0)). And you might have a pricing level for international sales (pricing level of one (1)).

With at least two pricing levels, such as domestic and international, you would be able to set up different royalty rates.

Pricing levels work with all other royalty options except for the profit method. For instance, you can have a counting method of "cash" and a calculation method of "net" combined with pricing levels. Or you could have "accrual" and "flat rate" combined with pricing levels. You can even combine pricing levels with quantity breakpoints and/or discount ranges.

To set-up pricing levels, begin by placing a checkmark beside "Vary Rate Based on Pricing Level" found on the [Royalty Set-up Screen](#). Then click on the "Pricing Level Set-up" button.



When you click on the "Pricing Level Set-up" button, the "Pricing Level" dialog box appears:

Vary Rate Based on Pricing Level **Level VII Feature**

In the fields, below, indicate the percentage rate (or flat rate) for each Pricing Level:

Type in percentage as a whole number. Example: 10.0000 means 10%. Type in a flat rate as a monetary amount. Example: 5.250000 means \$5.25.

The default percentage - for products listed with a pricing level of zero (0) - is the first one (Retail) on the list below:

Pricing Name	Name you wish to use for royalty purposes	Price of the Item (If using "Retail" Calculation Method)	Royalty Percentage or Flat Rate
Retail		14.95	10.0000
PRICE 1		0.00	0.0000
PRICE 2		0.00	0.0000
PRICE 3		0.00	0.0000
PRICE 4		0.00	0.0000
PRICE 5		0.00	0.0000
PRICE 6		0.00	0.0000

Notes:

- 1) An 'NA' above means the pricing level has not been set-up. Pricing Levels are set-up in the Product Database (Product Tools > Product Information & Catalog Numbers.
- 2) If you plan to use quantity breakpoints along with levels, the above values will be used for the first quantity breakpoint.

Each of the pricing levels that you have set-up in the Product Database will be indicated. For royalty purposes, you can change the name. If you don't change the name, the original name that you set-up in the Product Database will be used.

Beside each pricing level, you'll be able to indicate the royalty percentage. Or, in the case of a flat rate, you'll indicate the monetary amount.

Additionally, beside each pricing is the price of the item which comes directly from the Product Database. The price is important if you use the [Retail Calculation Method](#). If for some reason, you need to change the price, you can do so in the price field. The only thing that you can't do is to change

the price to zero. If you change it to zero (0), AnyOrder will re-insert the price found in the Product Database. If you need to have zero royalties for a particular price level, and you are using the Retail Calculation Method, set the percentage to zero (0).

Note that if you are using pricing levels in combination with quantity breakpoints, the percentage or flat rate that you indicate for each level will serve as the rates for the first quantity breakpoint. You'll need to set-up the additional rates for each of the other breakpoints by clicking on the "Quantity or Discount Set-up" button in the Variable Structure area of the Royalty Set-up Screen.

If you plan to use pricing levels in combination with discount ranges (or both discount and quantity breakpoints), you'll need to indicate the rates associated with each by clicking on the "Quantity or Discount Set-up" button in the Variable Structure area of the Royalty Set-up Screen. The dialog box that appears will lead you through the rest of the process.

Other Parts of the Set-up Screen include:

[Menu Bar](#)

[Name, Address, and Phone Blanks](#)

[Email, Product, and Catalog Number Blanks](#)

[Summary Name, Social Security, and Active Check Box](#)

[Keep Running Tally Box](#)

[Counting, Calculation and Structuring Methods](#)

[Options \(Net and Profit Calculation Methods\)](#)

[Vary Rate Based on Pricing Level](#)

For more information on setting up a royalty with a Variable Structure:

[Indicating the Number of Quantity Breakpoints](#)

[Indicating the Number of Discount Ranges](#)

[Entering Breakpoints & Royalty Rates for Variable Structure \(Quantity\)](#)

[Entering Discount Ranges & Royalty Rates for Variable Structure \(Discount\)](#)

[Entering Breakpoints, Ranges & Rates for Variable Structure \(Quantity & Discount\)](#)

3.5.1 Pricing Levels and Variable Structure

This is a Level 7 Feature

You can use pricing levels to vary royalty rates. Pricing levels are set-up in the main program's product database: PRODUCT TOOLS >> PRODUCT INFORMATION & CATALOG NUMBERS. If you have established pricing levels, you can use this method to vary royalties.

For example, you might have a pricing level for domestic sales (which would be the default pricing level of zero (0)). And you might have a pricing level for international sales (pricing level of one (1)). For more information, see [Pricing Levels](#).

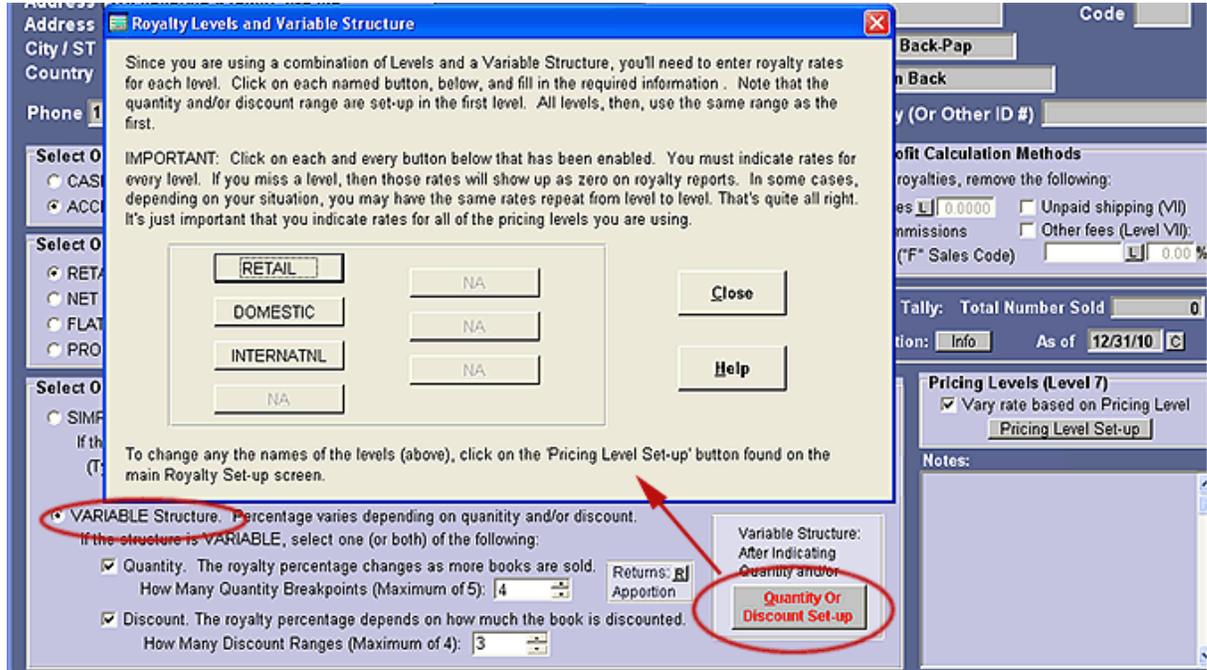
To set-up royalties based on pricing levels, see [Pricing Levels](#).

If you use pricing levels in combination with a Variable Structure (either "Quantity" or "Discount Ranges," you'll need to enter information for each quantity breakpoint or each discount (or both).

First indicate the number breakpoint and/or discount ranges in the "Variable Structure" area of the

[Royalty Set-up Screen](#), then click on the "Quantity or Discount Set-up" button. The "Royalty Levels and Variable Structure" dialog box will appear.

Notice in the illustration below, "Vary rate based on Pricing Level" is checked." Also "VARIABLE Structure" is selected. When the "Quantity or Discount Set-up" button is click, the dialog box shown appears:



In the "Royalty Levels and Variable Structure" dialog box (above), click on each named button, and fill in the required information. Note that the quantity and/or discount ranges are set-up in the first level. All levels, then, use the same range as the first.

In the illustration, below, serves as example. In this case, the "Domestic" button has been clicked and the following screen appears:

Royalty Information (Page 2): Variable Royalty Structure

Discount Ranges and Quantity Breakpoints for the Level: DOMESTIC

Fill in the blanks below. (Use whole numbers for percentages, i.e. 8.00% instead of .08)

QUANTITY BREAKPOINT #1: Pay the following royalties starting with the following quantity of books sold:

DISCOUNT RANGE #1: Pay a royalty of: % for the discount range of: % through %

DISCOUNT RANGE #2: Pay a royalty of: % for the discount range of: % through %

DISCOUNT RANGE #3: Pay a royalty of: % for the discount range of: % through %

QUANTITY BREAKPOINT #2: Pay the following royalties starting with the following quantity of books sold:

DISCOUNT RANGE #1: Pay a royalty of: % for the discount range of: % through %

DISCOUNT RANGE #2: Pay a royalty of: % for the discount range of: % through %

DISCOUNT RANGE #3: Pay a royalty of: % for the discount range of: % through %

QUANTITY BREAKPOINT #3: Pay the following royalties starting with the following quantity of books sold:

DISCOUNT RANGE #1: Pay a royalty of: % for the discount range of: % through %

DISCOUNT RANGE #2: Pay a royalty of: % for the discount range of: % through %

DISCOUNT RANGE #3: Pay a royalty of: % for the discount range of: % through %

HELP INFORMATION. Indicate royalties and percentage discounts as whole numbers, i.e. FROM 0% Through 40.0% means the discount ranges from 0% (no discount) to 40% discount. The first discount range always starts with 0% and the final range always ends with 100%. Type-in a number in the right column, and AnyBook will automatically insert the next starting number. Also note that for quantity breakpoints, the first breakpoint should always start with zero (0) books sold.

Be sure to click on each and every button below that has been enabled. You must indicate rates for every level. If you miss a level, then those rates will show up as zero on royalty reports. In some cases, depending on your situation, you may have the same rates repeat from level to level. That's quite all right. It's just important that you indicate rates for all of the pricing levels you are using.

To change any the names of the levels (above), click on the [Pricing Level Set-up](#) button found on the main Royalty Set-up screen.

Other Parts of the Set-up Screen include:

[Menu Bar](#)

[Name, Address, and Phone Blanks](#)

[Email, Product, and Catalog Number Blanks](#)

[Summary Name, Social Security, and Active Check Box](#)

[Keep Running Tally Box](#)

[Counting, Calculation and Structuring Methods](#)

[Options \(Net and Profit Calculation Methods\)](#)

[Vary Rate Based on Pricing Level](#)

For more information on setting up a royalty with a Variable Structure:

[Indicating the Number of Quantity Breakpoints](#)

[Indicating the Number of Discount Ranges](#)

[Entering Breakpoints & Royalty Rates for Variable Structure \(Quantity\)](#)

[Entering Discount Ranges & Royalty Rates for Variable Structure \(Discount\)](#)

[Entering Breakpoints, Ranges & Rates for Variable Structure \(Quantity & Discount\)](#)

3.5.2 Pricing Levels: File Maintenance

This is a Level 7 Feature

Note: This file maintenance function refers specifically to a special file that holds pricing level information. If you need to re-index all of the royalty data files, you can access that function by starting at the Main Menu and selecting File >> Re-index file.



Background

If you use [pricing levels](#) in your calculations, and if you also based those calculations on the quantity of the items sold (i.e. you select both "Pricing Levels" and "Variable Structure: Quantity,") then the data file named RoyLevel.dbf will be used.

It's very unlikely, but if RoyLevel.dbf is negatively impacted in some way -- such as a power failure during a file operation process -- it may be necessary to delete one or more records from the database. This function has been included to allow you to do that.

It may be helpful to understand when this database is used by the program. The first pricing level, "Retail," is handled by the RoyInfo.dbf database, the main database. Any additional level information which is associated with quantity breakpoints is held in the Royalty Pricing Level Database: RoyLevel.dbf.

How to Use this Function

If you are having problems when entering data associated with levels on one for one of your royalty holder (and the rest are fine), you can delete the problem record from RoyLevel.dbf. To remove the problem record, select File >> File Maintenance >> Delete This Record from Pricing Level Database.

If you are having problems enter pricing level data for all royalty holders, select File >> File Maintenance >> Delete All Records from Pricing Level Database. This will remove all records and allow you to start fresh.

Note that this process only removes the data stored in RoyLevel.dbf. All other databases are protected and not effected by this process. That means general settings such as name, address, counting, calculation and structuring methods remain the same. Also all the settings for the first level stay the same. It's only the second level and higher, associated with quantity breakpoints, that are removed.

Royalty Manual

AnyOrder: Order Processing & Fulfillment

Part



IV

4 Generate Royalty Reports

The Generate Reports Screen (also known as the "Report Generator") is reached by clicking on the appropriate button on the Main Menu or choosing MAIN TASKS and GENERATE ROYALTY REPORTS from the Menu Bar.

The purpose of the Report Generator is to take the information that you have provided in the [Set-up](#) portion of the program, sort through all invoice records, do an inventory, and determine how much royalty is due to the royalty holder. The actual report created by the generator is accessed in [View Royalty Reports](#).

Information on Generating Royalty Reports include:

[Parts of the Generator Screen & Details on the Process](#)

[Entering Start and End Dates](#)

[Creating Log Files](#)

[Information About the Error Message: "There's a problem with the starting date..."](#)

4.1 Generate Report: Detail Information on the Process

The Generate Reports Screen ("Report Generator") is reached by clicking on the appropriate button on the Main Menu or choosing MAIN TASKS and GENERATE ROYALTY REPORTS from the Menu Bar.

The following describes the parts of the generator and the generation process

Generate Reports after End of Reporting Period. It is best to wait until some time after the royalty period to do your reports. If you do reports at the end of the year, wait until December 31st has past before generating reports. If you do a report on December 15, for instance, you may be missing some sales that occurred between December 15 and December 31.

Start and End Dates. To begin the process, enter the start date and end date of the period of time you want the royalty to cover. To help you enter dates, an automatic insert feature has been built into the generator. More information on entering dates is found here: [Start & End Dates](#)

Create a Log File. Level VI-VII Feature. If you place a checkmark here, AnyOrder will create a log file of the data that goes into a royalty report. The log file is accessed in [Royalty Reports](#) and can be viewed in Excel or another spreadsheet program. More information: [Report Generator Log Files](#)

Cash Reserves Feature. *Level VI-VII Feature.* This allows you to create a report summarizing the total royalties for a period. It does not create individual reports; rather, it creates only one report with the total amount of royalties for all reports. This feature is often used to make sure that enough cash has been set aside to pay royalties at the end of the year. For more information, see [Cash Reserves](#).

Select From List. From the list on the Generate Reports dialog box, select the royalty holders and products for which you want reports generated. To make a selection, click in the first column so that a checkmark appears. Click again to remove the checkmark. If desired, you can select more than one royalty holder or all royalty holders.

You can also select one or more groups of royalty holders. To select a group, click on the first of the group. Make sure a checkmark is beside the first member of the group. Hold down the SHIFT key and select the last member of the group. All the royalty holders between the two will be selected. You can de-select a group by doing the same thing, but in this case, the first member of the group should not have a checkmark beside it.

You can speed up the process by keeping the number selected to ten or less.

"Check" and "Selected" Buttons. To find out how many you have selected from the list, click on the "Check" button. If you want to limit the list to only those with checkmarks, click on the "Selected" button.

"Active" Box. Place a checkmark in the Active Box to limit the list to only those royalty holders with "Active" enabled on the [Set-up Screen](#).

On-click. Place a checkmark in the On-click box if you want to select from the list by using one-click; otherwise, two clicks will make a selection.

Search Features. The search features are helpful if you have lots of royalty holders. Use the "First Letter Search" to go to the first letter of royalty holder's name. "Multi-letter" search enables you to type in two or more letters of the individual's name. Finally, "Partial Word Search" allows you to search for a portion of an individual's name. If you don't find the individual after clicking on "Search," you can click on "Repeat Search" to continue the same search throughout the list.

Turn Running Tally Off for this Batch. [Running Tally](#) is a feature which is turned on or off from the [Royalty Set-up Information Screen](#). It allows you to keep track of accumulated sales. When it's turned on, each time you do a royalty report, the number of products sold will be updated, and you'll always know how many total units have been sold.

The Running Tally feature assumes that you go in order. You create a royalty report for 2015. Then you create one for 2016 and so. Each time you run a new report, the "Number Sold" and "As Of" date in the Set-up Screen are updated. But if you go out order -- for instance, run a two-year old report -- the normal time sequence of updating the running tally figures is now thrown off kilter.

If you know you are going out of order, you can turn off the Running Tally feature by checking this box. The "As Of" date and "Number Sold" figure will not be updated. If you are running reports which have been set-up with Quantity Breakpoints, AnyOrder will assume that you want to use the *first* quantity breakpoint. That will give you ballpark figures. If, however, you want complete accuracy, leave this box unchecked and allow the [Running Tally Wizard](#) to guide you through the process.

Start Generation Process. When ready, click on "Generate Report" to begin the process.

Information on the Generation Process. The report generator consists of a long and involved series of sophisticated database processing instructions. It begins by looking at individual royalty holders and grouping those utilizing similar royalty payment systems together.

It then runs one or more inventories based on the groupings. Once the proper quantities and sales data has been obtained from the inventories, it compiles all the information into a report file. You can

track the progress of the generator by watching the informational messages on the bottom of screen.

Considerable processing power comes into bearing when it deals with reports which utilize a variable structure, particularly when the structure consists of both discount ranges and quantity breakpoints. When total sales of a product overlap into two or more quantity breakpoints, it calculates the relative percentage of sales between the breakpoints and assign numbers based on the percentages. When dealing with discount ranges, some rounding off is always necessary, but it re-checks all figures which have been rounded and adjust the quantities and sales figures so that the totals appearing on reports are always accurate. Of all the tasks undertaken by AnyOrder, some of the most complex occur in the Royalty generator.

Exiting Before the Generator Finishes. Since a significant amount of processing power is utilized during this portion of the program, it may take several minutes for the reports of a group of royalty holders to be generated. If you must exit the program before the processing is completed, press <ESC> on your keyboard.

Plan to wait a few seconds while everything is shut down. Many database files are opened during the process, and to protect your valuable files, AnyOrder will take a few moments to carefully close everything first. When all files are closed, a message will appear telling you that it's OK to exit.

Report Screen Automatically Opened. When the report generator has completed the generation process, it will automatically start [View Royalty Reports](#) which allows you to look over--or print--the newly created reports.

4.2 Generate Reports: Start & End Dates

The Generate Reports Screen ("Report Generator") is reached by clicking on the appropriate button on the Main Menu or choosing MAIN TASKS and GENERATE ROYALTY REPORTS from the Menu Bar.

One of the first things that you'll do when using the report generator is enter starting and ending dates. Here's some concepts to keep in mind:

Reports after End of Reporting Period. It is best to wait until some time after the royalty period to do your reports. If you do reports at the end of the year, wait until December 31st has past before generating reports. If you do a report on December 15, for instance, you may be missing some sales that occurred between December 15 and December 31.

Start and End Dates. To begin the process, enter the start date and end date of the period of time you want the royalty to cover. To help you enter dates, an automatic insert feature has been built into the generator.

The automatic insert feature assumes that you base your royalty reports on the fiscal year (the same fiscal year that you set-up in Basic Set-up). It also assumes that the royalty report that you are generating will cover the previous royalty reporting period. The following is an example of how the insert feature works, using 2016 as the current year:

Annual Reports. If you do reports annually and the current year is 2016, the automatic insert feature will insert 01/01/15 for the start date and 12/31/15 for the end date. Click on the arrows next to the annual button to increase or decrease the year.

Semi-annual Reports. If you do reports every six months and it's the first half of 2016, the automatic insert feature will insert 07/01/15 for the start date and 12/31/15 for the end date. If it's the second half of 2016, the automatic insert feature will insert 01/01/16 for the start date and 06/30/16 for the end date. Click on the arrows next to the semi annual button to increase or decrease the half year.

Quarterly Reports. If you do reports every quarter and it's the second quarter of 2016, the

automatic insert feature will insert 01/01/16 and 03/31/16 for the start and end dates. Note that AnyOrder uses calendar quarters for the automatic insert feature. If the starting month of the quarters in your business do not fall in January, April, July, or October, you'll need to manually adjust the dates. Click on the arrows next the quarterly button to increase or decrease the quarters.

Monthly Reports. If you do reports every month, and it is March, the automatic insert feature will insert 02/01/16 and 2/28/16 for the start and end dates. Click on the arrows next the quarterly button to increase or decrease the month.

If you use the insert feature, be sure to check the dates after they've been inserted. The insert feature assumes that you want reports from the *period directly proceeding the one you're in*. The year of the dates will need to be adjusted for the following:

- If you're generating a report over a year after the end date (for annual reports).
- If you're generating a report over 6 months from the end date (for semi-annual reports)
- If you're generating a report over 3 months from the end date (for quarterly reports)
- If you're generating a report over 1 months from the end date (for monthly reports)

You can also select dates by clicking the "C" buttons. A calendar will pop-up. To select a date, double-click on it.

4.3 Generate Reports: Creating Log Files

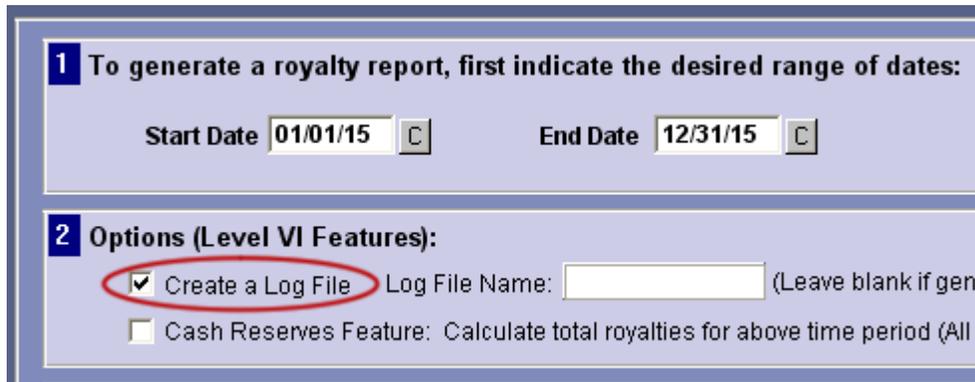
The Generate Reports Screen ("Report Generator") is reached by clicking on the appropriate button on the Main Menu or choosing MAIN TASKS >> GENERATE ROYALTY REPORTS from the Menu Bar.

The screenshot shows the 'Generate Royalty Reports' dialog box. It is titled 'Generate Royalty Reports' and has a menu bar with 'File', 'Main Tasks', 'Window', and 'Help'. The dialog is divided into three numbered sections:

- 1 To generate a royalty report, first indicate the desired range of dates:** This section contains 'Start Date' (01/01/12) and 'End Date' (12/31/12) fields, each with a 'C' button. To the right is an 'Automatic Insert' section with four buttons: 'Annual Dates', 'Quarterly', 'Semi-Annual', and 'Monthly', each with left and right arrow buttons.
- 2 Options (Level VI Features):** This section contains two checkboxes:
 - Create a Log File. Log File Name: (Leave blank if generating more than one report - when left blank, AnyBook will name by date & time)
 - Cash Reserves Feature: Calculate total royalties for above time period (All ACTIVE royalty holders included unless specific selections are made below.)
- 3 Select one or more from the following** (To select, click in LEFT column. A checkmark will appear. Click again to remove checkmark): This section features a list box on the left with 'Shakespeare--Never Turn Back' selected. To the right is a 'NOTE: If you have lots of reports to create, selecting ten (10) or less at a time will help speed processing times.' Below the note are search methods: 'First Letter Search' (with a checkbox), 'Multi-letter Search' (with a text field), and 'Partial Word Search' (with a text field). There are 'Search' and 'Repeat Search' buttons. Below these are a checkbox for 'Turn Running Tally OFF for this batch of reports' and a section for 'Number Selected (To Left): Check' and 'Limit Display to: Selected'. At the bottom of this section are checkboxes for 'Limit Display to Active' and 'One-click', along with 'Select All', 'De-select All', and 'One-click' buttons.

At the bottom of the dialog are three buttons: 'Generate Report', 'Cancel', and 'Help'.

Create Log File. *Level 6 - 7 Feature.* If you place a checkmark beside "Create a Log File," AnyOrder will create a log file of the data that goes into a royalty report.



1 To generate a royalty report, first indicate the desired range of dates:

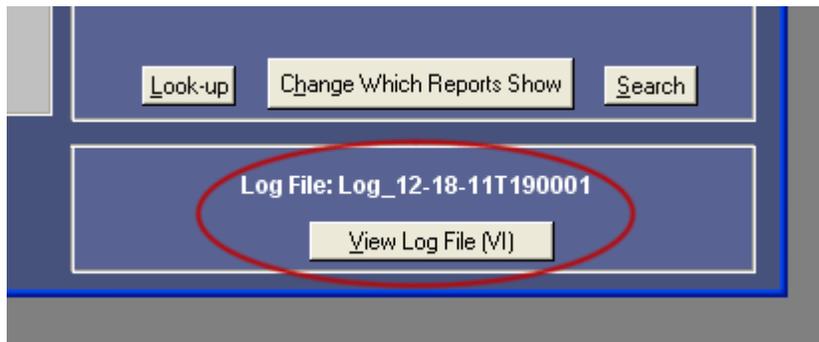
Start Date End Date

2 Options (Level VI Features):

Create a Log File Log File Name: (Leave blank if generated)

Cash Reserves Feature: Calculate total royalties for above time period (All /

The log file is accessed in [Royalty Reports](#) on the lower right of the screen (below). When you click on the "View Log File" button, Excel or another spreadsheet program opens with the log file.



It's easier to let AnyOrder name the log file, but, if desired, you can indicate a name. (If, however, you are running several reports together, it's best to let AnyOrder name the log file. When you run several reports, AnyOrder may need to create two or more log files during the process.)

As mentioned above, AnyOrder can create log files if you run two or more reports at the same time. During the report generation process AnyOrder will group similar reports together and include the data in one log file. For example, all reports which use a "net amount" calculation method and a "simple" structure will be grouped together. If you are running several reports, then all of the products which are associated with those reports will be included in the log file. **If you want only one product in each log file, you'll need to run each report separately.**

If you select both this option and the next option ([Cash Reserves](#)), AnyOrder will create a special type of log file which itemizes the totals of each royalty report.

Important Note for Network Users: Log files are created on the local computer and are saved in the C:\AnyOrder\LogFiles directory. In other words, log files are only accessible to the computer on which you are working. If you use log files, it's best to work from only one computer on the network. If you need to work from other computers on the network and must access one or more log files, you will need to copy the files that you need to the computer on which you are working.

4.4 Generate Report Error: Problem with Start Date

The Generate Reports Screen ("Report Generator") is reached by clicking on the appropriate button on the Main Menu or choosing MAIN TASKS and GENERATE ROYALTY REPORTS from the Menu Bar.

Information About the Error Message: "There's a problem with the starting date..."

This message only appears if you have turned on the Running Tally feature. It's telling you that the Starting Date that you've entered doesn't coordinate with the "As Of" date on that particular's royalty holder's set-up screen.

For example, let's say the "As Of" date on the Set-up Screen is 12/31/15. The Running Tally feature, then, expects you to enter 1/01/16 as the Start Date. Let's say you enter 1/15/16 as the start date. The Report Generator will trigger the error message: "There's a problem with the starting date..." The reason it triggers the error is that you will be missing any sales that occur between 1/01/16 and 1/14/16. If you sold any products during that time period, they won't be picked up by Running Tally and the running tally results will be inaccurate.

It is best to wait until some time after the royalty period to do your reports. If you do reports at the end of the year, wait until December 31st has past before generating reports. If you do a report on December 15, you may be missing some sales that occurred between December 15 and December 31.

Doing your report after the end of the report period also makes it easier to use the Running Tally feature. The "As Of" date in the Running Tally is the last day of the report period. When you run a report for the next year, your starting date for the Report Generator is January 1st.



Running Tally keeps a record of how many books or products have been sold over the life of the product. The "Total Number Sold" figure is updated each time you run a royalty report. Because of this, it's important when you use Running Tally to create royalty reports using a regular interval. If, for example, you create annual reports at the start of the calendar year, always use a Start Date of 01/01. If you were to change the Start Date and create a report starting 01/15, you would miss 15 days of sales and the running tally of accumulated sales would be inaccurate. A Running Tally Wizard is built into the Report Generator to warn you if the Start Date is not aligned with the "As of" date

The Running Tally feature is designed to have you produce royalty reports in order. First you do the report from 1/1/15 to 12/31/15. Then you do the report for 1/1/16 to 12/31/16, and so on. As you do the reports, the running tally figure is updated on the Set-up Screen. But if you jump out of order, then AnyOrder is confused in how to handle things.

Let's say, it's 2016 and you want to go back and re-run a report for 2014. Since you've gone out of order, AnyOrder triggers the Running Tally Wizard to try to understand what you might be doing. By following the directions on the wizard, you'll be able to communicate your purposes to AnyOrder. More information on the wizard is found here: [Running Tally Wizard](#). More information on Running Tally in

general is found here: [Running Tally](#).

4.5 Running Tally Wizard

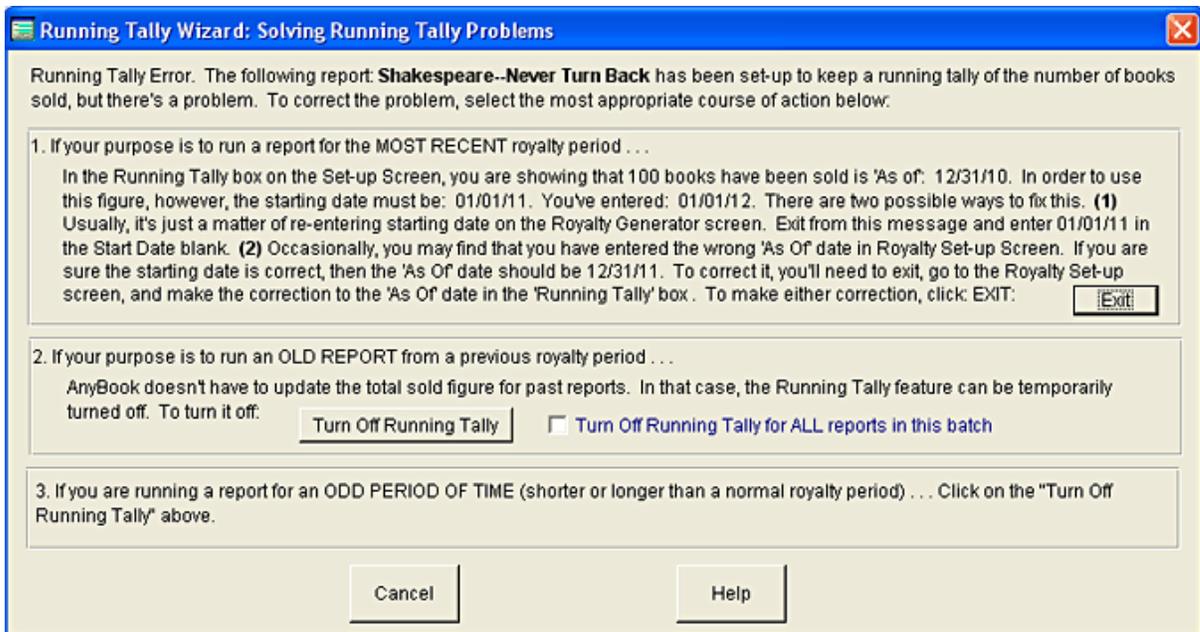
Running Tally is a feature which is turned on or off from the [Royalty Set-up Information Screen](#). It allows you to keep track of accumulated sales. When it's turned on, each time you do a royalty report, the number of products sold will be updated, and you'll always know how many total units have been sold.

The Running Tally feature assumes that you go in order. You create a royalty report for 2013. Then you create one for 2014 and so. Each time you run a new report, the "Number Sold" and "As Of" date in the Set-up Screen are updated. But if you go out order -- run a two-year old report -- the normal time sequence of updating the running tally figures is now thrown off kilter.

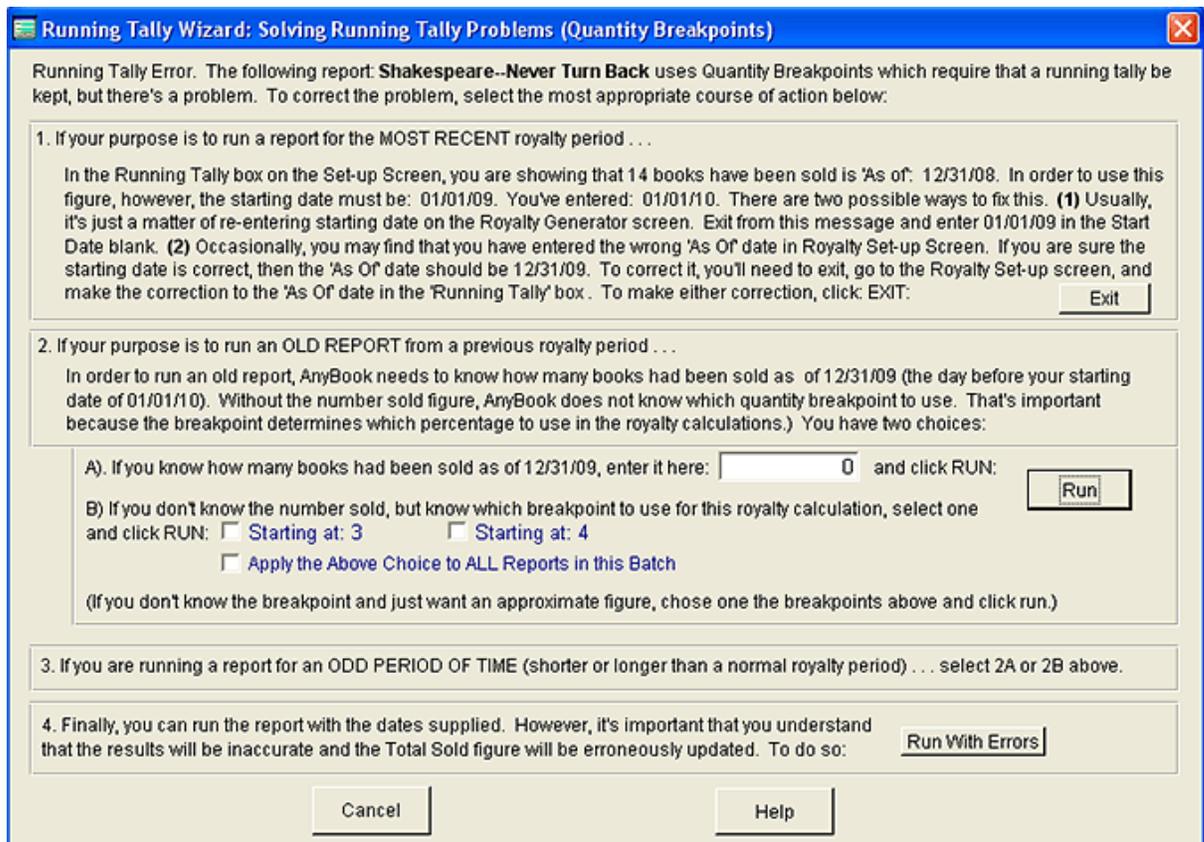
When you are generating reports in the [Report Generator](#) and the expected time sequence is changed, the Running Tally Wizard will be triggered.

There two Running Tally Wizards.

Running Tally Not Required. The following appears if you have not specifically set-up the royalty holder with a Variable Structure based on Quantities sold. In other words, you keeping a running tally for your own information, and it's not required to calculate royalties.



Running Tally Required. The following appears if you have set-up the royalty holder with a Variable Structure based on the Quantity sold. In other words, the royalty that you pay the royalty holder changes as more and more books or products are sold. Whenever you have a Variable Structure based on Quantity, you must have Running Tally turned on. AnyOrder must know how many books or products are sold in order to calculate the correct royalty. Here's what the Running Tally Wizard looks like:



The Running Tally Wizard will suggest a course of action depending upon your purposes. Both of the Wizards are similar. Differences are noted below . . .

First: Are you running a report for the most recent royalty period?

The first thing the Running Tally Wizard does is to ask if you are running a report for the most recent royalty period.

The answer to that question would be yes if two prerequisites are met: 1) You are *not* running a report for a *previous* period of time; and 2) you are *not* running a report for an *odd period* of time (different than what you normally run.) If that's the situation, then there's a problem with your dates.

Let's say that the running tally box on the Set-up Screen shows that 5,000 units have been sold as of 12/31/12. In the Report Generator you accidentally enter an incorrect starting date of 12/22/12 and an ending date of 06/30/13. The Running Tally Wizard will be triggered and you'll see this message:

1. If your purpose is to run a report for the **MOST RECENT** royalty period . . .

In the Running Tally box on the Set-up Screen, the latest figure for the total number of books sold is 'As of' the following date: 12/31/12. In order to use this figure, however, the starting date must be: 01/01/13. You've entered: 12/22/12. There are two possible ways to fix this. **(1)** Usually, it's just a matter of re-entering starting date on the Royalty Generator screen. Exit from this message and enter 01/01/13 in the Start Date blank. **(2)** Occasionally, you may find that you have entered the wrong "As Of" date in Royalty Set-up Screen. If you are sure the starting date is correct, then the "As Of" date should be 12/21/12. To correct it, you'll need to exit, go to the Royalty Set-up screen, and make the correction to the 'As Of' date in the 'Running Tally' box. To make either correction, click: EXIT

It's just a matter of following the directions. Exit from the Running Tally Wizard and correct the starting date to 01/01/13.

Second: Are you running a report for a past period of time?

If you are not running a recent report, the Running Tally Wizard asks if you are running a report for past period of time.

For example, let's say the current year is 2013, and you want to go back in time two years and try to run a report for the first half of 2011. The running tally box on the Set-up Screen shows that 5,000 units have been sold as of 12/31/12. In the Report Generator you enter the starting date of 01/01/11 and an ending date of 12/31/11. The Running Tally Wizard will be triggered:

At this point, the Wizard will vary in its instructions. There are two possible routes:

Route #1. Quantity Breakpoint. The information below describes the Wizard's instructions if you are using Quantity Breakpoints (where the royalty percentage varies depending upon quantity sold).

Running Tally is vital when you use Quantity Breakpoints. The program has to know how many products have been sold *during the time period of the report* so it can apply the correct royalty percentage. Thus, if you go back a year or two, it needs to know how many products had been sold *at that time* to make sure it's using the correct breakpoint percentage.

The Wizard will say the following:

2. If your purpose is to run an OLD REPORT from a previous royalty period . . .

In order to run an old report, AnyOrder needs to know how many books had been sold as of 12/31/13 (the day before your starting date of 01/01/14. Without the number sold figure, AnyOrder does not know which quantity breakpoint to use. That's important because the breakpoint determines which percentage to use to calculate royalties.) You have two choices:

A). If you know how many books had been sold as of 12/31/13, enter it here: _____ and click RUN

B) If you don't know the number sold, but know which breakpoint to use for this royalty calculation, select one and click RUN: (*The Wizard will list each of your quantity breakpoints here.*)

If you've kept copies of your past reports, then you can use the "A" option and enter the number of units sold as of 12/31/13. If you don't have records, but if you have a pretty good idea of which quantity breakpoint should be used, select one of the breakpoints from the "B" option. If you just need an approximate figure, you can select any of the breakpoints.

If you've selected Option "B" you have an additional choice if you are running a batch (more than one report at a time): "Apply above choice to all reports in this batch." In other words, if you've selected two or more from the selection list on the Royalty Generator, you need to decide whether you want to apply the setting to all reports in the batch. Let's say you've selected the first breakpoint. That means the first breakpoint will be used for all the reports generated in the batch. If you are just looking for approximate figures, this would work out fine. If you are looking for exact figures, then you'll want to run the reports one at a time.

Route #2. Not a Quantity Breakpoint. If the royalty report that you are generating does not use quantity breakpoints, a different message will appear:

If your purpose is to run an OLD REPORT from a previous royalty period . . .

AnyOrder doesn't have to update the total sold figure for past reports. In that case, the Running Tally feature can be temporarily turned off. To turn it off: (Click on the "Turn off Running Tally

Since, in this case, we are not dealing with quantity breakpoints, we don't need to know how many units were sold as of 12/31/13. We can go ahead and run a report and the data will be accurate.

But--and this important--you *must turn off the Running Tally feature*. If we don't turn it off, it will change the number and date on the Set-up Screen. In our example, it would mean that the "As Of" date will change to 12/31/14. That really creates havoc because it should be 12/31/15. But, we can take care of that. All we have to do is to turn off the running tally feature and no change is made to the date.

Third: Are you running a report for an odd period of time?

If you are not running a recent report or running an old report, we are left with one last question: Are you running a report for an odd period of time?

For example, let's say that the running tally box on the Set-up Screen shows that 5,000 units have been sold as of 12/31/15. Let's say that you normally run a yearly report, but you decide to run a report for a two-month period. In the Report Generator you enter the starting date of 09/01/14 and an ending date of 10/31/14. The Running Tally Wizard will be triggered:

At this point, the Wizard will vary in its instructions. There are two possible routes:

Route #1. Quantity Breakpoint. If you are using Quantity Breakpoints (where the royalty percentage varies depending upon quantity sold), the Wizard will say the following:

If you are running a report for an ODD PERIOD OF TIME (shorter or longer than a normal royalty period) . . . select 2A or 2B above.

In this case, you would select Option "A" (enter the number of units sold) or Option "B" (select one of the breakpoints). If you know the number of units sold as of 08/31/14, you enter the number. If you don't know but you know what quantity breakpoint to use, select the proper breakpoint from Option B. If you just need an approximate figure, select one of the breakpoints.

Route #2. Not a Quantity Breakpoint. If the royalty report that you are generating does not use quantity breakpoints, a different message will appear:

If you are running a report for an ODD PERIOD OF TIME (shorter or longer than a normal royalty period) . . . Click on the "Turn Off Running Tally" above.

In this case, the report does not depend upon quantity breakpoints. Thus, it's not necessary to enter a number or a breakpoint. We do, however, want to turn off the Running Tally Feature. Otherwise, the "As Of" date on the Set-up Screen will be changed to 10/31/14. That would throw us off when a current report is created. To avoid the problem, you can turn off Running Tally and no adjustment is made.

Do you have an inaccurate (or missing) Total Number Sold figure?

If so, directions on how to fix it are found here: [Fixing Inaccurate Total Sold](#).

Fourth: None of the above . . . Run with errors.

The last choice (4) only appears when Running Tally is required (when you have the royalty payment based on the quantity sold: Variable Structure - Quantity).

This is normally used when you need to correct an inaccurate (or missing) [Total Number Sold](#) figure found on the Royalty Set-up Screen. Complete directions on how to correct inaccurate Total Number Sold figure are found here: [Fixing Inaccurate Total Sold](#).

Royalty Manual

AnyOrder: Order Processing & Fulfillment

Part



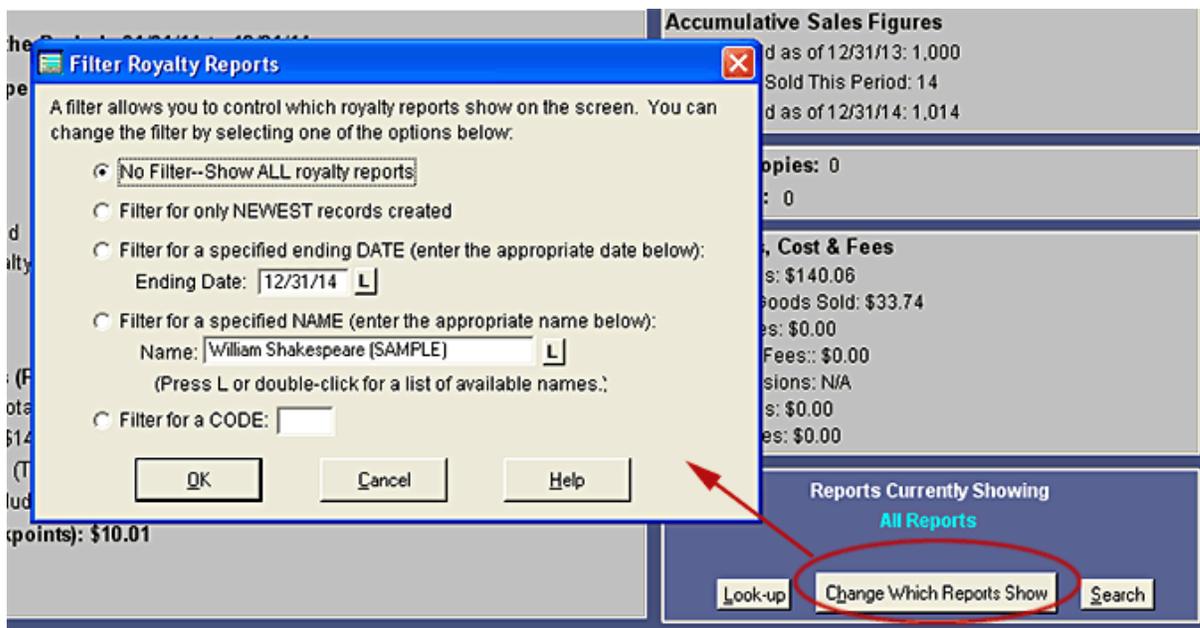
5 View Royalty Reports

Once reports are generated in the [Report Generator](#), you can access them from the View Royalty Reports Screen. To reach the View Royalty Reports Screen, click on the appropriate button on the Main Menu or choose MAIN TASKS >> VIEW ROYALTY REPORTS from the Menu Bar.

The Report Generator will automatically move you to the View Royalty Reports Screen when it completes its processing tasks. Any new reports that it has generated will be displayed on the screen.

Records Displayed. The Royalty Report Screen can display more than just the most recent reports. It keeps a record of all reports that you have generated. What is displayed is controlled by filtering features built into the program. You can change the filter by selecting TOOLS and FILTER REPORTS from the menu Bar. Or you can click on the "Change Which Reports Show" button on the right side of the screen. For more information, see [Filter Reports](#).

Note that if the *Report Generator* places you in the View Royalty Report Screen only the most **recently generated reports will be displayed**. If you enter the Report Screen from some other part of the program, *all* reports will be displayed. Click on "Change Which Reports Show" to alter the filter to your liking.



Moving from Report to Report. You can move to different reports by pressing Page Up or Page Down on your keyboard. To go to the first report, press Ctrl+Page Up on your keyboard. To go to the last report, press Ctrl+Page Down. You can also move from report to report by clicking on one of the navigation buttons on the bottom right of the screen. The navigation buttons resemble the buttons on a VCR, CD or tape player. The right arrow button (>) goes to the next report and the left arrow button (<) goes the previous report. The right arrow with a line (>|) goes to the last report, and the left arrow with a line (|<) goes to the first report.

Information Provided on a Report. A royalty report provides you with all the information which has gone into determining an individual's royalty. It lists the total number of products sold, net amounts received for the period, the number and amount of returns, and the number and amount of damages. Additionally, it lists "Ineligible" sales. These include any sales recorded on invoices on which you have checked "No Royalty." Ineligible sales usually include sales in which you have given particularly deep discounts. (See more about Ineligible sales lower on this page.)

Reproduced on a report is the formula that has been used to determine the royalty. The way in which the formula is constructed is based on the selections that you made on the [Royalty Set-up Screen](#). For your convenience, the set-up choices are summarized in the upper right hand corner of the screen.

The final figure (Total Due), which appears after the formula, is the amount that you owe the royalty holder.

If the Total Due is a negative number, then the amount is in your favor. To compensate for a negative amount, you'll need to deduct the amount from the next royalty check issued to the royalty holder. Negative amounts result from a sales environment where returns outnumber sales.

If you have selected [Keep Running Tally](#) on the Set-up Screen, accumulated sales figures appear on the box on the right side of the screen. Each time a report is created the sales figures will be updated and you'll always know how many total units have been sold. This is particularly important for quantity breakpoints in variable structured royalty systems. The program needs to keep track of running totals to determine which breakpoint to use for royalty calculations. For other types of royalty systems, keeping a running tally is optional, but you may want to use it to track total sales. If you decide not to use it, "NA" will appear in the two "Total Sold" lines.

Revenues, Cost & Fees. The Royalty Report Screen will include the figures for revenues, costs and fees if at least one of the following is met: 1) If *at least one* report in a group of reports generated includes a selection from the "Net or Profit Option" in Royalty Set-up; or 2) If *at least one* report in a group of reports generated uses the "Profit" calculation method. Since obtaining this data requires extra processing power and time, it's calculated only when necessary. If you'd like to obtain this information for all of your products, it's far easier to generate it (along with other data) by selecting PRODUCT TOOLS >> INVENTORY FUNCTIONS from the menu on the Main Invoice Screen.

Revenues, Cost & Fees

Revenues: \$140.06
 Cost of Goods Sold: \$33.74
 Card Fees: \$0.00
 Invoiced Fees: \$0.00
 Commissions: N/A
 Ship Fees: \$0.00
 Other Fees: \$0.00

Discount Ranges. If you have a variable structure with different discount ranges, the Report screen will list the quantity and amount of sales for each discount range, calculating the total royalty based on the information you provided in Set-up Information. If you are using a Net Calculation method, AnyOrder will calculate the percentage of sales based on the number of units sold in each discount range. Using these percentages, it divides total net sales and allocates proportional amounts to each range. See illustration, below, for an example:

Sales Summary for the Period: 01/01/14 to 12/31/14

Never Turn Back-Paper (\$14.95)

	Quantity	Invoiced Sales
Gross Number Sold	16	\$155.01
- Returns Credited	2	\$14.95
- Damages Credited	0	\$0.00
- Ineligible for Royalty	0	\$0.00
- Fees		\$0.00
Net Total	14	\$140.06

Royalty Calculations (By Discount Range)

Discounts (0%-20.0%): $5 \times \$14.95 \times .0600 = \4.48

Discounts (20.1%-100.0%): $9 \times \$14.95 \times .0400 = \5.38

Total Due: \$9.86

Quantity Breakpoints. If you have a variable structure with different quantity breakpoints, the Report Screen will list the breakpoint and calculate the amounts accordingly. If the number of products sold during the period extends across two or more breakpoints, the report screen will list each breakpoint on a separate screen page. A reminder note will notify you whenever a report spans more than one screen page.

Sales Summary for the Period: 01/01/14 to 12/31/14		
Never Turn Back-Paper (\$14.95)		Page 1 of 2
	Quantity	Invoiced Sales
Gross Number Sold	16	\$155.01
- Returns Credited	2	\$14.95
- Damages Credited	0	\$0.00
- Ineligible for Royalty	0	\$0.00
- Fees		\$0.00
Net Total	14	\$140.06
Royalty Calculations (For Quantities of 1,000 to 1,005)		
Royalty = Net Total x Price x Rate (.0400)		
= 3 x \$14.95 x .0400		
= \$1.79 (Total for this Breakpoint)		
(NOTE: Total Due includes more than one Breakpoint. See next page.)		
Total Due (All Breakpoints): \$10.01		

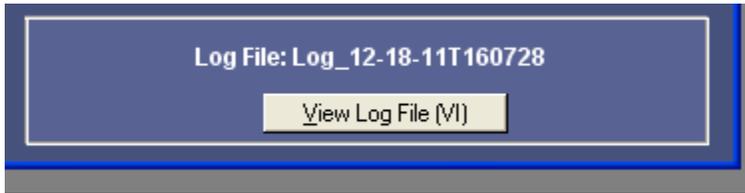
Breakpoints are labeled using the following format: "For Quantities of 20,000 to 50,000." This is a bit of simplification. What it means is that figures shown on the screen are for the breakpoint which starts at 20,000 and cover total accumulated sales ranging from 20,000 to 49,999. The next breakpoint starts at 50,000. This method of labeling was chosen since using numbers other than the breakpoints delineated in royalty contracts tend to complicate things and overall this is a bit easier to understand.

Compensating for Returns When Total Sales Cover More Than One Breakpoint. When the total sales of a product extend across more than one quantity breakpoint, AnyOrder has to compensate for any returns or damages that are involved. There are two different ways to deal with this situation, and you determine the method you wish to use for your business. More information on the methods and how select the appropriate option is found here: [Breakpoints and Returns](#).

Ineligible Sales. Ineligible sales are listed on the Royalty Report. These include any sales with the "No Royalty" box checked on invoices. Ineligible sales are included in the "Gross Number Sold" figure, but are removed for "Net Total." Although not likely, it is possible that you may have returns or damages associated with ineligible sales. If so, the quantity figure in the ineligible sales column will be adjusted accordingly. In very rare cases, you may have returns out-number sales. Since the "Gross Number Sold" figure has been reduced because of the returns, the royalty holder is credited the difference. The credit shows up as a negative amount in the ineligible sales column, and "Net Total" is increased a like amount.

Promotional Copies. This figure is the total number of products given away during the royalty period. It includes all products which have been recorded on invoices with a sales code of "P" (for promotional item). This figure is for informational purposes. Promotional copies are given away and do not generate income, and thus do not have a bearing on royalty calculations.

Log File. Level 6 - 7 Feature. When you [generate](#) royalty reports, you can indicate whether or not you want a log file. If you selected this option, the name of the log file will appear on the Royalty Report Screen. By clicking on the "View Log File" button, AnyOrder will start up your spreadsheet program and display the raw data that AnyOrder used to prepare the royalty report. Note that if you generated several reports at the same time, the log file will contain data from several products. If you want the log file restricted to only one royalty report, you'll need to generate royalty reports one at a time.



Important Note for Network Users: Log files are created on the local computer and are saved in the C:\AnyOrder\LogFiles directory. In other words, log files are only accessible to the computer on which you are working. If you use log files, it's best to work from only one computer on the network. If you need to work from other computers on the network and must access one or more log files, you will need to copy the files that you need to the computer on which you are working.

Cash-based Counting. When you create royalty reports based on Cash-based Counting, AnyOrder reviews each invoice. If the first paid date ("Date1") on the invoice falls within the start date and end date of the royalty report - and the author's book is listed in the Item Area, then AnyOrder will include the total amount on the royalty report. (The total amount is the price of the book times the quantity minus any discount) . AnyOrder always uses the total amount. If two payments (or more) were made on the invoice, AnyOrder still uses the book's total. It doesn't divide it up according to payment. This avoids discrepancies and it prevents the situation where an item might be counted twice when a second payment is made.

See the next section on how credits are handled with cash-based counting.

Credits. A major question that arises concerns credited items (such as returns and damages) is when should the credit be applied? Should it be applied during the same time period in which the original sale occurred? Should it be applied when the return occurred? Or should it be applied when the customer makes a lump sum payment in which the amount of the return has been subtracted?

In order to provide consistency in royalty reports, AnyOrder uses the following rule: *returns or damages are credited at the time the invoice is issued*. It doesn't matter when the invoice is paid or when the credit on the invoice is applied against the customer's account. What matters is the *invoice date*. Thus, any returns with an invoice date which fits within the designated time period will be counted for a cash-based royalty.

This rule applies to both accrual *and* cash-based counting methods.

This same rule also applies to fee invoices if you have [indicated on the set-up screen](#) that you want fees removed from net sales. Fee invoices are those in which you have coded the book with a sales code of "F."

Printing. When you are ready to print a report, make sure the desired report is showing on the screen

and press "Print" or "Quick Print." For more information on printing, see [Printing Royalty Reports](#).

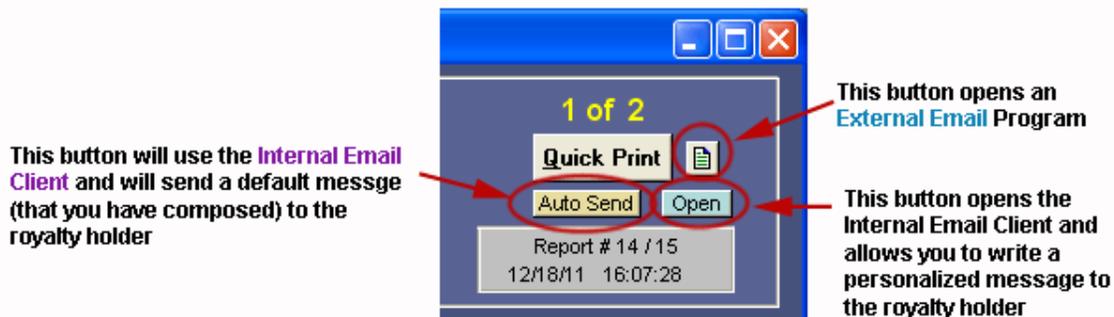
Menu Bar. Additional options are available from the Menu Bar. For more information, see [Menu Bar \(Royalty Reports\)](#).

5.1 Auto Email

This is a Level 7 feature

This feature provides you with a built-in email client which allows you to send reports to royalty holders with the press of a button.

It is accessed from the Royalty Report Screen. Near the "Email" address field (lower, center of the screen), and you'll see three buttons. The first button (a bluish icon) opens an external email client. It's the two buttons just below the "Quick Print" button that we are concerned about here.



One of these buttons is named "Auto Send" and sends a standardized cover letter and an attached copy of the report to the royalty holder. The last button ("Open") opens the internal email program and allows you to personalize the message before sending the report.

The information, below, is about the "Auto Send" button. For information about the "Open" button, see [Open Internal Email](#)

"Auto Send" can also be activated by selecting MAIN TASKS >> AUTOMATED EMAIL - INTERNAL PROGRAM.

"Open" can also be activated by selecting MAIN TASKS >> OPEN INTERNAL &EMAIL PROGRAM - MANUAL MODE.

In order to use the Internal Email program, you must, first, enter some information in Basic Program Set-up. To do so, select FILE and BASIC PROGRAM SET UP from the Menu Bar from the Main Invoice Screen in the main part of the program. Click on the "Email Set-up" tab on top of the page. The Email Set-up page will appear.

IMPORTANT NOTE: to use AnyOrder's internal email program, the email account that you use must be with an Internet Service Provider (ISP). AnyOrder's internal email is not designed to work with Yahoo, Gmail, HotMail and other web-based email. We can customize the program to work with web-based mail, but it does required extra charges in order to do that. ISP email accounts are very inexpensive (some less than \$20 US a year). You can have multiple accounts and pick your own identifiable domain name.

In Basic Set-up, you will be able to enter the various email parameters that allow AnyOrder to access the Internet Service Provider's (ISP's) email server.

Setting up the Default Message

Additionally, to use the "Auto Send" feature, you'll need to select MAIN TASKS >> SET-UP AUTOMATED EMAIL MESSAGE. A form will open on which you can write a short cover letter to go along with Invoices being emailed to customers.

Default Email Message

When sending royalty reports using AnyBook's internal email program, you may want to include a pre-composed message. This allows you to send a cover letter message along with a copy of the report by the clicking the "Auto Send" button - and no further intervention on your part. To use this feature, type in the message you wish to use. Note that you can use [NAME] (all caps and in square brackets) to insert the person's name in the message.

Use this Subject Line:

Dear [NAME],

Please find attached a copy of your royalty report for 2014.

If you have any questions, don't hesitate to contact me.

Best Wishes,

George Shaw

Optional. In addition to sending the email to the customer, you may wish to send a blind copy to another one of your company's email addresses to have a record of emails sent. You can also send CC's or include a "Reply To" address

Email address for copies (Cc) Email address for "Reply to"

Email address for blind copies (Bcc)

Attachments

Along with the standardized message, you'll also be able to indicate any CC's, BCC's or Reply to addresses you want included.

Once you've entered information here, you can use either the "Auto Send" or "Open" features.

"Auto Send" Button (Automated Email – Internal Email Program)

Make sure that you have: 1) entered the email set-up values in Basic Program Set-up as described above, and 2) prepared a short standardized email message to go along with the attached invoice (which is done in Basic Program Set-up as well).

To send off an report to a royalty holder, click on the "Auto Send" button on the Main Invoice Screen. The cover message that you prepared along with an attached copy of the invoice will be sent to the customer.

The attachment being sent to the royalty holder includes both an html and text copy of the invoice. The text version of the report assures that it will get through to the royalty holder no matter what settings they have on their email program.

All in all, this is a very quick and efficient way to send reports to your authors.

If you use this feature, you should monitor the sending email account to make sure you don't get any

bounced back emails. The internal email program built into AnyOrder does not receive emails, but you can monitor the account with your normal email program. If you get a bounced back email, then you'll want to double-check and make sure you have the correct email address for the customer.

Additionally, since the internal email program doesn't use a "Sent" box, you'll want to send a blind copy to a company email address. That allows you to have a record of the invoices sent. *When you set-up the standardized message in Basic Set-up, you can indicate an address for blind copies.*

5.2 Batch Printing

Batch Printing features are only found on Level 5 (or higher) programs

Batch Printing allows you to print two or more royalty reports (or royalty statements) at a time. For instance, let's say you've just entered a dozen reports and you're ready to print them. Instead of printing each one separately, you can use Batch Printing to print all of them.

Batch Printing is reached from the [View Royalty Reports Screen](#) by selecting FILE and BATCH PRINTING from the Menu Bar. It can also be reached from the [Royalty Statements Screen](#) by the same menu.

Report Batch Printing: Use the arrow keys on your keyboard (or use the slider bar) to move up or down the list. To select reports to be printed, click (or press the spacebar) in the "Yes" column. A group of reports may be selected by clicking on the first, holding down the the shift key and clicking on the last.

Y	Summary Name	Product	Royalty Holder Name	Start Date	End Date
	HOLDEFER--CONTRACTOR, THE	CONTRACTOR, THE	CHARLES HOLDEFER	12/11/08	12/11/09
	HILL--THREE MINUTES ON LOVE	THREE MINUTES ON LO	ROCCIE HILL	12/11/08	12/11/09
	JEAN--Out of Body and Mind	Out of Body and Mind	VERONICA JEAN	12/11/08	12/11/09
	JACOVSKY--Irregulars	Irregulars	MARILYN JACOVSKY	12/11/08	12/11/09
	JONES--Shadow in a Weary Land	Shadow in a Weary La	HARRY JONES	12/11/08	12/11/09
	JONES--Buried Land, A	Buried Land, A	MADISON JONES	12/11/08	12/11/09
	KALICH--Nihilisthete, The	Nihilisthete, The	RICHARD KALICH	12/11/08	12/11/09
	JENKINS--Cruise Control	Cruise Control	VICTORIA JENKINS	12/11/08	12/11/09
	JAMES--MY BROTHERS PASSION	MY BROTHER'S PASSION	D. JAMES SMITH	12/11/08	12/11/09
	KA'APUNI--SCHOOL FOR HAWAIIAN GIF	SCHOOL FOR HAWAIIAN	GEORGIA KA'APUNI MCM	12/11/08	12/11/09
	J.--KUPERMAN'S FIRE	KUPERMAN'S FIRE	JOHN J. CLAYTON	12/11/08	12/11/09
	KA'APUNI--SCHOOL FOR HAWAIIAN GIF	SCHOOL FOR HAWAIIAN	GEORGIA KA'APUNI MCM	12/11/08	12/11/09
	KANE--Door in the Wall, The	Door in the Wall, Th	BENITA KANE JARO	12/11/08	12/11/09
	KLAVAN--Darling Clementine	Darling Clementine	ANDREW KLAVAN	12/11/08	12/11/09
	KLAVAN--Son of Man	Son of Man	ANDREW KLAVAN	12/11/08	12/11/09
	KEEGAN--Piper	Piper	JOHN KEEGAN	12/11/08	12/11/09
	KEEGAN--GOOD DIVORCE, A	GOOD DIVORCE, A	JOHN KEEGAN	12/11/08	12/11/09
	KLAVAN--DARLING CLEMENTINE	DARLING CLEMENTINE	ANDREW KLAVAN	12/11/08	12/11/09
	KLEIN--HISTORY OF NOW, THE	HISTORY OF NOW, THE	DANIEL KLEIN	12/11/08	12/11/09
	LAMB--Striking Out	Striking Out	ROBERT LAMB	12/11/08	12/11/09
	Knopf--The Last Refuge	THE LAST REFUGE	Chris Knopf	12/11/08	12/11/09
	KNOPF--THE LAST REFUGE	THE LAST REFUGE	CHRIS KNOPF	12/11/08	12/11/09
	KNOPF--THE LAST REFUGE - PAPER	THE LAST REFUGE - PA	CHRIS KNOPF	12/11/08	12/11/09
	KNOPF--TWO TIME	TWO TIME	CHRIS KNOPF	12/11/08	12/11/09
	Knopf--TWO TIME-PAPER	TWO TIME-PAPER	Chris Knopf	12/11/08	12/11/09
	KNOPF--HEADWOUNDS	HEADWOUNDS	CHRIS KNOPF	12/11/08	12/11/09

The composition of the above list can be changed by selecting "Change Which Reports Show" button on the main report screen. Currently the reports showing are: REPORTS WITH AN ENDING DATE OF: 12/11/09

NOTE: If for some reason you need to stop a batch printing job once it's underway, press <ESC> 3 or 4 times in succesion.

Royalty Report Batch Printing

Important: When you batch print in the Royalty Report portion of the program, page through each of

the report before selecting and printing them. So many calculations are going on in the report part of the program, that the final set of calculations are not done until each report comes up on the screen. Once the report has appeared on the screen just once (a fraction of a second is all it needs), all the calculations are done and you can use batch printing.

After selecting FILE and BATCH PRINTING, the Royalty Report Batch Printing dialog box appears.

From the list of Reports, select those you want printed by clicking and placing a checkmark in the "Yes" column. (Pressing the spacebar also selects a Report.) If you make mistake, you can click again to remove the checkmark.

The list that appears can be filtered so that only new reports appear. Or it can be filtered for a designated name. Or it can be filtered for a certain ending date. To change the filter, click on the "Change Which Reports Show" button on the main report screen. You can then use the "Select All" button in the Batch Printing dialog box to select all of the filtered reports (if that's what you need). Whenever using the "Select All" button, however, always check to see how many reports have been selected. You can do that by clicking on the "Count" button. It's good practice to use the "Count" button to make sure you haven't selected more reports than you need.

You can select all of the reports by clicking on "Select All" or remove the checkmarks by clicking on "Deselect All."

When you've made the selections, press OK. Just before the printing process begins, the Print Report dialog box appears. This is the same dialog box that comes up every time you print reports. The selections you make on the Print Report dialog box will be applied to all reports in the batch. In other words, if you select one packing slip and two originals, then your printer will print one packing slip and two originals *for each report in the batch*.

Royalty Statement Batch Printing

Much of the information for "Royalty Report Batch Printing" (above) also applies to royalty statements. You select which statements you want printed by clicking and placing a checkmark in the "Yes" column. (The spacebar also selects statements.) If you make mistake, you can click again to remove the checkmark.

Note that if you are using AllPrint (the secondary print engine), selections are made by clicking or typing a "Y" (for Yes) in the "Y" column. To remove the selection, click or type an "N" (for No). The spacebar is not activated in the AllPrint version of Statement Batch Printing.

Just before the printing process begins, the Print Statement dialog box appears. This is the same dialog box that comes up every time you print statements. From this dialog box you can select the number of copies you want printed.

Note that the number of copies will be applied to all statements in the batch. In other words, if select two copies, then your printer will print two copies of *each statement in the batch*.

Stopping the Batch Printing Process

If you need to stop a batch printing job, tap the <ESC> key three or four times in succession. A message will appear telling you that the process has been canceled.

Printing, however, will not stop immediately. Like any printing process, the pages are sent first to the Windows Print Manager where they are placed in a queue. Then, from the Print Manager, they go to your printer.

Once you press <ESC> it may take a while for the Print Manager to clear out all pages being held in the queue. If desired, you can manually clear out any remaining pages by bringing up the Print Manager (click on the Print Manager Icon in the lower right side of the Windows Screen), and canceling any remaining pages.

5.3 Change Email Address

If you've indicated an email address in the Royalty Set-up Screen (MAIN TASKS >> ROYALTY SET-UP), AnyOrder will include the address with each of the royalty reports that you generate.

If need be, you can change the email address (or add an email address) associated with a report by using this function. To reach it, start in the "View Royalty Report" screen and select TOOLS >> CHANGE OR EDIT EMAIL ADDRESSES

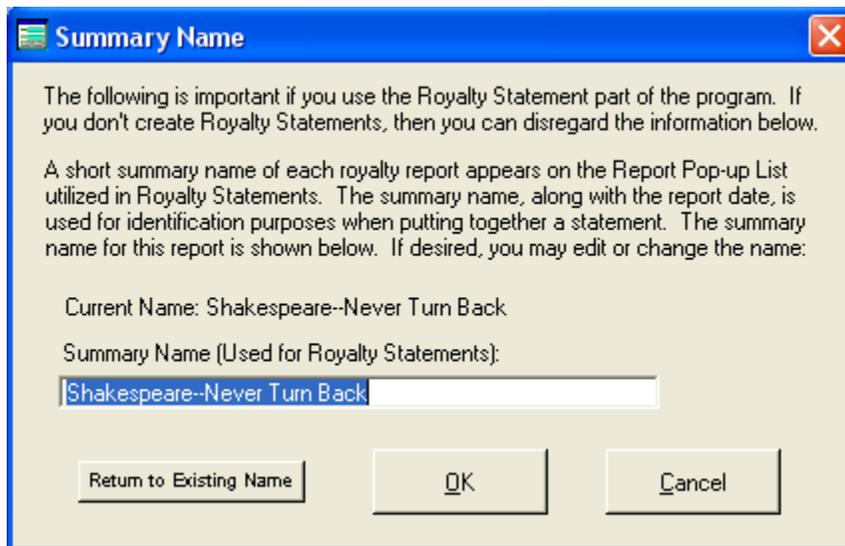


Note that a change in the email address applies only to the report on which the change is made. If you wish to change the email address for all newly generated reports, the change should be made on the Royalty Set-up Screen.

5.4 Change or Edit Summary Name

When AnyOrder produces Royalty Reports, it includes a summary name in the report file. The summary name is based on the information that you have entered in the Royalty Set-up Screen. This information is in the Royalty Report Pop-up List found in Royalty Statements. If while using the Royalty Report Pop-up List, you find that the summary name doesn't quite describe the report adequately (or it's missing), you can use this function to make changes.

It is reached by selecting TOOLS and CHANGE OR EDIT SUMMARY NAME from the Menu Bar on the Royalty Report Screen.



The summary name for the report is shown in the dialog box that appears. You can edit or change the name. When you are finished, click on "OK" and the new name will be saved.

5.5 Copy Entire Invoice to Clipboard

This feature is only available on the Level 5 program or higher.

The Copy Entire Report/Statement feature allows you to copy the royalty report (or royalty statement) currently showing on the screen to the clipboard. Once in the clipboard, it can be inserted in a word processing document, an email message, or an HTML document.

To use the copy feature, select EDIT and COPY ENTIRE REPORT (TEXT) or (HTML) from the Main Report Screen or from the [Royalty Statement Screen](#).

You have two options. You can copy the report (or statement) as text. Or you can copy as HTML. When copied as text, the report is reformatted so that it can be inserted into any word processing program. Once in another program, you can formatted the way you want--or leave it as it is.

The other option is to copy the report (or statement) as HTML. In this option, HTML tags are added to the text so that when viewed in a web browser, the report (or statement) looks the same as those printed by AnyOrder. You can paste the HTML copy into word processing programs which are compatible with HTML documents. Or you can paste the HTML copy into browsers or email programs.

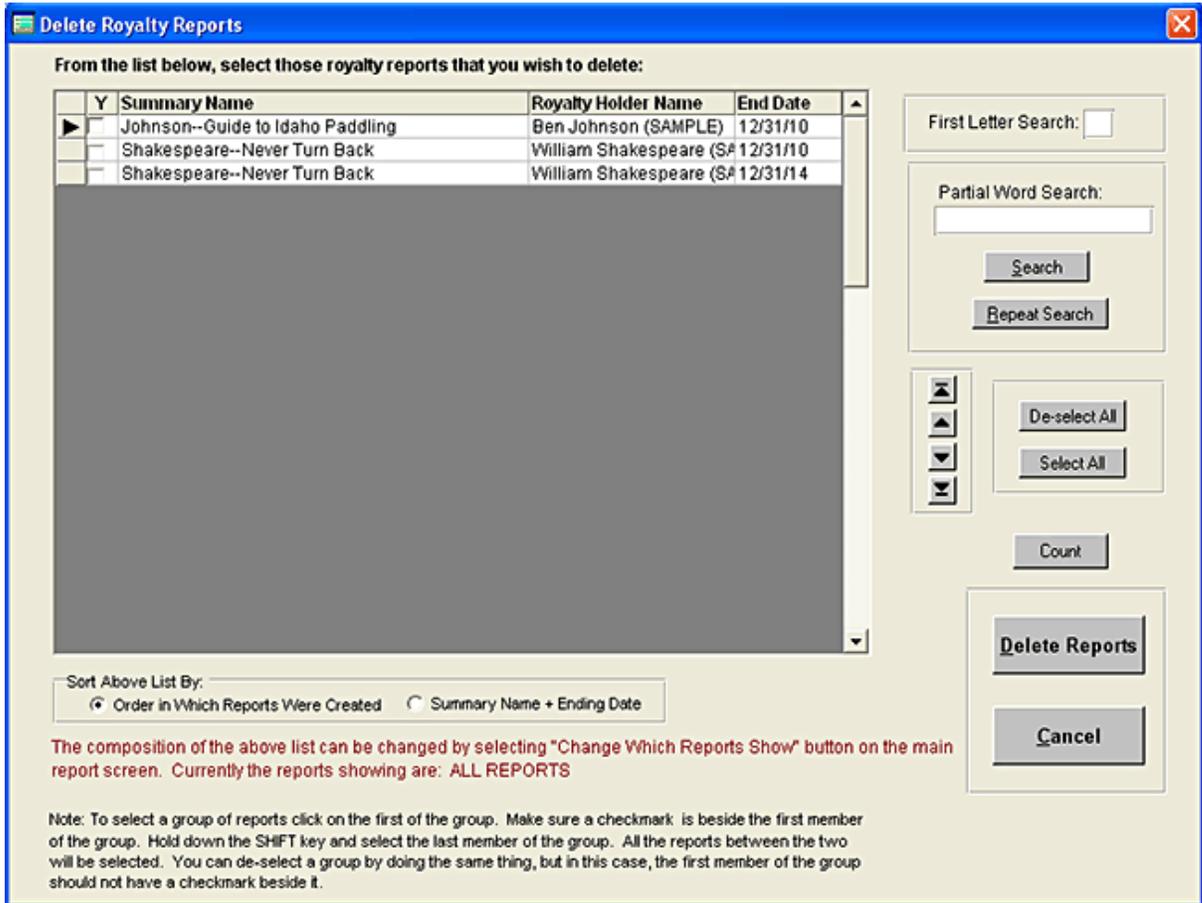
A Note About Text Format. In text format, reports are designed without columns. This enables you to use any type of font when a text formatted report is inserted into an email or word processing program. Royalty statements, on the other hand, out of necessity, need to have columns for credit, debit and balance figures. To keep the figures in the columns properly lined up *use a courier (or fixed space) font* when working with a text formatted statement in another program. If you are inserting a statement in a word processing program, you may also need to reduce the right and left margins so that it has adequate space to fit across the page.

5.6 Delete This Royalty Record

From either the [Set-up](#) or [Royalty Reports Screen](#), you can delete one or more records. To do so,

select EDIT and DELETE THIS ROYALTY RECORD or DELETE THIS ROYALTY REPORT from the Menu Bar. A warning message will appear asking whether you are sure you want to delete the record or report. If you say YES, then the record will be deleted.

From the Royalty Reports Screen, you also have the choice of using the Multi-Record Delete feature. Use it when you need to delete two or more records at a time. To reach it, select EDIT >> MULTI-RECORD DELETE.



Both the Set-up and Royalty Report screens have a record counter located underneath the navigation buttons (which resemble VCR buttons). You won't notice an immediate change in the total number of records on the counter. In order to provide the highest level of security for your data files, the actual deletion of the record(s) occurs when you exit from the program when it is much safer to do so. When you eventually return to the royalty program, you'll see that the total count has been updated.

5.7 Email Export

Email Export features are only available on the Level 5 or higher program.

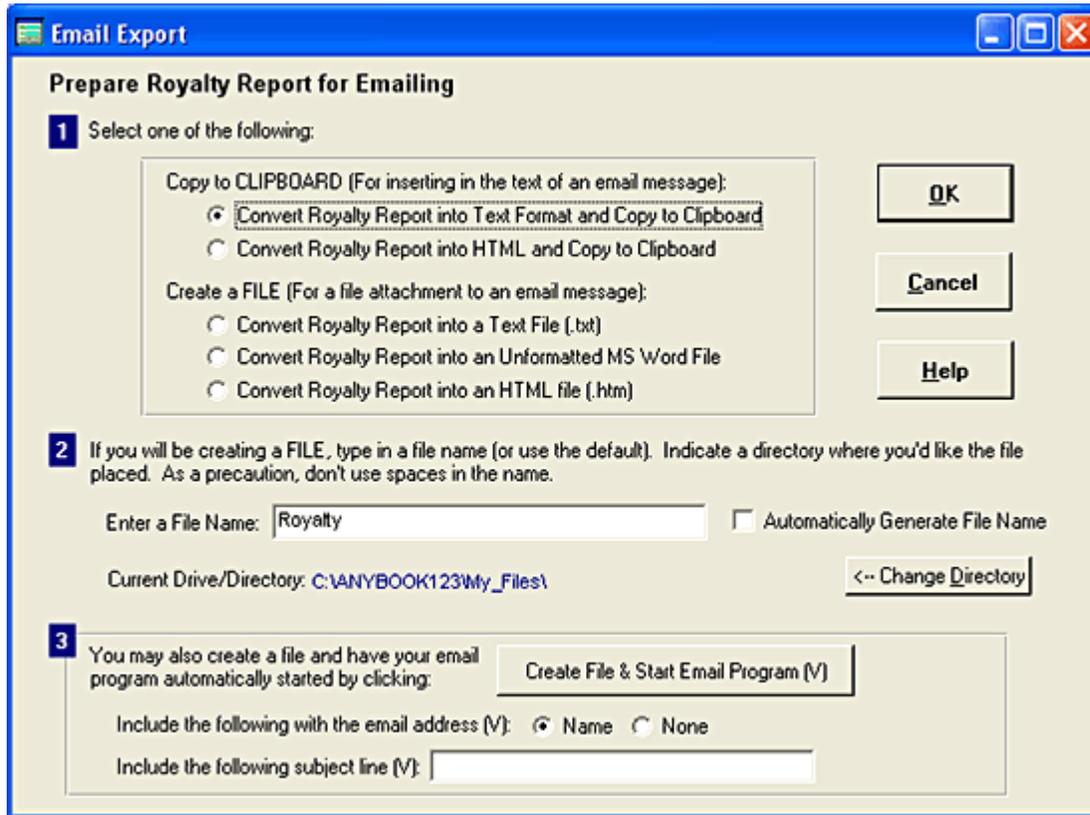
This function allows you to use an **external email program** (Outlook, Thunderbird, etc.) and attach an invoice or a billing statement. Note that the Level 7 has a **built-in email client** which makes this process more automatic, but this is available if you are using one of the lower level programs.

This function allows you to send a royalty report or a royalty statement to an individual via email. You

can either include the report (or statement) in the text of an email message or you can send it as an attachment to an email message. You're not limited to emailing purposes. You can also use this function to insert reports in word processing documents.

To use this feature, first, go to the report or statement you want to export. Once the report is showing on the screen, select FILE and EMAIL EXPORT from the Menu Bar.

After selecting FILE and EMAIL EXPORT, the following dialog box appears:



At the top of the box, you can choose the export format. You have your choice between placing the report (or statement) in the clipboard or placing it in a file:

Clipboard. If you use one of the two clipboard formats, the report (or statement) will be placed in the Windows clipboard. This allows you to start up your email program, write a message to the customer and insert the report (or statement) into the text of your message (by using your email program's EDIT and PASTE feature).

There are two clipboard formats:

1) The Clipboard (text format) option re-formats the report (or statement) into plain text so that it can be inserted into any type of email program (or word processing program). This is handy way of emailing someone an report. Since the report is a part of your message, it's readily seen and they don't have to open an attachment.

2) Clipboard (HTML) option reformats the report (or statement) with HTML tags. HTML is the way all information on the Web is formatted. The HTML tags are attached to the report (or statement) so that when it is viewed in a web browser, it looks the same as AnyOrder's printed report (or statement). If you have an email program that allows you to use HTML tags, you can place the report (or statement) directly into an email message so it retains its format.

File. You can also create a file which holds the report (or statement). Use the file options if you want to send the report as an attachment to an email message.

There are three file formats to choose from:

- 1) Text File. For a text file export, the report (or statement) is converted into plain text. The advantage of this format is that a text file is the basic form of a written document. There are no compatibility issues with a text file. All word processing and browsing programs can read it.
- 2) Unformatted Microsoft Word File. For this option, the report (or statement) is converted into a Microsoft Word file. The file is not formatted. In other words, it does not use tabs or different sized fonts or bolding, etc. It's a very simple document that can be opened in any version of Microsoft Word. Since it is unformatted, it can also be opened in other word processing programs as well.
- 3) HTML File. For this option, the report (or statement) is converted into HTML, the basic format of all information on the Web. Essentially what happens is that the report (or statement) is converted into a web page which looks just like the printed version produced by AnyOrder. The HTML option is very useful. When an HTML file is used as attachment, most email programs will show it fully formatted at the bottom of the message.

If you select any of the file formats, you have one last step. You need to type in a name for the file that you'll be creating. If "Automatically Generate File Name" is not checked, AnyOrder will save the name of the file up to 18 characters in length.

For your convenience, AnyOrder will automatically add an extension to your file name. You can, of course, give the file any extension you wish, but it is recommended that you use the following.

Text Files: .txt

Microsoft Word Files: .doc

HTML Files: .htm

Finally, indicate the directory where you'd like the file placed. To bring up a list of directories, click on "Change Directory" (or double click in the Directory blank). Once you designate a directory, AnyOrder will remember it for future sessions.

Automatically Generate File Name. If you place a checkmark here, AnyOrder will automatically name the file for you. The file name will begin with a prefix of "RR" (if it's a royalty report) or a "RS" (if it's a royalty statement). The prefix is followed by the first letter of the individual's first name and then by the full last name. (This assumes that you've entered names in normal order: first name followed by last name.) The auto-generation feature saves time since you can run a series of email exports for several royalty holders. Once you've finished, you can follow it up by creating emails with the attached report or statement. The naming convention makes it easy to connect royalty holders with the correct royalty report.

Automatically Starting your Email Program. After you create a file, you may wish to activate your email program. That's what this feature allows you to do. In addition to starting your email program, you can include the name of the individual in the email address by selecting the appropriate radio button. You can also include a subject heading in the email by typing in the desired phrase in the blank provided. To create the file and start your email program click on: "Create File & Start Email Program." Once the email program starts, you'll need to manually attach the text or HTML file. Because of security concerns, email programs won't automatically attach a file to an email, but with AnyOrder taking care of all of the background work, the process is greatly simplified.

A Note About Text Formatting. In text format (clipboard or file), reports are designed without columns. This enables you to use any type of font when a text formatted report is inserted in an email or word processing program. Billing statements, on the other hand, out of necessity, need to have columns for credit, debit and balance figures. To keep the figures in the columns properly lined up use

a *courier (or fixed space) font* when working with a text formatted statement in another program. If you are inserting a statement in a word processing program, you may also need to reduce the right and left margins so that it has adequate space to fit across the page.

Other Uses of This Feature. You are not limited to using this feature for email purposes. You can also use it to copy reports into word processing (or other types of) programs. For instance, you may wish to include a copy of a customer's report in the text of a letter.

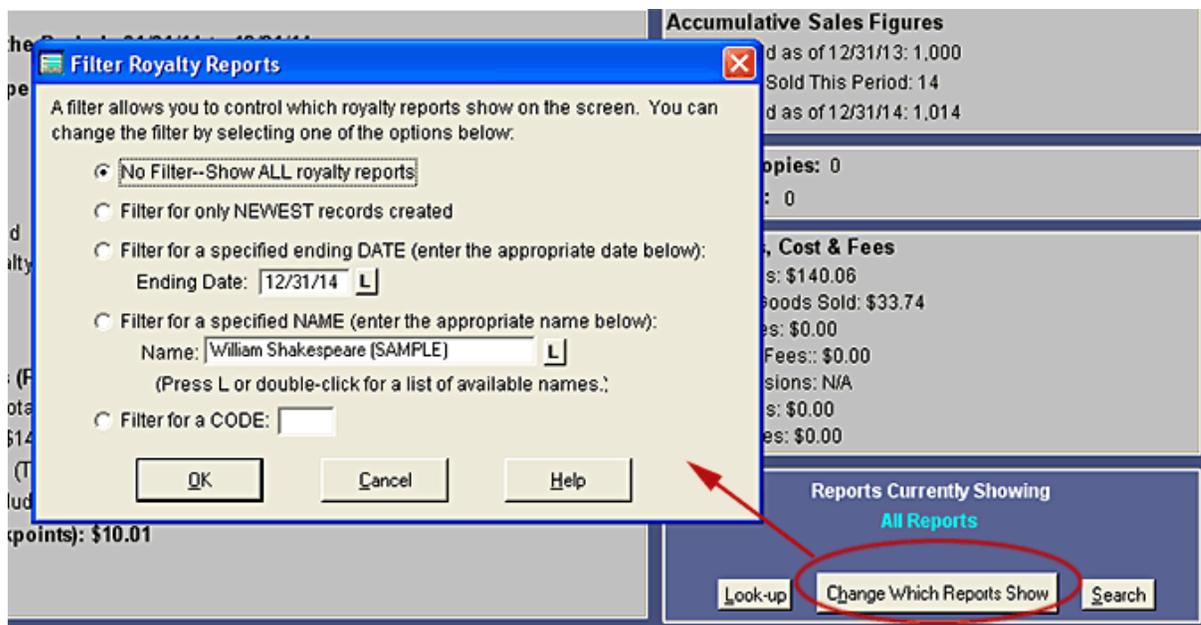
This can be done in one of two ways. One way is to create an export file. Then start up your word processing program, open the newly created export file, and type in a supplementary message along with the report (or statement). Or the other way is to begin in your word processing program, and using the clipboard option, paste a copy of the report (or statement) into the letter.

5.8 File and Close

CLOSE is a menu choice that can be accessed from any of the Menu Bars found in Royalty Functions. By selecting FILE and CLOSE, the current window will be closed, and you'll be returned to the Main Menu. You can also close a window by clicking on the X on the upper right hand corner of the window.

5.9 Filter Reports

The "Filter Reports" dialog box appears when you select TOOLS and FILTER from the Menu Bar on the [Royalty Report Screen](#). It also can be accessed by clicking on "Change Which Reports Show" button on the right side of the Report screen.



Filtering controls what is displayed on the Royalty Reports Screen. You may display only the most recent reports, or all of the reports, or selected reports. The filter is changed by selecting one of the options in the dialog box. You have several choices.

No Filter. If you select this option, all royalty reports will be displayed. The new reports will display along with all past reports generated.

Filter for Newest Records Created. This is the option which is selected when the Report Generator creates new reports and moves you to the report screen. Only the most recent reports created will be displayed.

Filter for a Specified Ending Date. By entering a date in the blank provided, only those reports with matching end dates will be displayed.

Filter for a Specified Name. By entering an royalty holder's name in the blank, only those reports created for that individual will be displayed. The easiest way to enter a name is to double click in the blank and a list of all names in the Set-up file will be listed. Pick the desired name and it will be entered in the blank for you.

Filter for a Code. This filter limits the display to a code. Royalty Set-up records can be coded by using the code field (in the upper right hand corner of the [Royalty Set-up Screen](#)). If a set-up record is coded, the code is carried forward to both the View Reports and Royalty Statements screen. On the View Royalty Reports screen, the code is shown in the Address panel to the right of country. If you select this option and do not enter a code, the reports will be filtered by an empty code blank. In other words, any reports that do *not* have a code will be shown. Any reports *with* a code will be filtered out.

5.10 Find by Scanning Barcode

This feature is only available with Level 5 or higher programs.

In the Level 5 or higher program, royalty reports and royalty statements can be barcoded. For more information on barcodes, see "Barcodes, Generation Information" in the Help documentation found in the main AnyOrder program. If a report (or statement) has a printed barcode on it, you can scan the barcode, and AnyOrder automatically displays it.

To reach the barcode dialog box, select GO TO >> FIND BY SCANNING BARCODE. Note that you can automatically bring up this dialog box by programming your barcode reader with a F2 prefix. When the barcode reader is programmed in this way, the barcode dialog is activated automatically as soon as you scan the barcode. It is not necessary to select it from the menu. (More information on programming your barcode reader is found in the Help documentation in the main AnyOrder program.)

When you scan the barcode, AnyOrder searches through the data file of reports (or statements), locates it, and displays the report on the screen.

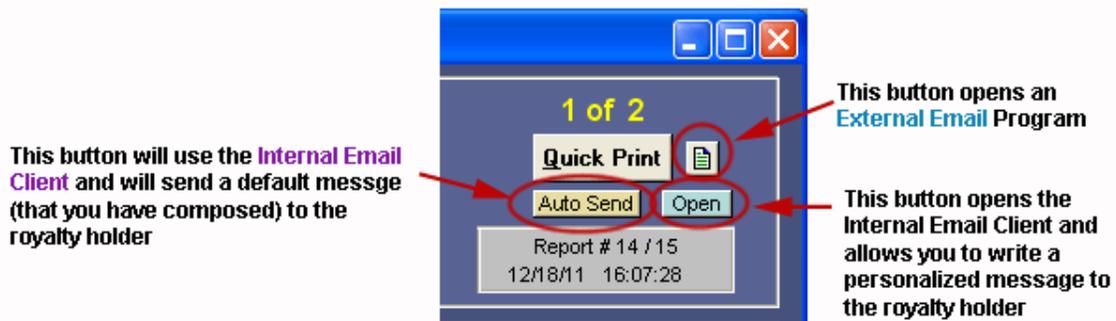
Note that AnyOrder can also locate a royalty holder by scanning a report or statement. The procedure is the same. Start at the Royalty Set-up Screen, scan the barcode, and the royalty holder will be displayed.

5.11 Internal Email (Open Button)

This is a Level 7 feature

This feature provides you with a built-in email client which allows you to send reports to your royalty holders with the press of a button.

It is accessed from the Royalty Report Screen. Near the "Email" address field (lower, center of the screen), and you'll see three buttons. The first button (a bluish icon) opens an external email client. It's the two buttons just below the "Quick Print" button that we are concerned about here.



One of these buttons is named "Auto Send" and sends a standardized cover letter and an attached copy of the royalty report to the royalty holder. The last "Open" starts the internal email program and allows you to personalize the message before sending the royalty report off to the royalty holder

The information, below, is about the "Open" button. For information about the "Auto Send" button, see [Auto Email](#)

"Open" can also be activated by selecting MAIN TASKS >> OPEN INTERNAL & EMAIL PROGRAM - MANUAL MODE.

The Email Screen appears:

Internal Email Program

Send Email Message to: William Shakespeare <Shakespeare@Globe.com>

Cc: Bcc: Reply To:

Subject: 2015 Royalty Report Attach copy of the royalty report Attach copy of the log file (as Excel File: XLS)

William,
I have attached your royalty report for 2015.
So sorry to here that about that name infringement lawsuit with Learjets. I hope you are able to settle in satisfactory manner.
Best wishes for the new year,
George Shaw

Other Attachments: Browse Clear Attach

To populate the fields, above, with your default message & addresses (and can be edited after inserting): Defaults

Send Cancel

In order to use the Internal Email program, you must, first, enter some information in Basic Program Set-up. To do so, select FILE and BASIC PROGRAM SET UP from the Menu Bar from the Main Invoice Screen in the main part of the program. Click on the "Email Set-up" tab on top of the page. The Email Set-up page will appear.

IMPORTANT NOTE: to use AnyOrder's internal email program, the email account that you use must be with an Internet Service Provider (ISP). AnyOrder's internal email is not designed to work with Yahoo, Gmail, HotMail and other web-based email. We can customize the program to work with web-

based mail, but it does required extra charges in order to do that. ISP email accounts are very inexpensive (some less than \$20 US a year). You can have multiple accounts and pick your own identifiable domain name.

In Basic Set-up, you will be able to enter the various email parameters that allow AnyOrder to access the Internet Service Provider's (ISP's) email server.

Once you've entered information in Basic Set-up, you can use the "Open" button.

"Open" Button (Manual Mode - Internal Email Program)

The "Open" button is used when you want to personalize the message before sending the report to the royalty holder.

When you click on the Open button, a form appears (shown above) on which you type out a message to the customer. By default it will attach a copy of the royalty report. If you don't want to attach the report, remove the checkmark.

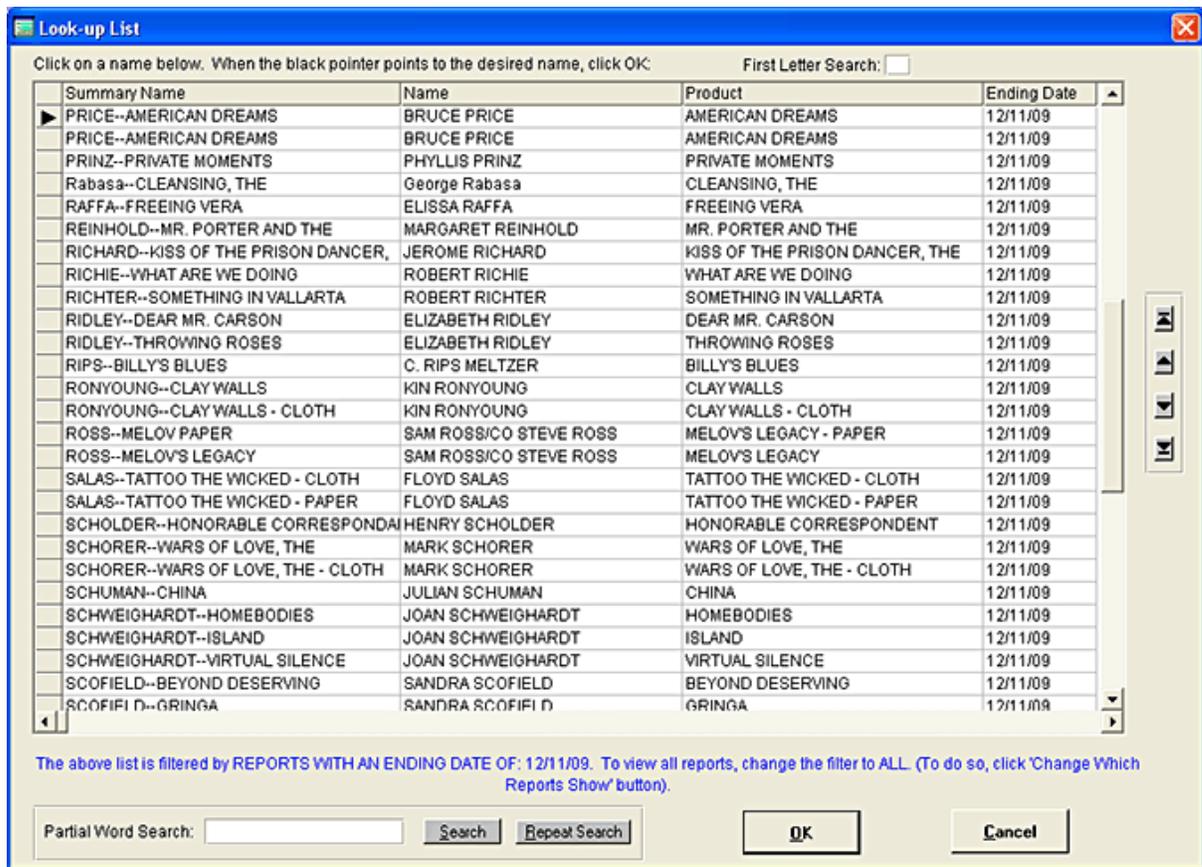
You can also insert your standardized message. Do that by clicking on the "Defaults" button. The standardize message along with any CC, BC, or Reply To addresses that you have indicated in [default email](#) dialog box will be pasted in place. You can, if needed, alter the standardized text and send the mail to the customer when you are ready.

Note that, as mentioned above, AnyOrder doesn't use a "Sent" mailbox to store copies of your sent Invoices, but you can send blind copies to another company mailbox as a way of tracking your sent mail.

Additionally, since AnyOrder doesn't currently have receiving capabilities, you'll want to use your normal email program to monitor responses from the customer.

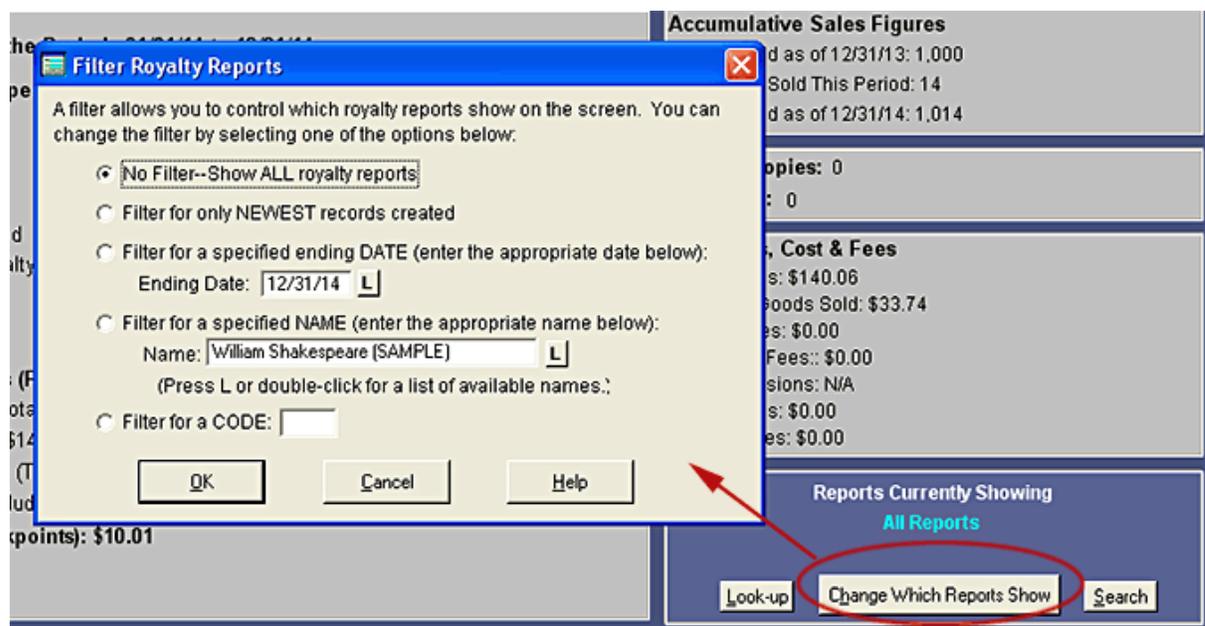
5.12 Look-up List

Each of the major Royalty functions (Set-up Royalty Information, Royalty Reports and Royalty Statements) includes a Look-up List feature. It is accessed by selecting GO TO >> FIND FROM LOOK-UP LIST.



The Look-up dialog box consists of an alphabetized list of names or reports. Make a selection from the list and you will be taken the appropriate record.

You can control what appears on the list by setting filters. That's done by clicking the "Change Which Report Show" button:



Once you have the proper filter set, then either click on the "Look-up" button or select GO TO >> FIND FROM LOOK-UP LIST to use the Look-up List.

5.13 Menu Bar (Royalty Reports Screen)

Printed across the top of the [Royalty Reports Screen](#) is the Menu Bar. It consists of FILE... EDIT... GO TO... TOOLS... MAIN TASKS... WINDOW... HELP. You select menu items by clicking them with the mouse or by pressing Alt on the keyboard and the first letter of the menu item, i.e. pressing Alt+F opens the file menu.



Note: menu items which have a V, VI or VII are features of the Level 5, 6, or 7 programs. For example: "View/Print Records from Spreadsheet (V)" which is found under the FILE menu is a Level 5 and above feature. If there's no Roman numeral, then the feature is available in all levels (Levels 4 - 7).

For more information on any aspect of the Royalty Report Menu Bar, click on the individual menu item below:

FILE

[Back-up Royalty Files](#)

[Print This Report \(Normal Method\)](#)

[Quick Print \(By-pass All Dialog Boxes\)](#)

[Batch Printing \(V\) - Level 5 and Above](#)

[Move Data to Spreadsheet - This Statement \(V\) - Level 5 and Above](#)

[Move Data to Spreadsheet - All Statements \(V\) - Level 5 and Above](#)

[Print Envelope](#)

[Email Export \(V\) - Level 5 and Above](#)

[Close](#)

EDIT

[Undo](#)

[Cut](#)

[Copy](#)

[Paste](#)

[Paste From List](#)

[Copy Entire Statement to Clipboard - Text \(V\) - Level 5 and Above](#)

[Copy Entire Statement to Clipboard - HTML \(V\) - Level 5 and Above](#)

[Delete This Royalty Record](#)

[Multi-Record Delete](#)

GO TO[Previous Record](#)[Next Record](#)[First Record](#)[Last Record](#)[New Record](#)[Search Royalty Reports](#)[Find Report from Look-up](#)[Find Report by Scanning Barcode \(V\) - Level 5 and Above](#)**TOOLS**[Change or Edit Summary Name](#)[Re-number Reports](#)[Filter Reports](#)[Change or Edit Email Address](#)[Options](#)**MAIN TASKS**[Generate Royalty Reports](#)[Set-up Royalty Information](#)[Royalty Statements](#)[Combined Totals / Cash Reserves Report \(VI\) - Level 6 - 7 Feature](#)[Automatic Email - Internal Program \(VII\) - Level 7](#)[Open Internal Email Program - Manual Mode \(VII\) - Level 7](#)[Set-up Automatic Email Message \(VII\) - Level 7](#)[Main Menu](#)**WINDOW**[Moving Between Different Windows](#)**HELP**

5.14 Move Data to Spreadsheet

This feature is only available with Level 5 (or higher) programs.

Data from each of the three major parts of Royalty Functions (including Royalty Set-up, Royalty Reports, and Royalty Statements) can be accessed by a spreadsheet program. To do so, select the FILE and MOVE DATA TO SPREADSHEET. (In the Royalty Set-up Screen, it is accessed by selecting FILE and VIEW/PRINT RECORDS FROM SPREADSHEET.)

Important: In the Royalty Report portion of the program, page through each of the reports before moving them to the spreadsheet. (This is not necessary in Royalty Set-up and Royalty Statements) So many calculations going on in the Royalty Report part of the program that the final set of calculations are not done until each report comes up on the screen. Once the report has appeared on the screen just once (a fraction of a second is all it needs), all the calculations are done and you can use View/Print from Spreadsheet.

If you haven't used the spreadsheet option in other parts of the program, you'll first be prompted to enter the path to your spreadsheet program. Once you've entered the path, AnyOrder will automatically start your spreadsheet program with the data in place.

This feature provides you with an additional way of viewing the data. You can sort the data in various ways, manipulate it and print it. Feel free to make whatever changes you desire. When you use this option, data is placed in a separate report file and any changes made will not affect the original database.

Note: If you are using this function with Royalty Reports, you must have paged through the reports first. (If you've already looked at each of the reports on the screen, then it's not necessary to do this). The export function requires some additional data calculations which only occur when the report is visible on the report screen. Once you page through the reports, all calculations will complete and you'll full access to the data in the spreadsheet.

5.15 Print Envelopes

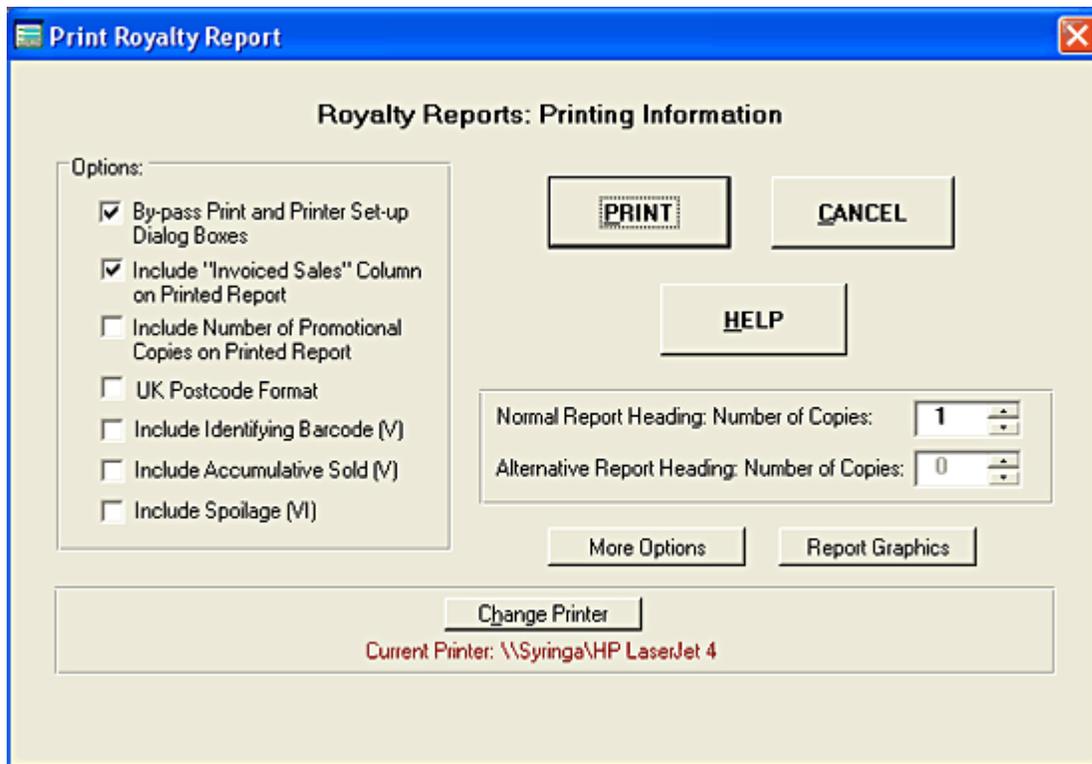
The Print Envelopes feature works the same as same feature in the main part of the AnyOrder program. It is reached by selecting FILE >> PRINT ENVELOPE.

In order to use this portion of the program, you need to have a labeling program installed on your computer which allows you to create and print labels and envelopes. A word processing program (such as Microsoft Word) is recommended as your labeling program since you can use macros to automate the process.

Complete details on how to use this feature is found in the help documentation in the main part of AnyOrder. Select HELP >> SEARCH HELP and look for: "Envelopes, Printing."

5.16 Printing Royalty Reports

The Printing Information dialog box appears when you click on the PRINT button on the [Royalty Reports](#) screen or choose PRINT THIS REPORT (Normal Method) from the Menu Bar. (To by-pass this dialog box click on the QUICK PRINT button on the Report screen, or choose QUICK PRINT from the Menu Bar.)



Here are the parts of the dialog box:

By-pass Printer and Printer Set-up Dialog Boxes. By removing the checkmark from "By-pass Printer and Printer Set-up Dialog Boxes," the program will flow through the Windows Printer dialog box, allowing you to change printer settings or switch to a different printer. Normally, AnyOrder skips the Windows Printer dialog box to save time, but if you need to make adjustments, it's just a matter of turning the by-pass off.

Include "Invoiced Sales" Column on Printed Report. This allows you to include or remove the "Invoiced Sales" column on reports. This is the same column that appears on the screen display which lists the *amount* of sales. If the individual's royalties are based on quantities, you may not want to include this information on the report provided to the royalty holder. You can turn it off by removing the checkmark. If desired, you can also turn off the feature by selecting TOOLS and OPTIONS from the Menu Bar. Note that the feature can not be turned off if you based royalties on net sales. Invoice sales data is a part of net sales calculations, and as such, it must be included on royalty reports.

Include Number of Promotional Copies on Report. Check this box if you would like to include the number of promotional copies on the individual's royalty report. Promotional copies are given away and do not generate income, and thus do not have a bearing on royalty calculations. Few businesses provide this information to the royalty holder, but the option is available should you need it.

Use UK format for postcodes: place postcode at end of address on its own line. This formats the postcode according to United Kingdom postal standards. As long as the name of a country is not found in the address, it positions the postcode at the end of the address on its own line. If you include a country, the postcode is positioned after the city.

Include Identifying Barcode (V). *Level 5 and higher feature.* When you place a checkmark here, AnyOrder will include a barcode on the report. This allows you to use a barcode reader to quickly find the report or locate the royalty holder. For more information on barcodes, see "Barcodes, General Information" in the Help documentation in the Main AnyOrder program.

Include Accumulative Totals (V). *Level 5 and higher feature.* This option is available if you are using the Running Tally feature. The Running Tally feature keeps track of the total number of copies sold from report to report. (On the Royalty Report Screen, this information is found under the section entitled "Accumulative Sales Figures.") By placing a checkmark here, AnyOrder will include on the printed report, accumulative copies sold as of the end of the report period.

Include Spoilage (VI). *Level 6 and higher feature.* One of the ways in which you can remove spoilage from your inventory is to use the "A" code in the Item Area on Main Invoice Screen. If you use this method, and you check this box, AnyOrder will include that the total spoilage figure on the royalty report.

Copies

Normal Report Heading: Number of Copies. Indicate how many copies that you want printed. This will print a normal Royalty Report. (You can also print a royalty report with alternative report heading, see next.)

Alternative Report Heading: Number of Copies. Level VI feature. You can also print a report with alternative report headings. The headings created by clicking on the "More Options" button.

Other Options

Note: All Other Options are Level 6 -7 Features

The More Options dialog box is reached by clicking the "More Options" button on the above print dialog box:

Royalty Report Printing - More Options

Include an ID # on the printed report (VI) Print this only with the Alternative Heading (below)
 Note: this will print the number you have entered in the Social Security (or other ID number) field on the set-up screen. It's primarily used for other ID numbers. If you use it for social security numbers, make sure that printed royalty reports are kept in a secure location.
 Use the following for the heading before the ID number:

Include 'Name' and 'Address' headings just to the left of the royalty holder's name and address (VI)

Include a signature line at the bottom of the report (VI) Print this only with the Alternative Heading (below)
 Use the following for the heading beside the signature line:

Include a secondary report title just below the address box (VI) Print this only with the Alternative Heading (below)
 Use the following for the secondary report title:

Create an Alternative Heading for the Royalty Report (VI)
 Substitute the following instead of the heading 'Royalty Accounting Report'
 Substitute the following in place of your business name
 Substitute the following for the Address
 Substitute the following for City/St/Province/Country
 Substitute the following for the Phone/Fax line

Include an ID # on the Printed Report. *Level 6 -7 Feature.* This will print the number that you have

entered in the Social Security (or Other ID Number) field on the [Royalty Set-up Screen](#). If you place a checkmark here, the ID number will be printed to the right of the royalty holder's name at the top of the report.

Primarily, this should be used for Other ID Numbers. For example, your company might assign account numbers to your royalty holders. Or you may have another number to identify royalty holders. From a security standpoint, it's not a good idea to have printed documents with an individual's social security. If you do use this for the social security number, you should keep the reports in a secure location.

Print this only with the Alternative Heading (below). If you place a checkmark here, the other ID number will be printed on the report only if you have set-up an Alternative Heading (see below.) And the number will only appear on the Alternative Heading report. If you place a checkmark on "Include an ID #..." and no checkmark here, the ID number will appear on normal royalty reports (and Alternative Heading reports if you've selected that option below).

[Include Name and Address Headings just to the left of the royalty holder's name and address.](#)

Level 6 -7 Feature. This will print the labels: "Name" and "Address" on the printed report. The royalty holder's name and address are quite obvious, but some accounting departments prefer to have this part of the royalty report clearly identified with a "Name" and "Address" labels. Place a checkmark here to include the labels.

[Include a signature line at the bottom of the report.](#) *Level 6 -7 Feature.* This will include a signature line at the bottom, left of the report. You may wish to use this for an authorized signature. Or some business -- such as educational institutions -- may have the royalty holder sign "an invoice" before issuing the check. Indicate how you wish to identify the signature line. Generally, you'll use the term "Signature," but you can adjust this to your needs.

Print this only with the Alternative Heading. If you place a checkmark here, the signature line will be printed on the report only if you have set-up an Alternative Heading (see below.) AND the number will appear only on the Alternative Heading report. If you place a checkmark on "Include Signature line..." and no checkmark here, the signature line will appear on normal royalty reports (and Alternative Heading reports if you've selected that option below).

[Include a secondary report title just below the address box.](#) *Level 6 -7 Feature.* This adds an extra title below the address block and before the beginning of the summary of the royalties. Use it when you need an additional description of the royalty summary which follows.

Print this only with the Alternative Heading. If you place a checkmark here, the secondary report title will be printed on the report only if you have set-up an Alternative Heading (see below.) AND the number will only appear on the Alternative Heading report. If you place a checkmark on "Include a secondary report title..." and no checkmark here, the signature line will appear on normal royalty reports (and Alternative Heading reports if you've selected that option below).

[Create an Alternative Heading for the Royalty Report.](#) *Level 6 -7 Feature.* This allows you to change the title of the report from "Royalty Report" to a title of your own choosing. Most commonly, this is used by educational or government institutions to create an invoice to submit to the accounting department for payment. For example, instead of "Royalty Report," the title might be changed to "Vendor's Invoice." And instead of the business name and address, you include a special department name and account routing information. And, finally, you may include a signature line at the bottom. (All of these choices are available, see above.) This allows you to print two documents at one time. One is the regular royalty report. The second is an invoice which the author signs and sends back to the university's accounting department.

Report Graphics

If desired you can add graphics or logos to royalty reports. This feature works the same as with Invoice Graphics. For more information see Graphics, Adding to Invoices & Statements in AnyOrder's main HELP documentation.

Preparing Reports for Mailing

The printed reports are set up so they can be folded and placed in a windowed business envelope. Fold the report along the horizontal line just above the product name so that "Royalty Accounting Report" at the top shows. Then fold the bottom of the edge of paper so that it fits inside this fold. It will now fit in an envelope, and the royalty holder's address will be lined up with the window.

A Note About Quantity Breakpoints

Note that if you have two or more Quantity Breakpoints on a report, each breakpoint will be listed on a *separate screen page*. To print the report, go to the *first page*, and then click on the print button. All breakpoints will be combined into one printed report. The printing system is set up this way so that you don't accidentally print multiple copies of the same report.

5.17 Re-number Reports

This function is reached in the Royalty Reports part of the program by selecting TOOLS >> RE-NUMBER REPORTS.

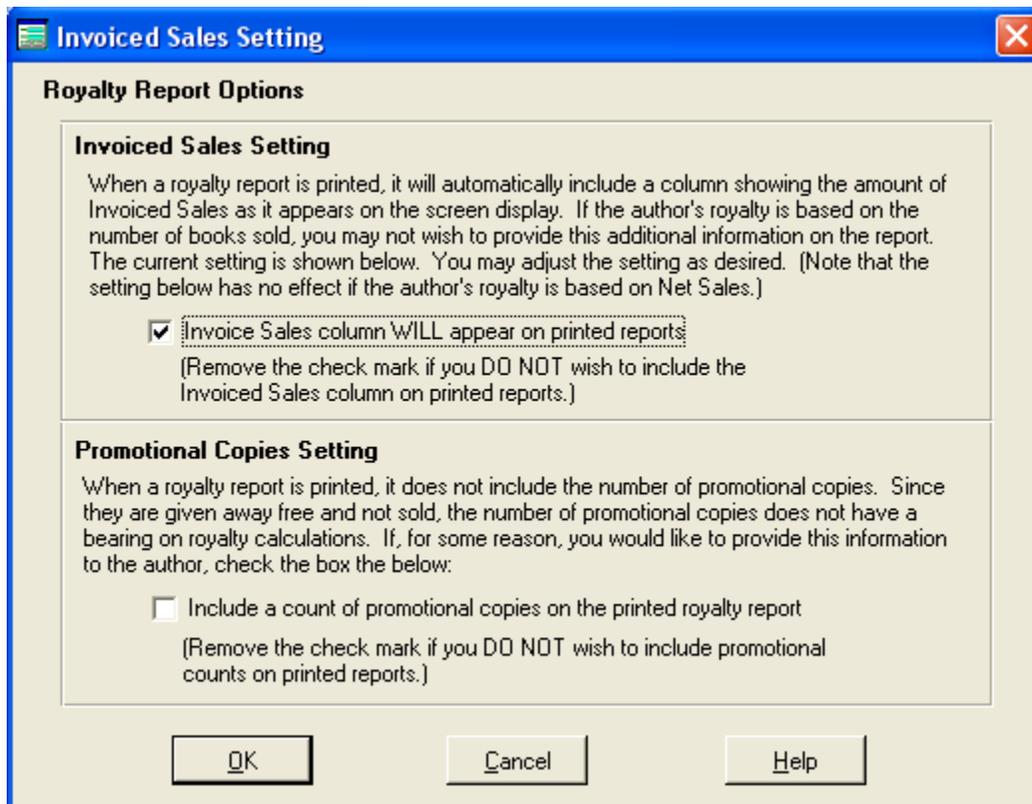
This function is available for AnyOrder users that may have older reports that they would like update. The new data file format for reports includes a number identifier. The number is used for barcoding purposes, and it is when making group selections when using the multi-delete or batch printing features.

Any new report automatically includes this identifier, but older (pre-version 11) reports lack it. This will add the identifier to older reports. This process will not effect new reports.

There's only one caution. Since the number identifier will be changed, this process is not recommended if you are already using barcodes on your royalty reports. The barcodes are use the current numbering system, and if you re-number, the numbers will no longer match the reports on which they have been used.

5.18 Royalty Report Options

The Royalty Report Options dialog box appears when you select TOOLS and OPTIONS from the Menu Bar on the [Report Screen](#).



You have two options:

Invoiced Sales Setting. When a royalty report is printed, it will automatically include a column showing the amount of Invoiced Sales. This is the same column that appears on the screen display. If the individual's royalty is based on the *number* of units sold, you may not wish to provide this additional information on the report. The current setting is shown in the dialog box. You may adjust the setting as desired.

Note that the feature can not be turned off if you based royalties on net sales. Invoice sales data is a part of net sales calculations, and, as such, it must be included on royalty reports.

Promotional Copies Setting. Check this box if you would like to include the number of promotional copies on the individual's royalty report. Promotional copies are given away and do not generate income, and thus do not have a bearing on royalty calculations. Few businesses provide this information to the royalty holder, but the option is available should you need it.

5.19 Search

Each of the major Royalty functions (Set-up Royalty Information, Royalty Reports and Royalty Statements) has a search feature. It is accessed by selecting GO TO >> SEARCH from the Menu Bar. Or by clicking the "Search" button on the screen.



Search

General Search:

General Search: enter a full or partial word. The name, address, city, state and country will be searched.

Product Search:

Product Search: Enter one or more words--or a partial word. Make sure the General Search blank is empty.

Both General & Product searches begin with the newest reports and work back.

In the blank on top of the Search dialog box, you can enter a partial word or phrase. It will also for a product name. AnyOrder will search the name and address blanks for a match.

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6 Royalty Statements

The Royalty Statements portion of the program allows you to set up accounts for each of your royalty holders. On each account, you can record advances, royalties owed, payments, and subsidiary sales. If you're paying royalties to an individual for several different products, the Statements feature allows you to combine everything into one package. It's designed to tie in with royalty reports. You can trigger a pop-up list of royalty reports, and insert the figures from a chosen report to the statement.

To reach Royalty Statements, click on the appropriate button on the Main Menu or choose MAIN TASKS and ROYALTY STATEMENTS from the Menu Bar.

Date	Description	Debit Payments (or charges) to royalty holder	Credit Amounts due to the royalty holder	Balance Negative amount = due to royalty holder
10/09/09	Advance	2000.00		2000.00
12/31/09	Royalty-Never Turn Back-Pap		20.93	1979.07
08/09/10	Film Rights Sale		5000.00	-3020.93
12/31/10	Royalty-Never Turn Back-Pap		3456.67	-6477.60
01/05/11	Payment	6477.60		0.00

Name and Address

In the top blanks of the Statement Screen, enter the name and address of the royalty holder. Unlike the Royalty Information Screen where a different record is set-up for each product, in Royalty Statements only one record is set-up per royalty holder. To enter the name automatically, click on "List" and a pop-up list of all royalty holders will appear. Select the desired individual, and the name, address and other information will be pasted in place.

Account Spreadsheet: Debit and Credit Transactions

The Account Spreadsheet which occupies the middle of the screen is used to enter all transactions with the royalty holder.

There are two parts of the Account Spreadsheet that deserve an extra explanation: debit and credit transactions. A *debit transaction* is any payment made to the royalty holder. Each time you send the royalty holder a check, the amount of the check would be recorded as a debit transaction. Charges

against the royalty holder also are considered debit transactions. If you provide the royalty holder with copies of the product, you may charge his or her account. That's a debit against the royalty holder.

A *credit transaction* is any amount which is owed to the royalty holder. When you produce a royalty report for the previous year's sales, the amount owed is recorded as a credit. Subsidiary rights is another credit. For instance, let's say you have contracted with a royalty holder to split 50-50 any subsidiary rights sales. If you sell subsidiary rights to another party for \$5,000, you would record \$2,500 on the royalty statement as a credit transaction.

A negative final figure in the "Balance" column means that you owe the royalty holder. A positive final figure in the Balance column is an amount in your favor.

The program has a number of features built in to help you decide whether a transaction should be entered in the credit or debit column. In particular, the pop-up lists are helpful. They will automatically place advances, payments, royalties owed, etc. in the proper column.

Account Spreadsheet: Entering Information

There are two ways of entering information on the spreadsheet. You can simply type it directly into the spreadsheet, or you can paste information by using pop-up lists.

Let's say the first transaction that you want enter is an Advance. If you'd like to use a pop-up list, click on "ADD" just beyond "Paste from Transaction List."

The [Transaction Pop-up List](#) will appear. (The Transaction pop-up list can be altered to your liking. For instance, if you have a common advance amount, you have it appear on the Transaction List. For more information on changing the Transaction list, see [Transaction List Maintenance](#)).

AnyOrder comes with a few sample entries on the transaction list. In the sample, Advance is set at \$2,000. You can select the sample amount or you can change it in the "Amount" blank found in lower part of the dialog box.

Once you get the Advance set at the proper amount, check the date and then click on OK. The Advance will be entered on the spreadsheet in the debit column.

Now let's say you return to Royalty Statements some time later after you've generated royalty reports for the year. This time you need to enter royalties owed to the customer. In this case, you would click the ADD button just beyond "Paste from Royalty Reports."

The Royalty Report Pop-up List will appear. If desired, you can filter the pop-up list to show only reports involving the individual who is named on the Statement Screen. This is handy if you deal with many royalty holders. There are other filter options as well. For more information, see [Royalty Report Pop-up List](#)

To paste the figures from the report on the spreadsheet, click on "Paste and Exit." If you have a couple of reports to enter, click on "Paste and Continue." AnyOrder will paste the selected report. Then you'll be returned to the pop-up list where you can select another report and paste again.

If you have already issued a check for the amount of royalty on a report, you can use "Paste+Paid and Exit" button. This will enter the amount on the royalty report, and it will add a second line showing that it was paid.

ADD and PLACE Buttons

Use ADD when you want to add a new row to the spreadsheet and paste information onto it. Use PLACE when you want to overwrite a row on the spreadsheet. To use PLACE you need to position the cursor on the proper row of the spreadsheet first, then click the PLACE button.

Note that you can only add one new row at a time. This done to conserve space in the Royalty Statement file. AnyOrder will not add any more rows once a new blank row has been added.

Other Spreadsheet Functions.

If you need to delete a row from the spreadsheet, position your cursor on the proper row and click "Delete Row." If you need to insert a blank row in the middle of the spreadsheet, position your cursor on a line below where you want the blank row, and click on "Insert."

More Information on Other Aspects of Royalty Statements:

[Menu Bar](#)

[Royalty Report Pop-up List](#)

[Transaction Pop-up List](#)

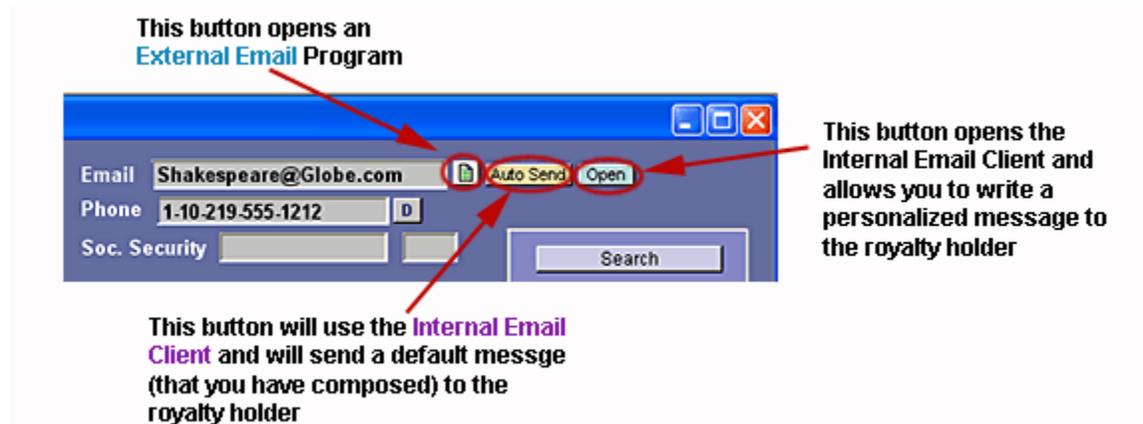
[Transaction List Maintenance](#)

6.1 Auto Email

This is a Level 7 feature

This feature provides you with a built-in email client which allows you to send reports to royalty holders with the press of a button.

It is accessed from the Royalty Statement Screen. In the upper right of the screen, you'll see three buttons. The first button (a bluish icon) opens an external email client. It's the two other buttons that we are concerned about here.



One of these buttons is named "Auto Send" and sends a standardized cover letter and an attached copy of the statement to the royalty holder. The last button ("Open") opens the internal email program and allows you to personalize the message before sending the statement.

The information, below, is about the "Auto Send" button. For information about the "Open" button, see [Open Internal Email](#)

"Auto Send" can also be activated by selecting MAIN TASKS >> AUTOMATED EMAIL - INTERNAL PROGRAM.

"Open" can also be activated by selecting MAIN TASKS >> OPEN INTERNAL &EMAIL PROGRAM - MANUAL MODE.

In order to use the Internal Email program, you must, first, enter some information in Basic Program Set-up. To do so, select FILE and BASIC PROGRAM SET UP from the Menu Bar from the Main Invoice Screen in the main part of the program. Click on the "Email Set-up" tab on top of the page. The Email Set-up page will appear.

IMPORTANT NOTE: to use AnyOrder's internal email program, the email account that you use must

be with an Internet Service Provider (ISP). AnyOrder's internal email is not designed to work with Yahoo, Gmail, HotMail and other web-based email. We can customize the program to work with web-based mail, but it does require extra charges in order to do that. ISP email accounts are very inexpensive (some less than \$20 US a year). You can have multiple accounts and pick your own identifiable domain name.

In Basic Set-up, you will be able to enter the various email parameters that allow AnyOrder to access the Internet Service Provider's (ISP's) email server.

Setting up the Default Message

Additionally, to use the "Auto Send" feature, you'll need to select MAIN TASKS >> SET-UP AUTOMATED EMAIL MESSAGE. A form will open on which you can write a short cover letter to go along with Invoices being emailed to customers.

When sending royalty statements using AnyBook's internal email program, you'll want to include a pre-composed message. This allows you to send a cover letter message along with a copy of the report by the clicking the "Auto Send" button - and no further intervention on your part. To use this feature, type in the message you wish to use. Note that you can use [NAME] (all caps and in square brackets) to insert the person's name in the message.

Use this Subject Line:

Dear [NAME],

Please find attached your royalty statement for the year.

If you have any questions, please don't hesitate to drop me a line.

Cordially,

Edgar Allen Poe

Optional. In addition to sending the email to the customer, you may wish to send a blind copy to another one of your company's email addresses to have a record of emails sent. You can also send CC's or include a "Reply To" address

Email address for copies (Cc)

Email address for 'Reply to'

Email address for blind copies (Bcc)

Attachments

Along with the standardized message, you'll also be able to indicate any CC's, BCC's or Reply to addresses you want included.

Once you've entered information here, you can use either the "Auto Send" or "Open" features.

"Auto Send" Button (Automated Email – Internal Email Program)

Make sure that you have: 1) entered the email set-up values in Basic Program Set-up as described above, and 2) prepared a short standardized email message to go along with the attached invoice (which is done in Basic Program Set-up as well).

To send off an report to a royalty holder, click on the "Auto Send" button on the Main Invoice Screen. The cover message that you prepared along with an attached copy of the invoice will be sent to the customer.

The attachment being sent to the royalty holder includes both an html and text copy of the invoice. The text version of the report assures that it will get through to the royalty holder no matter what settings they have on their email program.

All in all, this is a very quick and efficient way to send reports to your authors.

If you use this feature, you should monitor the sending email account to make sure you don't get any bounced back emails. The internal email program built into AnyOrder does not receive emails, but you can monitor the account with your normal email program. If you get a bounced back email, then you'll want to double-check and make sure you have the correct email address for the customer.

Additionally, since the internal email program doesn't use a "Sent" box, you'll want to send a blind copy to a company email address. That allows you to have a record of the Invoices sent. *When you set-up the standardized message in Basic Set-up, you can indicate an address for blind copies.*

6.2 Copy Entire Invoice to Clipboard

This feature is only available on the Level 5 or higher program

The Copy Entire Report/Statement feature allows you to copy the royalty report (or royalty statement) currently showing on the screen to the clipboard. Once in the clipboard, it can be inserted in a word processing document, an email message, or an HTML document.

To use the copy feature, select EDIT and COPY ENTIRE REPORT (TEXT) or (HTML) from the Main Report Screen or from the [Royalty Statement Screen](#).

You have two options. You can copy the report (or statement) as text. Or you can copy as HTML. When copied as text, the report is reformatted so that it can be inserted into any word processing program. Once in another program, you can formatted the way you want--or leave it as it is.

The other option is to copy the report (or statement) as HTML. In this option, HTML tags are added to the text so that when viewed in a web browser, the report (or statement) looks the same as those printed by AnyOrder. You can paste the HTML copy into word processing programs which are compatible with HTML documents. Or you can paste the HTML copy into browsers or email programs.

A Note About Text Format. In text format, reports are designed without columns. This enables you to use any type of font when a text formatted report is inserted into an email or word processing program. Royalty statements, on the other hand, out of necessity, need to have columns for credit, debit and balance figures. To keep the figures in the columns properly lined up *use a courier (or fixed space) font* when working with a text formatted statement in another program. If you are inserting a statement in a word processing program, you may also need to reduce the right and left margins so that it has adequate space to fit across the page.

6.3 Delete Statement

To delete a statement, select EDIT and DELETE THIS STATEMENT from the Menu Bar. A warning message will appear asking whether you are sure you want to delete the statement. If you say YES, the record and all the information on the spreadsheet will be deleted. Use caution when using this function, once a record is deleted, you can't undo the process.

6.4 Email Export

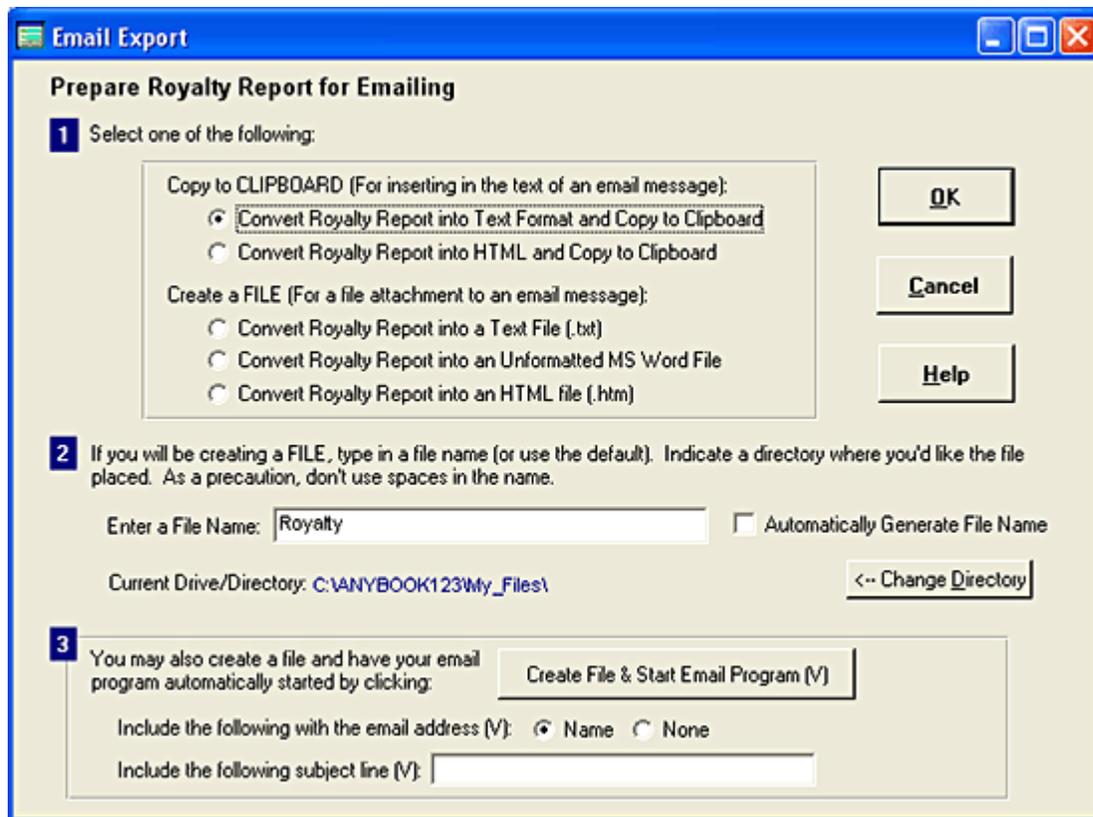
Email Export features are only available on the Level 5 or higher program.

This function allows you to use an **external email program** (Outlook, Thunderbird, etc.) and attach an invoice or a billing statement. Note that the Level 7 has a **built-in email client** which makes this process more automatic, but this is available if you are using one of the lower level programs.

This function allows you to send a royalty report or a royalty statement to an individual via email. You can either include the report (or statement) in the text of an email message or you can send it as an attachment to an email message. You're not limited to emailing purposes. You can also use this function to insert reports in word processing documents.

To use this feature, first, go to the report or statement you want to export. Once the report is showing on the screen, select FILE and EMAIL EXPORT from the Menu Bar.

After selecting FILE and EMAIL EXPORT, the following dialog box appears:



At the top of the box, you can choose the export format. You have your choice between placing the report (or statement) in the clipboard or placing it in a file:

Clipboard. If you use one of the two clipboard formats, the report (or statement) will be placed in the Windows clipboard. This allows you to start up your email program, write a message to the customer and insert the report (or statement) into the text of your message (by using your email program's EDIT and PASTE feature).

There are two clipboard formats:

- 1) The Clipboard (text format) option re-formats the report (or statement) into plain text so that it can be inserted into any type of email program (or word processing program). This is handy

way of emailing someone an report. Since the report is a part of your message, it's readily seen and they don't have to open an attachment.

2) Clipboard (HTML) option reformats the report (or statement) with HTML tags. HTML is the way all information on the Web is formatted. The HTML tags are attached to the report (or statement) so that when it is viewed in a web browser, it looks the same as AnyOrder's printed report (or statement). If you have an email program that allows you to use HTML tags, you can place the report (or statement) directly into an email message so it retains its format.

File. You can also create a file which holds the report (or statement). Use the file options if you want to send the report as an attachment to an email message.

There are three file formats to choose from:

- 1) Text File. For a text file export, the report (or statement) is converted into plain text. The advantage of this format is that a text file is the basic form of a written document. There are no compatibility issues with a text file. All word processing and browsing programs can read it.
- 2) Unformatted Microsoft Word File. For this option, the report (or statement) is converted into a Microsoft Word file. The file is not formatted. In other words, it does not use tabs or different sized fonts or bolding, etc. It's a very simple document that can be opened in any version of Microsoft Word. Since it is unformatted, it can also be opened in other word processing programs as well.
- 3) HTML File. For this option, the report (or statement) is converted into HTML, the basic format of all information on the Web. Essentially what happens is that the report (or statement) is converted into a web page which looks just like the printed version produced by AnyOrder. The HTML option is very useful. When an HTML file is used as attachment, most email programs will show it fully formatted at the bottom of the message.

If you select any of the file formats, you have one last step. You need to type in a name for the file that you'll be creating. If "Automatically Generate File Name" is not checked, AnyOrder will save the name of the file up to 18 characters in length.

For your convenience, AnyOrder will automatically add an extension to your file name. You can, of course, give the file any extension you wish, but it is recommended that you use the following.

Text Files: .txt

Microsoft Word Files: .doc

HTML Files: .htm

Finally, indicate the directory where you'd like the file placed. To bring up a list of directories, click on "Change Directory" (or double click in the Directory blank). Once you designate a directory, AnyOrder will remember it for future sessions.

Automatically Generate File Name. If you place a checkmark here, AnyOrder will automatically name the file for you. The file name will begin with a prefix of "RR" (if it's a royalty report) or a "RS" (if it's a royalty statement). The prefix is followed by the first letter of the individual's first name and then by the full last name. (This assumes that you've entered names in normal order: first name followed by last name.) The auto-generation feature saves time since you can run a series of email exports for several royalty holders. Once you've finished, you can follow it up by creating emails with the attached report or statement. The naming convention makes it easy to connect royalty holders with the correct royalty report.

Automatically Starting your Email Program. After you create a file, you may wish to activate your email program. That's what this feature allows you to do. In addition to starting your email program, you can include the name of the individual in the email address by selecting the appropriate radio button. You can also include a subject heading in the email by typing in the desired phrase in the blank provided. To create the file and start your email program click on: "Create File & Start Email

Program." Once the email program starts, you'll need to manually attach the text or HTML file. Because of security concerns, email programs won't automatically attach a file to an email, but with AnyOrder taking care of all of the background work, the process is greatly simplified.

A Note About Text Formatting. In text format (clipboard or file), reports are designed without columns. This enables you to use any type of font when a text formatted report is inserted in an email or word processing program. Billing statements, on the other hand, out of necessity, need to have columns for credit, debit and balance figures. To keep the figures in the columns properly lined up *use a courier (or fixed space) font* when working with a text formatted statement in another program. If you are inserting a statement in a word processing program, you may also need to reduce the right and left margins so that it has adequate space to fit across the page.

Other Uses of This Feature. You are not limited to using this feature for email purposes. You can also use it to copy reports into word processing (or other types of) programs. For instance, you may wish to include a copy of a customer's report in the text of a letter.

This can be done in one of two ways. One way is to create an export file. Then start up your word processing program, open the newly created export file, and type in a supplementary message along with the report (or statement). Or the other way is to begin in your word processing program, and using the clipboard option, paste a copy of the report (or statement) into the letter.

6.5 Find by Scanning Barcode

This feature is only available with Level 5 or higher programs.

In the Level 5 program, royalty reports and royalty statements can be barcoded. For more information on barcodes, see "Barcodes, Generation Information" in the Help documentation found in the main AnyOrder program. If a report (or statement) has a printed barcode on it, you can scan the barcode, and AnyOrder automatically displays it.

To reach the barcode dialog box, select GO TO >> FIND BY SCANNING BARCODE. Note that you can automatically bring up this dialog box by programming your barcode reader with a F2 prefix. When the barcode reader is programmed in this way, the barcode dialog is activated automatically as soon as you scan the barcode. It is not necessary to select it from the menu. (More information on programming your barcode reader is found in the Help documentation in the main AnyOrder program.)

When you scan the barcode, AnyOrder searches through the data file of reports (or statements), locates it, and displays the report on the screen.

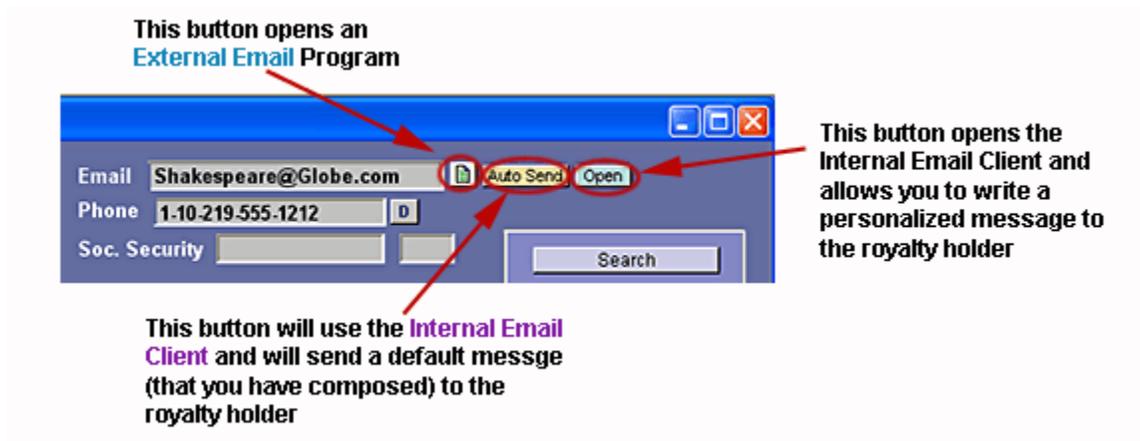
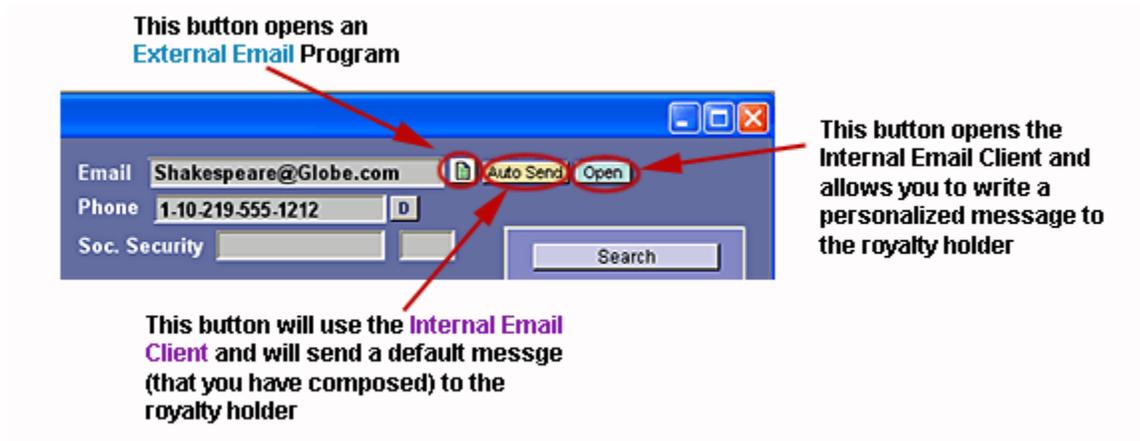
Note that AnyOrder can also locate a royalty holder by scanning a report or statement. The procedure is the same. Start at the Royalty Set-up Screen, scan the barcode, and the royalty holder will be displayed.

6.6 Internal Email (Open Button)

This is a Level 7 feature

This feature provides you with a built-in email client which allows you to send reports to your royalty holders with the press of a button.

It is accessed from the Royalty Statement Screen. In the upper right of the screen, you'll see three buttons. The first button (a bluish icon) opens an external email client. It's the two other buttons that we are concerned about here.



One of these buttons is named "Auto Send" and sends a standardized cover letter and an attached copy of the royalty statement to the royalty holder. The last "Open" starts the internal email program and allows you to personalize the message before sending the royalty statement off to the royalty holder

The information, below, is about the "Open" button. For information about the "Auto Send" button, see [Auto Email](#)

"Open" can also be activated by selecting MAIN TASKS >> OPEN INTERNAL &EMAIL PROGRAM - MANUAL MODE.

The Email Screen appears:

In order to use the Internal Email program, you must, first, enter some information in Basic Program Set-up. To do so, select FILE and BASIC PROGRAM SET UP from the Menu Bar from the Main Invoice Screen in the main part of the program. Click on the "Email Set-up" tab on top of the page. The Email Set-up page will appear.

IMPORTANT NOTE: to use AnyOrder's internal email program, the email account that you use must be with an Internet Service Provider (ISP). AnyOrder's internal email is not designed to work with Yahoo, Gmail, HotMail and other web-based email. We can customize the program to work with web-based mail, but it does required extra charges in order to do that. ISP email accounts are very inexpensive (some less than \$20 US a year). You can have multiple accounts and pick your own identifiable domain name.

In Basic Set-up, you will be able to enter the various email parameters that allow AnyOrder to access the Internet Service Provider's (ISP's) email server.

Once you've entered information in Basic Set-up, you can use the "Open" button.

"Open" Button (Manual Mode - Internal Email Program)

The "Open" button is used when you want to personalize the message before sending the statement to the royalty holder.

When you click on the Open button, a form appears (shown above) on which you type out a message to the customer. By default it will attach a copy of the royalty report. If you don't want to attach the report, remove the checkmark.

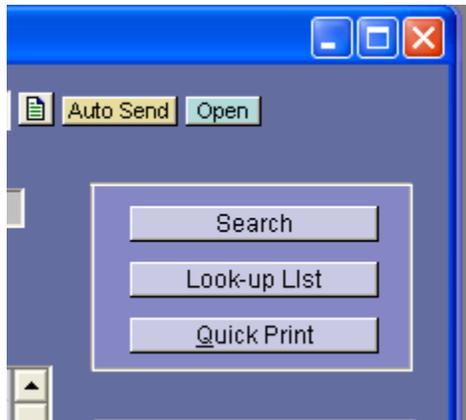
You can also insert your standardized message. Do that by clicking on the "Defaults" button. The standardize message along with any CC, BC, or Reply To addresses that you have indicated in [default email](#) dialog box will be pasted in place. You can, if needed, alter the standardized text and send the mail to the customer when you are ready.

Note that, as mentioned above, AnyOrder doesn't use a "Sent" mailbox to store copies of your sent Invoices, but you can send blind copies to another company mailbox as a way of tracking your sent mail.

Additionally, since AnyOrder doesn't currently have receiving capabilities, you'll want to use your normal email program to monitor responses from the customer.

6.7 Look-up List

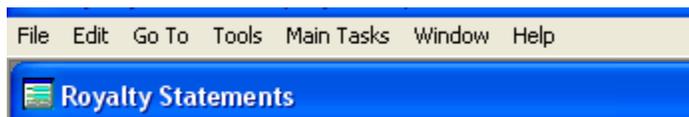
Each of the major Royalty functions (Set-up Royalty Information, Royalty Reports and Royalty Statements) includes a Look-up List feature. It is accessed by selecting GO TO and FIND FROM LOOK-UP LIST. Or you can click the "Look-up" button on the screen:



The Look-up dialog box consists of an alphabetized list of names or reports. Make a selection from the list and you will be taken the appropriate record.

6.8 Menu Bar (Royalty Statement Screen)

Printed across the top of the Royalty Statement Screen is the Menu Bar. It consists of FILE... EDIT... GO TO... TOOLS... MAIN TASKS... WINDOW... HELP. You select menu items by clicking them with the mouse or by pressing Alt on the keyboard and the first letter of the menu item, i.e. pressing Alt+F opens the file menu.



Note: menu items which have a V, VI or VII are features of the Level 5, 6, or 7 programs. For example: "View/Print Records from Spreadsheet (V)" which is found under the FILE menu is a Level 5 and above feature. If there's no Roman numeral, then the feature is available in all levels (Levels 4 - 7).

For more information on any aspect of the Royalty Statement Menu Bar, click on the individual menu item below:

FILE

[Back-up Royalty Files](#)

[Print This Report \(Normal Method\)](#)

[Quick Print \(By-pass All Dialog Boxes\)](#)

[Batch Printing \(V\) - Level 5 and Above](#)

[Move Data to Spreadsheet - This Statement \(V\) - Level 5 and Above](#)

[Move Data to Spreadsheet - All Statements \(V\) - Level 5 and Above](#)

[Print Envelope](#)

[Email Export \(V\) - Level 5 and Above](#)

[Close](#)

EDIT

[Undo](#)

[Cut](#)

[Copy](#)

[Paste](#)

[Paste From Royalty Report](#)

[Paste From Transaction List](#)

[Add Line & Royalty Report Paste](#)

[Add Line & Transaction List Paste](#)

[Insert Spreadsheet Row](#)

[Delete Spreadsheet Row](#)

[Copy Entire Statement to Clipboard - Text \(V\) - Level 5 and Above](#)

[Copy Entire Statement to Clipboard - HTML \(V\) - Level 5 and Above](#)

[Delete This Statement](#)

GO TO

[Previous Record](#)

[Next Record](#)

[First Record](#)

[Last Record](#)

[New Record](#)

[Search Royalty Statements](#)

[Find Statement from Look-up List](#)

[Find Statement by Scanning Barcode](#)

TOOLS

[Calculate Balance](#)

[Transaction List Maintenance](#)

MAIN TASKS

[Set-up Royalty Information](#)

[Generate Royalty Reports](#)

[View Royalty Reports](#)

[Combined Totals / Cash Reserves Report - Level 6 - 7](#)

[Main Menu](#)

WINDOW

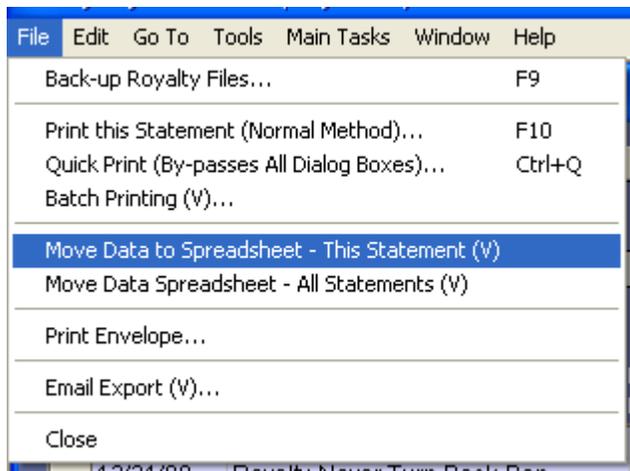
[Moving Between Different Windows](#)

HELP

6.9 Move Data to Spreadsheet

This feature is only available with Level 5 or higher programs.

Data from each of the three major parts of Royalty Functions (including Royalty Set-up, Royalty Reports, and Royalty Statements) can be accessed by a spreadsheet program. To do so, select the FILE and MOVE DATA TO SPREADSHEET. (In the Royalty Set-up Screen, it is accessed by selecting FILE and VIEW/PRINT RECORDS FROM SPREADSHEET.)



Important: In the Royalty Report portion of the program, page through each of the reports before moving them to the spreadsheet. (This is not necessary in Royalty Set-up and Royalty Statements) So many calculations going on in the Royalty Report part of the program that the final set of calculations are not done until each report comes up on the screen. Once the report has appeared on the screen just once (a fraction of a second is all it needs), all the calculations are done and you can use View/Print from Spreadsheet.

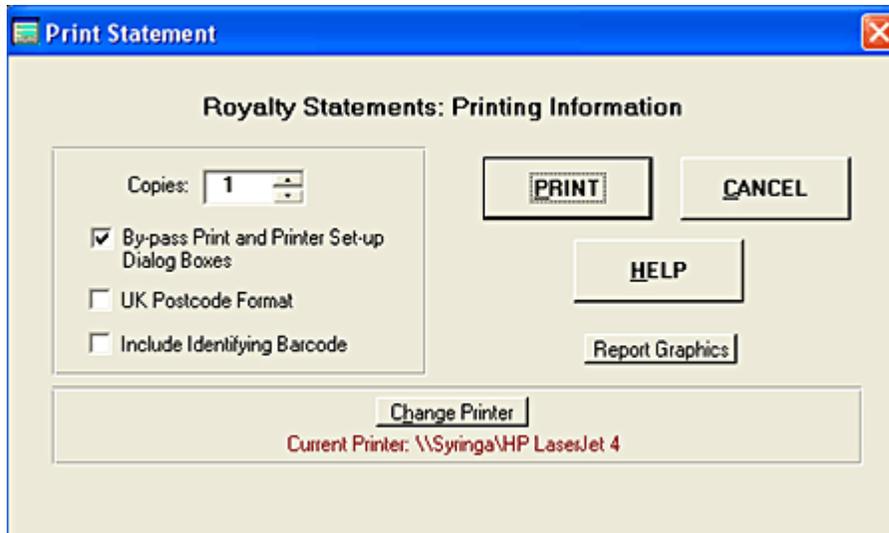
If you haven't used the spreadsheet option in other parts of the program, you'll first be prompted to enter the path to your spreadsheet program. Once you've entered the path, AnyOrder will automatically start your spreadsheet program with the data in place.

This feature provides you with an additional way of viewing the data. You can sort the data in various ways, manipulate it and print it. Feel free to make whatever changes you desire. When you use this option, data is placed in a separate report file and any changes made will not affect the original database.

Note: If you are using this function with Royalty Reports, you must have paged through the reports first. (If you've already looked at each of the reports on the screen, then it's not necessary to do this). The export function requires some additional data calculations which only occur when the report is visible on the report screen. Once you page through the reports, all calculations will complete and you'll full access to the data in the spreadsheet.

6.10 Printing Royalty Statements

The Printing Information dialog box appears when you click on the PRINT button on the Statement Screen or choose PRINT THIS STATEMENT (Normal Method) from the Menu Bar. (To by-pass this dialog box, click on the QUICK PRINT button on the Statement screen, or choose QUICK PRINT from the Menu Bar.)



Near the top of the Printing Information dialog box, you can indicate the number of copies you want printed. Below "Number of Copies" is the following:

By-pass Printer and Printer Set-up Dialog Boxes. By removing the checkmark from "By-pass Printer and Printer Set-up Dialog Boxes," the program will flow through the Windows Printer dialog box, allowing you to change printer settings or switch to a different printer. Normally, AnyOrder skips the Windows Printer dialog box to save time, but if you need to make adjustments, it's just a matter of turning the by-pass off.

Use UK format for postcodes: place postcode at end of address on its own line. This formats the postcode according to United Kingdom postal standards. As long as the name of a country is not found in the address, it positions the postcode at the end of the address on its own line. If you include a country, the postcode is positioned after the city.

Include Identifying Barcode (V). Level V feature. When you place a checkmark here, AnyOrder will include a barcode on the statement. This allows you to use a barcode reader to quickly find the statement or locate the royalty holder. For more information on barcodes, see "Barcodes, General Information" in the Help documentation in the Main AnyOrder program.

Printed statements are set up so they can be folded and placed in a windowed business envelope. Fold the statement along the horizontal line just above the word DATE so that "Statement" at the top shows. Then fold the bottom of the edge of paper so that it fits inside this fold. It will now fit in an

envelope, and the billing address will be lined up with the window.

6.11 Royalty Report Pop-up List

You can access the Royalty Report Pop-up List by clicking on either the ADD or PLACE button on the Statement Screen (just beyond "Paste from Royalty Reports"). You can also access it by selecting EDIT and ADD LINE & ROYALTY REPORT PASTE EDIT or PASTE FROM ROYALTY REPORT from the Menu Bar.

The ADD button and the menu choice ADD LINE & ROYALTY REPORT PASTE do the same thing. A new row is added to the spreadsheet and the Royalty Report Pop-up list is activated. After a selection is made from the pop-up list, the information will be pasted in the new row on the spreadsheet.

The PLACE button and the menu choice PASTE FROM ROYALTY REPORT do the same thing. The Royalty Report pop-up list is activated. After a selection is made from the list, the information will be pasted *at the location of the cursor* on the spreadsheet.

When the Royalty Report Pop-up List first appears, it shows all royalty reports in the report file. You can limit what shows on the list by using a filter. You can show newest reports. You can filter the reports to a selected ending date. (The "L" button beside the date field allows you to select from a list of available ending dates.)

Additionally, you can filter the reports to a selected name. For a list of names, click on the "L" button just after the "Name" field. If desired, you can combine the name with an ending date. For instance, Shakespeare and 12/31/13 mean that only Shakespeare's reports with an ending date of 12/31/13 will be displayed.

Once you select a filter, you'll need to activate it before it can take effect. To activate it, click on "Activate" (circled below):

1 First, choose how you wish to filter the list, below:

Show ALL royalty reports
 Show NEWEST reports
 Show with an ending DATE of: / / L

Show the NAME: William Shakespeare (SAMPLE) L
 AND (if desired) DATE: / / L

2 After choosing above, click here to activate your choice: **Activate**

3 Select the report you want from the list (below):

To paste the report on the spreadsheet and then exit from the pop-up list, click on "Paste and Exit." If you have a couple of reports to enter, click on "Paste and Continue." AnyOrder will paste the selected report information on the spreadsheet. Then, you'll be returned to the pop-up list enabling you to select another report.

If you have already issued a royalty check, you can use "Paste+Paid and Exit" button. This will enter the amount of royalties on the spreadsheet. After that's done, it will add a second line to the spreadsheet showing that it was paid.

If you need to show that several reports are paid, you can use the "Paste+Paid and Continue" button. This will enter the amount of royalties on the spreadsheet. In addition, it will add a second line to the spreadsheet showing that it was paid. Then it will return you to the pop-up list, enabling you to select another report.

When using the "Paste+Paid" button, you can adjust which date appears on the spreadsheet by changing the date in the bottom left hand corner of the pop-up list.

Note: If some of the reports don't appear on the list or if the summary name shown on the list is misleading, you can change it. To do so, go to the Royalty Reports Screen (accessed by selecting MAIN TASKS from the Menu Bar). Once the Royalty Reports Screen appears, page forward or backward to the report that needs the name change. Select TOOLS and CHANGE OR EDIT SUMMARY NAME to make the change. [More Information.](#)

6.12 Statement: Delete or Insert Spreadsheet Row

If you need to delete a row from the Account Spreadsheet, position your cursor on the proper row and click the "Delete Row" button on the Statement screen. Selecting EDIT and DELETE SPREADSHEET ROW from the Menu Bar also accomplishes the same thing.

Date	Description	Payments (or charges) to royalty holder	Amounts due to the royalty holder	Negative amount = due to royalty holder
10/09/09	Advance	2000.00		2000.00
12/31/09	Royalty-Never Turn Back-Pap		20.93	1979.07
08/09/10	Film Rights Sale		5000.00	-3020.93
12/31/10	Royalty-Never Turn Back-Pap		3456.67	-6477.60
01/05/11	Payment	6477.60		0.00
/ /				0.00

Quick Print

Paste Data

ROYALTY REPORTS

Add Place

TRANSACTION LIST

Add Place

Insert Row Delete Row

If you need to insert a blank row in the middle of the spreadsheet, position your cursor on the line

below where you want the blank row, and click on the "Insert" button on the Statement Screen. Selecting EDIT and INSERT SPREADSHEET ROW from the Menu Bar also accomplishes the same thing.

6.13 Statements: Calculate Balance

Normally, a royalty holder's balance is re-calculated when you move the cursor off the Account Spreadsheet found in the middle of the Royalty Statements Screen. When the cursor is not moved or when you've returned from a Pop-up list, the balance may need to be updated. To do so, click on the "Calculate" button on the bottom of the screen or select TOOLS and CALCULATE BALANCE.

6.14 Transaction List Maintenance

The [Transaction List](#) is used to enter payments, advances, subsidiary sales, etc. on the Statement Spreadsheet. You can add or alter information on the Transaction List by selecting TOOLS and TRANSACTION LIST MAINTENANCE from the Menu Bar.

Transactions List Maintenance

The transaction list is composed of common transactions that you make with royalty holders. One obvious transaction is paying the royalty holder their regular royalty payment. Another common transaction is providing an advance on royalties. On the list below, you can add or make changes to the information on this list. The Amount column normally remains blank, but if you have a common amount (i.e. you always provide \$2,500.00 advances), then you can place a figure there. Otherwise leave it blank.

Reference (Description of Transaction):

Amount (Usually left blank):

Additionally, you need to indicate whether this is Debit Transaction (which includes amounts paid to--or that you charge against--the royalty holder); or whether it is a Credit Transaction (which are amounts that you owe to the royalty holder, i.e. royalties)

Debit Transaction. Payments made (or charges) to the royalty holder

Credit Transaction. Amounts owed to the royalty holder.

To move to different transactions, click on ----->

To add a new transaction to the list, go to the last record of the list. That's done by clicking the last record navigation button **>|**. Then click on the right navigation button **>**. AnyOrder will ask if you want to add a new record, click on YES and a new blank record will be added.

In the top blank of the Transaction List Maintenance dialog box, enter a reference name for the transaction. Some examples are "Advance," "Payment," "Film Rights," "Subsidiary Sales," etc. If you have an amount that you commonly use for a transaction, enter it in the Amount blank. For instance, if

you commonly provide a \$5,000 advance, enter it in the blank. If it's highly variable (like Payments), leave it the Amount blank empty.

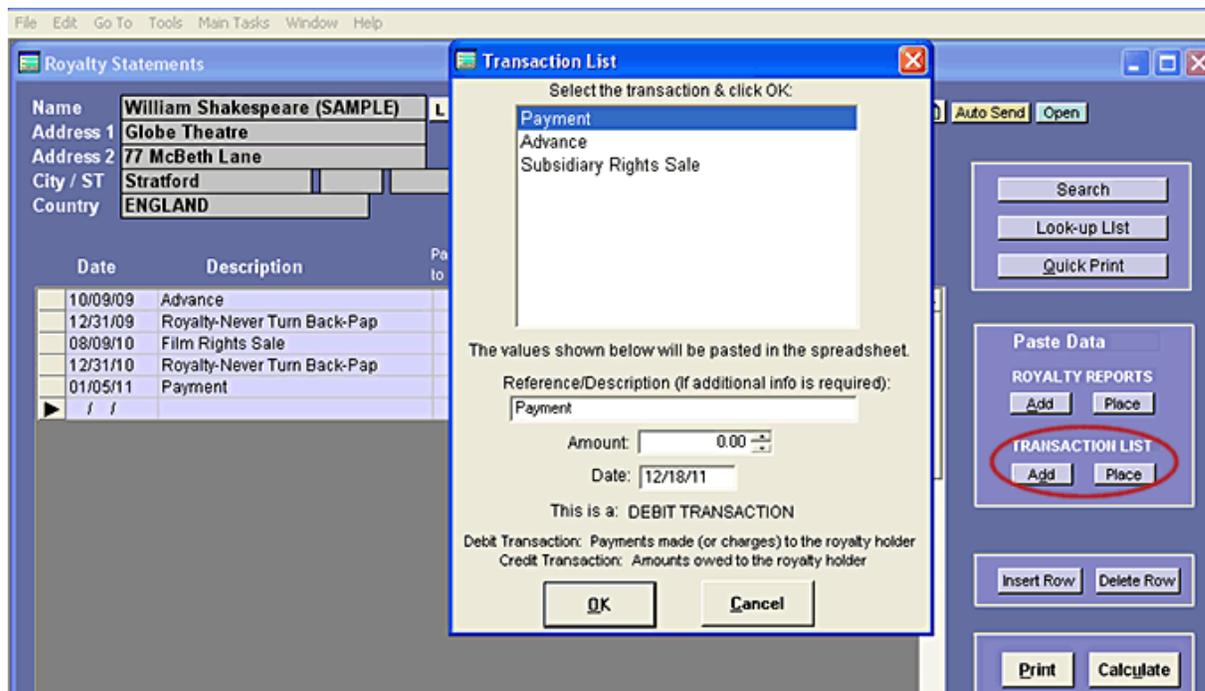
Next, indicate whether the transaction is a debit or credit transaction. Debit transactions are payments or charges made against the royalty holder. Credit transactions are amounts due to the royalty holder.

If you'd like to delete a transaction record, use "Delete This Item."

When you've finished altering or adding records, click on OK. AnyOrder will automatically save your work.

6.15 Transaction Pop-up List

You can access the Transaction Pop-up List by clicking on either the ADD or PLACE button on the Statement Screen (just beyond "Paste from Transaction List "). You can also access it by selecting EDIT and ADD LINE & TRANSACTION LIST PASTE or PASTE FROM TRANSACTION LIST from the Menu Bar.



The ADD button and the menu choice ADD LINE & TRANSACTION LIST PASTE do the same thing. A new row is added to the spreadsheet and the Transaction Pop-up List is activated. When a selection is made from the list, the information will be pasted to the new row.

The PLACE button and the menu choice PASTE FROM TRANSACTION LIST do the same thing. The Transaction Pop-up List is activated. When a selection is made from the list, the information will be pasted *at the location of the cursor* on the spreadsheet.

AnyOrder comes with a few sample transactions entered in the Transaction Pop-up List. You'll probably want to make a few additions or changes to the list. To do so, select TOOLS and TRANSACTION LIST MAINTENANCE.

When the Transaction Pop-up List appears, you have several choices: 1) You can select a Transaction from the list and have it pasted directly to the spreadsheet with no changes. 2) You can select from the list, and make alterations to the selection, changing the name, date or amount. After you've made the changes, you can then paste it to the spreadsheet. 3) You can type in entirely new information in pop-up dialog box and have the new information pasted on the spreadsheet.

Note that the one item that you can't enter in the Transaction Pop-up List is a designation for credit or debit transactions. That comes only from [Transaction List Maintenance](#) (TOOLS and TRANSACTION LIST MAINTENANCE). If you commonly type in entirely new information in the Transaction pop-up list, you may find it helpful to have debit and credit choices. If desired, you can add two generic records to the transaction list: one for debit and one for credit. Use Transaction List Maintenance to set up the generic records.

Lastly, the Transaction Pop-up List has one feature to help make payment entries easier. If "Payment" is one of the choices on the Transaction List—and we highly recommend that you keep "Payment" on the list—AnyOrder will automatically pick up the last amount on the spreadsheet. If it's a negative amount (an amount owed to the Royalty Holder), the amount box will show the balance due. This feature saves typing time. Click on OK, and the same amount will be entered on the spreadsheet, balancing the royalty holder's account.

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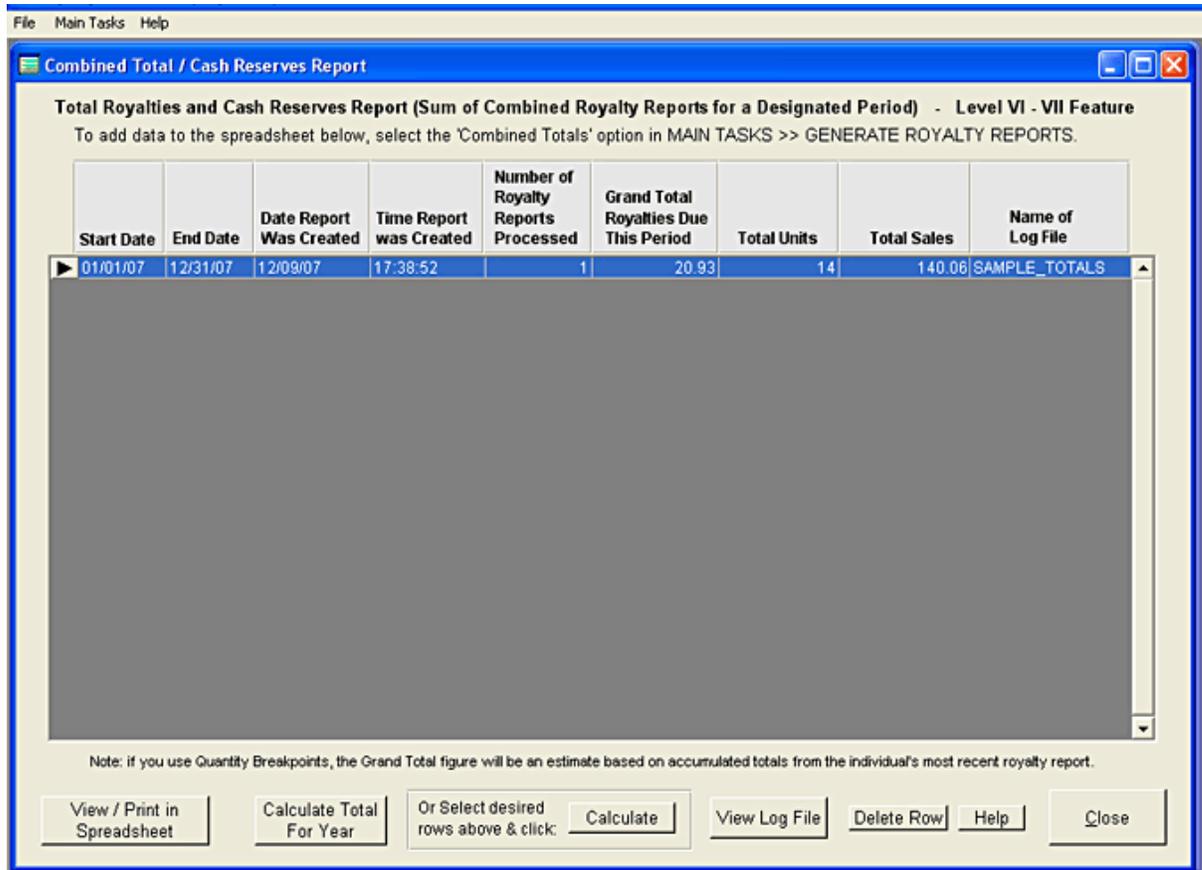
Part



7 Cash Reserves Report

Level 6 - 7 Feature

The Cash Reserves Report is accessed from the Royalty Main Menu by clicking on the "Cash Reserves Report" button. It is also reached by selecting the Main Tasks menu in most parts of Royalty Functions.



This section consists of two parts:

Information on how the data is assemble for a cash reserves report: [Generating Data](#)

Explanation of each of the parts of the cash reserves report screen: [Report Screen](#)

7.1 Generating Data for the Cash Reserves Report

This is Level 6-7 Feature

Generating Data for the Cash Reserves Report

In order to generate data for the Cash Reserves Report, you'll need to start at the [Royalty Generator](#). AnyOrder assumes that all of your royalty holders have been set-up properly and that you've created a report or two to make sure that there are no errors.

When you are ready, indicate the dates that you want the report to cover. Then place a checkmark beside: "Cash Reserves Feature." If you'd like to have a log file (which is a copy of the underlying the data going into a cash reserves report), place a checkmark beside: "Create a Log File." It's easier to let AnyOrder name the file, but you can also indicate own name if desired.

For cash reserves reports, AnyOrder assumes you want to include all active royalty holders. If, however, you wish to limit the report to certain royalty holders, you may select from the list.

When ready, click on "Generate" report.

When AnyOrder creates a cash reserves report it calculates the royalties for each of your royalty holders. It then totals up each individual royalty to derive the figures for the report. (Unlike the normal royalty generation process, it does not create separate reports for royalty holder. It creates only one report with a summary.)

If you have a number of reports, it may take AnyOrder some time to do all the necessary processing. In a network situation, it's recommended that you wait to do this report when no one else is on the network or use Local mode (which separates you from the network).

The amount of computing power that comes to bear while AnyOrder accumulates the data is substantial. It is extraordinary process, involving hundreds of file manipulations and full use of your computer's memory. If you have a large number of royalty holders, once the process is completed, it is a good idea to exit from AnyOrder and then re-start it. This helps re-set the program's memory and file buffers.

7.2 Explanation of the Cash Reserves Report Screen

This is Level 6- 7 Feature

To generate the data needed for the Cash Reserves Report, begin: [here](#)

Cash Reserves Report Screen

When the data generation process is complete, you will be moved to the Cash Reserves Report screen. The report will be summarized in spreadsheet form. The spreadsheet includes the date, time, and the number of reports processed as shown below:

Start Date	End Date	Date Report Was Created	Time Report was Created	Number of Royalty Reports Processed	Grand Total Royalties Due This Period	Total Units	Total Sales	Name of Log File
01/01/07	12/31/07	12/09/07	17:38:52	1	20.93	14	140.06	SAMPLE_TOTALS

Note: if you use Quantity Breakpoints, the Grand Total figure will be an estimate based on accumulated totals from the individual's most recent royalty report.

Here's an explanation of each of the features found on the above screen:

Total Units Sold. This is total number of units sold. For example, in the case of books, it's the total number of books sold for all royalty reports covered.

Total Sales. This is the sum total of the sales for all of the units sold.

Grand Total Figure. The Grand Total figure is the most important figure on the report. This is the total amount of royalties your business owes to its royalty holders for the selected time period. If you are running a monthly cash reserves report, this figure tells you how much you need to keep in reserve to pay the royalties.

Log File. The final column in the report is the name of the log file associated with the report. It's a handy addition to the main report. You can view the log file by clicking on the "View Log File" button. This will start your spreadsheet program and display the log file. The spreadsheet summarizes each of the reports making up the totals in the Cash Reserves Report.

Important Note for Network Users: Log files are created on the local computer and are saved in the C:\AnyOrder\LogFiles directory. In other words, log files are only accessible to the computer on which you are working. If you use log files, it's best to work from only one computer on the network.

If you need to work from other computers on the network and must access one or more log files, you will need to copy the files that you need to the computer on which you are working.

Calculation Features. "Calculate Total for the Year" is useful feature for those that utilize the calendar year for their fiscal year. Select one of the rows in the spreadsheet. AnyOrder looks at the year of the start date of the currently select row. It will then add up all reports that have the same start year. To effectively use this feature, you need to make sure that you don't have any duplicates and the reports with the same start year cover a twelve month period.

The "Calculate" button is more flexible when it comes to totaling several rows on the spreadsheet. In this case, you select what reports you want included in the report. To select reports, hold down the CTRL key and click on the reports you want. Each report to be included in the calculations will be highlighted.

When you have the reports highlighted, click on "Calculate." AnyOrder will provide the totals.

View/Print in Spreadsheet. The "View/Print in Spreadsheet" moves the data from Cash Reserves Report to your spreadsheet program. That allows you to arrange and format the data for a printed report.

Delete Button. Use the "Delete" button this to remove old or duplicate reports. Select the row to be deleted and click on "Delete."

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Part



8 Networking & Help System

This short chapter covers royalty networking and the help system:

- [Networking](#)
- [Help System](#)

8.1 Networking

Royalty Functions can be accessed from all computers on the network, but *only one person at a time* can work in the royalties area. The reason for this is that the data files used in Royalty area of the program require exclusive use. As soon as one person is finished and exits from Royalty Functions, then another person can access the files from a different computer.

With one exception, you can work in Royalty Functions while others on the network are issuing invoices and working in the main part of AnyOrder. The exception is Generating Royalty Reports. Generating reports requires considerable computing power, and it requires the manipulation of invoice files. Wait to generate royalty reports during times when others are not using AnyOrder.

8.2 Help System

A complete on-line help system has been built into the Royalty Functions program. It is accessed by selecting HELP from the Menu Bar. Note that the Royalty program has its own independent help system. If you need help on other aspects of AnyOrder, use the Help Menu found on the Main Invoice Screen.

If you want to check the version number of the Royalty program, you'll find it the "About" dialog box. About is accessed by selecting HELP and ABOUT from the Menu Bar. In addition to the version number, the About box lists copyright information, the individual or business name to which the program is registered, the number of times that the main AnyOrder program has been used, contact numbers (phone & email), and some basic system information including available memory, the amount of disk space left on the program disk drive, and available Windows resources.

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