DSI901 Work with Customer

Overview

In a customer-centric organization the customer is the starting point for everything. This means that anyone who is interacting with a customer should be able to retrieve all information about that customer from a single source, without having to change systems and/or databases. This also applies to prospects, potential customers, suppliers, agents, authors, end-users or anyone with whom the company relates to.

During a prospect or customer interaction the prospect or customer may wish to do many things. For an instance, a customer may wish to place an order, inquire about the status of an existing order, request information on a product, inquire about his or her account, make a payment, request a quote or pro-forma invoice, report a problem, inquire about the progress of a previously reported problem and much more.

The CRM System allows customer service representatives or other authorized personnel to perform any of the functions mentioned above. There is no duplication of data or business processes and no need to re-key information which allows for an efficient, accurate and rapid response to customer requirements.

Purpose

This panel allows you to:

Add a customer

Inquire on a customer

Inquire on a Customer’s Delivery Address

Maintain a Customer’s Details

Inquire on a Customer’s transactions by Customer/ISBN

Inquire on a Customer’s Outstanding Transactions

Inquire on a Customer’s Transactions

Enter claims for a Customer

Inquire on a Customer’s Debtors Transactions

Inquire on a Customer’s Debtor Balance

Inquire on a Customer’s Debtor DSO

Inquire on a Customer’s Payments

Inquire on a Customer’s Extended Information

Inquire on a Customer’s Contacts

Place a Customer Order

Place a P&A Customer Order

View Customer Complaints

View Seminars a Customer is attending

Examples

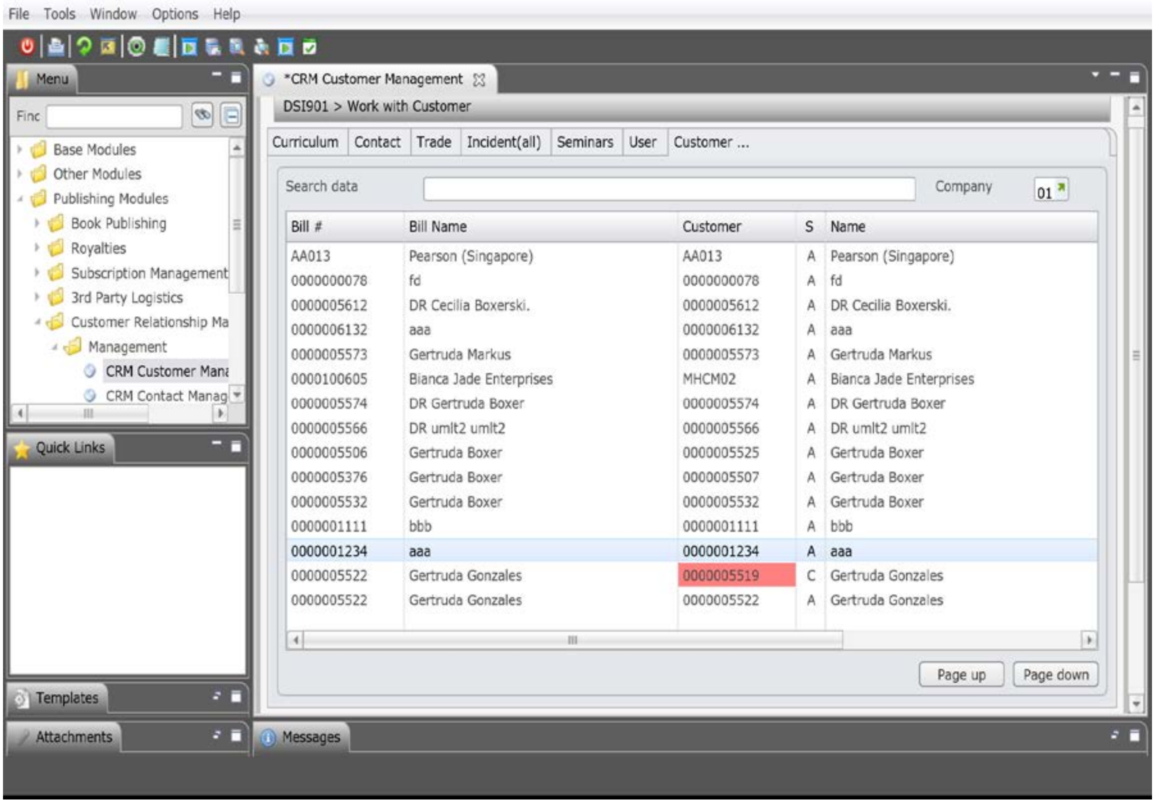
This section illustrates examples concerning:

Example 1: Add a new customer

This example describes how to add a new customer.

1. Select option **CRM Customer Management** from Publishing Modules>Customer Relationship Management>Management.

DSI901 Work with Customer main panel is displayed.



Functions

Add	Add a new customer.
Detail	This function displays the customer name and customer’s all addresses. This function expands list of contacts to display these details.
Filter	Allows selection of customer by company, billing number, customer status, exchange code, warehouse, customer branch, customer’s region and debtor class.

Tabs

Contact type	Access Work with Contact in maintenance mode to modify existing or add new contacts for customers.
Match key	Access Work with Contact Match Key in maintenance mode to check for the duplicate match keys.
User	Access Work with User in maintenance mode displaying list of users to modify existing or add new users.

Options

P&A O/E	Access Price and Availability Inquiry to check for the availability of the item for a selected customer. It provides facility to place an order of the selected item for the selected customer.
Claim Entry	Access Claims Entry and Maintenance to add new claim entry against selected customer.
Complaint	Access Work with Complaints in maintenance mode to modify existing or add new complaints against selected customer.

Debtor DSO	Access Customer Balance History and Debtors days' Sales Outstanding inquiry to display outstanding history for the selected customer.
Payment	Access Payment Inquiry to display all the current transactions by the customer.
Cust Ext	Access Customer Extended information in maintenance mode to work with it.
Contact	Access Customer Contact in maintenance mode to lists all the contacts for the selected customer.
Order Entry	Access Order Entry so as to place normal sales order via picking slip for the selected customer.
Cust trans	Access Document Inquiry by Customer to display list of all the transactions for the selected customer.
Cust/item trans	Access Transaction Inquiry by Customer or Item to display list of all transaction inquiry for the selected customer.
O/S trans	Access Outstanding Order Inquiry by customer to display list of all outstanding orders for the selected customer.
Debtor trans	Access Debtor Transaction Inquiry to display list of all transaction for the selected customer.
Debtor balance	Access Customer Balance Inquiry to display customer balance for claims, draft, L/C etc for the selected customer.
Seminars	Access Work with Seminars in maintenance mode to list all the seminars for the selected customer.
Cust details	Access Customer Masterfile Inquiry to display selected customers masterfile details.
Delivery number	Access Delivery Number Selection to display all the delivery addresses for the selected customer.
Cust Maint	Access Customer Masterfile Maintenance in maintenance mode to maintain a Customer's Details.

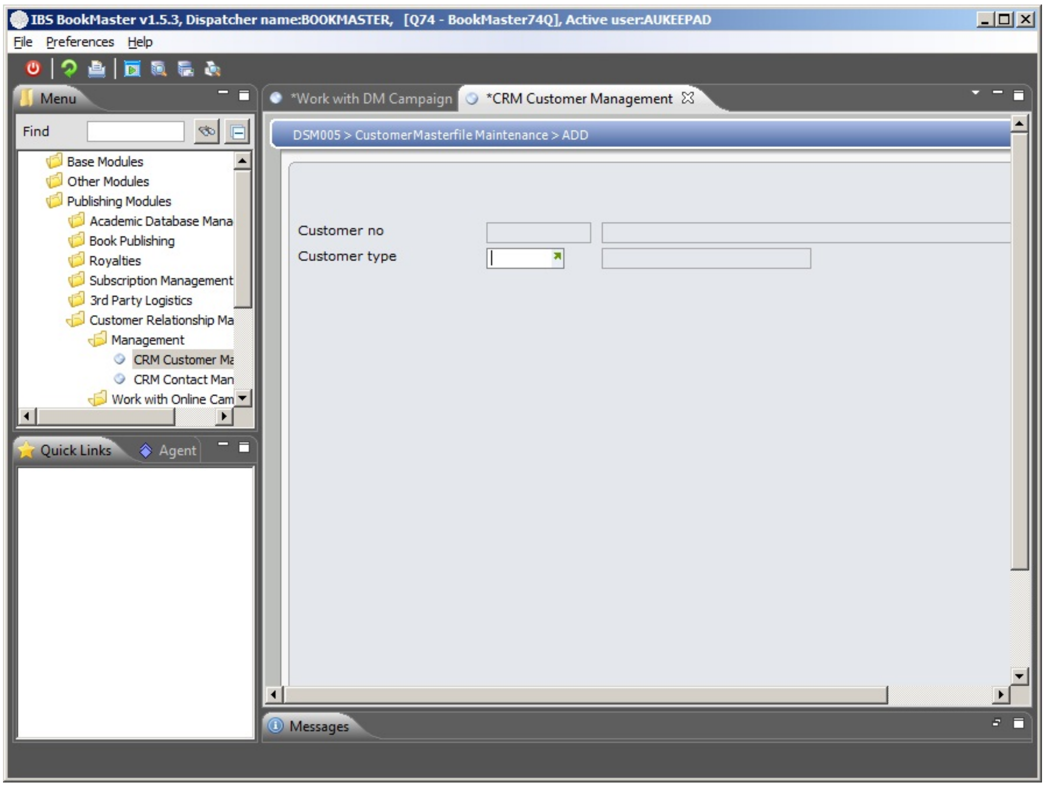
Relevant Fields

Bill #	This is the customer's billing account. All invoices will be billed to this account code.
Bill Name	The name of the billing account.
Customer	This alphanumeric account number uniquely identifies a customer to the Distribution System.
S	Picked up from TMSCRM/ISS-STS which gives the status details such as Closed, Held, In progress, Opened, Rejected and Un Assigned for particular incident.
Name	The name of the customer.
Town	The town from where the customer belongs to.
Postcode	The Post code/Zipcode of the address is mandatory once the country has been entered. If the suburb has been entered and a search is performed for the post code/zip code all post codes valid for the suburb display within the Address Prompt.

	The user can then select the correct post code/zipcode.
C	This is the currency that the customer uses.

2. Click **Add** function.

DSM005 Customer Masterfile Maintenance Add panel is displayed for adding a new customer.



Example 2: Inquire on customer details

This example describes how to inquire on customer details.

1. Repeat step **1** in [Example 1: Add a new customer](#).

2. Select a customer and click **Cust details** option.

DSI072 Customer Masterfile Inquiry panel is displayed to display selected customers masterfile details.

Example 3: Inquire on a customer’s address

This example describes how to do Inquiry on a customer’s delivery address

1. Repeat step **1** in [Example 1: Add a new customer](#).

2. Select a customer and click **Delivery number** option.

DSI036 Delivery Number Selection panel is displayed to display all the delivery addresses for the selected customer.

Example 4: Maintain a customer's details

This example describes how to maintain a customer's details

1. Repeat step **1** in Example 1: Add a new customer.
2. Select a customer and click **Cust Maint** option.

DSM005 Customer Masterfile Maintenance panel is displayed in maintenance mode to maintain a Customer's Details.

Example 5: Inquire on a customer's transactions by customer/ISBN

This example describes how to inquire on transactions by Customer/Item.

1. Repeat step **1** in Example 1: Add a new customer.
2. Select a customer and click **Cust/item trans** option.

DSI048 Transaction Inquiry by Customer/Item is displayed to display list of all transaction inquiry for the selected customer.

Example 6: Inquire on a customer's outstanding transaction

This example describes how to inquire on a customer's outstanding orders

1. Repeat step **1** in Example 1: Add a new customer.
2. Select a customer and click **O/S trans** option.

DSI081 Outstanding Order Inquiry by Customer panel is displayed to display list of all outstanding orders for the selected customer.

Example 7: Inquire on a customer's transaction

This example describes how to do Inquiry on a customer's transactions.

1. Repeat step **1** in Example 1: Add a new customer.
2. Select a customer and click **Cust trans** option.

DSI131 Document Inquiry by Customer panel is displayed to display list of all the transactions for the selected customer.

Example 8: Enter claims for a customer

This example describes how to enter claims for a customer.

1. Repeat step **1** in Example 1: Add a new customer.
2. Select a customer and click **Claim entry** option.

CLE005 Claims Entry/Maintenance panel is displayed to add new claim entry against selected customer.

Example 9: Inquire on debtor transactions for a customer

This example describes how to do Inquiry on debtor transactions for a customer.

1. Repeat step **1** in Example 1: Add a new customer.
2. Select a customer and click **Debtor trans** option.

ARI017 Debtor Transaction Inquiry panel is displayed to display list of all transaction for the selected customer.

Example 10: Inquire on customer balance

This example describes how to do Inquiry on balance for a customer.

1. Repeat step **1** in Example 1: Add a new customer.
2. Select a customer and click **Debtor balance** option.

ARI021 Customer balance Inquiry panel is displayed to display customer balance for claims, draft, L/C etc for the selected customer.

Example 11: Inquire on customer's debtor DSO

This example describes how to do Inquiry on debtor DSO for a customer.

1. Repeat step **1** in Example 1: Add a new customer.
2. Select a customer and click **Debtor DSO** option.

ARI026 Customer Balance History and DSO Inquiry panel is displayed to display outstanding history for the selected customer.

Example 12: Inquire on customer's payments

This example describes how to do Inquiry on customer's payments.

1. Repeat step **1** in Example 1: Add a new customer.
2. Select a customer and click **Payment** option.

ARI036 Payment Inquiry panel is displayed to view all the current transactions by the customer.

Example 13: Inquire on customer's extended information

This example describes how to do Inquiry on customer's payments.

1. Repeat step **1** in Example 1: Add a new customer.
2. Select a customer and click **Cust Ext** option.

XAM155 panel is displayed to access Customer Extended information in maintenance mode to work with it.

Example 14: Inquire on a customer's contacts

This example describes how to do Inquiry on customer's contacts.

1. Repeat step **1** in Example 1: Add a new customer.
2. Select a customer and click **Contact** option.

DSW224 Customer Contact panel in maintenance mode is displayed to lists all the contacts for the selected customer.

Example 15: Place a customer's order

This example describes how to place an order for a customer

1. Repeat step **1** in Example 1: Add a new customer.
2. Select a customer and click **Order Entry** option.

DSE005A Order Entry – Picking Slips panel is displayed to place normal sales order via picking slip for the selected customer.

Example 16: Place a P&A order for a customer

This example describes how to place a P&A order for a customer

1. Repeat step **1** in Example 1: Add a new customer.
2. Select a customer and click **P&A O/E** option.

DSI907 Item alpha search panel is displayed to check for the availability of the item for a selected customer. It provides facility to place an order of the selected item for the selected customer.

Example 17: View a customer's complaints

This example describes how to view a customer's complaints

1. Repeat step **1** in Example 1: Add a new customer.
2. Select a customer and click **Complaint** option.

CRW005 Work with Complaints panel in maintenance mode is displayed to modify existing or add new complaints against selected customer

Example 18: View seminars a customer is attending

This example describes how to view seminars a customer is attending

1. Repeat step **1** in Example 1: Add a new customer.
2. Select a customer and click **Seminars** option.

CRW120 Work with Seminars panel in maintenance mode is displayed to list all the seminars for the selected customer.