DSM006 Template Maintenance

Overview

Customer Template Maintenance or Customer Masterfile Default Maintenance, as it is also known, provides the facility to add customers to the Customer Masterfile in abbreviated form. This facilitates customer addition by users who, based on the department they work for, have maintenance to the masterfile restricted to certain fields only.

Explanation

Restricted access is defined for users within a department, on **TMSDS/LA-CMMU**. During customer addition, the system checks the limited access Control File, and if the user is classified as being a limited access user, the Customer Number and Customer Type fields display. A Customer Type is a unique three character code that identifies and retrieves a Customer Masterfile Template. **TMSDS/LA-CMMUT** can be setup to make entry of a type mandatory.

A Template can also be used to establish default values for various fields which would cut down on operator errors and speed up processing. It can then be determined whether or not these defaults can be overridden thereby restricting entry to specific data only.

Multiple Customer Masterfile templates can be defined and each template is identified by a user defined Customer Type code that can be inquired on and selected during customer addition.

Examples

This section illustrates examples concerning:

[Example 1: Create a Customer Master file Template]

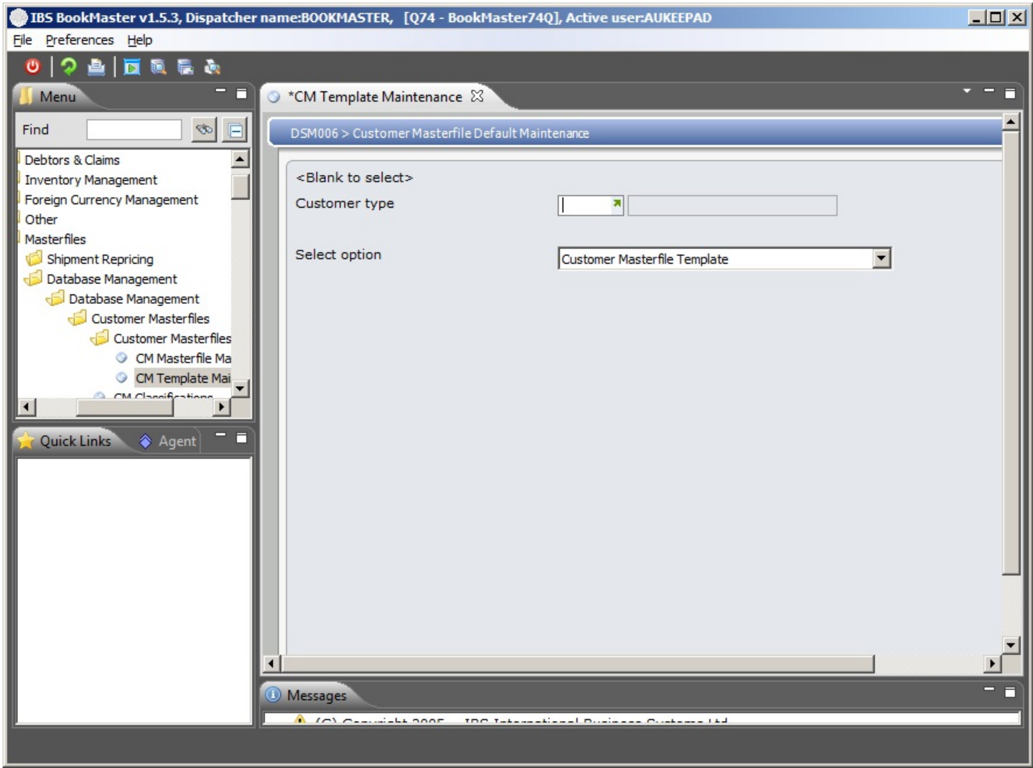
[Example 2: Create a Customer Classification Template]

[Example 3: Maintaining a Template]

Example 1: Create a Customer Master file Template

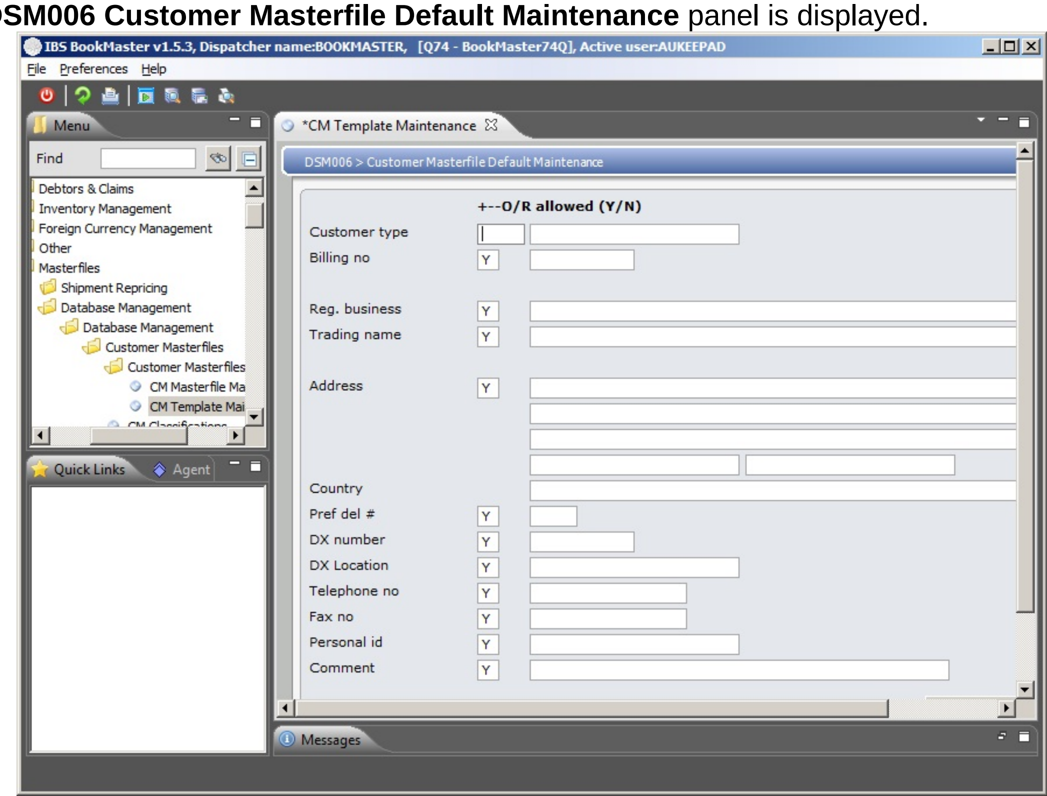
1. Select option **CM Template Maintenance** from Base Modules>Distribution>Masterfiles>Database Management>Database Management>Customer Masterfiles>Customer Masterfiles menu.

DSM006-Customer Masterfile Default Maintenance main panel is displayed.



2. Click **Add**.

DSM006 Customer Masterfile Default Maintenance panel is displayed.



Y = Yes this field can be overridden and **N** = No this field cannot be overridden.

Relevant Fields

Customer Type	It is the new type of customer being created.
Billing no	When adding a Contact's template definition, flag the default Contact for the Billing Number. Valid choices are: Yes, default the Billing number No, do not default the Billing number
Reg. Business	Registered business is the name of the entity registered as the official name. The name can be different from the trading name. When adding a Contact's template definition, flag the default Contact for the registered business. Valid choices are: Yes, default the registered business No, do not default the registered business
Trading Name	When adding a Contact's template definition, flag the default Contact for the trading name. Valid choices are: Yes, default the trading name No, do not default the trading name
Address	When adding a Contact's template definition, flag the default Contact for the address. Valid choices are: Yes, default the address No, do not default the address
Country	When entering a Contract's template definition, enter the default country for the Contact.
Pref del	When adding a Contact's template definition, flag the default Contact for the preferred delivery number. Valid choices are: Yes, default the preferred delivery number No, do not default the preferred delivery number
DX number	When adding a Contact's template definition, flag the default Contact for the DX number. Valid choices are: Yes, default the DX number No, do not default the DX number
DX location	When adding a Contact's template definition, flag the default Contact for the DX location. Valid choices are: Yes, default the DX location No, do not default the DX location
Telephone no	When adding a Contact's template definition, flag the default Contact for the telephone number. Valid choices are:

Yes, default the telephone number

No, do not default the telephone number

Fax no When adding a Contact's template definition, flag the default Contact for the fax number. Valid choices are:

Yes, default the fax number

No, do not default the fax number

Personal ID When adding a Contact's template definition, flag the default Contact for the Personal ID. Valid choices are:

Yes, default the Personal ID

No, do not default the Personal ID

Comment When adding a Contact's template definition, flag the default Contact for the Comment. Valid choices are:

Yes, default the Comment.

No, do not default the Comment.

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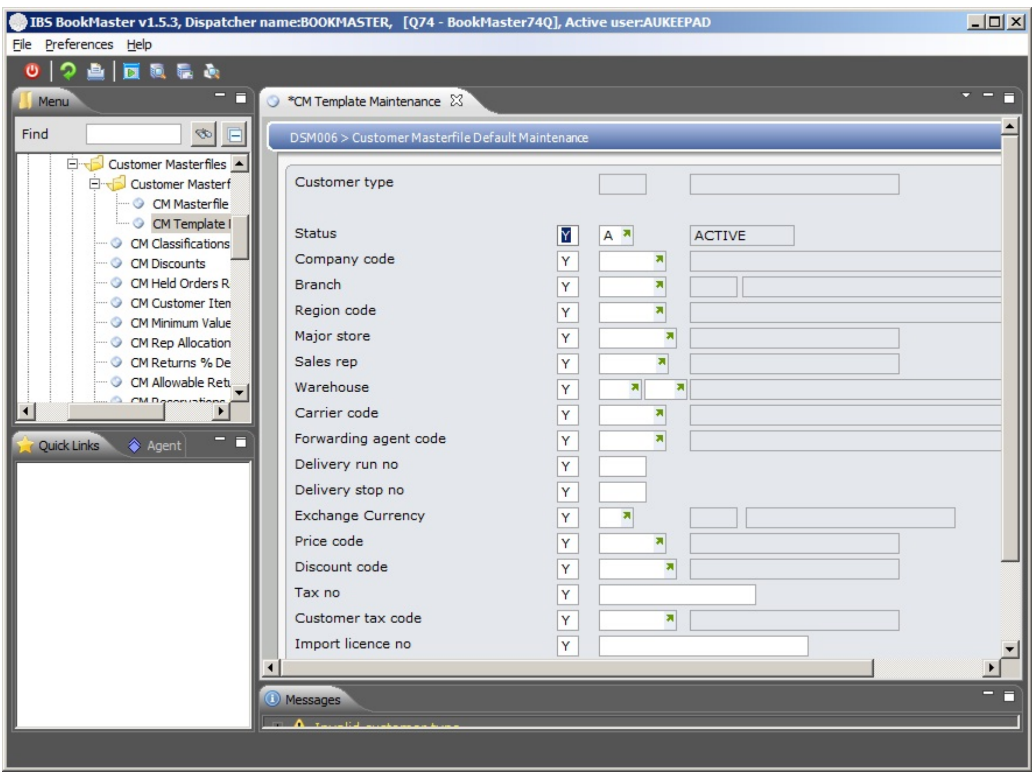

Relevant Fields

Status When adding a Contact's template definition, flag the default Contact for the status. Valid choices are:

Yes, default the status

No, do not default the status

When adding a Contact’s template definition, flag the default Contact for the delivery address status. Valid choices are:

Yes, default the delivery address status

No, do not default the delivery address status

Company code

When adding a Contact’s template definition, flag the default Contact for the Company code. Valid choices are:

Yes, default the Company Code.

No, do not default the Company Code.

Branch

When adding a Contact’s template definition, flag the default Contact for the Branch code. Valid choices are:

Yes, default the Branch Code.

No, do not default the Branch Code.

Region code

When adding a Contact’s template definition, flag the default Contact for the Region code. Valid choices are:

Yes, default the Region Code.

No, do not default the Region Code.

Major store

When adding a Contact’s template definition, flag the default Contact for the major store. Valid choices are:

Yes, default the major store.

No, do not default the major store.

Sales rep

When setting up templates flag how you want the sales rep to be overridden when the template is being used. Valid override types are:

Allow override

Do not allow override

Allow override and default from memory

Do not allow override and default from memory.

Warehouse

When adding a Contact’s template definition, flag the default Contact for the Warehouse. Valid choices are:

Yes, default the Warehouse.

No, do not default the Warehouse.

Carrier code

When adding a Contact’s template definition, flag the default Contact for the Carrier code. Valid choices are:

Yes, default the Carrier code.

No, do not default the Carrier code.

Forwarding agent code

When adding a Contact’s template definition, flag the default Contact for the Forwarding Agent Code Flag. Valid choices

	are:
	Yes, default the Forwarding Agent Code Flag.
	No, do not default the Forwarding Agent Code Flag.
Delivery run no	When adding a Contact's template definition, flag the default Contact for the Delivery Run Number. Valid choices are:
	Yes, default the Delivery Run number
	No, do not default the Delivery Run number
Delivery stop no	When adding a Contact's template definition, flag the default Contact for the Delivery Stop Number. Valid choices are:
	Yes, default the Delivery Stop number
	No, do not default the Delivery Stop number
Exchange currency	It represents the currency in which the customer transactions must take place.
Price code	When adding a Contact's template definition, flag the default Contact for the Price code. Valid choices are:
	Yes, default the Price Code.
	No, do not default the Price Code.
Discount code	When adding a Contact's template definition, flag the default Contact for the Discount code. Valid choices are:
	Yes, default the Discount Code.
	No, do not default the Discount Code.
Tax no	When adding a Contact's template definition, flag the default Contact for the Tax Number. Valid choices are:
	Yes, default the Tax number.
	No, do not default the Tax number.
Customer tax code	When adding a Contact's template definition, flag the default Contact for the Customer Tax Code. Valid choices are:
	Yes, default the Customer Tax Code.
	No, do not default the Customer Tax Code.
Import license no	When adding a Contact's template definition, flag the default Contact for the Import License Number. Valid choices are:
	Yes, default the Import License number
	No, do not default the Import License number
Standard account no	This is trading number or San number which is unique and used to directly access customer records mainly for EDI orders.

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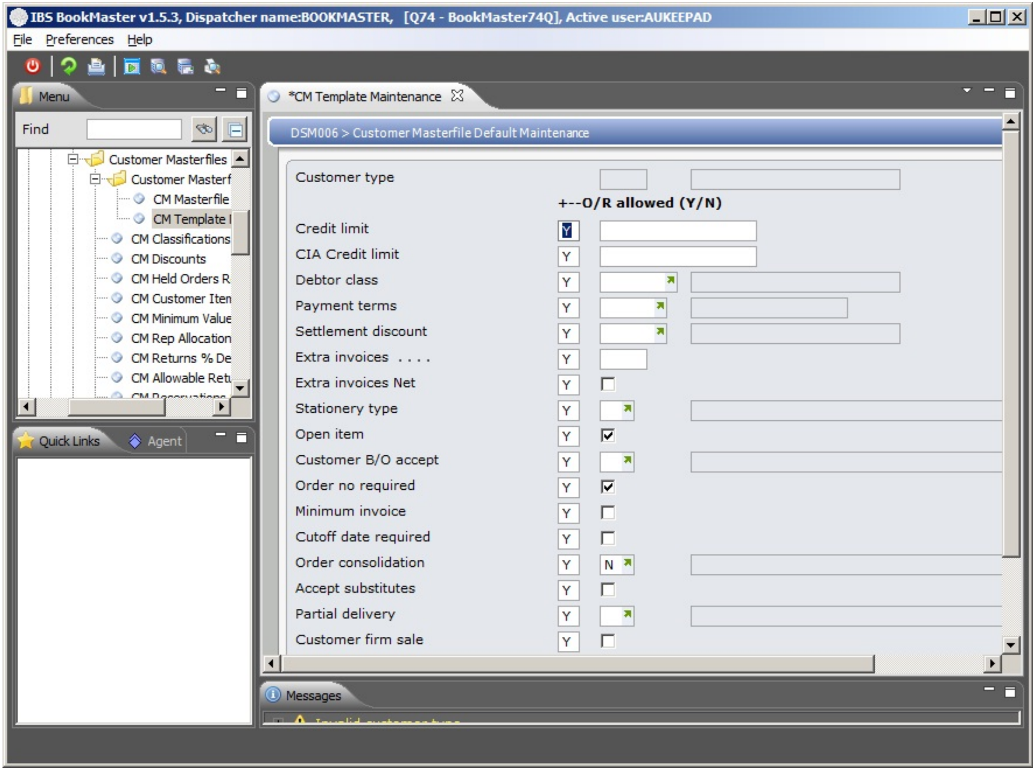

Relevant Fields

Credit limit
: The value of credit the company will extend to the customer.

CIA Credit limit
: The value the Credit Insurance Association will extend to the customer.

Debtor class
: When adding a Contact's template definition, flag the default Contact for the Debtor Class. Valid choices are:

Yes, default the Debtor Class.

No, do not default the Debtor Class.

Payment terms
: When adding a Contact's template definition, flag the default Contact for the Payment Terms. Valid choices are:

Yes, default the Payment Terms

No, do not default the Payment Terms

Settlement discount
: Enter any settlement discount applicable. The total amount deducted from the debtor's balance is the sum of the payment and discount amounts. The Discount is shown on the transaction details screen as a document type of DSC with a system generated reference number, and is allocated to the specified document number.

Extra invoices
: When adding a Contact's template definition, flag the default Contact for the Extra Invoices. Valid choices are:

	Yes, default the Extra Invoices. No, do not default the Extra Invoices.
Extra invoices Net	When adding a Contact's template definition, flag the default Contact for the Extra Invoice Net. Valid choices are: Yes, default the Extra Invoice net. No, do not default the Extra Invoice net.
Stationery type	When adding a Contact's template definition, flag the default Contact for the Stationary Type. Valid choices are: Yes, default the Stationary Type. No, do not default the Stationary Type.
Open item	When adding a Contact's template definition, flag the default Contact for the Open Item. Valid choices are: Yes, default the Open Item. No, do not default the Open Item.
Customer B/O accept	When adding a Contact's template definition, flag the default Contact for the Customer B/O Acceptance Flag. Valid choices are: Yes, default the Customer B/O Acceptance Flag. No, do not default the Customer B/O Acceptance Flag.
Order no required	When adding a Contact's template definition, flag the default Contact for the Order No. Required Flag. Valid choices are: Yes, default the Order No. Required Flag. No, do not default the Order No. Required Flag.
Minimum invoice	When adding a Contact's template definition, flag the default Contact for the Min. Invoice. Valid choices are: Yes, default the Min. Invoice. No, do not default the Min. Invoice.
Cutoff date required	When adding a Contact's template definition, flag the default Contact for the Cut Off Date Required Flag. Valid choices are: Yes, default the Cut Off Date Required Flag. No, do not default the Cut Off Date Required Flag.
Order consolidation	When adding a Contact's template definition, flag the default Contact for the Order Consolidation Flag. Valid choices are: Yes, default the Order Consolidation Flag. No, do not default the Order Consolidation Flag.

Accept substitutes

When adding a Contact's access definition, flag the security level Contact for the accept substitute flag. Valid choices are:

Not allowed

View

Change

Partial delivery

When adding a Contact's template definition, flag the default Contact for the Accept Part In Delivery Flag. Valid choices are:

Yes, default the Accept Part In Delivery Flag.

No, do not default the Accept Part In Del. Flag.

Customer firm sale

When adding a Contact's template definition, flag the default Contact for the Customer Firm Sale Flag. Valid choices are:

Yes, default the Customer Firm Sale Flag.

No, do not default the Customer Firm Sale Flag.

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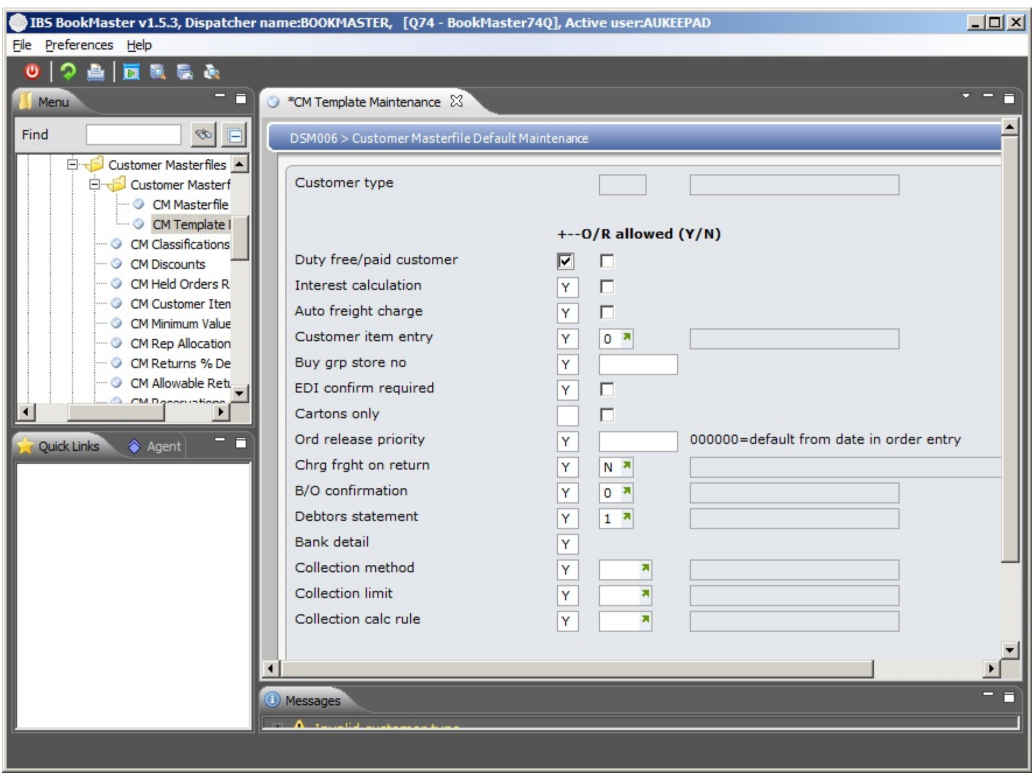


Relevant Fields

Duty free/Paid customer

When adding a Contact's template definition, flag the default Contact for the Duty Free Customer Flag. Valid choices are:

Yes, default the Duty Free Customer Flag.

	No, do not default the Duty Free Customer Flag.
Interest calculation	When adding a Contact's template definition, flag the default Contact for the Interest Calculation. Valid choices are: Yes, default the Interest Calculation. No, do not default the Interest Calculation.
Auto freight charge	When adding a Contact's template definition, flag the default Contact for the auto freight charge flag. Valid choices are: Yes, default the auto freight charge flag. No, do not default the auto freight charge flag.
Customer item entry	Select a valid Customer Item Code, which determines if and how a Customer will use their product codes during sales order entry.
Buy grp store no	When adding a Contact's template definition, flag the default Contact for the buying group store number. Valid choices are: Yes, default the buying group store number. No, do not default the buying group store number.
EDI confirm required	When adding a Contact's template definition, flag the default Contact for the EDI confirmation required flag. Valid choices are: Yes, default the EDI confirmation required flag. No, do not default the EDI confirmation req. flag.
Cartons only	When adding a Contact's template definition, flag the default Contact for the cartons only flag. Valid choices are: Yes, default the cartons only flag. No, do not default the cartons only flag.
Ord release priority	When adding a Contact's template definition, flag the default Contact for the order release priority. Valid choices are: Yes, default the order release priority. No, do not default the order release priority.
Chrg frght on return	When adding a Contact's template definition, flag the default Contact for the Charge Freight on Return flag. Valid choices are: Yes, default the Charge Freight on Return flag. No, do not default the Charge Freight on Return flag.
B/O confirmation	When adding a Contact's template definition, flag the default Contact for the backorder confirmation flag. Valid choices are: Yes, default the backorder confirmation flag. No, do not default the backorder confirmation flag.

Debtors statement	When adding a Contact's template definition, flag the default Contact for the Debtors statement. Valid choices are: Yes, default the Debtors statement. No, do not default the Debtors statement.
Order release priority	When adding a Contact's template definition, flag the default Contact for the order release priority. Valid choices are: Yes, default the order release priority. No, do not default the order release priority.
Collection method	When adding a Contact's template definition, flag the default Contact for the Collection method flag. Valid choices are: Yes, default the Collection method Flag. No, do not default the Collection method Flag.
Collection limit	When adding a Contact's template definition, flag the default Contact for the Collection limit flag. Valid choices are: Yes, default the Collection limit Flag. No, do not default the Collection limit Flag.
Collection calc rule	When adding a Contact's template definition, flag the default Contact for the Collection calc rule Flag. Valid choices are: Yes, default the Collection calc rule Flag. No, do not default the Collection calc rule Flag.

6. Key in the fields and click **OK** or press **<ENTER>** to confirm.

Customer Masterfile Template is added.

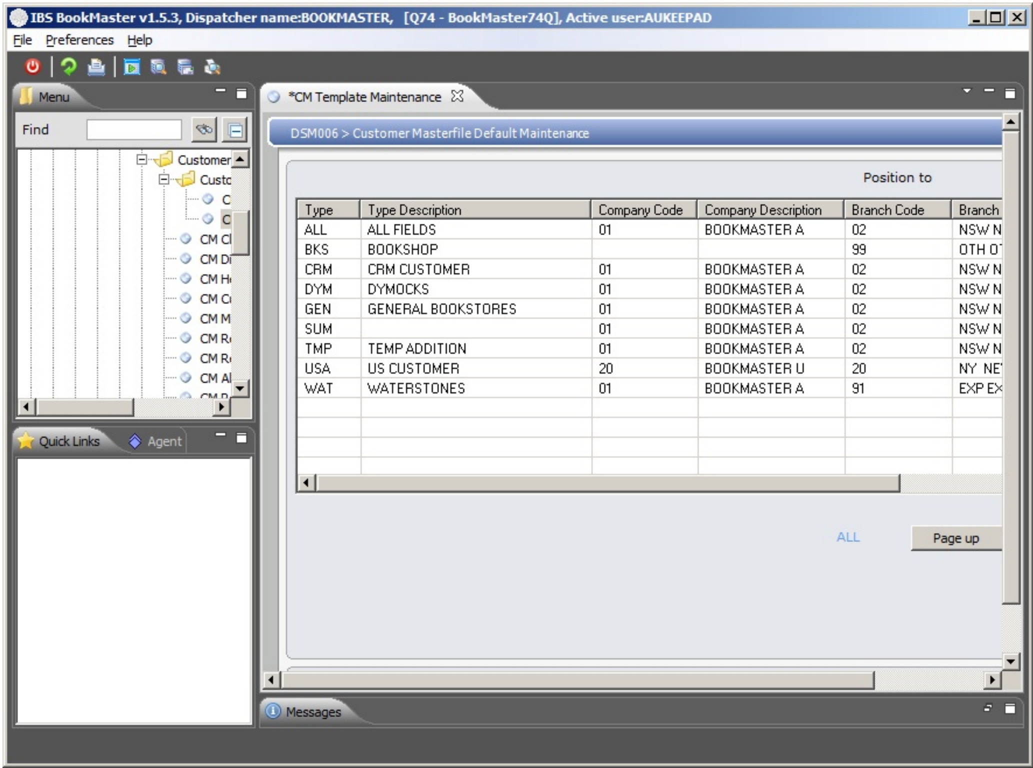
Example 2: Create a Customer Classification Template

1. Repeat step **1** of Example 1: Create a Customer Master file Template.

DSM006 Customer Masterfile Default Maintenance main panel is displayed.

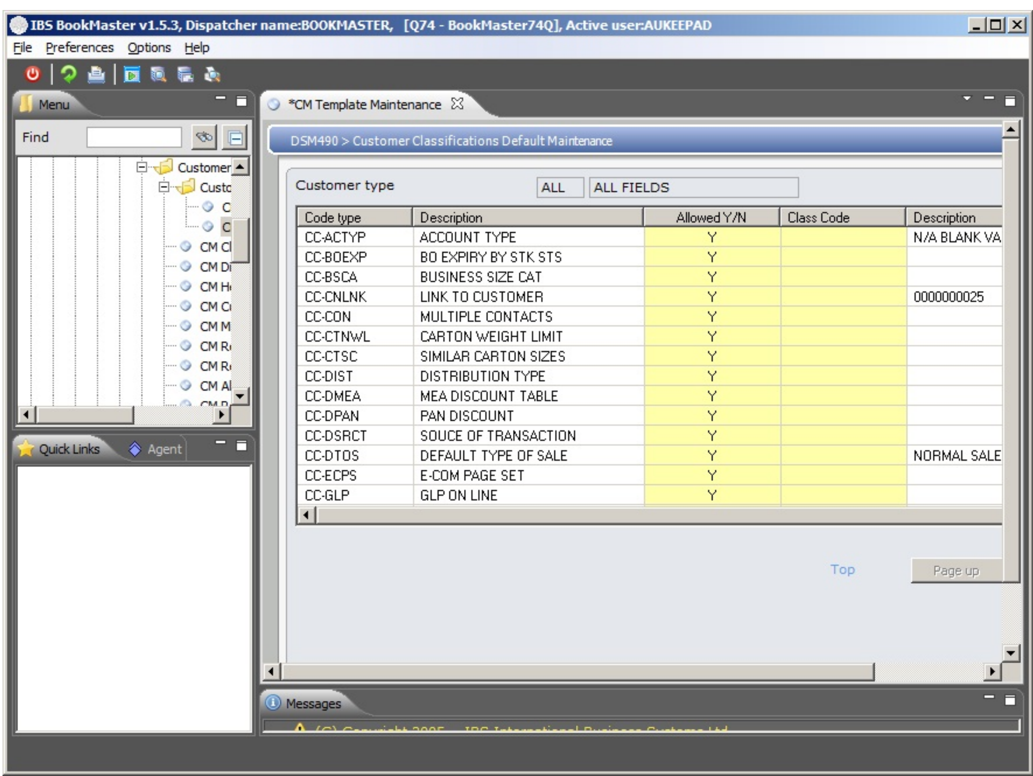
2. Select **Customer Classification Template** and click **OK** or press <ENTER> to confirm.

DSM006 Customer Masterfile Default Maintenance panel is displayed.



3. Select a customer and click option **Chg Class**.

DSM490 Customer Classifications Default Maintenance panel is displayed.



4. Select a classification and click **OK** or press **<ENTER>** to confirm.

Customer Classification Template is added.

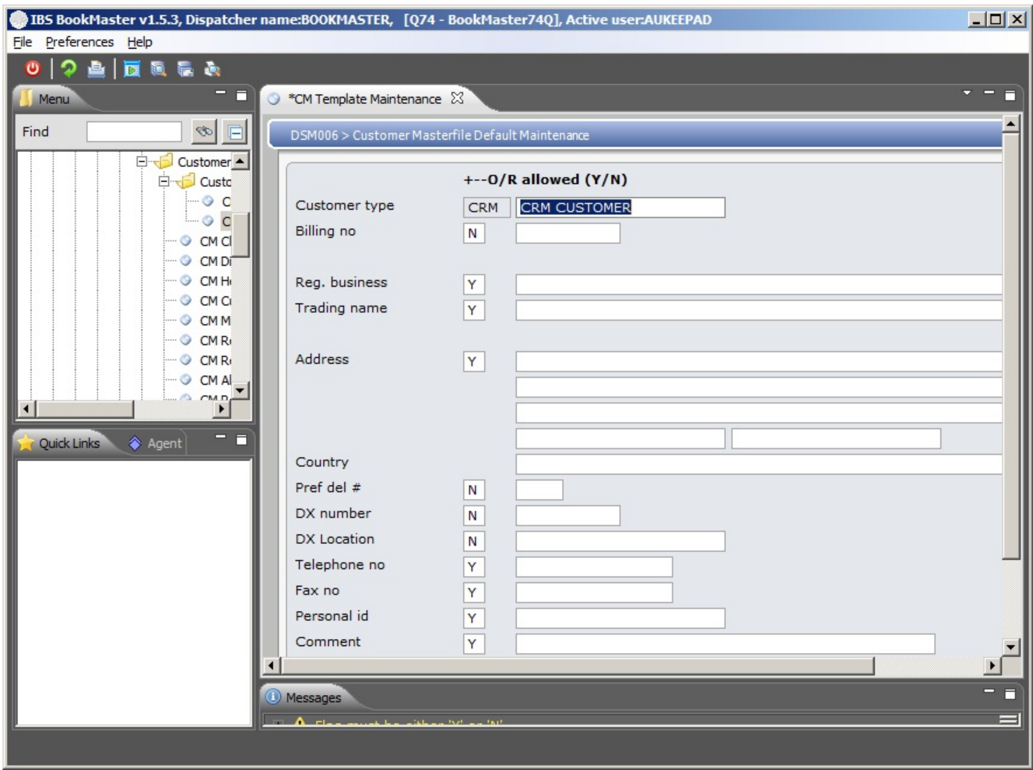
Example 3: Maintaining a Template

1. Repeat steps **1 and 2** of [Example 2: Create a Customer Classification Template]

DSM006 Customer Masterfile Default Maintenance panel is displayed.

2. Select a customer and click option **Chg Masterfile**.

DSM006 Customer Masterfile Default Maintenance panel is displayed.



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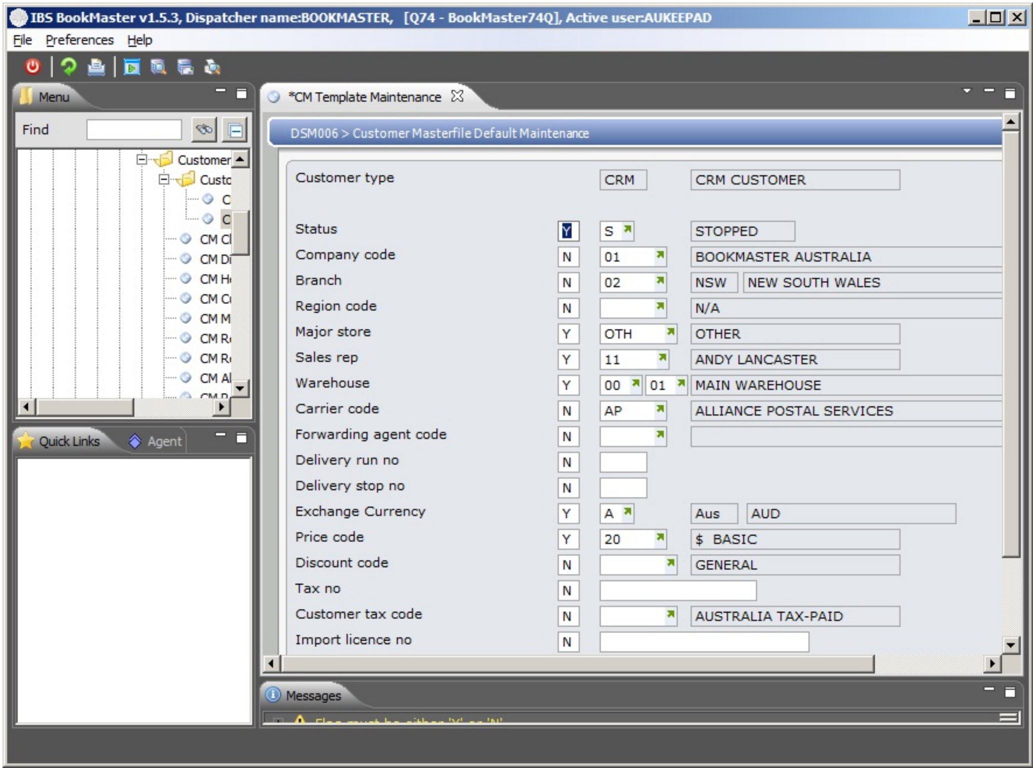

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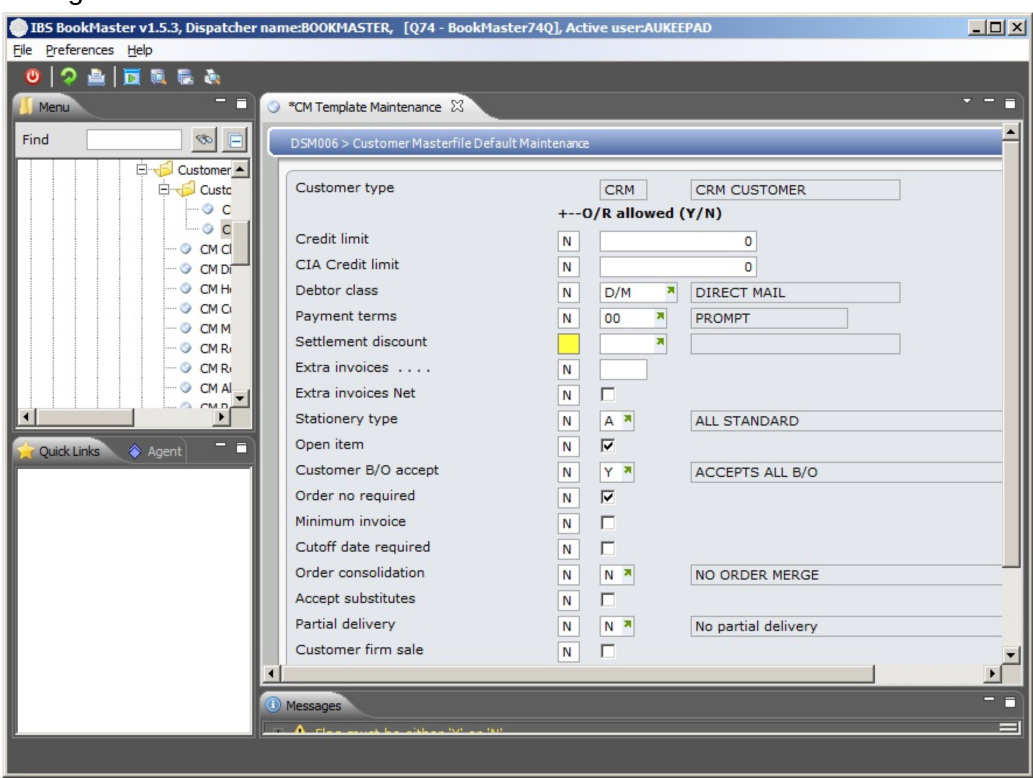

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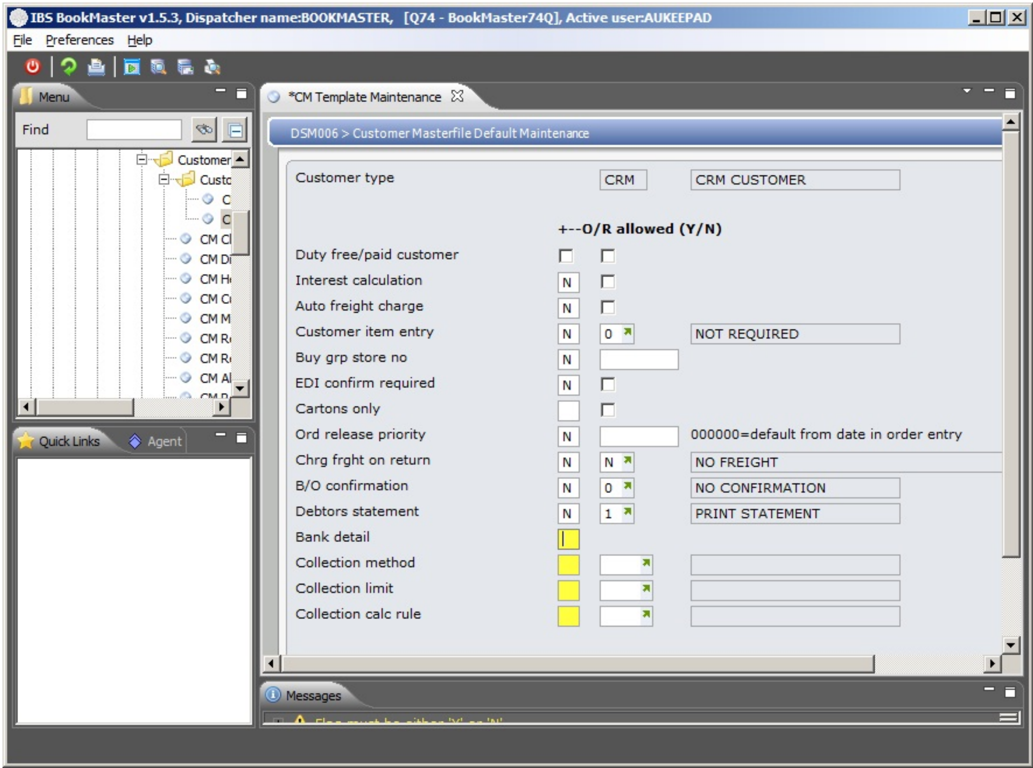

6. Key in required fields and click **OK** or press **<ENTER>** to confirm.

Customer Classification Template is changed.