
DSM480 Customer Global Maintenance

Overview

Global Maintenance does mass changes to selected Customer Masterfile fields, for a selected group of customers. For example, you can select one Billing Number and all accounts linked to that Billing number are updated with changes made.

Explanation

The customer selection criteria are by:

- Company - all customers in a company or range of companies (Co 01)
- Branch - all customers in a branch or range of branches (02 NSW & 03 VIC)
- Region - all customers in every region except a specified one (NW =Northwest)
- Customer Classification - all customers classified by a specific Buying Group (TAR)
- Billing number - all customers billed to a specific head office account (Target 50000)
- Customer number
- Major Store - all customers with the same major store code (TAR for Target)

Only the fields that are applicable to the Global Change are made available for selection.

The Change Date field is updated and any changes written to a Notes file. An audit trail of changes made is available and the Notes file can be viewed via the Customer History facility.

Examples

This section illustrates examples concerning:

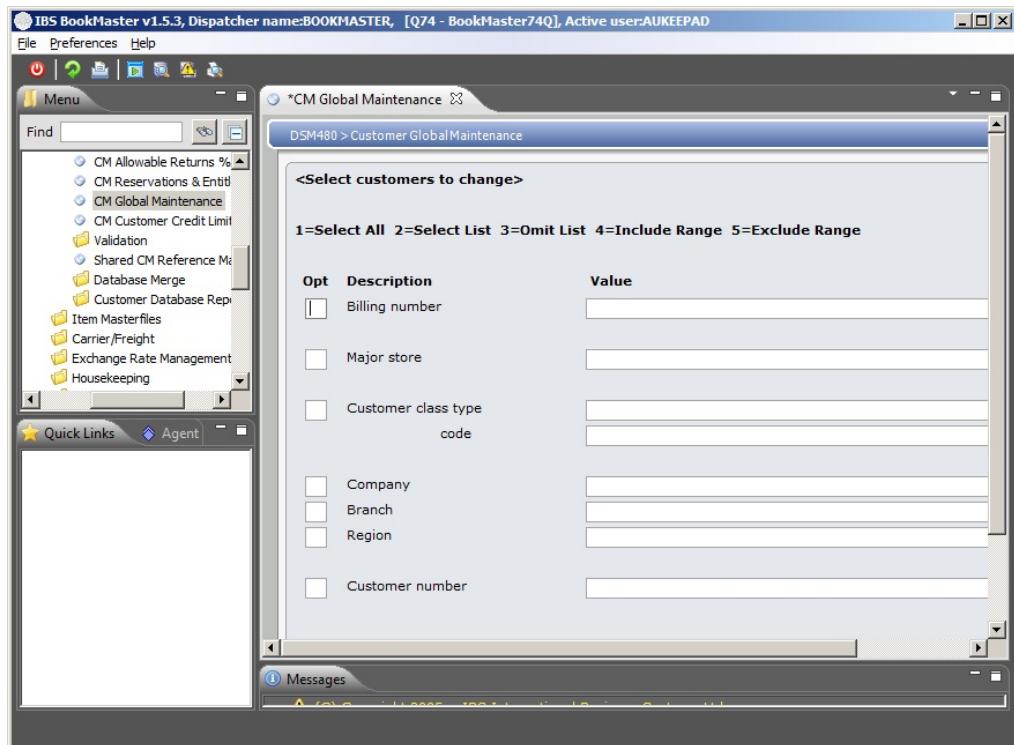
[Example 1: Process a global change](#)

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This example describes how to Process a global change.

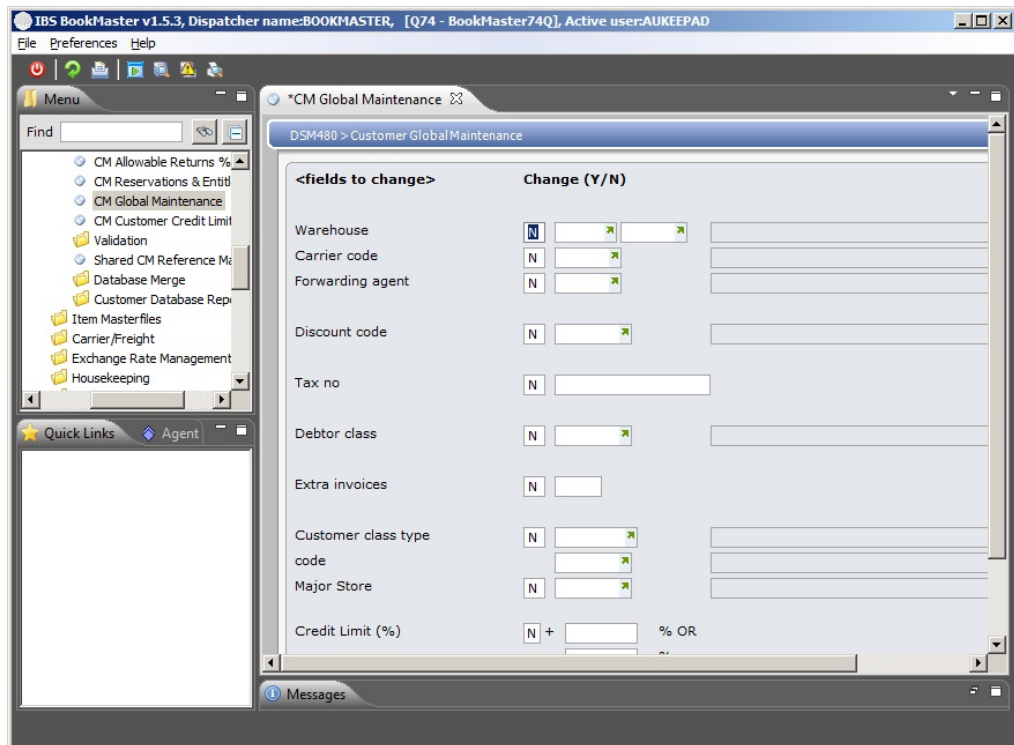
1. Select menu **CM Global Maintenance** from Base Modules>Distribution>Masterfiles>Database Management>Database Management>Customer Masterfiles menu.

DSM480 Customer Global Maintenance main panel is displayed.



2. Indicate the customer groupings according to criteria such as: by company or major store and within the selected criteria you define the range. To define the range the options are:
 - 1=Select all – Select all Major Stores, etc.
 - 2=Select list – where you indicate what must be selected
 - 3=Omit list – select everything except what is listed
 - 4=Include range – select everything within the range given
 - 5=Exclude range – select everything excluding the range given
3. Select option as mention above on the description and enter corresponding values. Click **OK** to confirm.

DSM480 Customer Global Maintenance panel in Change mode is displayed.



Relevant fields

Warehouse

The default is N but may be overridden to Y if required. A warehouse can be entered if flag is set to Y.

Carrier code

The default is N but may be overridden to Y if required. A carrier code can be entered if flag is set to Y.

Forwarding agent

The default is N but may be overridden to Y if required. A forwarding agent can be entered if flag is set to Y.

Discount code

The default is N but may be overridden to Y if required. A discount code can be entered if flag is set to Y.

Tax no

The default is N but may be overridden to Y if required. A tax no can be entered if flag is set to Y.

Debtor class

The default is N but may be overridden to Y if required. A debtor class can be entered if flag is set to Y.

Extra invoices

The default is N but may be overridden to Y if required. A extra invoices can be entered if flag is set to Y.

Customer class type

The default is N but may be overridden to Y if required. A customer class type can be entered if flag is set to Y.

Customer class code

The default is N but may be overridden to Y if required. A customer class code can be entered if flag is set to Y.

Major store

The default is N but may be overridden to Y if required. A major store can be entered if flag is set to Y.

Credit Limit (%)

The default is N but may be overridden to Y if required. A Credit Limit range can be entered using the plus (+) and minus (-) fields.

4. Select the fields to be change. If a field is flagged as Y to change, the code to which it must be changed needs to be entered. Click **OK** to confirm.

A report showing listing of changes made using the Global Maintenance option is automatically produced.