
DSI067 Transaction Inquiry by Customer Reference

<i>Overview</i>	The Transaction by Customer Reference is used to search for a customer's transaction by customer reference. Entry of a customer reference is optional, if left blank it will display all transactions.
<i>Purpose</i>	This panel allows you to: View list of selected transactions according to customer reference.

Examples

This section illustrates examples concerning:

[Example 1: To Inquire on Customer Transactions by Customer Reference](#)

[Example 2: To Display Original Invoice Details](#)

[Example 3: To Display Original Order Header Details](#)

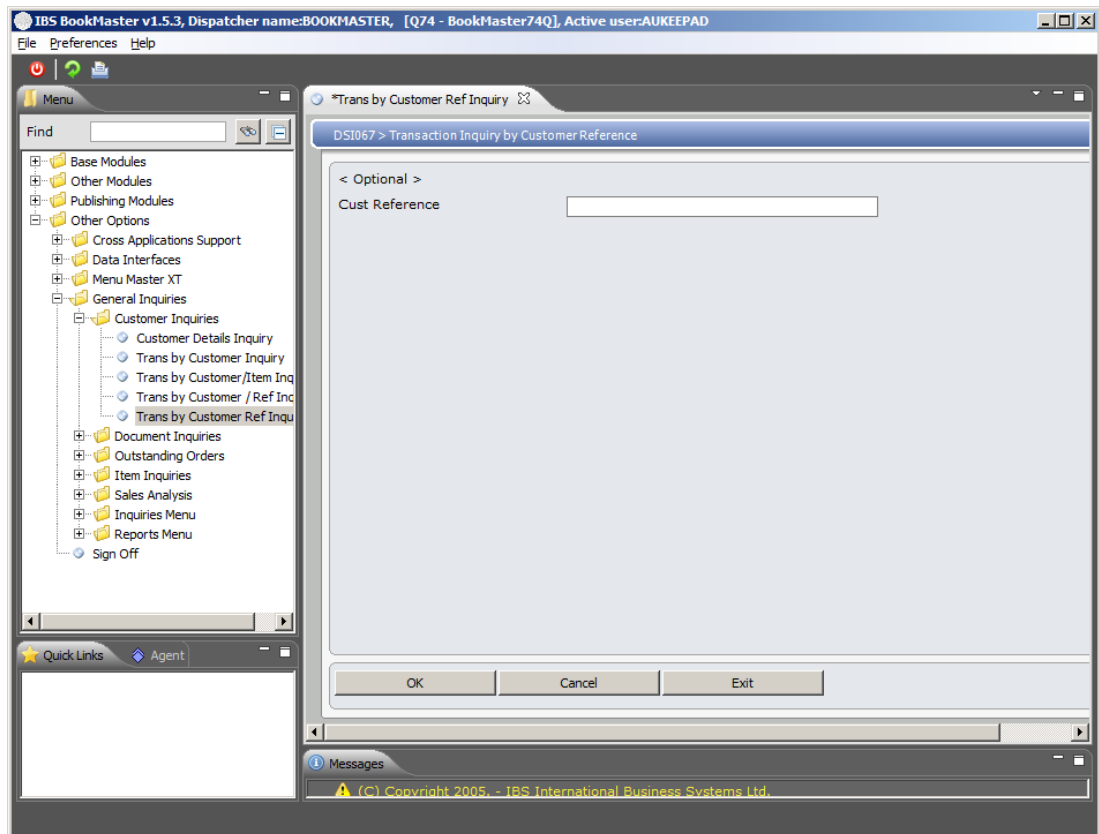
[Example 4: To Maintain Diary Text](#)

Example 1: To Inquire on Customer Transactions by Customer Reference

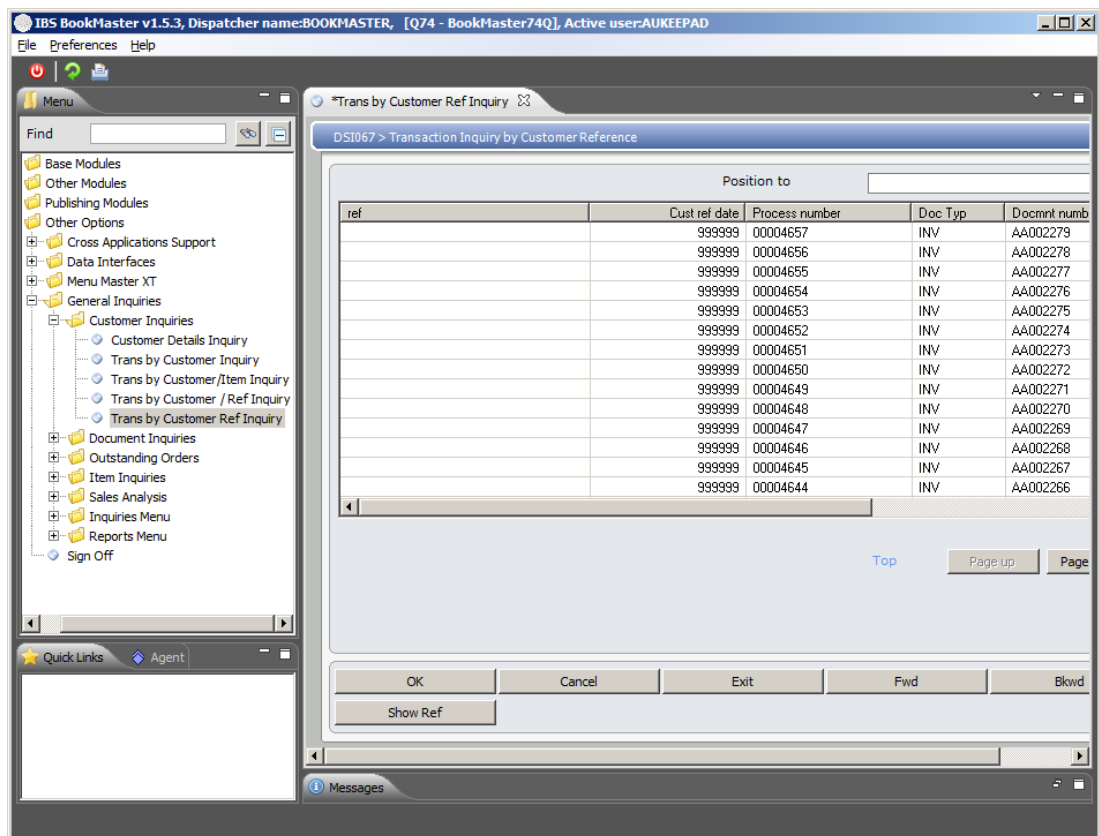
This example describes how to view transaction documents by customer reference.

1. Select option **Trans by Customer Ref Inquiry** from Other Options>General Inquiries>Customer Inquiries menu.

DSI067 Transaction Inquiry by Customer Reference panel is displayed.



2. Select customer reference. This field is optional. If not selected then all transactions are displayed. Click **OK** to confirm the selection and following panel is displayed.



Functions

Fwd	This function is used to display next customer's transactions.
Show Ref/Show Cust	This function switches between displaying the customer number and the customer reference for each transaction.
Bkwd	This function is used to display previous customer's transactions.

Options

Orig document	Access DSI120 Transaction Inquiry to display invoice details for selected customer with options to view details regarding selected transaction.
Display header	Access DSI125 Transaction Header Inquiry to display information regarding the original order, such as billing, carrier and delivery details.
Diary text	Access DSM900 Diary Text in maintenance mode to change or maintain diary text attached to the customer order.

Relevant Fields

Cust No	The customer number for which transaction details are displayed.
Customer reference	This is customer reference specified against particular customer order/transaction.
Customer ref date	The date on which customer placed the order. Defaults to current system date but can be overridden.
Process number	This is system generated number which is unique to every transaction.
Doc Typ	This is type of document which can be invoice, credit or other.
Docmnt number	This number uniquely identifies each document. In case of invoice for example this is invoice number.
S	This is current status of the document.
Total amt	This is total value of selected document. In case of invoice, it is total invoice amount.
Our Ref	This is additional optional reference given further to identify selected order.

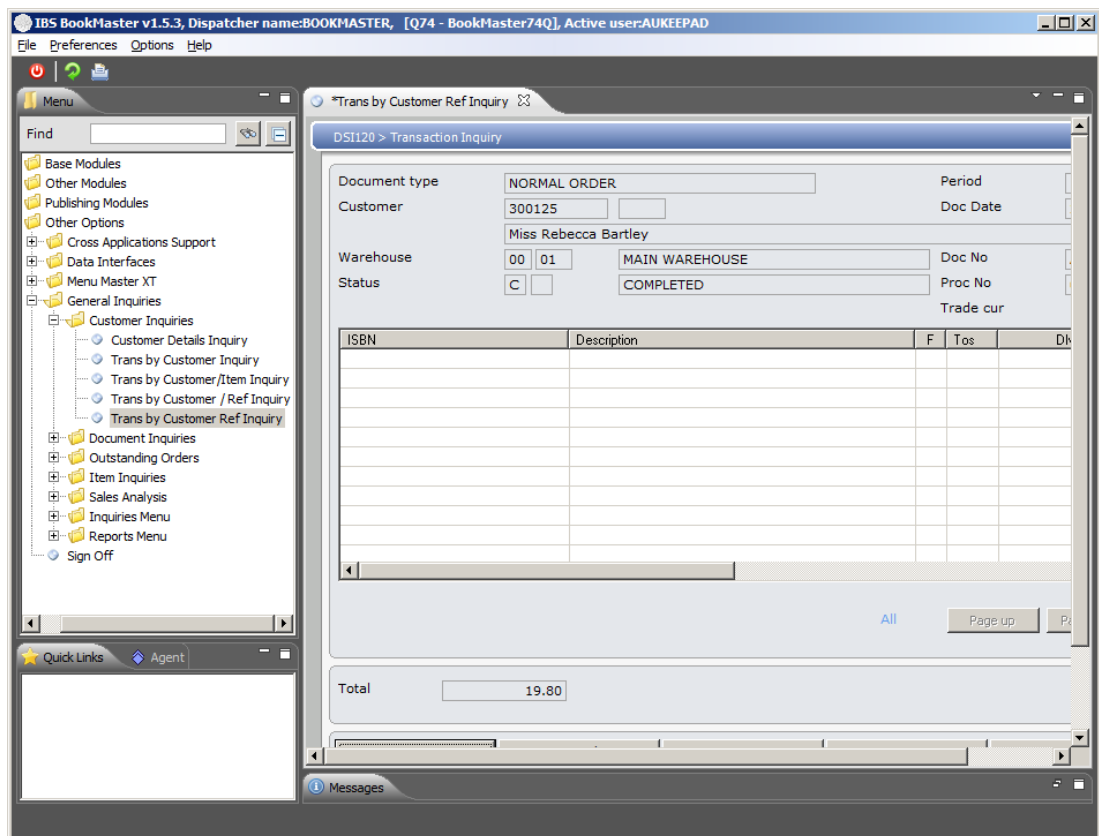
If customer reference is provided then only transactions matching the customer reference are retrieved. This process is subject to User Access Restrictions. Refer to **User Access/Restrictions** documentation for more information on this feature.

Example 2: To Display Original Invoice Details

This example describes how to view original invoice details for particular transaction document.

1. Repeat steps 1 and 2 from [Example 1: To Inquire on Customer Transactions by Customer Reference](#). Select document with option **Orig document**.

DSI120 Transaction Inquiry main panel is displayed.



Please refer to **DSI120 Transaction Inquiry** documentation for further information.

Example 3: To Display Original Order Header Details

This example describes how to view original order header details for particular transaction document.

1. Repeat steps 1 and 2 from [Example 1: To Inquire on Customer Transactions by Customer Reference](#). Select document with option **Display header**.

DSI125 Transaction Header Inquiry main panel is displayed.

IBS BookMaster v1.5.3, Dispatcher name:BOOKMASTER, [Q74 - BookMaster74Q], Active user:AUKEEPAD

File Preferences Help

Menu

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Quick Links Agent

Messages

*Trans by Customer Ref Inquiry

DSI125 > Transaction Header Inquiry

Process number	00004657	2/2001	NORMAL ORDER
Picking slip	14/06/2001	AA002942	PICKING SLIPS
Document	28/02/01	A	AA002279
Picking run			INVOICE
Transaction status	C		COMPLETED
Customer	300125		Miss Rebecca Bartley
Bill to	300125	Ship to	300125
Miss Rebecca Bartley		Miss Rebecca Bartley	
1/21 Lonnigan Drive		1/21 Lonnigan Drive	
Middle Park		Middle Park	
VIC	3024	VIC	3024
Australia		Australia	
Phone	03 9878 6655	Phone	03 9878 6655
Fax		Fax	
Contact name			
Credit request number			
Debtor alloc. Doc Type	A	INVOICE	
Debtor alloc. Doc no	AA002279		
Customer reference			
Cust reference date	999999		

Top Page up Page down

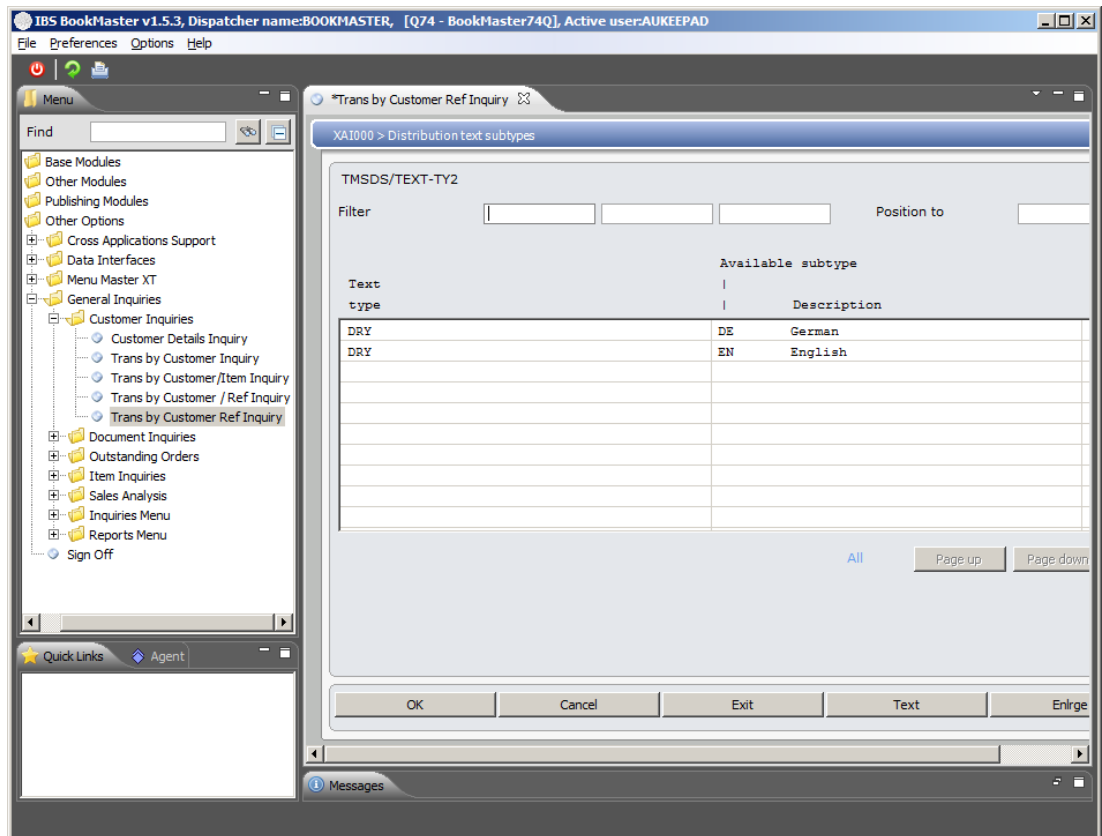
Please refer to **DSI125 Transaction Header Inquiry** documentation for further information.

Example 4: To Maintain Diary Text

This example describes how to maintain diary text attached to the customer order.

1. Repeat steps 1 and 2 from [Example 1: To Inquire on Customer Transactions Customer Reference](#). Select document with option **Diary Text**.

XAI000 Distribution text subtypes main panel is displayed.



Please refer to **DSM900 Diary Text** documentation for further information.