# DSI130 Document Inquiry by Customer

*Overview* The document inquiry by customer inquiry displays all transactions for the entered customer number. These include invoices, credits, transfers and adjustments.

*Purpose* This panel allows you to:

View selected customer's all transactions and their details.

## Examples

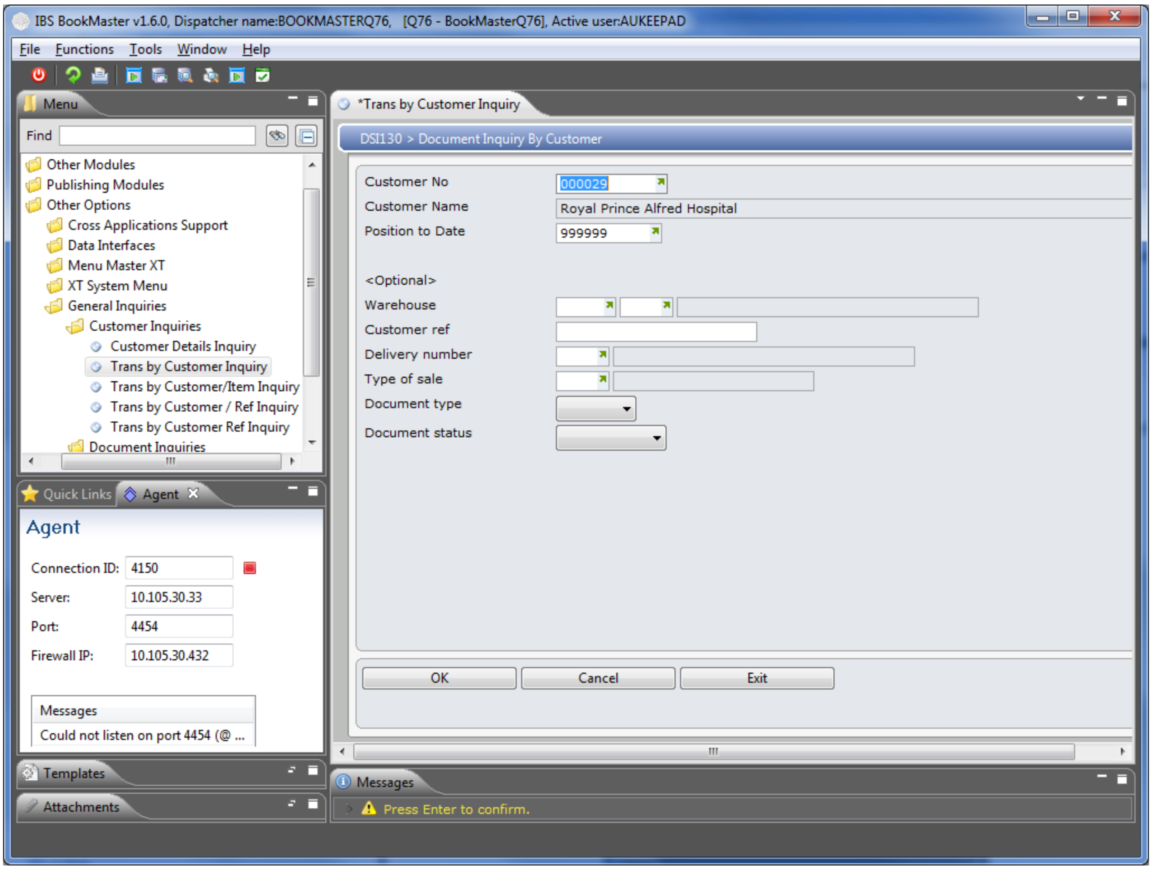
This section illustrates examples concerning:



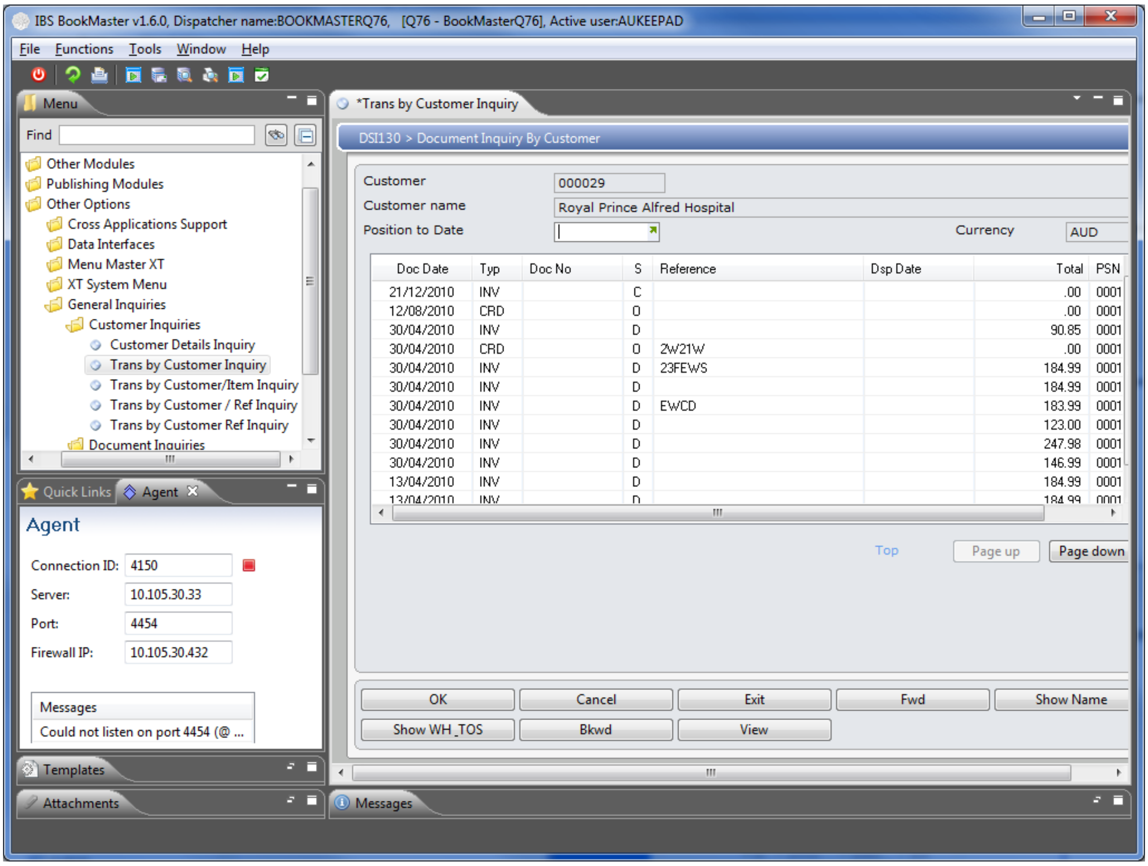
### Example 1: To Display Transaction Documents by Customer

This example describes how to view transaction documents by customer.

1. Select menu **General Inquiries** from menu **Distribution**. Select menu option **Transactions by Customer**. Following panel is displayed.




2. Select customer number and if required key in other optional fields to get filtered set of transactions. Click **OK** to confirm the selection and following panel is displayed. All documents for the selected customer are displayed.




**Functions**

| | |
|---|---|
| Fwd | This function is used to display next customer record. |
| Show Name/Show Ref | This function switches between the customer name and the order reference |
| Show WH & TOS | This function switches between the warehouse and type of sale. |
| Bkwd | This function is used to display previous customer record. |
| View | This function is used to display or change document imaging group. |

**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. |
| View Doc | This option is used to display or change document imaging group. |

**Relevant Fields**

| | |
|---|---|
| Customer no | The customer number for which transaction details are to be |

| | |
|---|---|
| | found. |
| Position to date | The position to date is used to specify a date from which the inquiry is to start displaying transactions. The system will position the transactions on the next inquiry screen to start from the date specified. |
| Reference | This is the reference number or order number used by the customer when the document was produced. |
| Doc date | This is the date on which selected document is posted to accounts receivable. Normally, it should be current processing period. |
| Typ | This is type of document which can be invoice, credit or other. |
| Doc No | This number uniquely identifies each document. In case of invoice for example this is invoice number. |
| S | This is current status of the document. |
| Dsp Date | The date on which selected document is created in the system. |
| W/H TOS | Name of the warehouse to which selected transaction belongs. TOS is used to categorize sales into different types of sales. |
| Total | This is total value of selected document. In case of invoice, it is total invoice amount. |
| PSN | This is system generated picking slip number for document. It is unique for every document. |

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 or transaction details for selected customer order.

1. Repeat steps **1** and **2** from Example 1: To Display Transaction Documents by Customer. 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 Order Header Details

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

1. Repeat steps **1** and **2** from Example 1: To Display Transaction Documents by Customer. Select document with option **Display header**.

**DSI125 Transaction Header Inquiry** main panel is displayed.

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 Display Transaction Documents by Customer. Select document with option **Diary Text**.

**DSM900 Diary Text (Customer Order)** main panel is displayed.

Please refer to **DSM900 Diary Text (Customer Order)** documentation for further information.