
DSM080 Outstanding Order Maintenance by Customer

Overview In this program customer allows for the maintenance and selection of customer orders by customer number.

Explanation

There are options available for the following:

- View the order without making changes
- View details
- Change line item text information
- Flag the order for release from the outstanding order file
- Flag the order as un-released preventing the order from being released to the warehouse
- View for external programs that are customer specific
- Maintain credit card details
- Maintain customer delivery address details
- Change the quantity, type of sale, price discount flag, tax amount
- Change the release priority and customer reference information.

This process is subject to User Access Restrictions. Refer to User Access/Restrictions documentation for more information on this feature.

Access to the maintenance program is gained by entering the customer number, other optional selections are available, after which all of its outstanding orders display by Title. For each outstanding order, summary information is shown, such as transaction type, title, warehouse, quantity, outstanding, type of sale, price, discount, tax and line title total, as well as the transaction currency. In order to display only specific outstanding orders, additionally select one or all of the optional fields.

Examples

This section illustrates examples concerning:

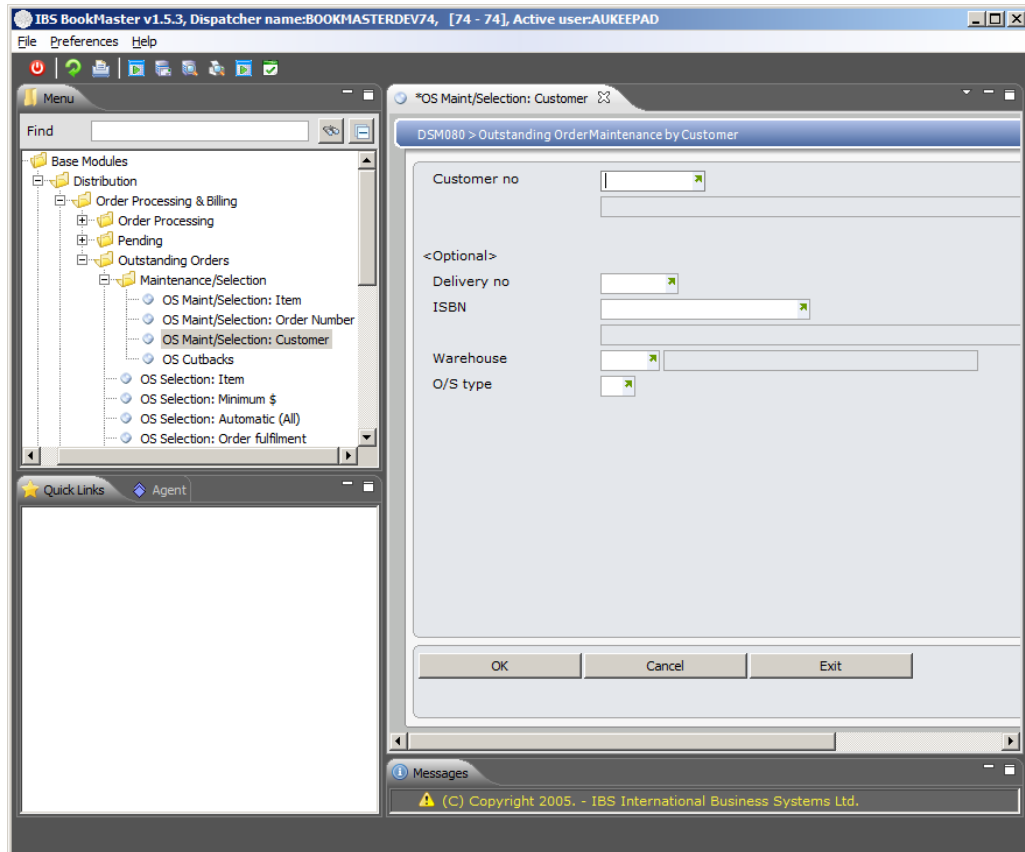
[Example 1: Outstanding Order Maintenance](#)

Example 1: Outstanding Order Maintenance

This example describes how to maintain outstanding order by customer.

1. Select option **OS Maint/Selection: Customer** from Base Modules>Distribution>Order Processing & Billing>Outstanding Orders>Maintenance/Selection menu.

DSM080 Outstanding Order Maintenance by Customer panel is displayed.



Relevant Fields

Customer no

The customer whose orders you want to see.

Delivery no

The delivery number is used to access common alternative delivery addresses, if the customer has more than one delivery address. An optional entry used to enter the delivery address of the customer to which this order is to be sent. If this field is left blank the system will default this field to 000, which is the first delivery address on the Customer Masterfile.

ISBN

An optional entry used to enter the title that you want to release into the system.

Warehouse

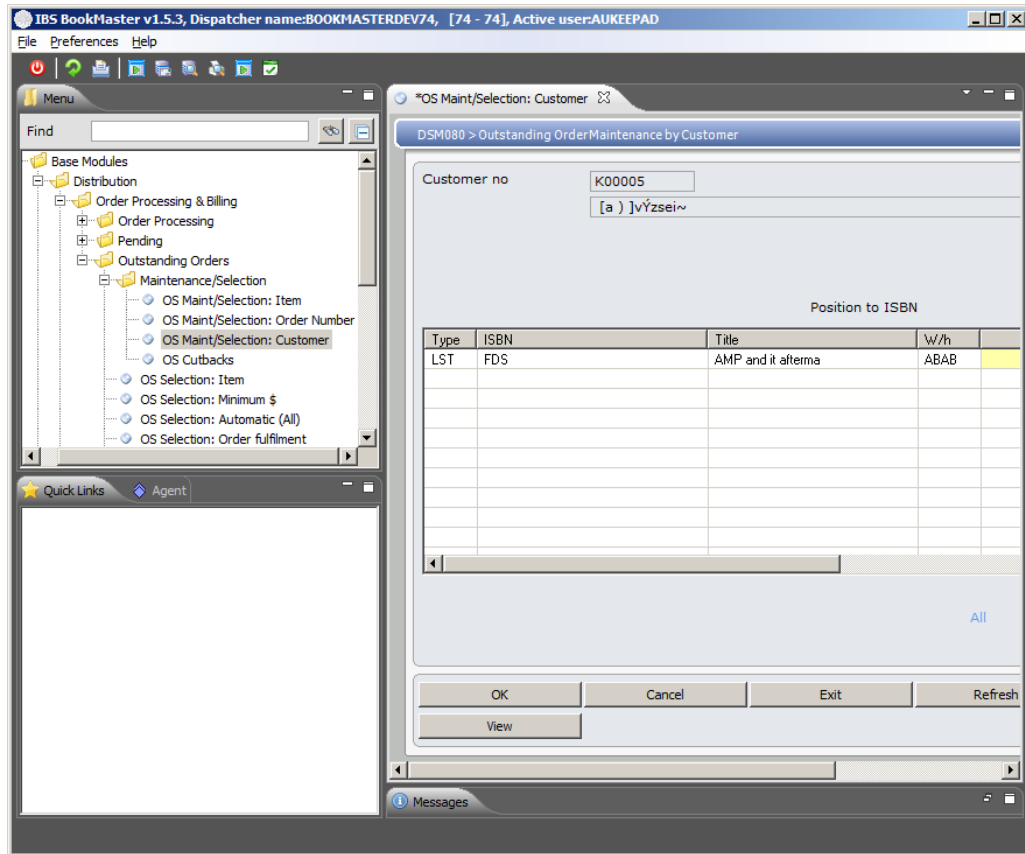
An optional entry used to specify the warehouse in which the title is stored.

O/S type

An optional entry to key a document type relating to Outstanding Orders for a specific title.

2. Enter the Customer Number, the Title to be released for that customer and any other specific criteria and click **OK**.

DSM080 Outstanding Order Maintenance by Customer panel is displayed.



Options

Un-release

Un-release is used to reverse the selection for release prior to generating the release/update routine.

View

Access XAI00 TMS document imaging group. View provides the option to view Outstanding Order document types by spy group for customers.

Credit card

Credit card - If payment of the order was by Credit card this option will display details of the Credit card payment.

Delivery addr

Access outstanding order maintenance by customer to display the delivery address, phone and fax number of this customer

Display order

Access DSI120 Transaction Inquiry to view all entry details for the order.

Display details

Access DSI076 Outstanding Item Detail Inquiry to display the Outstanding Item Details.

Change text

Access DSE006 Line Item Text Maintenance panel for each outstanding invoice. You are able to enter unlimited text regarding the order

Release

Release flags this order for release. The actual release is generated via the O/S Orders Release/Update function.

Functions

More detail

Access outstanding order maintenance by customer to view Release Priority, Total and Customer Reference under each

line or outstanding order.

Cancel orders

Cancel Orders cancels the selected outstanding order, which is then recorded in the system as a lost order with an outstanding order type of X.

View

Access XAI00 TMS document imaging group. View provides the option to view outstanding order document types by spy group for customers.

Relevant Fields

ISBN

Enter or scan the ISBN being purchased by the customer. TMSDS/OM-VI determines whether to check for an alternate item or barcode if the given ISBN does not exist on the Title Masterfile.

Warehouse

The existing Warehouse on selected Outstanding Orders can be overridden.

Type of Sale

Select the Type of Sale Codes to be included or excluded in this definition.

Price

All customers are assigned a basic default price code which can usually be overridden. A title can have multiple prices. The title's Price Code determines what price comes into effect and when, through the use of effective date and price break fields. The Price Code also determines whether a price is tax inclusive or tax exclusive. The value (excluding tax) and tax amount are calculated from the tax inclusive price.

When overriding prices, bear in mind that there may be Minimum Profit Margin checking for the warehouse in which case an order below the set margin will pend.

If the price is not set up on the Title Masterfile entry of a price will be mandatory in order entry.

Discount

The discount rate given, which is calculated on the unit cost of each title, can be overridden.

Tax

This is tax amount included in the order.

Release Date

The date on which the order was released displays.

3. Make required changes and click **OK**.

Outstanding order details are maintained.

Note To change order text, maintain delivery address details, credit card payment details, inquire item transaction and item line details, view outstanding order document types by spy groups, release and un-release an outstanding order, select the formulae and click the corresponding option.