DSM400 Hold Order Definition

Overview

This panel enables you to define and maintain a retention period by company and currency and instruct the system on what action to take once this retention period has expired. Flexible rule definitions allow multiple inclusion or exclusion of specific values.

Explanation

The hold order definition can be maintained and deleted at any time.

Once the retention period is exceeded, you can instruct the system to either:

- Supply the order, regardless of its value
- Delete the order and record it as a lost sale
- Delete the order

Orders or Invoices are checked to establish whether or not they meet the Minimum Value criteria at the picking slip or invoice stage. The first step the system takes is to check for merge instructions, the order then merges with any held orders. The new merged order is then checked for Minimum Value conditions and is either held again or a picking slip/invoice prints if the Minimum Value criteria are met. If, when the minimum value checking is done the order does not meet the Minimum Release Value criteria, before it is placed back on hold, the system checks whether or not the retention period has exceeded. If the retention period has exceeded, the system follows the instructions on the Hold Orders file and either releases the order anyway or deletes it.

When a held order is released the system checks whether the Customer has the field Minimum Invoice (Order) flagged as Yes on the Customer Masterfile. This determines whether or not a minimum charge must be applied if the Invoice (Order) is below the Minimum Charge Value established on the Minimum Value Definition. Whether the Minimum Charge is to be applied based on the Order or Invoice value is a flag on the Minimum Value Definition. The charge amount to apply is taken from the Price recorded against the Minimum Charge Item. The Title against which this Minimum Charge is applied is a non-stocked Item on the Title Masterfile.

Orders that do not meet the Merge criteria do not hold for Minimum Release Value. There are a number of reasons why orders will not merge. Refer to the Customer Masterfile section of the document under field Consolidation.

Examples

This section illustrates examples concerning:

Example 1: Add a Hold Order Definition

Example 2: Change a Hold Order Definition

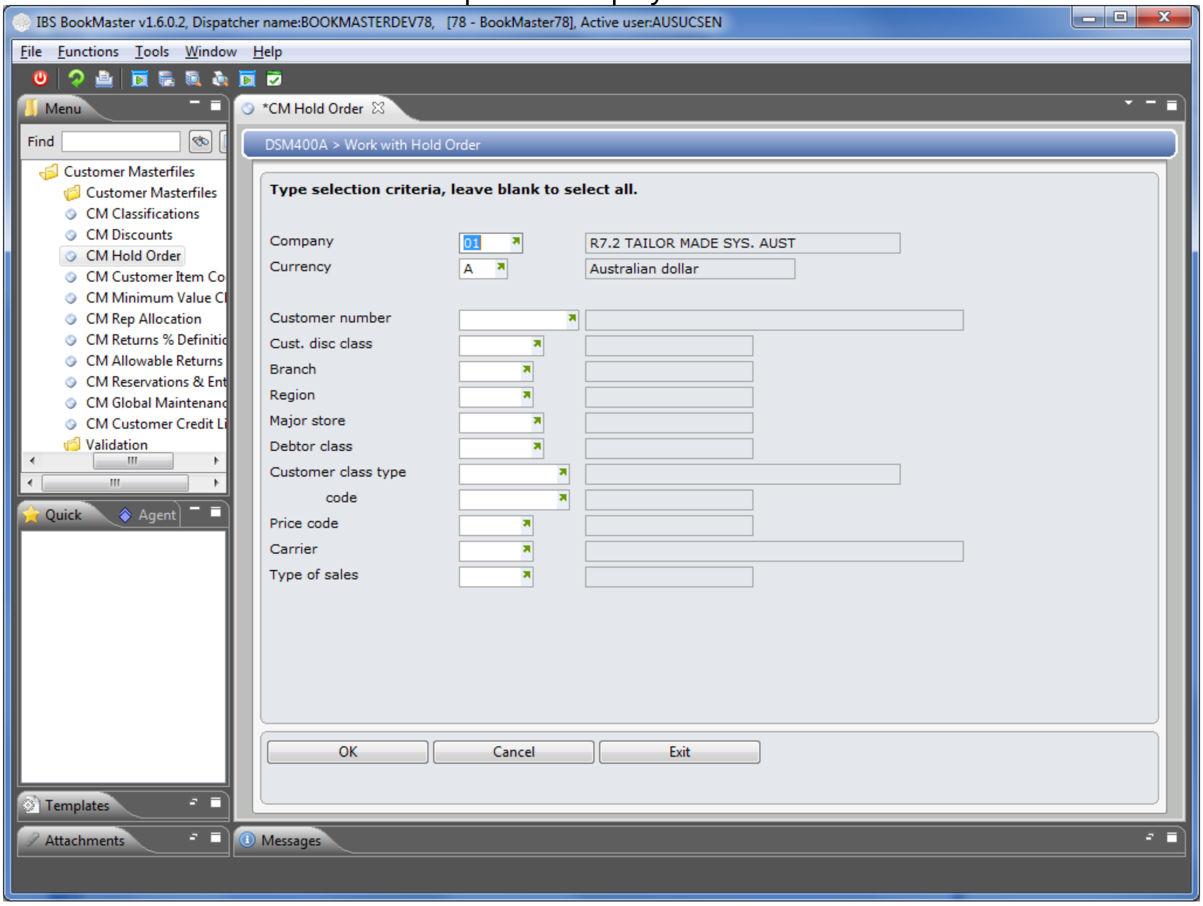
Example 3: Delete a Hold Order Definition

Example 1: Add a Hold Order Definition

This example describes how to add customer address details.

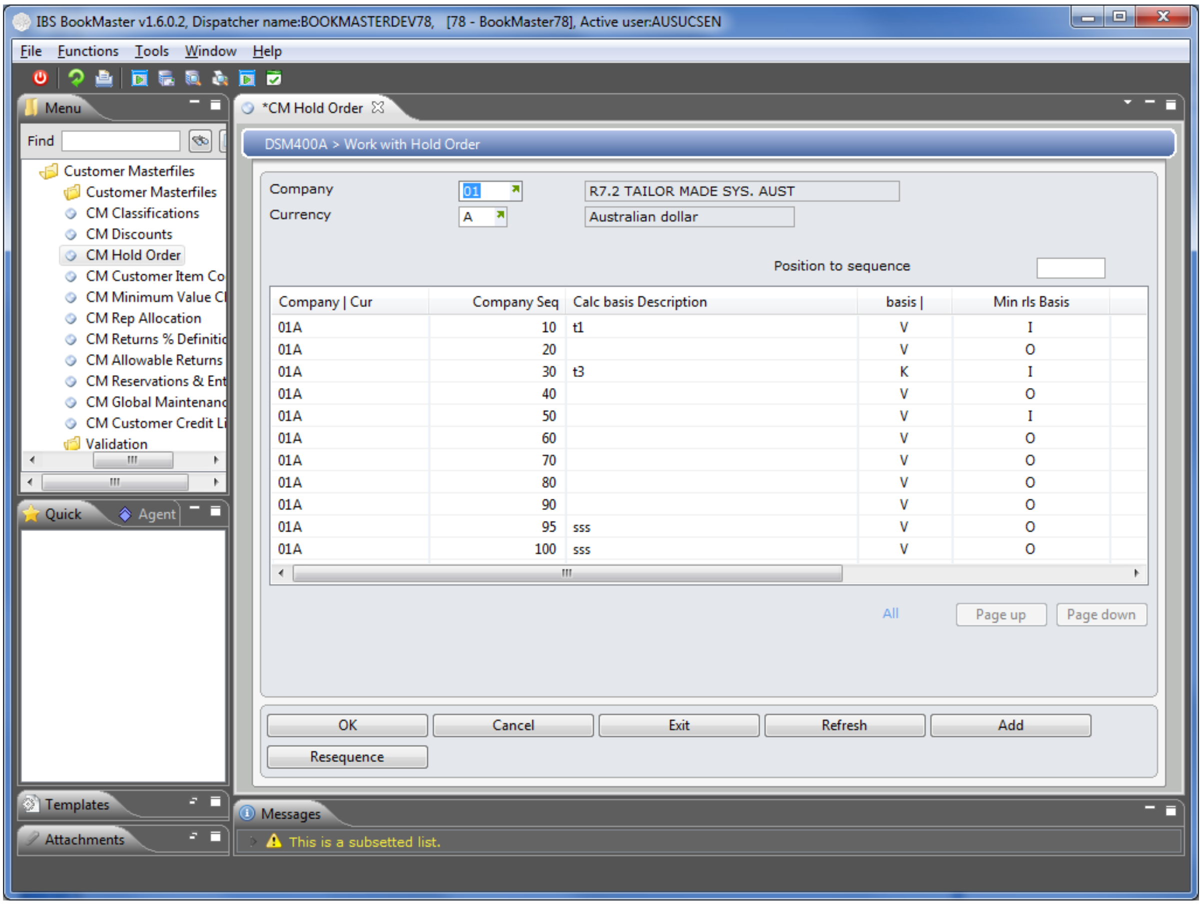
1. Select option **CM Hold Order** from Base Modules>Distribution>Masterfiles> Database Management>Database Management>Customer Masterfiles menu.

DSM400 Work with Hold Order filter panel is displayed.



2. Click **OK**.

DSM400 Work with Hold Order main panel is displayed.

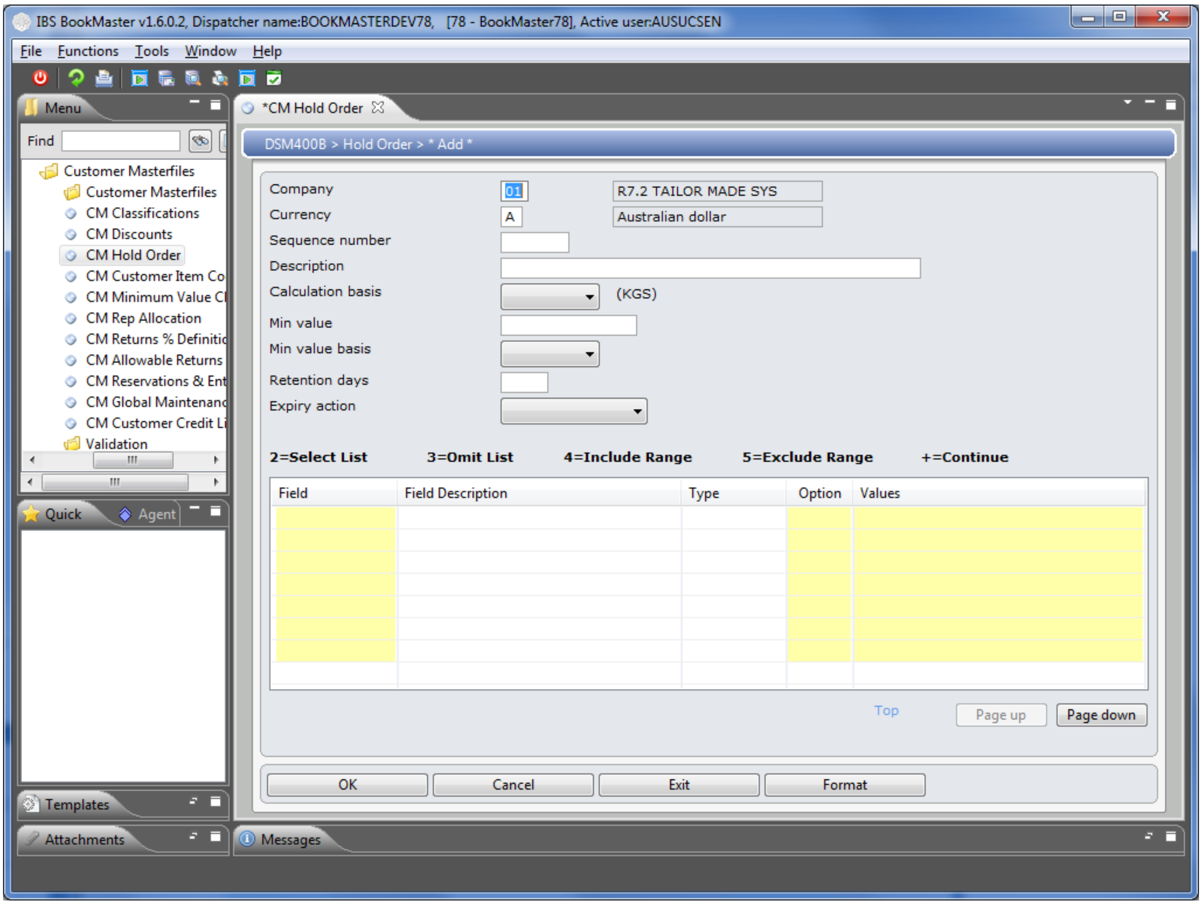


Functions

[Add]() This is used to add a hold order definition.

3. Select function **Add**.

DSM400B Hold Order panel is displayed in Add mode.



Relevant Fields

Calculation Basis	Specify if the calculation should be based on the Value or Weight.
Min Value	Specify a value as a minimum value.
Min Value Basis	Min Value Basis defines if the specified Min Value is applicable to the order or the invoice.
Retention Days	The Retention Period is given in number of days. Held orders are kept on file for this specified length of time and if they do not meet the minimum value criteria, they are dealt with according to the instructions given in the Expiry Action field. The Retention Period is calculated from Entry Date.
Expiry Action	Lost Sales have a status of X and cannot be reinstated or modified. The Expiry Action instructs the system how to deal with held orders if they have not met the minimum value criteria. Some reports in the Outstanding Orders section can be used to list these orders. A deleted order is no longer available on the system.

4. Key in the required fields and click **OK** to confirm.

The record is added.

Example 2: Change a Hold Order Definition

1. Repeat step **1** to **2** of Example 1: Add a Hold Order Definition.

2. Select the required record and click option **Detail.**

DSM400 Hold Order panel is displayed in change mode.

3. Change the required details and click **OK** to confirm.

The record is changed.

Example 3: Delete a Hold order Definition

1. Repeat step **1** of Example 2: Change a Hold Order Definition.

2. Select the required record and click option **Delete**.

DSM400 Hold Order panel is displayed in Delete mode.

3. Click **OK** to confirm.

The record is deleted.