
DSW600 Work with Order Form Orders

Overview

Work with order form orders program allows you to create, maintain and display order forms. Order Forms functionality has been designed to support Pre-Pack Booklist Order Processing. Normal distribution orders (non-booklist) are still keyed without the use of Order Forms or batches but all Booklist orders will use Orders Forms with Batches.

Each Booklist is created as an Order Form.

Once an Order Form and Batches have been created for a Booklist, orders can be entered. Orders may be captured either through manual entry against Order Form Batches or via an interface for orders received on the web.

Changes to orders (for example additions, deletion of lines, order cancellations or order deletions) may be captured using Batch Order Entry.

Examples

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Example 1: Add order forms

This example describes how to add new order forms.

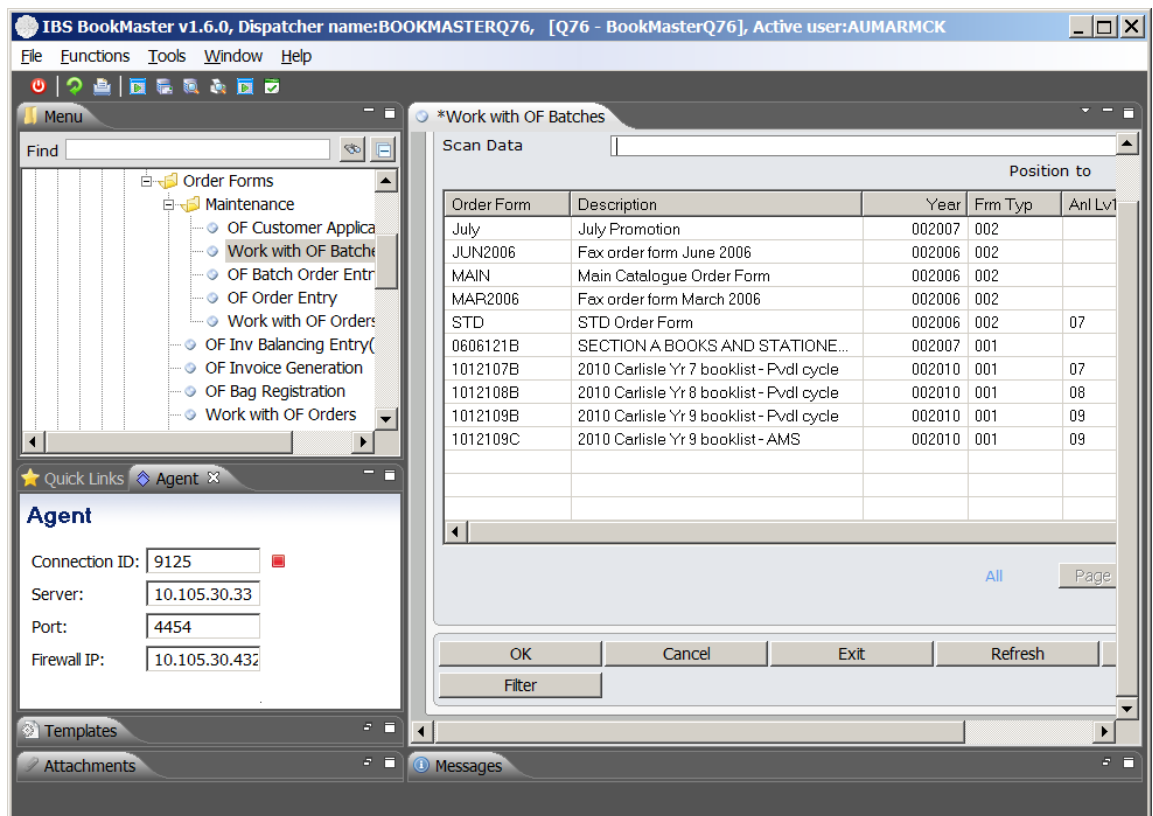
1. Select menu option **Work with OF Batches** from Distribution>Order Processing & Billing>Order Processing>Other>Order Forms>Maintenance Menu.

DSW600 Work with Order Forms – Filter selection panel is displayed.

The screenshot displays the IBS BookMaster v1.6.0 application interface. The title bar indicates the dispatcher name as BOOKMASTERQ76 and the active user as AUMARMCK. The main menu on the left shows a tree structure with 'Order Forms' expanded, highlighting 'Work with OF Batches'. Below the menu is a 'Quick Links' section with an 'Agent' tab, showing connection details: Connection ID: 9125, Server: 10.105.30.33, Port: 4454, and Firewall IP: 10.105.30.43. The main panel, titled '*Work with OF Batches', contains a sub-panel 'DSW600 > Work with Order Forms - Filter'. This panel prompts the user to 'Type selection criteria, leave blank to select all.' and provides fields for filtering: 'Order form' (From/To), 'Description', 'Order form type' (From/To), 'Order type' (From/To), 'Status' (Active dropdown), 'Customer' (From/To), 'Analysis value 1' (From/To), 'Analysis value 2' (From/To), 'Analysis value 3' (From/To), 'Calendar year' (From/To), 'Perferred dlvs date' (From/To), and 'First sell date' (From/To). The bottom status bar shows a copyright notice: (C) Copyright 2005. - IBS International Business Systems Ltd.

2. Enter selection criteria to selectively list Order Forms or leave the selection fields blank to select all active Order Forms and click **OK**.

DSW600 Work with Order Forms main panel is displayed.



Function

Add

Access Work with Order Form panel to add order form.

Filter

Access Work with Order Forms – Filter panel to selectively list order forms.

Option

Batches

Access Work with Order Form Batches panel is displayed

Change

Access Work with Order Forms panel to change order forms.

Copy

Access Work with Order Forms panel to copy order forms.

Delete

Access Work with Order Forms panel to delete order forms.

Display

Access Work with Order Forms panel to display order forms.

Release

Release only verified orders for the selected Order Form

Orders

Access Work with Order panel to work with orders

Batch register

Batch register option prints the batch register.

Cred card

Cred card option complete the credit card charge

Gen batch

Access Generate Batch Header panel to generate batch

Cls order

Cls order option close the order

Charge

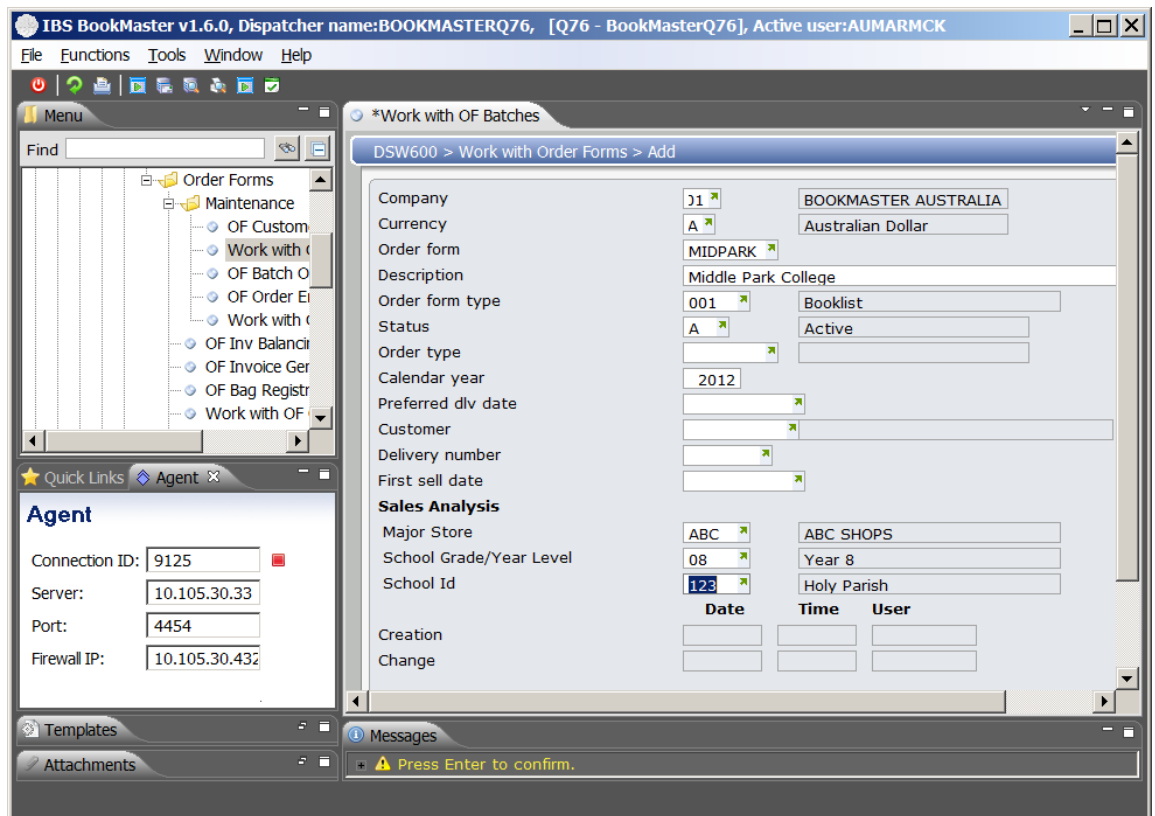
Access Order Form Processing Charge panel to process order form charge

Text

This option displays the **TMSDS/TEXT-TY2 text subtype** control file and access Order Form Text panel.

3. Click **Add** to add order forms.

DSW600 Work with Order Forms panel is displayed in add mode.



Relevant field

Order form

A unique ID for the order form you are creating, this can be either numeric or alphanumeric.

Description

The description for the Order Form being created is a mandatory field.

Order form type

Order Form Type is mandatory.

Status

In Work with Order Forms, Order Forms with a status of **A = Active**, **C = Closed** or **Blank** for all, can be selected for maintenance or deletion. Enter **A** for "Active" when creating new order forms. Order forms can only be closed using option **Cls/Reopn**.

In **Work with Order Form Batches**, this is the status of the Batch. Order Form Batch Statuses are established in Control File **TMSDS/OF-BSTS**, and can be either of the following: **O** = Open, **D** = Deleted, **R** = Released, **U** = In Use, **V** = Verified

Calendar year

The calendar year is the year in which this Order Form is to be used. This is an information only field for sales analysis.

Preferred dlv date

This is the date customer prefers for the delivery of the Titles for that Order Form.

Customer

This is the Customer that can use that Order Form. Leave the Customer field blank for the Order Form to be used by other customers.

Delivery number

Delivery Number

Delivery Number is a three character numeric code which uniquely identifies the delivery address of the customer and it is maintained in the Customer Masterfile.

In Work with Order Forms, if the customer is entered then the Delivery Number for that customer can be entered. If the customer is entered and this field is left blank, it defaults to '000', meaning the first delivery address on the Customer Masterfile is used. No entry is required if the customer field is blank.

Delivery no

TMSDS/OM-OT1 setup determines if the customer delivery address or the contact address is required as the delivery address. If the setup is for customer delivery address then use this field to change to any of the delivery addresses defined in the Customer Masterfile.

First sell date

This is date when the Titles in an Order Form can be first sold.

Sales analysis

The Sales Analysis field uses TMSDS/OM-SALVL Sales **Analysis** Levels allowed by Order Type. *An example of an Analysis Level and Type is Grade Level and School ID.* Once the Analysis Level has been selected a specific code for that level can be entered. TMSDS/OM-SGL defines School Grade/Year Level.

4. Enter the relevant data and click **OK** to add item to order form.

DSW600 Work with Order Forms item details panel is displayed in add mode.

The screenshot displays the IBS BookMaster v1.6.0 software interface. The title bar indicates the dispatcher name as BOOKMASTERQ76, the active user as AUMARMCK, and the window title as *Work with OF Batches. The main window is titled 'DSW600 > Work with Order Forms > Add'. On the left, there is a 'Menu' pane with a tree view showing 'Order Forms' and 'Maintenance' sub-menus. Below the menu is a 'Quick Links' section with an 'Agent' tab. The 'Agent' section contains fields for 'Connection ID: 9125', 'Server: 10.105.30.33', 'Port: 4454', and 'Firewall IP: 10.105.30.432'. The main area of the window is a form for adding a new order form batch. It includes fields for 'Company' (01 BOOKMASTER AUSTRALIA), 'Currency' (A Australian Dollar), 'Order form' (MIDPARK Middle Park College), and 'Order form type' (001 Booklist). Below these fields is a table with columns 'Seq', 'Lno', 'Item', and 'Description'. The table is currently empty, and the 'R2ORFSEQ' label is visible in the bottom left corner of the table area. At the bottom of the window, there are buttons for 'Top', 'Page up', and 'Page down'.

Function
Text

This option displays the **TMSDS/TEXT-TY2 text subtype** control file and access Order Form Text panel.

Relevant field

Lno

This is the Line Number of the Order Form that has all the order details for fast order entry.

ISBN

This is the ISBN of the title being ordered. The ISBN selected must be a valid Order Form Title, which means it must be flagged in IC-BOOK classification.

Title

This is the title being ordered. It defaults from the ISBN in the previous field.

Default qty

Default Qty

This is the default order quantity for the ISBN. TMSDS/OM-VQTY **determines** the quantity limit per order type

Qty

In Key Batch Orders the default quantity displays from the Order Form line unless the Manual Qty flag is Y. The default quantity can be overridden.

Tos

TMSDS/OM-VTOS is used to define the Types of Sale **allowed** per Order **Type**.

R Supply rule

The Supply Rule Flag for a line item indicates whether that line item is optional, mandatory or not to be supplied. This rule is defined in TMSDS/OF-SUPR. If the rule is "Do Not Supply" then the title will be forced to lost when the order is released to the warehouse. The invoice will then indicate that the title will not be supplied. The Order Detail Inquiry will display these lost titles as cancelled. Enter a '1' to flag this *Line Number* as mandatory or a '2', to remove this *Line Number* from all orders using this Order Form (do not supply) or a '0' to make this line optional on the order.

F Manual flag

This flag indicates whether price is from the order form (flag='2'), including zero price or will need to be manually entered when an order for this order form is raised (flag='1').

If flag='1', the price must be zero since this will need to be entered on the order. However; a zero price for records with flag='2' means that the price is actually zero.

Prices of orders from order forms, whether coming from the order form record or manually entered, will be flagged as fixed and will not be updated in the downstream process when the order is converted into an actual order. Discount also can not be updated on these records.

Price

This is the default price for the ISBN. TMSDS/OM-VPRC determines per Order Type, using a validation parameter, whether to give a warning or hard error if there is no price.

5. Enter the Order form titles.
6. Click **OK** to confirm addition of order form.

Example 2: Work with order form batches

This example describes how to maintain order form batches

1. Repeat steps **1, 2** and **3** in [Example 1: Add order forms](#)
2. Select order form and click option **Batches**

DSW610 Work with Order Form Batches panel is displayed.

Please refer program **DSW610 Work with Order Form Batches**

Example 3: Change order form details

This example describes how to change order form details

1. Repeat steps **1, 2** and **3** in [Example 1: Add order forms](#)
2. Select order form and click option **Change**.

DSW600 Work with Order From panel is displayed in change mode.

3. Enter new order details and click **OK**.

DSW600 Work with Order From item details panel is displayed in change mode.

Function

Text

This option displays the **TMSDS/TEXT-TY2 text subtype** control file and access Order Form Text panel.

Header

Access Work with Order Form panel to display order form header in change mode.

4. Enter new item details and click **OK** to confirm changes.

Example 4: Copy order form

This example describes how to copy order form.

1. Repeat steps **1, 2** and **3** in [Example 1: Add order forms](#)
2. Select order form and click option **Copy**.

DSW600 Work with Order From panel is displayed in copy mode.

3. Enter order form details and click **OK**.

DSW600 Work with Order From item details panel is displayed in copy mode.

4. Enter item details and click **OK** to confirm copy of order form.

Example 5: Display order form

This example describes how to display order form.

1. Repeat steps **1, 2** and **3** in [Example 1: Add order forms](#)
2. Select order form and click option **Display**.

DSW600 Work with Order From panel is displayed in inquiry mode.

3. Click **OK** to display item details to order form.

DSW600 Work with Order Form item details panel is displayed in inquiry mode.

Example 6: Delete order form

This example describes how to delete order form.

1. Repeat steps 1, 2 and 3 in [Example 1: Add order forms](#)
2. Select order form and click option **Delete**.

DSW600 Work with Order Form panel is displayed in delete mode.

3. Click **OK**.

DSW600 Work with Order Form item details panel is displayed in delete mode.

4. Click **OK** to confirm deletion.

Example 7: Release order form order

This example describes how to release order form.

1. Repeat steps 1, 2 and 3 in [Example 1: Add order forms](#)
2. Select order form and click option **Release**.

Order form order is released,

Example 8: Work with orders

This example describes how to maintain order form order.

1. Repeat steps 1, 2 and 3 in [Example 1: Add order forms](#)
2. Select order form and click option **Order**.

ORW010 Work with Order panel is displayed.

Please refer **ORW010 Work with Order** for further details.

Example 9: Prints batch register

This example describes how to print batch.

1. Repeat steps 1, 2 and 3 in [Example 1: Add order forms](#)
2. Select order form and click option **Batch register**.

Batch register printed.

Example 10: Order form credit card charge

This example describes how to charge order form credit card

1. Repeat steps 1, 2 and 3 in [Example 1: Add order forms](#)
2. Select order form and click option **Cred card**.

Order form credit card charged.

Example 11: Generate batch header

This example describes how to generate batch header.

1. Repeat steps 1, 2 and 3 in [Example 1: Add order forms](#)
2. Select order form and click option **Gen batch**.

DSO601 Generate Batch Header panel is displayed.

Please refer **DSO601 Generate Batch Header** for further details.

Example 12: Close order

This example describes how to close order.

1. Repeat steps 1, and 2 in [Example 1: Add order forms](#)
2. Select order form and click option **Cls/Reopn order**.
3. Click **OK** to close order.

Note Upon closing all forecast data would be deleted. Closed Order Form can be re-opened using the same option

Example 13: Order form processing charge

This example describes about order form processing charge

1. Repeat steps 1, 2 and 3 in [Example 1: Add order forms](#)
2. Select order form and click option **Charge**.

DSW622A Order Form Processing Charge panel is displayed.

Please refer **DSW622A Order Form Processing Charge** for further details.

Example 14: Add text to order form

This example describes how to add text to order form

1. Repeat steps 1, 2 and 3 in [Example 1: Add order forms](#)
2. Select order form and click option **Text**.

Control file **TMSDS/TEXT-TY2 Distribution text subtype** is displayed.

3. Select text subtype.

DSM900 Order Form Text panel is displayed.

Please refer **DSM900 Order Form Text** for further details.

Example 15: Order forms order inquiry

This example describes how to display order forms order details.

1. Select menu option Work with OF Batches or Work with OF Orders from Order Forms menu.

DSW600 Work with Order Forms – Filter selection panel is displayed.

2. Click **OK** to select all order forms.

DSW600 Work with Order Forms main panel is displayed in inquiry mode.

3. Repeat [Example 2: Work with order form batches](#) to inquiry about order form batches. Or repeat [Example 5: Display order form](#) to display order forms details,

Cross Reference

- DSE095A - Order/Credit entry
- DSE650A - Booklist Batch order entry
- DSR604A - Batch cover sheet
- DSR606A - Batch register