

Sales Order Maintenance User Manual

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Sales Order Maintenance

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Sales Order Maintenance Features

The Sales Order Maintenance system allows you to quickly and easily change over 25 elements of your sales order without entering into TR,100. In addition, the sales order maintenance command will create an audit trail of the changes have made.

Features:

- * Conversational change capability:
 - You are prompted for a sales order number, and then you can make multiple changes quickly and easily in a question and answer format, rather than block mode.
 - Contains new features that are unavailable with traditional Omar Order Entry:
 - Change the product number without deleting and re-adding
 - Copy and Split sales order line items
 - Change the Ship to customer - Option to copy the new ship to customers default values to the sales order
 - Renumber a single line item or all lines on your order
 - Quick sales order number lookup by customer po number
 - Perform changes to a "range" of line item numbers
 - Option to update the Manufacturing order demand file (ODF)

- * Sales Order change audit trail capability
 - Each sales order change will be written to a small sales order audit trail data base.
 - The user name who made the change, along with the date and time the change was made is written to the data base
 - With each change, you have the option of entering up to 30 characters of comments describing why the change was made to the sales order.
 - The before and after values are captured
 - A list command is provided which will allow all users to see what changes were made to the sales orders, the

comments as to why the changes were made, and who made the change.

Benefits:

- Increase the efficiency of your customer service group by enabling easier maintenance capability.
- Provide an audit trail to all users of the changes made to your sales orders and the reason the sales orders were changed.

Enhancements made to Release 4.5

Security Options

There is a new comin variable option in TR,191 to turn off and on the individual sales order change features in the Sales Order Maintenance command TR,190

Quick date, quantity, price change

There is a option (137) in the TR,190 command which will allow the user to quickly change the ship dates, order quantity, and unit price on a line item.

Enhancements made to Release 4.0

New Customer Purchase Order Lookup

We are now shipping the Summit Systems customer purchase order lookup with the Sales Order Maintenance system. The command UT,699 (generate customer purchase order search file) program is included with the product. When the user enters a '?' to the sales order number prompt a prompt appears which allows you to enter the first few characters of the customers purchase order number and pull up the sales order you would like to maintain.

Comin Variables for Sales Order Maintenance

A new command, TR,191, has been added to allow you the ability to set comin variables for the Sales Order Maintenance software. The comin variables will include defaults for sales order revision changes, sales order reprint changes, reason code defaults, etc. See the documentation under command TR,191 for a full description of the changes

New Sales Order Change Features

Several new features and options have been added to the TR,190 Change a sales order command:

- 1) **Option 112 - Change a ship to customer number**
- 2) **Option 113 - Change the Must date**
- 3) **Option 114 - Reset Pick list flag**
- 4) **Option 122 - Change the sales agent(s)**
- 5) **Option 124 - Change the sales order hold code**
- 6) **Option 125 - Change the sales order user defined fields
(Release 10 and 11 only)**
- 7) **Option 126 - Renumber all sales order line items**
- 8) **Option 133 - Copy / Split a line item**
- 9) **Option 140 - Renumber a sales order line item**
- 10) **Option 143 - Change the product number on a line item**

New Range of line items option

We have added the ability to enter a range of line numbers for the date, commission, and discount features. If you enter a '?' to the line number prompt you can enter a beginning and ending line number. This feature is helpful with users with sales orders with several line items that want to apply a change to several but not all lines on the order.

New Order Demand file update option

You now have the ability to update the manufacturing order demand file with the sales order changes made "real-time" without waiting for the nightly Omar UT,205 to run.

Enhancements made to Release 3.0

A. User name and time logged

The user (hp logon) who made the change and the date and time the change was made is now logged to the data base. These values appear when you list the sales order changes in LI,190.

B. Multiple Comment lines

You may now enter more than one 30 character comment lines when documenting a sales order change. All comment lines will appear when listing the sales order changes in LI,190.

C. Change Requested Date on All Lines

The change a requested ship date option allows you to enter 'ALL' to the line number prompt and change the requested date on all line items with a single transaction.

D. Changing a Discounted Price Enhancements

When changing the price on a line item, the system will let you type in the new price and reduce it by the discount percentage on the line item. Previously, if you had to change the price on a discounted line item, you had to calculate the discount yourself and enter the price. In addition, the pricing changes and discount change feature will list the before and after values of the pricing or discount change.

E. Line item hold code option

The ability to change a line item hold code has been added to the line change menu. The change a plant code on a line item option has been assigned to a new number for consistency with the rest of the OMAR commands.

F. Command Streamlining

A few prompts have had their defaults changed and a few prompts have been eliminated to expedite the flow of the transaction. The carriage return to acknowledge the change reason code has been eliminated. The default to line the sales order lines has been changed to 'N'.

LI,190 List Sales Order Changes

This command is used to list changes made to sales orders using command TR,190. In addition, this screen will extract information from the OMAR CHAFIL (change file) to capture any sales order changes or cancellations made by the user in command TR,100. This will allow the user to have a complete picture of the changes made to the sales order.

All Entries are listed in descending (most recent) date sequence.

Prompts

Displays output options.
OPTION (3)?

SALES ORDER NUMBER?
Enter a sales order number.

If the sales order is still on file, the customer master information is listed.

If any entries are on file from the OMAR CHAFIL, the following prompt appears:

LIST ENTRIES FROM SALES ORDER CHANGE FILE (Y)?

If any entries are on file from the Audit Trail file, the following prompt appears:

LIST AUDIT FILE RECORDS (Y)?

Files Accessed

BILMAS Bill-to master file
CUSFIL Ship-to master file
CHAFIL Sales order change/cancellation file
OMAAUD Sales order audit trail file
PROMAS Product master file

Screen Format

Change file section

Sales order number
Ship-to customer number (CHASH0 - CHAFIL)
Original sales order date (CHADAT - CHAFIL)
Ship to name (CUSNAM - CUSFIL)
Ship to address 4 (CUSAD4 - CUSFIL)

For each sales order header

Change code (CHACOD - CHAFIL)

Reason code (CHARES - CHAFIL)
 Date Changed (CHANEW - CHAFIL)
 Product number (CHAPRO - CHAFIL)
 Product description (PRODES - PROMAS)
 Sales Agent (CHASAL - CHAFIL)
 Sales Category Code (CHASC - CHAFIL)
 Quantity Changed - increase or decrease in the
 order quantity of the sales order line item
 (CHAQTY - CHAFIL)
 Extended Value - extended net price change (CHAPRI - CHAFIL)

Audit Trail file section - first line

Sales Order number
 Line number
 Product Number
 Product Description (PRODES - PROMAS)
 Old customer requested date (OMSCUS - OMSSOD)
 Old original scheduled ship date (OMSOSCH - OMSSOD)
 Old scheduled ship date (OMSSCH - OMSSOD)
 Old Quantity ordered (OMSSOQ - OMSSOD)
 Old Price (OMSPRI - OMSSOD)

Message:

If a line item was added 'ADD'

If a line item was changed, one of the following messages
 will appear:

'ADDRES' Change in the ship to address
 'SHIPTO' Change in the ship to customer number
 'MUSTDT' Change in the sales order pick must date
 'RESPIK' Reset the sales order pick list flag
 'FREIGH' Change in the freight terms
 'METSHP' Change in the method of shipment
 'CUSTPO' Change in the customer purchase order
 'INSTRU' Change in the special instructions
 'PAYTRM' Change in the payment terms
 'GRPCOD' Change in the sales order group code
 'SALCAT' Change in the sales category code
 'HDRHLD' Change in the sales order header hold code
 'USRDEF' Change the sales order user defined fields
 (release 10 and 11 users only)
 'ADD LN' Line item was added
 'DEL LN' Line item was delete
 'CUS PN' Customer part number changed
 'COPYSP' Copy or split a sales order line item
 'REQSHP' Customer requested ship date changed
 'SCHED' Scheduled ship date was changed
 'QTYORD' Quantity ordered was changed
 'PRICE' Unit price was changed
 'COMMI S' Commission rate was changed
 'RENUMB' Renumber a sales order line item
 'DISCNT' Discount rate was changed
 'PRODNO' Change the product number on a line item
 'PLANT' Plant code was changed

Second Line (if these elements changed)

New customer requested ship date (SODCUS - SODFIL)
New original scheduled ship date (SODOSCH - SODFIL)
New scheduled ship date (SODSCH - SODFIL)
New quantity ordered (SODQO - SODFIL)
New unit price (SODPRI - SODFIL)

Third Line

Description of product (if a line item change)
Change Comments
Date the change was made
Time the change was made
User name (logon) who made the change

TR,105 Sales Order Entry

Command TR, 105 is used to enter sales orders. It is a conversational order entry system which allows quick and easy entry of orders with very little training.

The first is to enter the ship-to customer number and header information about the sales order. The second part of the order entry allows the user to enter product numbers, dates, quantities and prices for one or more products. At the conclusion of entering products, the user enters sales order special instructions, and then gets to enter the method of shipment, and whether or not to put the order on hold.

Prompts

SHIP TO CUSTOMER NUMBER?

Enter the customer number of the ship-to customer. If you wish to search for customer numbers, enter a "?" to perform a lookup by customer name.

The ship-to and bill-to name and address appear, followed by:

EDIT SHIP-TO ADDRESS (N)?

You can 'override' the address on the sales order by entering a "Y" to this prompt.

The header screen of the order entry process appears:

```

P.O. NO:
STANDARD DISCOUNT: .00% OK?
FLAT COMMISSION RATE:
PAYMENT TERMS CODE: xx
REQUESTED SHIP DATE:
SCHEDULED SHIP DATE:
OK TO SHIP PRIOR TO REQ DATE? Y
SALES CATEGORY: xxx
NUMBER OF AGENTS COMMISSIONED: 1
AGENT: xxx PRO-RATA:
  
```

The entry of this screen is self-explanatory. The payment terms, sales category, and default sales agent are from the ship-to customer file. The only caveats regarding data entry in the header screen are as follows:

- a) To apply the commission rate for each line item, press return at the commission prompt. If there is not a commission associated with this sales order, enter a zero to the commission prompt.
- b) If you wish to apply a commission to more than one sales agent, you enter the number of sales agents to split, and the 'number of sales agents commissioned' prompt.

Upon entering the header information of the order, the following prompt will appear:

PRODUCT NUMBER?

Enter a valid product number. To look up products by product description, enter a "?" to this prompt.

Upon entering a product number, the following information will appear, if you use allocations:

QUANTITY AVAILABLE: 999.99

DETAILED AVAILABILITY LIST (N)? *

Entering a "Y" to the availability prompt will display a list of the open supply and demand for the product.

CUSTOMER PART NUMBER?

Enter the customer part number associated with this line item.

If you entered return to the commission prompt on the header screen, the following prompt appears:

COMMISSION PERCENTAGE?

QUANTITY ORDERED?

Enter the quantity ordered of this line item.

REQUESTED SHIPMENT DATE (99/99/99)?

CAN SHIPMENT BE MADE PRIOR TO THIS DATE (Y)?

SCHEDULED SHIPMENT DATE? (99/99/99)

Enter the requested and scheduled ship date of this line item.

ENTER LINE NOTES (N/Y)?

If you wish to enter notes associated with this line item, enter a 'Y'.

NOTE CODE?

Enter a special note code to attach to this line item

SPECIAL INSTRUCTIONS:

LINE 1.01 ?

Enter any special instructions associated with the line item.

The list price or pricing table price is now displayed for the product number entered. Enter the unit price of the product:

LIST PRICE: 50.00

UNIT PRICE FOR QTY 1.00 IS: 50.00

UNIT PRICE?

The screen now returns to the 'product number?' prompt. When you are finished entering line items. Enter 'E'.

Now you have the opportunity to enter any note codes, or special instructions associated with the order.

ADDING SALES ORDER SPECIAL INSTRUCTIONS...
SPECIAL NOTE CODE?

SPECIAL INSTRUCTIONS:
LINE 1000.01 ?

DISPLAY LINE ITEMS(Y)?

If you enter a 'y' to the display line item prompt, you can list back the sales order, prior to updating.

SHIPPED VIA (xxxxxx):

Enter the method of shipment for this sales order.

FREIGHT TERMS CODE (xx):

Enter the freight terms associated with the sales order.

SALES ORDER HOLD CODE ():

You may put the sales order on hold, by entering a hold code at this time.

ENTER DESIRED OPTION:

1. CREATE SALES ORDER
2. CORRECT SALES ORDER LINE ITEMS
3. CORRECT SALES ORDER HEADER

OPTION?

To add the sales order enter 1. To go back and correct the line items enter a 2. To change values on the sales order header enter a 3.

The screen returns to the 'ship-to customer number? ' prompt, for entry of your next order.

TR,190 Change a Sales Order

This command is used to change your sales order. You have the option of selecting up to 25 different types of changes you can make to the sales order within this one command.

We recommend that you run TR,191 to set the 'comin' variables that effect the flow of this transaction. The comin variables allow you to take the appropriate defaults for your order entry environment. If you do not use reason codes, always or never reprint, and always or never increment the revision, these prompts can be completely eliminated.

At the conclusion of making your changes, you have the option of entering one or more 30 character comments describing why this change was made. To review the changes and comments made to the sales order use command LI,190.

If you intend on using the customer purchase order lookup feature from within this command, we recommend you run the UT,699 (generate customer po lookup file) each evening.

Prompts

SALES ORDER NUMBER ('?' FOR CUSTOMER PO) ?

Enter a sales order number. If you would like to retrieve the sales order number by entering the customers purchase order number, then enter a question mark

If you entered a question mark, the following prompt appears:

CUSTOMER PO SEARCH STRING?

Enter a customer purchase order number of the first few characters of the customer purchase order number. If you find an exact match the Omar sales order number will be retrieved. If more than one match is found then a list of the sales orders matching the string entered is displayed and you are asked which sales order number to select.

If this is your first entrance into the screen, the change a sales order menu now appears.

You will then see the prompt:

SALES ORDER: xxxxx ENTER COMMAND NUMBER ('?' FOR LIST)?

Enter one of the 3 digit command numbers, corresponding to the change you would like to perform. If you would like to see a list of the command numbers, enter a question mark.

The sales order number is always displayed at this prompt

so that the user always knows the sales order number that is in the process of being changed.

The status of the sales order is now obtained, and you will be told how many open, picked, and shipped line items appear on the order, along with the open and total value of the sales order.

Sales Order Header Changes

If you are changing the header of the sales order, the command will display the current value of the sales order field, and you will be prompted for the new value.

If you selected option 112 - changing the ship to customer number, the following prompts appear:

NEW SHIP TO CUSTOMER NUMBER?
Enter the new customer number.

COPY NEW SHIP-TO DEFAULT TAX, SALES CATEGORY,
METHOD OF SHIPMENT AND PAY TERMS TO THE SALES ORDER (Y)?
We give you the option of updating the sales order with the default values associated with the ship-to and bill-to customer. If you respond 'N' to this prompt the sales order values will remain the same and only the customer number, name and address will be updated.

If you selected option 119 - changing the sales order special instructions, the following prompts appear:

INSTRUCTION OPTION:
1. ORDER INSTRUCTIONS
2. LINE ITEM INSTRUCTIONS
OPTION(1)?
To add, change or delete instructions at the end of the order select option 1. To add, change or delete instructions on a sales order line item, choose option number 2. You will be prompted for the line number.

Sales Order Line Item Changes

If you are making a change to a line item, the following prompts will appear:

LIST SALES ORDER LINE ITEMS (N)?
If you would like to view your sales order lines, enter a 'Y'.

For most line item changes the old value will be displayed, and you will be prompted for the new value. Some of the

other options are as follows:

If you selected option 130 - add a line item - the following prompts appear:

PRODUCT NUMBER? *

ASSIGN TO LINE NUMBER(x)?

If you wish to insert a line, enter the value as a decimal. For example, if your sales order has 4 line items, and you wish to insert a line between lines 3 and 4, enter the line number as 3.5. The line must meet the 'renumbering' criteria mentioned below to do so.

CUSTOMER PART NUMBER?
 COMMISSION PERCENTAGE?
 DISCOUNT PERCENTAGE?
 QUANTITY ORDERED? 1
 REQUESTED SHIPMENT DATE?
 SCHEDULED SHIPMENT DATE?

UNIT PRICE?

SPECIAL INSTRUCTIONS:

LINE x.01? *

For option 133 - copy/split a line item, the following prompts appear:

SALES ORDER: xxxx ENTER LINE NUMBER TO COPY FROM?

Enter the line number you wish to copy or split. Then the following prompt will appear:

CURRENT BACKORDERED QUANTITY IS: xxxx.xx
 QUANTITY TO SPLIT (C/R = COPY)?

If you wish to split the line item into a new line item, enter the quantity of the new line item to be created. The quantity must be less than the current backordered quantity. If you split, the quantity entered will be deducted from the 'copy from' line item and added to the new line item.

If you wish to copy the line item press return. A new line item will be created for the same quantity as the 'copy from' line item.

Both splitting and copying the line item will assign the newly created line item the next available line number on the sales order.

For option 134 and 135 - change the requested date or the scheduled ship date, the following prompt appears:

ENTER LINE NUMBER ('A' FOR ALL, '?' FOR RANGE)?

With these two date options you may update the dates on all line items by entering 'A' or 'ALL', or you may enter a range of line items by entering a '?'.

The following prompt then appears:

SET THE SCHEDULED AND REQUESTED DATE TO THE SAME VALUE(Y)?

You have the option of setting the scheduled and requested date to the same value. This allows you to update both dates in a single transaction instead of performing two transactions.

If you requested a range of line items ('?'), the following prompts appear:

BEGINNING LINE NUMBER?

ENDING LINE NUMBER?

For option 140 - renumber a line item, the following prompt appears:

SALES ORDER: xxxxx ENTER LINE NUMBER TO MOVE?

Enter the line number to move on your order. Then the following prompt appears:

LINE NUMBER TO ASSIGN?

Enter the new line number for this line item. You may not assign a line number that is already on file.

For all other sales order line item transactions the following prompt appears:

SALES ORDER: xxxxx ENTER SO LINE NUMBER (xxx)?

Enter the line number of the line you wish to change. If you press return, the default line number will be used. The default line number is the first open line item on your sales order.

After entering the new sales order value, the following prompt Appears:

REASON CODE?

Enter a valid reason code from the OMAR reason code table.

It is possible to suppress the reason code prompt and set a default variable with the use of a comin variable setting in command TR, 191

COMMENTS?

COMMENTS (C/R TO CONTINUE)?

Enter one or more lines of 30 character comments describing why the change was made. Enter C/R to continue.

Returns to the sales order command number prompt
SALES ORDER: xxxxx ENTER COMMAND NUMBER ('?' FOR LIST)?

When you have completed making changes to this sales order then enter an 'E', and the following prompts will appear:

DO YOU WANT TO REPRINT THE SALES ORDER(x)?
Respond 'Y' if you want the order number to print with the next UT,700 sales order run. This prompt can be suppressed or the default (Y or N) can be set through the use of a comin variable setting in TR,191.

DO YOU WANT TO INCREMENT THE REVISION NUMBER(x)?
Respond 'Y' to increment the sales order revision number. This prompt can be suppressed or the default (Y or N) can be set through the use of a comin variable setting in TR,191.

Returns to 'SALES ORDER NUMBER?' prompt. Enter the next sales order number to maintain or 'E' to exit.

Special Considerations on Renumbering Line Items, or Changing the Product Number

In order to renumber or insert sales order line items, the following must be true:

The sales order may not have any shipments or invoices
The sales order may not have any configurable line items
The sales order may not be associated with Manman Projects

The program will renumber any allocation records or sales order line instructions.

Special Considerations for Changing the Ship-to Customer

In order to change the ship-to customer, the following must be true:

The sales order may not have any shipments or invoices

Changing the ship-to customer changes the ship to number, name and address fields. Responding "Y" to the copy customer defaults prompt will also update the tax flag, tax code, sales category code, method of shipment, payment terms, and hold code field.

Special Considerations for Updating the Manufacturing Order Demand file

If you have the comin variable turned on in TR,191 to update the manufacturing order demand file, the TR,190 change a sales order command will update the order demand file immediately. The types of changes that trigger the order demand file update are as follows:

- 124 Header Hold code
- 126 Renumber all line items
- 130 Add a line item
- 131 Delete a line item
- 133 Copy/Split a line item
- 134 Change customer requested date
- 135 Change scheduled ship date
- 136 Change quantity ordered
- 140 Renumber a line item
- 143 Change a product number
- 144 Change the line item hold code
- 146 Change the plant code on a line item

Configurable line items do not update the order demand file.

Files Accessed

- BILMAS Bill-to master file
- CUSFIL Ship-to master file
- CHAFIL Sales order change/cancellation file (updated)
- FRTMAS Freight terms master file
- OMAAUD Sales order audit trail file (updated)
- PROMAS Product master file
- SIFIL Special instruction file (updated)
- SODFIL Sales Order detail file (updated)
- SOEFIL Sales Order header file (updated)

- ODF Manufacturing Order Demand file (updated)

TR,191 Sales Order Maintenance Comin Variables

This command is used to set the 'comin' variables for the Sales Order Maintenance Command TR, 190. These variables are used to set defaults or suppress a number of the prompts within TR, 190.

Prompts

RESTRICT SECURITY ON SELECTED TR, 190 FUNCTIONS (N/Y)?

This prompt will allow you to prohibit users from using individual functions within the TR, 190 maintenance command. If you respond 'Y' then the following prompt will appear:

COMMAND NUMBER (999)?

Enter the three digit function as displayed in the TR, 190 menu

1. RESTRICT
2. ALLOW

OPTION(1)?

Enter 1 or 2 to restrict or allow the function. Initially, the software allows all users access to all functions unless you specifically restrict a function in TR, 191.

MENU DISPLAY OPTION:

1. DISPLAY MENU ONCE WHEN YOU ENTER THE COMMAND
2. DISPLAY THE MENU AFTER EACH TRANSACTION

OPTION(1)? 1

The menu of 25 different changes to choose from appears when you first enter the TR, 190 transaction. After the first change, the menu no longer appears. If you would like the menu to appear after each change, set this variable to a '2'.

INCREMENT SO REVISION NUMBER OPTION:

1. PROMPT THE USER, DEFAULT TO 'Y'
2. PROMPT THE USER, DEFAULT TO 'N'
3. DO NOT PROMPT, ALWAYS INCREMENT
4. DO NOT PROMPT, DO NOT INCREMENT

OPTION(1)? 1

Upon finishing changing a sales order, you have the option of incrementing the sales order revision number. This variable allows you to suppress the prompt (options 3 or 4) or display the sales order revision number prompt (options 1 and 2).

REPRINT SALES ORDER OPTION:

1. PROMPT THE USER, DEFAULT TO 'Y'
2. PROMPT THE USER, DEFAULT TO 'N'
3. DO NOT PROMPT, ALWAYS REPRINT
4. DO NOT PROMPT, NEVER REPRINT

OPTION(1)? 1

Upon finishing changing a sales order, you have the option of reprinting the sales order. This variable will allow the user to choose whether they want to reprint the sales order (options 1 and 2) or the suppress the prompt and always reprint (option 3) or suppress the prompt and never reprint (option 4).

REASON CODE PROMPT OPTION:

1. PROMPT USER FOR A REASON CODE
2. DO NOT PROMPT FOR A REASON CODE

OPTION(2)? 2

A reason code prompt appears after each sales order change in command TR,190. If you do not use reason codes, we recommend that you set this variable to a '2'. If you choose to option number 2, the following prompt will appear:

REASON CODE DEFAULT VALUE:

DEFAULT TO(1)? 1

Enter a valid reason code from your Omar reason code table. The value will be used in lieu of prompting the user for a reason code when they change a sales order.

UPDATE MFG ORDER DEMAND (ODF) FILE OPTION:

1. DO NOT UPDATE ODF
2. UPDATE THE ODF FILE

OPTION(1)? 1

This variable is currently not in use and will be used in a later release of the TR,190 program.

UT,699 Generate Customer PO Lookup file

Use this command to create a KSAM Customer purchase order file for use by command TR,190 (Change a Sales Order). The SOEFIL file is read serially, and all sales orders (open and closed) with a customer purchase order, are written to the KSAM file.

Prompts

The date of the last time the file was regenerated is displayed, and you are prompted:

READY TO START (RE)GENERATION (N/Y)?

Enter 'Y' to begin the creation of the KSAM File.

DISPLAY OPTION:

1. CUSTOMER NUMBER AND NAME
 2. CUSTOMER NAME AND ADDRESS LINE 4
- OPTION(1)?

Enter the option either to display customer number and name or customer name and address

Files Accessed

SOEFIL Sales order header file
CUSPOFIL.FDATABxx Customer purchase order lookup file

File Format

Customer purchase order number (1-24)
Sales order number (25-34)
Ship-to customer name or number and address (35-66)
Date sales order was entered (67-74)

COMMAND (TEST,OM, 0)? L,190

*

List Sales Order Changes and Cancellations (v4.0)

ENTER DESIRED OUTPUT OPTION:

- 0. LINE PRINTER
- 1. TERMINAL, 132 COLUMNS
- 2. ENTER LOGICAL DEVICE/DISC FILE, 132 COLUMNS
- 3. TERMINAL

OPTION (3)?

SALES ORDER NUMBER? 25853 *

SALES ORDER CHANGES AND CANCELLATIONS PAGE NO: 1

```

=====
SALES ORDER NUMBER: 25853 ORIG SO DATE: 06/23/98
=====
SHIP-TO: 4613-127 ! BILL-TO: 4613-127
MENARD CASHWAY LUMBER 523 ! MENARD INC
6001 W. OAKTON STREET ! 6001 W OAKTON STREET
!
!
SKOKIE IL ! SKOKIE IL
60077-2637 ! 60077-2637
=====

```

LIST ENTRIES FROM OMAR CHANGE FILE (N)? *

LIST AUDIT FILE RECORDS (Y)? *

LINE NO	PRODUCT NUMBER/DESCRIP	OLD/NEW CUS REQ	OLD/NEW ORG	OLD/NEW SCHD	OLD/NEW SCHD SHIP	OLD/NEW QTY	OLD/NEW ORD	OLD/NEW UNT	OLD/NEW PRICE	MESG/ DATE
HDR		OLD: 12/31/98	NEW: 00/00/00							1 MUSTDT
		SET THE MUST DATE				12/12/98		12:51AM		BYRNS
1	999025-1	06/24/98	06/24/98	06/24/98		1.00		.000		REQSHP
	LUCITE ES HEADER	06/25/98				.00		.000		1
		SET THE CUST RQ DATE				12/12/98		1:28PM		BYRNS
3	221100-1-25	12/31/98	12/31/98	12/31/98		1.00		1.500		ADD LN
	LPS-PAT12-095-2X4	JOHN CALLED AND ADDED TO ORDER				12/12/98		1:40PM		BYRNS

SALES ORDER NUMBER? E *

COMMAND (TEST,OM, 0)? E

*

* Example of changing the scheduled and requested *
* ship date concurrently on a range of line items *
* from within the TR,190 change a sales order command *

COMMAND (TEST,OM, 0)? TR,190 *

Change a Sales Order (v4.0)

SALES ORDER NUMBER ('?' FOR CUSTOMER PO)? 35134 *

NDC WARWICK, RI 10225-24 10/01/98

SALES ORDER CHANGE COMMANDS

SALES ORDER LINE COMMANDS

111 SHIP TO ADDRESS	130 ADD A LINE ITEM
112 SHIP TO CUSTOMER NUMBER	131 DELETE A LINE ITEM
113 MUST DATE	132 CUSTOMER PART NUMBER
114 RESET PICK LIST PRINT FLAG	133 COPY / SPLIT A LINE ITEM
116 FREIGHT TERMS CODE	134 CUSTOMER REQUESTED SHIP DATE
117 METHOD OF SHIPMENT	135 SCHEDULED SHIP DATE
118 CUSTOMER PURCHASE ORDER NUMBER	136 QUANTITY ORDERED
119 MAINTAIN SPECIAL INSTRUCTIONS	138 UNIT PRICE
120 PAYMENT TERMS CODE	139 COMMISSION RATE
121 GROUP CODE	140 RENUMBER A LINE ITEM
122 SALES AGENT(S)	142 DISCOUNT PERCENT
123 SALES CATEGORY CODE	143 PRODUCT NUMBER
124 HEADER HOLD CODE	144 LINE HOLD CODE
125 USER DEFINED FIELDS (10/11)	146 PLANT CODE
126 RENUMBER ALL LINE ITEMS	

SALES ORDER: 35134 ENTER COMMAND NUMBER ('?' FOR LIST)? 135

CHANGE THE SCHEDULED SHIP DATE
ORDER STATUS: OPEN VALUE: 27354.69 TOTAL VALUE: 27354.69
6 OPEN LINE ITEMS
LIST SALES ORDER LINE ITEMS (N)? N *

SALES ORDER: 35134 ENTER LINE NUMBER ('A' FOR ALL, '?' FOR RANGE)? ?

SET THE SCHEDULED AND REQUESTED DATE TO THE SAME VALUE (Y)? Y *
BEGINNING LINE NUMBER? 2
ENDING LINE NUMBER? 5

NEW SCHEDULED SHIPMENT DATE? 12/31 *

UPDATE ORIGINAL SCHEDULED SHIP DATE (N)? *
REASON CODE DESCRIPTION: E
COMMENTS? RESCHED DUE TO PLANT CAPACITY *
COMMENTS (C/R TO CONTINUE)? *

*** NUMBER OF LINES UPDATED: 4

SALES ORDER: 35134 ENTER LINE NUMBER ('A' FOR ALL, '?' FOR RANGE)? E

SALES ORDER: 35134 ENTER COMMAND NUMBER ('?' FOR LIST)? E

DO YOU WANT TO REPRINT THE SALES ORDER (Y)? E *

DO YOU WANT TO INCREMENT THE REVISION NUMBER (Y)? E *

 * Example of adding a sales order line item within *
 * the TR,190 change a sales order command *

SALES ORDER NUMBER ('?' FOR CUSTOMER PO)? 25853 *
 MENARD CASHWAY LUMBER 523 SKOKIE IL 12345 06/23/98

SALES ORDER CHANGE COMMANDS	SALES ORDER LINE COMMANDS
-----	-----
111 SHIP TO ADDRESS	130 ADD A LINE ITEM
112 SHIP TO CUSTOMER NUMBER	131 DELETE A LINE ITEM
113 MUST DATE	132 CUSTOMER PART NUMBER
114 RESET PICK LIST PRINT FLAG	133 COPY / SPLIT A LINE ITEM
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124 HEADER HOLD CODE	144 LINE HOLD CODE
125 USER DEFINED FIELDS (10/11)	146 PLANT CODE
126 RENUMBER ALL LINE ITEMS	

SALES ORDER: 25853 ENTER COMMAND NUMBER ('?' FOR LIST)? 130

ADD A LINE ITEM TO THE SALES ORDER
 ORDER STATUS: OPEN VALUE: .00 TOTAL VALUE: .00
 2 SHIPPED LINE ITEMS
 LIST SALES ORDER LINE ITEMS (N)? N *

PRODUCT NUMBER? 221100-1-25 *
 PRODUCT DESCRIPTION: LPS-PAT12-095-2X4-25/PTC25
 ASSIGN TO LINE NUMBER(3)?
 CUSTOMER PART NUMBER? *
 COMMISSION PERCENTAGE?
 DISCOUNT PERCENTAGE?
 QUANTITY ORDERED? 1
 REQUESTED SHIPMENT DATE? 12/31 *
 SCHEDULED SHIPMENT DATE? 12/31 *

PRODUCT: 221100-1-25
 LIST PRICE: 50.7500
 UNIT PRICE FOR QTY 1 IS: 50.7500

UNIT PRICE? 1.50

SPECIAL INSTRUCTIONS:
 LINE 3.01? e *

REASON CODE (1)?
 COMMAND (TEST,OM, 0)? *
 COMMENTS? JOHN CALLED AND ADDED TO ORDER*
 COMMENTS (C/R TO CONTINUE)? *

PRODUCT NUMBER? E *

SALES ORDER: 25853 ENTER COMMAND NUMBER ('?' FOR LIST)? E

DO YOU WANT TO REPRINT THE SALES ORDER (Y)? E *

DO YOU WANT TO INCREMENT THE REVISION NUMBER (Y)? E *

SALES ORDER NUMBER ('?' FOR CUSTOMER PO)? *

COMMAND (TEST,OM, 0)? TR,191

*

Sales Order Maintenance Comin Variables (v4.0)

MENU DISPLAY OPTION:

- 1. DISPLAY MENU ONCE WHEN YOU ENTER THE COMMAND
- 2. DISPLAY THE MENU AFTER EACH TRANSACTION

OPTION(1)? 1

INCREMENT SO REVISION NUMBER OPTION:

- 1. PROMPT THE USER, DEFAULT TO 'Y'
- 2. PROMPT THE USER, DEFAULT TO 'N'
- 3. DO NOT PROMPT, ALWAYS INCREMENT
- 4. DO NOT PROMPT, DO NOT INCREMENT

OPTION(1)? 1

REPRINT SALES ORDER OPTION:

- 1. PROMPT THE USER, DEFAULT TO 'Y'
- 2. PROMPT THE USER, DEFAULT TO 'N'
- 3. DO NOT PROMPT, ALWAYS REPRINT
- 4. DO NOT PROMPT, NEVER REPRINT

OPTION(1)? 1

REASON CODE PROMPT OPTION:

- 1. PROMPT USER FOR A REASON CODE
- 2. DO NOT PROMPT FOR A REASON CODE

OPTION(1)? 2

REASON CODE DEFAULT VALUE:

DEFAULT TO(1)? 1

UPDATE MFG ORDER DEMAND (ODF) FILE OPTION:

- 1. DO NOT UPDATE ODF
- 2. UPDATE THE ODF FILE

OPTION(1)? 1

COMMAND (TEST,OM, 0)? E

*

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*****
Example of the TR,105 Order Entry command
*****

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HIP-TO CUSTOMER NUMBER? 4212-001 *

HIP-TO: 4212-001
 COMMERCIAL PLAS & SUPPLY CORP
 475 W 3600 SO

BILL-TO: 4212-001
 COMMERCIAL PLAS & SUPPLY CORP
 475 W 3600 SOUTH

SALT LAKE CITY UT
 84115

SALT LAKE CITY UT
 84115

DIT SHIP-TO ADDRESS (N)? *

.O. NO: *

STANDARD DISCOUNT: .00% OK?

LAT COMMISSION RATE:

PAYMENT TERMS CODE: 20

REQUESTED SHIP DATE:

SCHEDULED SHIP DATE:

WANT TO SHIP PRIOR TO REQ DATE? Y

SALES CATEGORY: IND

NUMBER OF AGENTS COMMISSIONED: 1

GENT: 120 PRO-RATA:

RODUCT NUMBER? 221100-1-25 *
RODUCT DESCRIPTION: LPS-PAT12-095-2X4-25/PTC25
UANTITY AVAILABLE: 108.00
ETAILED AVAILABILITY LIST (N)? *
USTOMER PART NUMBER? 1234 *

OMMISSION PERCENTAGE? 0

UANTITY ORDERED? 100

EQUESTED SHIPMENT DATE (10/24/01)? *
CAN SHIPMENT BE MADE PRIOR TO THIS DATE (Y)? *
CHEDULED SHIPMENT DATE? (10/24/01) *

ENTER LINE NOTES (N/Y)? Y *

PECIAL NOTE CODE?
PECIAL INSTRUCTIONS:
LINE 1.01 ? STACK 10 HIGH
LINE 1.02 ?
LLOCATED: 100

RODUCT: 221100-1-25
LIST PRICE: 50.7500
UNIT PRICE FOR QTY 100.00 IS: 50.7500

NIT PRICE? 50.00

LINE 1 ADDED. ORDER VALUE: 5000.00 WEIGHT: 4331

RODUCT NUMBER? E

DDING SALES ORDER SPECIAL INSTRUCTIONS...
PECIAL NOTE CODE?

PECIAL INSTRUCTIONS:
LINE 1000.01 ? DO NOT DELIVER AFTER 3PM
LINE 1000.02 ?

TOTAL SALES ORDER VALUE: 5000.00
TOTAL SALES ORDER WEIGHT: 4331

SHIPPED VIA (YELLOW): *

WEIGHT TERMS CODE (26): *

SALES ORDER HOLD CODE (): *

ENTER DESIRED OPTION:
1. CREATE SALES ORDER
2. CORRECT SALES ORDER LINE ITEMS
3. CORRECT SALES ORDER HEADER
PTION? 1
KEY TO CREATE (Y/N)? Y *

OUR SALES ORDER NUMBER IS 95317

IT CARRIAGE RETURN TO ENTER NEXT SALES ORDER: *