

**Order Entry
Fourth Shift Release 8.00A**

Fourth Shift Help
Release 8.00A

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Order Entry Module

The Order Entry Module gives customer service representatives on-line support to enter and track customer orders. Through sales order review, the customer service representative can take action on credit problems, rescheduling requirements, and the timely release of orders to meet shipment dates.

The Order Entry Module checks customer credit, available-to-promise, and order backlogs, and produces order acknowledgments.

Module Prerequisites

The Order Entry Module has the following prerequisites:

- SYSM (System Control)
- INVM (Inventory Control)
- BILM (Bill of Material)
- MOMM (Manufacturing Order Management)

Module Integration

The CUSM Module is integrated with other modules. It uses information from the:

- INVM (Inventory Control) Module, for defining item planning parameters, inventory balances, and item information.
- MOMM (Manufacturing Order Management) Module, for periodic order review, closed order analysis, and order fulfillment.
- MRPM (Material Requirements Planning) Module, for time-phased planning of products to satisfy customer order requirements.
- PURM (Purchasing) Module, for establishing the supplies available to cover customer orders.
- SHPM (Shipping) Module, for order fulfillment.
- APBM (Advanced Price Book) Module, for available pricing and quantity breaks.

The CUSM Module updates the GLSM (General Ledger) Module and the ARSM (Accounts Receivable) Module as a result of picking transactions when the SHPM Module is not yet installed.

Setting Up the Order Entry Module

Setting Up the Order Entry Module provides an overview of how to implement the module. It covers:

- guidelines to consider before you implement the module
- how to prepare your data for loading
- suggested procedures for loading your data
- suggestions for using the module

Although this section provides key information about the Order Entry Module, it does not explain order entry procedures.

Before You Implement the Module

The primary function of the Order Entry Module is to process and track customer orders from entry through shipment or shipment preparation. Review these guidelines before you implement the module.

Customer Information

- Each customer must have a unique customer number and the information about each customer should be accurate. If a customer numbering scheme does not already exist, define a scheme that uses as few characters as possible.

If one customer has multiple locations, define a unique customer identification for each location.

If a customer has multiple “ship-to” locations with a single “bill-to” address, use the multiple ship-to capability rather than defining unique customers for each location.

- Each customer must be assigned a standard payment terms option.
- Each customer should be assigned a date and number format to use when printing information on external documents such as order acknowledgments.
- Each customer should be assigned with an Email Print Preference for email enabled external reports.
- Each customer can have contacts set up.
- If emailing external reports then each customer must have contacts set up.
- Each customer must be assigned a VAT customer code, if you are using a VAT system.
- Procedures and responsibility should be established for collecting customer information and entering this data into the computer. As changes are made to customer information, these changes must be entered into the computer.

Customer Item Information

Assign each of your saleable items an item number identifier. You can also specify a customer item to represent the customer's definition of the item. The **Customer Item** field is 30 characters.

Customer Order Information

- Guidelines and responsibility should be established for entering orders, including use of payment terms.

- A sufficient supply of forms (if you choose to use preprinted forms) and window envelopes for order acknowledgments should be ordered, and controls should be established for their use. For more information, see "Order Acknowledgment" in the **Reports** section.
- Guidelines and responsibility should be established for emailing, printing, filing, and retaining order acknowledgments.
- Guidelines should be established for the information included on order acknowledgments. Options are:
 - include text messages in the order header and line item sections
 - print the line item information in terms of the customer's identification or the Item Master as the primary reference
- An implementation plan should be developed. This plan should include a cutover date for loading information about released customer orders.

Preparing Your Data for Loading

Information about your items, taxes, commissions, customers and customer orders may exist in a variety of forms. There is no "one best method" for preparing this data. The following suggestions will help minimize data entry time and effort when you enter the data during startup.

System Configuration

The following fields on the CNFG (System Installation Setup) screen should be reviewed as they relate to order entry:

- Print Text on Ext Documents
- Order Lead Time
- Deferred Update Option
- Address Format
- Order Entry Configuration

The following fields on the COCF (Order Entry Configuration) screen should be reviewed as they relate to order entry:

- Duplicate Customer PO Notification
- Credit Check CO Line
- Obsolete Item Enforcement for CO Entry
- Print CO Header Standard Text on Pick List
- Print CO Line Standard Text on Pick List
- Allow Movement of Shipping Inventory

Master Account Numbers

Verify master account number combinations exist for the following order entry accounts:

Screen	Master Account Field
--------	----------------------

ARCF	Commission Liab Commission Expense Sales
CNFA	Cost of Goods Sold Cust Prod Variance Cust Prod WIP Inv Sales
Customer Name/ Address Detail	A/R Acct No COGS Acct No* Freight Acct No Sales Acct No
TXTA	Tax Accrual Master Account No Tax Liability Master Account No

*If the SHCF Setting allows the use of multiple COGS accounts, you may need to define more account numbers for users.

Item and Pricing Information

Check the accuracy of item and bill of material information for items on the following screens:

- ITMB (Item Master)
- Item Master Detail
- Item Master Planning Detail
- ITMC (Item/Work Center Cost Data)
- BILL (Single Level Bill)
- Bill of Material Detail

Identify the standard price for each salable end item. The Order Entry Module is designed to accommodate a policy for item list price and customer discounts on an item. The list price is identified for each item and a discount is identified for each customer.

Catalog Item Information

Catalog items are used to cross-reference customer information with Item Master information for use by more than one customer. Catalog item information includes:

- 30-character catalog item identifier
- catalog item description
- Item Master item cross-reference
- restricted code

Catalog items can be used on customer orders, customer invoices and in customer pricebooks if the Advanced Price Book Module is installed. The EDIM Module does not take advantage of the catalog item feature.

Establish the Item Master to catalog item identifier table for use during data entry.

Sales Accounts Tracking

Sales transactions can be tracked by item or by customer. The sales, COGS and accounts receivable master account numbers are entered on the following screens:

- CNFA (Configuration of Interface Account Numbers)
- ITMC (Item/Work Center Cost Data)
- Customer Name/Address Detail

Invoices and credit memos are system-generated as a result of filling customer orders. The accounts used for these sales transactions are based on the following hierarchical order:

	Customer Name / Address Detail	ITMC	CNFA
Sales	1	2	3
COGS	1	2	3
A/R	1		

- To track sales for a product line, use the ITMC screen to identify the sales and COGS master accounts for each item in the product line. Use the **Product Line** field, on the ITMC screen, to identify the product line.
- To track sales by channel of distribution, use the Customer Name/Address Detail screen to identify the sales, COGS and accounts receivable master accounts for customers.

Tax and Commission Information

Check the accuracy of tax information on the following screens:

- TXTA (Tax Code Table)
- VATT (Value Added Tax Code Table), if a VAT system is used

Identify each sales commission by a code and identify the associated salesperson and rate for each commission. The overall commission for a sale is calculated at the time of shipment. Any appropriate splitting of the commission is performed when the sales analysis capability is installed in the system.

Customer Information

Identify your current customers and define related customer information. Predetermined values for fields on the three Customer Master screens can be established for entering groups of customers with similar characteristics by using the Default-Customer. When adding a customer, the default values are displayed and stored in the system until overridden. See [Using DEFAULT Values](#) for a list of values related to the DEFAULT-CUSTOMER.

Add a generic customer identifier, such as 999999, for use with one time customers or in unusual situations.

Shipping Address Information

Each customer can have several sets of shipping-specific information. Each customer has a unique set of **Ship to ID** = 000000 default values. See [Using DEFAULT Values](#) for a list of values related to the **Ship to ID**.

Identify a default set of shipping information for each customer. Identify each additional set of shipping information using up to a 13-digit identifier (**Ship to ID**). If recipients for email enabled

external reports are dependent on ship to address, setup Ship To/Delivery Location Contacts for the ship to address.

Initial Balances

It is assumed that your current inventory balances already reflect issues that have been made to partially shipped orders.

The system automatically assigns a line number in sequential order, so that the assigned line number may or may not correspond to the line numbers on your existing documents.

Identify any released customer orders and the status of each released line item at the time of cutover. For each line item, it is important to identify the extent to which shipments have been made against it. Closed line items do not need to be entered.

Forms for entering information about released customer orders should contain required field entries found on the COMT (Customer Order), CO Header Detail and Standard Product Detail screens. Check your customer orders to determine whether they can be used for data entry purposes. If they are not complete, transcribe your information onto a new form.

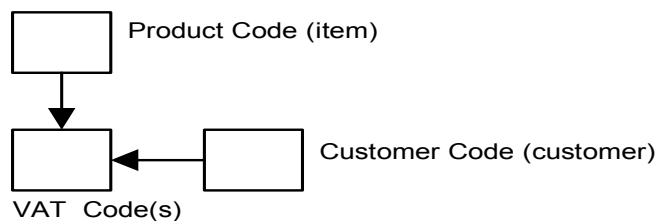
Suggestions for preparing your data for input on the COMT screen include:

- Use the **Order Qty** (order quantity) field for each line item to indicate the quantity not yet shipped.
- Use the **Prom Dlvry** (promised delivery date) field to indicate when shipment was promised to be at the customer's dock. If the date shown on the original customer order is no longer valid, enter the correct date.

Predetermined values for fields on the COMT and CO Header Detail screens can be established for entering groups of orders with similar characteristics by setting up the Default-Order. When adding an order, the default values are displayed and stored in the system until overridden. See [Using DEFAULT Values](#) for a list of values related to the DEFAULT-ORDER.

VAT Customer and Product Codes

Identify the customer codes to use when determining the necessary VAT code. Product codes are also assigned to each item in the Item Master. VAT codes are determined based on the combination of a VAT product code and a VAT customer code. Customer code/product code relationships are established on the VATT (Value Added Tax Code Table) screen. The relationship looks similar to the following:



See [Customer Orders in a VAT System](#) in this section for more information on VAT customer and product codes.

Standard Payment Terms

Several standard payment terms are available including:

- **Discount Days.** Specifies the net due date as well as two discount dates with associated discount percentages.

- **Monthly Account.** Specifies the day of the month on which payments should be made, how many months before the first payment is due and the cutoff date when a payment must be made before the next due date.
- **Specific Terms.** Specifies up to four payment amounts and due dates.

Standard payment terms can be changed for customers or on an order-by-order basis. See [Terms of Payment](#) in **Suggestions for Using the Module** for an example of each payment term option.

Data Entry Alternatives

The following default record is used to establish the basis for entering similar data:

Data	Default Record Id	Default Record Description
customers	000000	Default-Customer
shipping addresses	000000	default ship-to
customer orders	000000	Default-Order

Use the Mask Setup window as a tool to enter repetitive or similar data. The Mask Setup window is available when entering customer order lines on the COMT screen. For more information, see "Default Data Entry Masks" in the Fourth Shift Basics manual.

Loading Your Data

Once your data has been prepared for entry, use this section to load your data into the Order Entry module.

A **validation tool** is identified for each screen or task listed in this section. Use the validation tool to double-check the accuracy of the data you have entered. Validation tools include:

- **Screen reports.** Create these reports by choosing **Print** from the **File** menu. For more information, see "Screen Reports" in the Fourth Shift Basics manual.
- **Print screens.** When other report options are not available, you can capture an image of your screen and use it to validate your data entry. For more information, see "Using the Print Screen Key" in the Fourth Shift Basics manual.

Other validation tools, such as batch processes and data extracts, may also be listed.

1. Check System Configuration

Screen/Task	Module	Description	Validation Tool
COCF	CUSM	Verification: order entry fields	print screen
GLCA and GLOS	GLSM	Verification: master account combinations used for order entry	Screen report
CNFA	SYSM	Verification: master account numbers	print screen
TXTA	SYSM	Verification: master account numbers	Screen report

2. Enter Commissions

Screen/Task	Module	Description	Validation Tool
CMTA	CUSM	commission codes	Screen report

3. Enter Customers

These instructions assume you do not have the SOPM Module installed. If the SOPM Module is installed, use the SOPM manual for entering customer information.

Screen/Task	Module	Description	Validation Tool
CUID	CUSM	default customer values: Customer Id = 000000	Screen report
Customer Name/Address Detail from CUID	CUSM	default customer values: Customer Id = 000000	print screen
Customer Financial Detail from CUID	CUSM	default customer values: Customer Id = 000000	print screen
CUID	CUSM	customer identification	Screen report
Customer Name/Address Detail from CUID	CUSM	address information default values for Ship Id = 000000 multiple sets of shipping information for each customer Select Cust Class field position 1-6 for sales analysis	print screen
Customer Financial Detail from CUID	CUSM	financial information	print screen
Customer Contact Master CCOT	CUSM	customer contact information	print screen
Customer Contact Detail CCO1	CUSM	customer contact detail	print screen
Ship To Delivery Location Contacts CCO2	CUSM	contacts for ship to and delivery locations	print screen
Customer Report Options CROP	CUSM	customer report options	print screen
Customer Report Recipient Detail CRO1	CUSM	report recipient detail	print screen

4. Enter Prices and Catalog Data

Screen/Task	Module	Description	Validation Tool
ITPB	CUSM	standard prices for items	Screen report
CCAT	CUSM	customer catalog item cross references	Screen report

5. Enter Released Customer Orders

Repeat this process for each outstanding customer order.

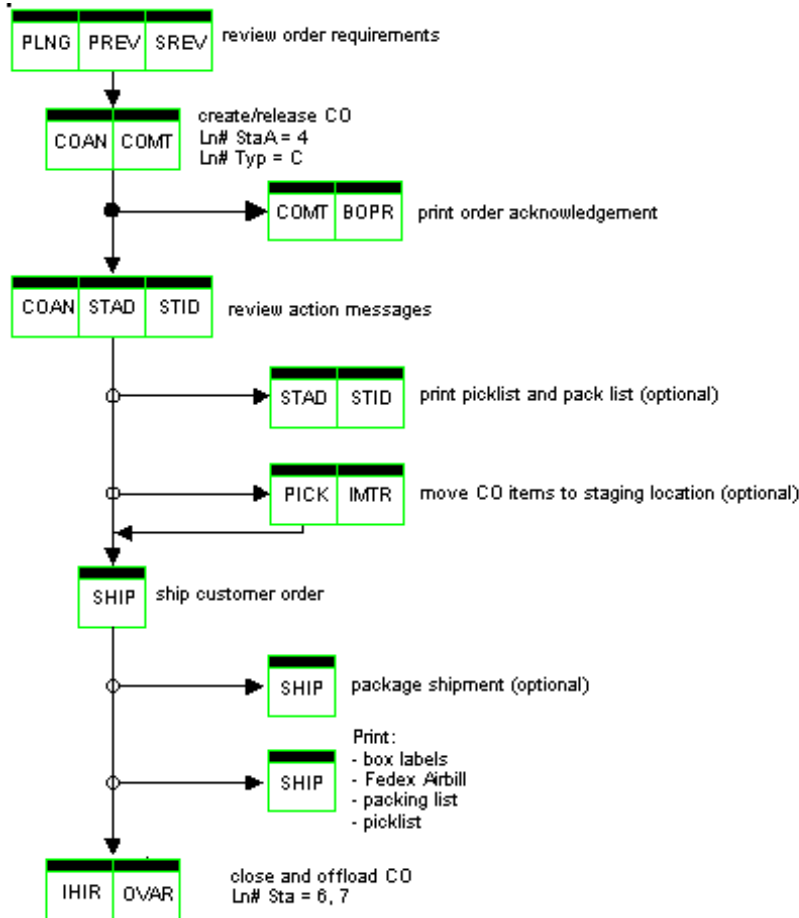
Screen/Task	Module	Description	Validation Tool
COMT	CUSM	default values for DEFAULT-ORDER	print screen
COMT	CUSM	header and lines	n/a
CO Header Detail from COMT	CUSM	header detail	n/a
Standard Product Detail from COMT	CUSM	line detail	n/a
COMT	CUSM	order acknowledgment print	Screen report: single BOPR: batch mode

Suggestions for Using the Module

The ways in which the Order Entry Module is used vary from company to company. The following guidelines may be helpful for using the Order Entry Module in your company.

Customer Order Processing

Customer order processing looks similar to the following when the Shipping Module is also installed:



Forecast

- Use the COMT (Customer Order) screen to enter sales forecasts with **Ln# Typ** = 1, 2 or 3 corresponding to forecast types 1, 2 or 3. The forecast line items entered on the COMT screen are identified as a pegging type of Cust Sales Pln on the SDAL (Supply/Demand Analysis) screen.
- Use the **RF** (replace forecast) field for each line item on the COMT screen to indicate whether the line item is additive to forecast (**RF** = N) or replaces forecast (**RF** = Y). The entry in the **RF** field affects how the system determines forecast consumption as follows:

Forecast Code	Forecast Consumption Level	Forecast/ATP Impact; RF field = N	Forecast/ATP Impact; RF field = Y
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0	production-plan (family)	Does not consume family fcst; Reduces family ATP *	Consumes family fcst; Reduces family ATP
1	production-plan (family)	Does not consume family fcst; Reduces family ATP *	Consumes family fcst; Reduces family ATP
2	item	Does not consume item fcst; Reduces item ATP	Consumes item fcst; Reduces item ATP
3 or 4	item	Does not consume item fcst; Reduces item ATP	Consumes item fcst; Reduces item ATP

*An IPP (Increase Production Plan) action message is displayed on the MOAN (Planner Action) screen to indicate that an increase to the production plan for this item may be required.

Forecast codes 0 and 1 allow customer orders for individual items in a product family to reduce the ATP for the family. Family ATP is then re-exploded and item production forecasts are adjusted proportionately to the bill of material percentage.

Terms of Payment

Terms of payment are used to identify how a customer order or an invoice will be paid. The terms of payment available include:

- Discount Days
- Monthly Account
- Specific Terms

Use the **Terms** field to select the term of payment for all orders associated with a specific customer, or for individual customer orders.

Standard payment terms can be established for:

- customers
- a specific customer order
- a specific invoice

Standard terms can be established for each customer using the Customer Financial Detail screens. For example, if **Cust Id** = 000010 uses discount days payment terms for every order, use **Std Terms** = D (discount days) on the Customer Financial Detail screen.

Use the **Terms** field on the COMT screen for the specific order or the IVIE screen for a specific invoice to modify one order without changing the default selection.

Discount Days

The discount days method allows you to specify up to two discount dates and net days for the order. Several values are specified when using discount days:

- **Percent Discount.** The percentage discount given if payment is made within the specified number of days.
- **Discount Effectivity Days.** The number of days after the invoice is printed that the percent discount is effective.

- **Net Days.** The number of days allowed for payment before the account is considered delinquent.

For example, you can specify term of payment using **Terms** = D (discount days) and the following values:

- percent discount of 4% effective for 10 days
- percent discount of 2% effective for 20 days
- Net 30 days

Field entries would include:

Field	Entry
Cash #1%	4.0
Cash #1 Days	10
Cash #2%	2.0
Cash #2 Days	20
Net Days	30

Monthly Account

The monthly account method assumes payments are made on a certain day each month. Three values must be specified when using monthly account:

- **Day.** The day of the month on which payments are due.
- **Cutoff.** The day of the month the customer invoice is sent or the vendor invoice is received to be available for payment on the next monthly due date.
- **Delay.** The number of months to delay the normal due date.

For example, to specify monthly account, use **Terms** = M (monthly account) and the following values:

- payments are due the first day of the month
- the vendor invoice is due by the fifteenth day of the month
- the normal due date is not delayed

Field entries would include:

Field	Entry
Day	1
Cutoff	15
Delay	0

Specific Terms

The specific terms method allows for up to four payment amounts and due dates to be specified. The term of payment is selected when the order is created and the specific due dates and amounts are selected when the invoice is created.

For example, to select specific terms for **CO Number** = 1212 with payments of 500.00 on 03/24/04 and the net amount of 1,000.00 due on 3/31/04, complete the following:

- Select **Terms** = S (specific terms) on the COMT screen for **CO Number** = 1212.
- After the customer order has been shipped, the specific payment amounts and dates are entered on the IVIE (Invoice Entry and Maintenance) screen for the invoice created if the ARSM Module is installed. The following field entries would be needed on the IVIE screen:

Field	Entry
Pay #1 Date	032404
Pay #1 Amt	500.00
Net Date	033104

Available to Promise

The available-to-promise (ATP) calculation provides the means to quote realistic delivery dates at the point of taking a customer order. The ATP calculation considers available inventory, all types of supply orders and all types of demands, except forecast and safety stock. The available-to-promise quantity can be checked on the COMT (Customer Order) and COAN (Customer Order Action) screens.

Calculation Assumptions

There are two possible ATP assumptions:

- Ship as soon as you can (maximize revenue)
- Ship upon customer request (maximize customer service and, ultimately, revenue)

The Fourth Shift ATP calculation makes the latter assumption—ship upon customer request.

- Only on-hand inventory and supply orders scheduled to arrive earlier than the requested date of the demand can be used to cover the demand. This means that, as each demand is added, the demand consumes supply **backwards** from the required date.
- Safety stock and forecast do not consume ATP. All other demand types consume ATP.
- The ATP for each supply is carried on the supply record itself.
- To answer the question, “What is the available date I can quote?” the system moves **forward** and adds the available-to-promise from inventory plus the available-to-promise for each supply until it finds ATP sufficient to cover this new request.
- To answer the question, “Is this date okay?” the system starts at the required date and moves **backwards**, adding up all available-to-promise from the required date, and determines if there is ATP to commit to the order.
- The cumulative ATP is a forward accumulation of all individual on-hand and available-to-promise quantities. The **Cum ATP** calculates how many units are left to commit to new customer orders at the time of this supply order.
- Any ATP shortfall either needs an additional supply (manufacturing or purchase orders) to meet the demand stream (customer orders) or the demand stream needs to be rescheduled to be consistent with the ATP supply.

Item ATP Calculation Method

Use the Item Master Planning Detail screen, from the ITMB (Item Master) screen, to specify that available-to-promise quantities should be calculated for each salable item. Enter a **Y** or **P** in the

ATP field to indicate that available-to-promise should be calculated on-line (Y), or that available-to-promise quantities should be calculated when the B ATP (Available to Promise) or PLNG (MRP Planning) task is run (P). The ATPS (Available to Promise Server) task can be substituted for the B ATP task if you wish to have ATP information updated every few minutes.

Note: Inventory transactions entered on the INVA (Inventory Adjustment) screen are not considered in available-to-promise calculations until the B ATP/ATPS or PLNG task is run. The B ATP/ATPS or PLNG task must be run even when **Deferred Update** = N on the CNFG screen and **ATP** = Y on the Item Master Planning Detail screen.

Customer Order ATP Calculations

On the COMT screen, the F4 or ALT+F4 keys can be pressed in the **Order Qty** or **Prom Divrvy** field for a line item to check available-to-promise. By using these two fields, you can deal with a customer who has both a quantity and date in mind, a specific quantity in mind, or a specific date in mind.

Order Qty Entry	Prom Divrvy Entry	Field Position	Message Displayed
desired quantity	blank	Order Qty	date quantity is available
blank	delivery date	Prom Divrvy	quantity available on date
desired quantity	delivery date	Order Qty	availability of quantity on date

On the COAN screen, press F4 when the cursor is in the **Remaining Required Quantity** or **Ship Date** field to view the item quantity that is available to promise. This information is provided for the following action messages:

- REL (Order Due for Release)
- SCH (Reschedule Existing Order)
- CRW (Credit Limit Exceeded)
- CRH (Order on Credit Hold)

These messages are generated for orders due for release.

Calculation Formula and Examples

The formula for ATP calculations is:

Supply – Demand = ATP

where:

Supply = on-hand + (in-inspection * yield)/ 100

Demand = customer order

The following two examples illustrate the answer to the question, “Is this date okay?,” by starting at Period 3 and calculating backwards.

Example 1

	On-Hand	Period 1	Period 2	Period 3
--	----------------	-----------------	-----------------	-----------------

Customer Order	0	15	15	0
Supply	10	10	10	10
ATP	0	0	0	10
Calculation	D	C	B	A

Calculation A:

$$10 - 0 = 10$$

Calculation B:

$$10 - 15 = -5 \quad (+5 \text{ is borrowed from Period 1 so ATP} = 0)$$

Calculation C:

$$10 - (15+5) = -10 \quad (+10 \text{ is borrowed from On-Hand so ATP} = 0)$$

Calculation D:

$$10 - (0+10) = 0$$

Example 2

	On-Hand	Period 1	Period 2	Period 3
Customer Order	0	0	35	0
Supply	10	10	10	10
ATP	-5	0	0	10
Calculation	D	C	B	A

Calculation A:

$$10 - 0 = 10$$

Calculation B:

$$10 - 35 = -25 \quad (+25 \text{ is borrowed from Period 1 so ATP} = 0)$$

Calculation C:

$$10 - (0+25) = -15 \quad (+15 \text{ is borrowed from On-Hand so ATP} = 0)$$

Calculation D:

$$10 - (0+15) = -5$$

Transportation Lead Time

The system uses the **Tr LT** (transportation lead time) to determine when the item should be shipped. The transportation lead time can be specified for a line item on the COMT screen and a

customer item on the Standard Product Detail screen. The **Tr LT** field entry for a new line item is determined as follows:

Line Item Tr LT Entry	Custom Item Tr LT Exist	COMT Tr LT Entry
yes	no	Line item Tr LT
yes	yes	Line item Tr LT
no	yes	Custom item Tr LT
no	no	Ø (zero)

The transportation lead time on the COMT screen is used to calculate two sets of dates—requested dates and promised dates for shipment and delivery.

The **Rqst Ship** date is calculated as:

(Requested Delivery Date) - (Transportation Lead Time)

The **Reqst Divrvy** date can be entered for each line item on the Standard Product Detail screen. The **Rqst Ship** date can be manually changed using the COAN screen.

The **Ship Date** is calculated as:

(Promised Delivery Date) - (Transportation Lead Time)

The **Prom Divrvy** date can be entered for each line item on the COMT screen. The **Ship Date** can be manually changed using the COAN screen.

Screens and reports used to communicate internal priorities display dates in terms of shipping. For example, the COAN screen displays the **Ship Date** and compares it to the **Rqst Ship** date.

Screens and reports used to communicate with the customer display dates in terms of delivery. For example, the COMT screen and related detail screens display **Prom Divrvy** and **Reqst Divrvy** dates.

Freight Charges

Use the **Frt Charge Code** field on the Customer Master to identify the method of charging a customer for freight. **Frt Charge Codes** are:

Ø = Freight paid

1 = Prepay and add to invoice

2 = Carrier collects freight costs from customer

If the Shipping Module is installed, shipments assigned **Frt Charge Code** = 1 generate an automatic FREIGHT line on a system-generated invoice with a **Ref Ln#** in the 900-999 range.

Customer Items

Use the CIMT (Customer Item Maintenance) screen to add, change or delete customer items. Customer items are added automatically to the Customer Item application when you are using the SOPM Module.

Use the Standard Product Detail or Custom Product Detail screen to add a customer item or to enter additional information about an existing customer item during order entry. Information includes description, price and transportation lead time. Once a **Price** is established for a

customer item, customer item identification and price can be used to enter a custom order on the COMT screen (**LS = Q**).

If you are using the SOPM Module, use the Customer Item application to define additional customer item detail.

Catalog Items

Catalog items are used to cross-reference an item in the Item Master with another item identifier. Catalog items can be used on customer orders to any customer. Catalog item use includes:

- entering the catalog item/Item Master item relationship on the CCAT (Customer Catalog) screen
- entering customer orders on the COMT (Customer Order) screen using **LS = B** and entering the catalog item identifier in the **Item/Catalog Item** field

For example, catalog item to Item Master cross reference information could look similar to the following:

Catalog Item	Catalog Item Description	Item
Classic Commuter	Classic Commuter Bike	CB-BIKE
Get-Fit-2000	Fitness Master Stationary Bike	SB-BIKE
Roadster-5000	World Class Roadster 5000	ROADBIKE

Use **LS = B** on the COMT (Customer Order) screen to specify catalog item identifiers on the customer order rather than Item Master identifiers.

Use **Prt = B** on the Customer Financial Detail screen to specify printing of catalog item descriptions on the customer invoice rather than Item Master descriptions.

Catalog items are included on printed documents such as order acknowledgments and customer invoices.

Catalog items can also be specified in customer price books if desired. See the Advanced Price Book manual for additional information.

Order Follow-Up

- Use the COAN (Customer Order Action) screen to review the action messages and take appropriate actions.
- Use the Material Shortages Detail screen from the COAN screen to check material shortages before opening/releasing an order.
- Use the SDAL (Supply/Demand Analysis) screen, if available, to analyze problems and proposed schedule changes.
- Use the COBK (Customer Order Backlog Report) task to list the value of outstanding orders by item or by customer.
- Use the IORD (Open and Released Orders by Item) screen to list open and released orders for a specified item.

- Use the COCD (Customer Orders by Customer Id) screen to list open and released orders for a specified customer.
- Use the ORST (Order Status Summary) screen to list orders in the system and identify assignment of the next available order number.

Shipping

When the Shipping Module is not yet installed in your system, the PICK (Picklist) screen is used to ship customer orders. When the Shipping Module is installed in your system, customer order line items can be moved to a staging location using the PICK or IMTR (Inventory Move) screen.

- Use the PICK screen, when the Shipping Module is not yet installed, to issue line items to a customer order. Issuing a line item:
 - assumes the item goes directly to the mode of transport
 - decreases allocations
 - generates a positive line item on an unapproved invoice
- Use the COAN (Customer Order Action) screen to review PIK (pick customer order) action messages to meet promised delivery dates.

A number of screens provide information on what has been shipped-to-date.

- The Standard Product Detail screen displays, for each line item, the quantity shipped, the quantity in a shipping location awaiting shipment and the date a quantity of the item was last shipped.
- The Picklist Detail screen displays the shipped quantity and the date a quantity of a line item was last shipped.
- A CLO (order closure requested/suggested) message on the COAN screen provides information on the item quantity shipped. Press F4 in the **Remaining Required Quantity** field to view the order quantity and shipped quantity.

Customer Returns

Use the PICK (Picklist) screen, when the Shipping Module is not yet installed, to reverse issue line items to a customer order. Reverse issuing a line item:

- increases allocations
- reduces the shipped quantity for a line item on a matching unapproved invoice. When an unapproved invoice is not found, a credit memo is generated.

Use the SHIP (Ship) screen to return shipments when the Shipping Module is installed.

Pricing

Standard Prices

The standard **Unit Price** for an item can be used in conjunction with the **Price Adjustment** to determine the price of a line item on a customer order. Press F4 in the **Unit Price** field on the COMT (Customer Order) screen to obtain the adjusted price.

The system first uses the **Price Adjustment** established for the customer. However, the **Price Adjustment** can be changed to be order-specific or line item-specific for special orders.

Price adjustments are set up using the following screens:

Price Adjustment	Screen
------------------	--------

Customer	Customer Name/Address Detail
Customer Order	CO Header Detail
CO Line Item	Standard Product Detail

Use the ITPB (Item Price Book) screen to maintain standard unit prices for salable items.

Quoted Prices

An item's quoted price can be defined by establishing a customer item. Multiple customer items can be established for one customer. Use the following procedure to define and use quoted prices for an item:

- Use the CIMT (Customer Item Maintenance) screen to define a customer item.
- Use the COMT screen to enter a line item for the item. Use **LS** (list selector) = S to identify the price source as standard Item Master information.
- Use the Standard Product Detail screen to define customer item information for the line item entered on the COMT screen. The **Customer Item Conv** field is used to calculate the **Customer Item Unit Price** (the quoted price).
- Use the COMT screen to enter a line item for the item. Use **LS** = Q to identify the price source as quoted customer item price. Press F4 in the **Unit Price** field to obtain the quoted price.

The line item entered as a quote is redisplayed in terms of Item Master information. The price source remains **LS** = Q as an audit trail.

Credit Checking

- Use the Customer Financial Detail screen from the CUST/CUID screen to define a customer's credit limit and review accounts receivable balances.
- Use the COAN (Customer Order Action) screen to review CRH (order on credit hold) and CRW (credit limit exceeded) action messages. The CRH and CRW messages are produced when an order is on credit hold (**Ln# Sta** = 9) or the order has placed the customer over the established credit limit.
- Use the COMT screen for a particular order to view a customer's current credit balance. As orders are entered, the customer's credit balance is automatically calculated so that you can identify when the credit limit is exceeded.

Enforced Credit Hold

Two credit hold options are available to identify customer credit status. The **A/R Cust** field on the Customer Financial Detail screen is used to identify customer credit information. The credit hold options include:

A/R Cust	Option	Description
H	Hold	Customer orders can be entered, staged and shipped; a message is displayed indicating that the customer is on hold
C	Credit Hold	Customer orders can be entered but cannot be staged or shipped

Handling Commissions

A commission code established on the CMTA (Commission Code Table) screen can be assigned to a customer on the Customer Name/Address Detail screen. This commission code can be changed:

- on an order-by-order basis using the CO Header Detail screen
- on a line-by-line basis using the Standard Product Detail screen
- on an invoice basis using the IVIE (Invoice Entry and Maintenance) screen in the Accounts Receivable Module

Commissions are calculated based on the rate established on the CMTA screen. Commissions are calculated as part of the invoice printing process. See the Accounts Receivable manual for more information on handling commissions.

Using DEFAULT Values

Some screens provide default entries that provide initial entries for data elements on one or more screens. These default entries appear in open fields every time you begin using. DEFAULT values are specific to a data element like customers. Each time you create a record of this type, the default values are entered as initial values to assist in data entry.

Using default values can dramatically increase your data entry speed, especially when entering groups of related information such as items in the Customer Master.

The following default values are related to screens and fields as listed below. These screens assume you do not have the SOPM Module installed. Use the Sales Order Processing manual to determine the default values for fields using the SOPM Module.

Default	Screen	Field
DEFAULT-CUSTOMER	CUID	Customer Name Contact Phone CSR FOB Point Ship Via

	<p>Customer Name/Address Detail</p>	<p>A/R Acct No Acct Contact Acct Phone Addr (bill to) Addr (customer) Bill to C (bill to) C (customer) Certificate No City (bill to) City (customer) COGS Acct No Com Cd Contact Cust Class Exmpt FAX # Freight Acct No Frt Charge Code Partial Shipment Price Adjustment Print Format Print Language Region Code Sales Acct No St (bill to) St (customer) Tax Codes VAT Cust Code VAT Id Zip (bill to) Zip (customer)</p>
	<p>Customer Financial Detail</p>	<p>A/R Cust Bank References Certificate No Credit Limit Ctrl Curr Curr Code Open/Bal Forward Prt Rate Service Charge Statement Cycle Statement Print Std Terms Status default for pre-printed invoices Status default for pre-printed credit memos</p>

SHIP-TO-ID = 000000	Customer Name/Address Detail	Ship to Name Addr City St Zip C Contact E-Mail VAT Cust Code Region Code Print Format Print Language Exmpt Certificate No Tax Codes VAT Id
DEFAULT-ORDER	COMT	Cust Id Ship to Id Customer PO Number Ship Via Terms (based on Cust Id)
	CO Header Detail	Commission Code Sales Category Default Tax Exempt Reason Certificate No.

Action Message Filtering

Action messages displayed on the COAN (Customer Order Action) screen can be generated or reviewed using several filtering options. Action message filtering allows you to view only the messages which require action for your specific daily activities.

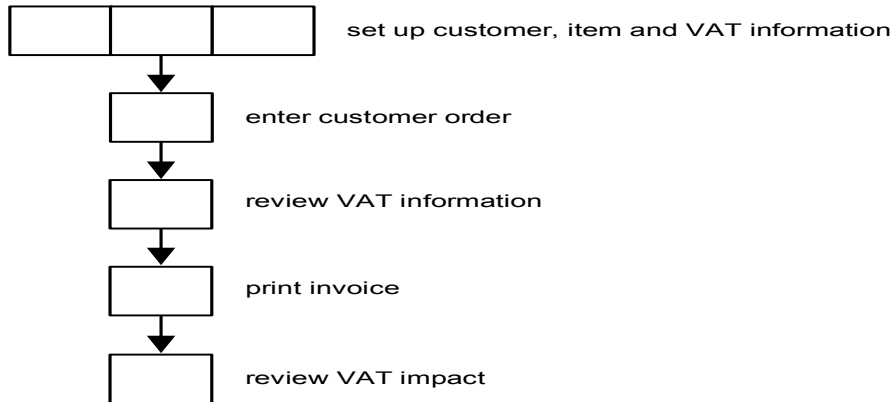
- Use the **Msg Code to Display** field on the COAN screen to select a specific message code. For example, you may wish to review all OPQ messages and begin taking action on these messages before you begin releasing orders.
- Use the MSCF (Message Configuration) screen to select which messages should be generated. For example, you may wish to generate all action messages except OFR (order follow-up required) messages. You may use a method for tracking scheduled deliveries other than based on the **Order Lead Time**.

Customer Orders in a VAT System

VAT amounts are tracked throughout the system for customer orders. Tracking VAT amounts is based on several types of information including:

- customer information
- item information
- VAT information
- order information

The VAT tracking process looks similar to the following:



Setup Customer Information

Customer VAT information provides the first part of the VAT tracking information. A VAT customer code and a VAT identification number can be assigned to each ship-to location. VAT customer codes are used in conjunction with item information to determine the VAT code when a customer order is created.

Setup Item Information

Item information provides the second half of the VAT tracking information. VAT product codes are assigned to each item. VAT product codes are used in conjunction with customer information to determine the VAT code when a customer order is created. The VAT product code is assigned on the ITMC (Item/Work Center Cost Data) screen.

Setup VAT Information

Tax information for each VAT code is identified on the TXTA (Tax Code Table) screen. VAT code information including descriptions, rates and liability master account numbers are specified.

The relationships between VAT customer codes and VAT product codes determine the necessary VAT Code. For example, the following relationships need to be defined:

Information	Based On	Example Value
Customer Code	Cust Id Ship to Id	DST01
Product Code	Item	LM0001
VAT Code	Customer Code Product Code	A1

The relationship between customer codes and product codes is established on the VATT (Value Added Tax Code Table) screen.

Enter Customer Order

VAT amounts are tracked once customer orders are entered. The VAT code is assigned automatically based on the relationship between the customer and the item ordered established on the VATT screen.

VAT information is transferred to the invoice once the customer order is shipped. VAT amounts can be reviewed for each invoice.

Review VAT Information

The VAT Summary window, available from the IVIE (Invoice Entry and Maintenance) screen, identifies VAT amount information. VAT amount information displayed in the VAT Summary window consists of several pieces:

- **Extd Amount** is the total amount associated with the items being invoiced.
- **Base Amount** is the amount resulting from the **Extd Amount** after the tax mask calculation is completed. In this example, no tax mask calculation is used.
- **VAT Amount** is the amount resulting from the **Base Amount*Rate**.

The tax amounts on the VAT Summary window are displayed in local currency.

Print Invoice

If the Accounts Receivable and Invoicing Module (ARSM) is installed, the printed invoice identifies VAT information in a summary section at the bottom of the invoice.

Review VAT Impact

A summary of VAT amounts for each VAT code is available by using the ARTX (A/R Tax Register) task if the ARSM Module is installed.

Using the Multi-Currency Feature

When the Multi-Currency Management (MCM) Module is installed, it extends the functionality of this module by allowing you to enter multi-currency transactions. The **currency information window** can be displayed whenever you review or update monetary values using a foreign currency. You can press ALT+C to toggle between local and foreign currency values.

For information on using the window, see "Using the Currency Information Window" in the Fourth Shift Basics manual.

External Documents

The Order Acknowledgment document displays currency information based on the currency information setup for the customer order.

Example

For an example of customer order processing in a multi-currency environment, see "Customer Orders Using Multiple Currencies" in the Multi-Currency Management manual.

Using the Extended Text Window

The Extended Text feature is available, by pressing ALT+T, from the following screens:

- Customer Financial Detail
- Customer Order Header Detail
- Standard Product Detail

See "Extended Text" in the Fourth Shift Basics manual for more information about using the Extended Text feature.

Module Communication

The Order Entry Module communicates with the General Ledger and Accounts Receivable modules using module communication files as customer orders are filled.

Note: When the Shipping Module is installed, the SHIP (Ship) screen replaces the PICK screen for filling customer orders and communicating with the General Ledger and

Account Receivable modules. See **Module Communication** in the Shipping manual for more information.

General Ledger Communication

You issue or reverse issue each line item using the PICK screen. The financial transactions are placed in a communication file for transfer to the general ledger using the GLMQ (G/L Module Communication) task in the General Ledger Module.

A **Trans Code** identifies each transaction for standard products as follows:

Trans Code	Description
COMT01	Line Item Change
PICKCI	PICK CO Issue
PICKCX	PICK CO Reverse Issue

See "Financial Transaction Detail" in the System Administration manual for the financial transactions related to the Order Entry Module.

Accounts Receivable Communication

Invoice information is generated when items are shipped for a customer order using the PICK (Picklist) screen when the Shipping Module is not installed. Invoice information is placed in the MODCOMIV.FIL communication file and is transferred to the Accounts Receivable Module using the ARMQ (Accounts Receivable Invoice Module Communication) task. The types of invoicing transactions created, when the Shipping Module is not installed, are:

- customer order data (modcom flag = 0)
- line item shipment data (modcom flag = 1)

See "MODCOMIV.FIL" in the System Administration manual for the MODCOMIV.FIL record layout of each transaction.

An issue of an item generates a positive line item on a preprinted invoice. A reverse issue reduces the shipped quantity for a line item on a matching preprinted invoice. When a preprinted invoice is not found, a credit memo is generated.

Information entered on the COMT (Customer Order), CO Header Detail and Standard Product Detail screens is used to generate new invoices.

Sales Analysis Communication

Information for sales analysis is generated in staging tables. Entries are created for the staging tables as a result of transactions from the following screens and tasks:

- COAN (Customer Order Action)
- COMT (Customer Order)
- CUID/CUST (Customer Master)
- PICK (Picklist) if the SHPM Module is not installed

System Administration

The System Administration manual outlines the tasks involved in maintaining Fourth Shift. The Order Entry Module includes special considerations in the areas of security and periodic tasks.

Screen Level Security Considerations

Screen/Task	Security for
CUID/CUST	should be assigned the same access codes; can be used to update the same information; assign access to the inquiry versions of these screens (CUII/CUSI) as an option
BR2C (Customer Browse Detail)	should have the same access code as the Customer Name/Address Detail (CUS1) and Customer Financial Detail (CUS2) window
BR2S (Ship to Browse Detail)	should have the same access code as the Customer Name/Address Detail (CUS1) window

Batch Processing Considerations

A number of tasks need to be run to efficiently maintain the most up-to-date Order Entry information. See "**Batch Processing**" in the System Administration manual for task prerequisites and processing frequency.

- Use the B ATP (Available to Promise) task to adjust available-to-promise quantities. If the MRP Module is installed, substitute the PLNG (MRP Planning) task for the B ATP task. The ATPS (Available to Promise Server) task allows you to update ATP information during normal processing such as in high volume order entry situations.
- Use the SREV (Shipping Order Review) task to generate action messages for customer orders and shipments; maintain shipment statuses to purge old shipments and automatically close expired orders (if SOPM is installed).
- Use the PREV (Period Review) task to generate action messages for purchased items based on the passage of time.
- Use the IHIR (In-Inspection and On-Hold Inventory by Order) task for determining what order-related inventory is still in inspection or on hold.
- Use the OVAR (Close Order Analysis/Order Variance) task for prompt order maintenance.
- Use the COYE (Customer Year-End Processing) task for resetting the year-to-date customer order totals on the Customer Master.
- Use the CCON (Currency Conversion Utility) screen to change currency code information for a customer.
- Use the BOPR (Batch Order Print) task with the C option for generating customer order acknowledgement reports to be printed or emailed.

Order Acknowledgment File Layouts

The COBP (Customer Order Export) task can be used as an alternative to the customer order printing process. The COBP task generates four types of customer order information files:

- Customer Order Header

- Customer Order Line Item Detail
- Text Message
- Custom Product Component Information

Each type is placed in a sequentially numbered destination file. For example, if the filename COFILE.TXT is selected as the destination file, the files created are: COFILE1.TXT, COFILE2.TXT, COFILE3.TXT and COFILE4.TXT.

File 1: Customer Order Header

Field Name	Max Field Length	Field Type
CO_NUMBER	30	C
CO_RV_DATE	8	D
CUST_PO_NO	30	C
SHIP_VIA	30	C
PAY_TERM	1	C
DISC_PCNT1	4	N
DISC_DAYS1	3	N
DISC_PCNT2	4	N
DISC_DAYS2	3	N
NET_DAYS	3	N
MON_CUTOFF	2	N
MON_DELAY	2	N
MON_PAYWEN	2	N
CSR	3	C
CTRL_CURR	1	C
CURR_CODE	5	C
CURR_DESC	15	C
CURR_PREC	1	N
CURR_SYMBL	4	C
CUR_SYM_LC	1	C
CUST_CNTCT	20	C
CUST_PHONE	20	C
CUST_ID	13	C
PARTL_SHIP	1	C
CO_TOT	20	N
F_CO_TOT	20	N
OUR_NAME	60	C
OUR_ADDR1	60	C

OUR_ADDR2	60	C
OUR_CITY	15	C
OUR_STATE	10	C
OUR_ZIP	12	C
OUR_CNTRY	15	C
SOLD_NAME	60	C
SOLD_ADDR1	60	C
SOLD_ADDR2	60	C
SOLD_CITY	15	C
SOLD_STATE	10	C
SOLD_ZIP	12	C
SOLD_CNTRY	15	C
SHIP_NAME	60	C
SHIP_ADDR1	60	C
SHIP_ADDR2	60	C
SHIP_CITY	15	C
SHIP_STATE	10	C
SHIP_ZIP	12	C
SHIP_CNTRY	15	C
SHP_TO_FMT	1	C
SHP_TO_LNG	12	C
H_TEXT_NO	6	N

File 2: Customer Order Line Item Detail

Field Name	Max Field Length	Field Type
CO_NUMBERD	30	C
CO_LN_NO	3	C
ITEM	30	C
ITEM_DESC	70	C
ORDER_QTY	20	N
ORD_QTY_PR	1	N
UM	4	C
PROM_DLVR	8	D
UNIT_PRICE	20	N
EXTD_PRICE	20	N

FUNIT_PRIC	20	N
FEXTD_PRIC	20	N
D_TEXT_NO	6	N

File 3: Text Message

Field Name	Max Field Length	Field Type
TEXT_NO	6	N
TEXT_LINE1	60	C
TEXT_LINE2	60	C
TEXT_LINE3	60	C
TEXT_LINE4	60	C

File 4: Custom Product Component Information

Field Name	Max Field Length	Field Type
CO_NUMBERX	30	C
CO_LN_NOX	3	C
ITEMX	30	C
ITEM_DESCX	70	C
ORDER_QTYX	20	N
ORD_QTY_PX	1	N

ATPS – Available to Promise Server

The ATPS (Available to Promise Server) task provides perpetual updates to available-to-promise quantities, which are used for order promising. Current inventory, scheduled receipts and customer orders are taken into consideration when calculating available to promise. Adjustments are made based on changes to scheduled receipt dates and quantities.

Daily transactions which could impact ATP totals write an internal message which includes the item identifier. This list of items is then used for processing by the B ATP and ATPS tasks. Only items with **ATP** = Y or P on the Item Master Planning Detail screen are included in this list. The ATPS task should be used in high volume order entry situations where ATP information is updated frequently.

The B ATP (Available to Promise) task can also be used to update ATP information at a point in time, such as at the end of nightly processing. The difference between the B ATP and ATPS tasks is:

- the B ATP task runs through the calculation process once
- the ATPS task cycles through looking for items to recalculate based on a defined number of wait minutes between cycles

Both tasks process only the items where transactions have been completed which may alter available-to-promise totals.

Parameters

To start the Available to Promise Server, you enter the ATPS task as one of the sequenced tasks in a batch process. See "Batch Processing" in the System Administration manual for the task prerequisites and processing frequency.

The ATPS task has the following parameters:

Task Parameter	Format	Entry Is...
1: Enter Wait Period in Minutes	M99	Required

Parameter 1: Wait Period in Minutes

Specify the number of minutes that the ATPS task should wait before checking for new messages based on transactions completed in the system since the last recalculation. In high volume transaction situations, you may wish to use fewer minutes between processing. Parameter 1 is required.

Example

For example, to start the Available to Promise Server:

- to wait ten minutes between processing runs
- as the first task in the process
- the **Seq, Num, Task** and **Parameters** fields in the task line are entered like this:

```
01 ATPS M10
```

Entry Field	Example Value	Description
Seq Num	01	First task in process
Task	ATPS	Available to Promise Server

Entry Field	Example Value	Description
Parameter 1	M10	Wait ten minutes between processing runs

To start the Available to Promise Server, use the BEXE (Batch Process Execution) screen to execute the process in which the ATPS task is entered. Check the LOG file produced if the BATP task does not execute successfully.

The ATPS task runs continuously until you press ESC to halt processing.

BATP – Available to Promise

The BATP (Available To Promise) task updates available-to-promise quantities, which are used for order promising. Current inventory, scheduled receipts, and customer orders are taken into consideration when calculating available to promise. Adjustments are made based on changes to scheduled receipt dates and quantities.

If you are tracking available to promise in a deferred batch mode (**ATP = P**), it is recommended that the BATP task be run daily. If the MRP Module is installed and the PLNG (MRP Planning) task is run daily, the PLNG task should be substituted for the BATP task. The PLNG task includes the same available to promise updates as the BATP task. As an option, you can also use the ATPS (Available to Promise Server) task to cycle through looking for items to recalculate ATP based on a defined number of wait minutes between cycles.

Note:

- Inventory transactions entered on the INVA (Inventory Adjustment) screen are not considered in available-to-promise calculations until the BATP or PLNG task is run. The BATP or PLNG task must be run even when **Deferred Update = N** on the CNFG screen and **ATP = Y** on the Item Master Planning Detail screen.
- ATP only includes inventory in locations where **Included in ATP = Y** (yes).

Parameters

To request Available to Promise, enter the BATP task as one of the sequenced tasks in a batch process. See "Batch Processing" in the System Administration manual for the task prerequisites and processing frequency.

The BATP task requires no parameters.

Example

For example, to request Available to Promise as the first task in a process, the **Seq Num**, **Task** and **Parameters** fields in the task line are entered like this:

01 BATP

Entry Field	Example Value	Description
Seq Num	01	First task in process
Task	BATP	Available to Promise

To execute Available to Promise, use the BEXE (Batch Process Execution) screen to execute the process in which the BATP task is entered. Check the LOG file produced if the BATP task does not execute successfully.

CIMT – Customer Item Maintenance

Use this screen to maintain the customer items a customer refers to when placing a customer order.

Customer items can be created for standard and custom product items. For custom products, each customer item identifies a specific configuration of a family item.

Note: For SOPM environments, a customer item is added or changed in SOPM. However CIMT is used to delete a SOPM customer item relationship.

Transportation Shortcuts

You can use shortcut keys or transport buttons to go to the following related screens.

Destination	Shortcut Key(s)
COMT (Customer Order) (not available after SOPM Module installation)	F8
CPMT (Custom Product Maintenance)	F9
CUID (Customer Master) (not available after SOPM Module installation)	F10

Browse Windows

You can open browse windows by choosing **Browse/Detail** from the **Tools** menu in the following fields:

Browse	From Fields
Customer Browse	Cust Id
Item Browse	Item

For more information, see "Selecting from a Browse List" in the Fourth Shift Basics manual.

Web Links

If you use Web UI, you can link to other screens by clicking tabs or hyperlinks.

Go to Screen...	By clicking...
COMT (Customer Order) (not available after SOPM Module installation)	Next Step button
COCD (Customer Orders by Customer Id)	Screen label: Id
CUID (Customer Master by Customer Id) (not available after SOPM Module installation)	Screen label: Id
ITMB (Item Master)	Screen label: Item

Go to Screen...	By clicking...
ITMC (Item/Work Center Cost Data)	Screen label: Item
ITPB (Item Price Book)	Screen label: Item

Reports

Customer Item Maintenance

Lists all customer items on file for a customer range.

Access Method

To generate the report, choose **Print** or **Print Preview** from the **File** menu. The Report screen appears before the report is generated, allowing you to select a range of data for the report. For more information on reporting in general, see "Printing and Reporting" in the Fourth Shift Basics manual.

Report Template

For more information on report templates, see "Reporting for SQL Server Systems" in the System Help topics.

Fields

Contact

Contact is the name of the person at the vendor/customer who is the primary contact when items are ordered. Entry is any alphanumeric combination of up to 40 characters.

Where Used: APIP; CIMT; COBK; COCD; **COMT**; Contract Header Detail; CUID; CUII; CUSI; CUST; Customer Browse Detail; Customer Financial Detail; Customer Name/Address Detail; DISI; DIST; ISVI; POCR; POVD; Purchase Order Header Detail; QSRC; VDSC; VEDI; VEID; VEND; Vendor Browse Detail; Vendor Configuration; Vendor Master Detail; VENI; VSDI; VSDT

Cust Id

Customer Identification is the identification number assigned to a customer. Entry is any alphanumeric combination of up to 13 characters.

Where Used: Advance Ship Notice Carrier Detail; Advance Ship Notice Shipment Detail; ARAH; ARCD; ARCJ; ARCP; ARCR; AREX; ARIC; ARIH; ARIP; ARIR; ARPD; ARPH; ARRJ; ARSC; ARSR; ARST; ARTB; ARTX; Available Customer Shipments; Available for Shipping Allocation Batch; Browse Setup (customer); Browse Setup (order); CIMT; CINV; COAN; COBK; COCD; COMI; COMT; CORV; COYE; CPMT; CUID; CUII; Cumulative Detail; CUPB; CUPJ; CUSI; CUST; Custom Product Component Detail; Custom Product Detail; Customer; Customer Browse; Customer Browse Detail; Customer Financial Detail; Customer Invoice List; Customer Item + General; Customer Name/Address Detail; Customer Order; Customer Order + Order Header; Customer Order Header Detail; Customer Order Receipt/Reverse; Customer Payment List; Demand Peg Detail; EDIX; EXRU; G/L Distribution (ARSM Module); GASN; Inbound Conversion Detail; Inventory Adjustment Application; Invoice Header Detail; Invoice Line Item Detail; IORD; IVCO; IVIA; IVIE; IVII; IVPP; IVPR; IVRR; IVRV; JEST; Job

Estimates and Performance Report; Lot Trace Issue Detail; Lot Trace Receipt Detail; Material Shortages Detail; MOAN; MPED; MPIT; MSMT; OPSL; Order Browse; Order Detail; ORST; Outbound Conversion Detail; Partner Item Detail; PCMT; PICI; PICK; Picklist Detail; Pricing Maintenance + Items/Customers; Pricing Maintenance + Test Order; SBOL; Serial Number List; SHIP; Ship to Browse; Ship to Browse Detail; Shipment Allocation Detail; Shipment Allocation List; Shipping Allocation Batch; SHPI; SHPL; STAD; Standard Product Detail; Supply Peg Detail; Transaction Detail

Cust Item

Customer Item is the identification assigned to the item by the customer. Entry is any alphanumeric combination of up to 30 characters.

Where Used: CIMT; CPMT; Cumulative Detail; Custom Product Component Detail; Custom Product Detail; Customer Item + General; Customer Order; Customer Order Receipt/Reverse; JEST; Job Estimates and Performance Report; Line Item Details + Customer Item; MPIT; OPSL; Partner Item Detail; PCMT; Shipments by Line Item; Standard Product Detail; Transaction Detail

Customer Item Tr LT

Customer Item Transportation Lead Time is the number of days, according to the customer, required to transport this item to the customer site. Entry is up to 2 numbers.

Where Used: CIMT; Custom Product Detail; Line Item Details + Customer Item; Standard Product Detail

Customer Item UM

Customer Item Unit of Measure identifies the standard unit of measure assigned to the item by the customer. Entry is up to 4 letters.

Where Used: CIMT; Customer Item + General; Customer Order Receipt/Reverse; Line Item Details + Customer Item; MPIT; Partner Item Detail; Pricing Maintenance + Test Order; Shipments by Line Item; Standard Product Detail

Customer Name

Customer Name is the name of a customer. Entry is any alphanumeric combination of up to 60 characters.

Where Used: ARAH; ARCD; ARCJ; ARCR; AREX; ARIC; ARIH; ARIP; ARIR; ARPD; ARPH; ARRJ; ARSC; ARSR; ARTB; ARTX; Available Customer Shipments; Browse Setup (customer); Browse Setup (order); CIMT; COBK; COCD; COMI; COMT; CORV; COYE; CPMT; CUID; CUII; CUPB; CUPJ; CUSI; CUST; Custom Product Component Detail; Custom Product Detail; Customer; Customer + Address; Customer + General; Customer Browse; Customer Browse Detail; Customer Financial Detail; Customer Invoice List; Customer Item + General; Customer Name/Address Detail; Customer Order; Customer Order Header Detail; Customer Order Receipt/Reverse; Customer Payment List; EDIX; EXRU; G/L Distribution (ARSM Module); IVCO; IVIA; IVPP; JEST; Job Estimates and Performance Report; Lot Trace Issue Detail; Lot Trace Receipt Detail; OPSL; Order Browse; Order Detail; ORST; PICI; PICK; Picklist Detail; Pricing Maintenance + Test Order; SBOL; Serial Number List; SHIP; Ship to Browse Detail; Shipment Allocation List; Shipping Detail; SHPI; SHPL; STAD; Standard Product Detail

Description

Customer Item Description is the description assigned to the item by the customer. Entry is any alphanumeric combination of up to 70 characters.

Where Used: CIMT; Custom Product Component Detail; Custom Product Detail; Customer Item + General; Customer Order; Customer Order Receipt/Reverse; JEST; Job Estimates and Performance Report; Line Item Details + Customer Item; OPSL; Partner Item Detail; Shipments by Line Item; Standard Product Detail

Function

Function codes are four-character abbreviations for screen names. Each screen has a unique code used for identification and transportation. For example, ITMB identifies the Item Master screen. Entry is 4 alphanumeric characters.

Where Used: screens and reports

Item

Item is the unique identifier for a part, whether it be a piece part, tool, raw material, an assembly or finished product. All items are set up using the ITMB screen. Within a product structure, an item can be a component as well as a parent. Entry is any alphanumeric combination of up to 30 characters.

Where Used: A/P Received Item List; ABCR; Advance Ship Notice Line; Allowance/Charge Detail (Detail); APPI; APPV; AUDT; Available for Shipping Allocation Batch; AVII; AVIT; Bill of Material Accuracy Results; Browse Setup (item); Capacity Planning; CBIL; CCAN; CCAT; CIMT; CINV; COAN; COBK; COCD; COMI; COMP; Comparison Bill; Comparison of Summarized Bills; COMT; Contract Item Detail; Contract Item Detail/Pricing; Contract Summary; CORV; CSTU; Cumulative Detail; Customer Item + General; Customer Order; Customer Order Line Price Adjustment; Customer Order Receipt/Reverse; CWIP; Demand Peg Detail; Engineering; FCST; GASN; ICCR; IHIR; IMTR; INVA; Inventory Adjustment Application; Inventory Allocation; Inventory History List; Inventory Transaction History Report; INVR; IORD; IPPD; ISVI; ITBI; ITCB; ITCI; Item + Quantity; Item Availability; Item Availability + Quantity; Item Browse; Item Browse Detail; Item History; Item Lot Receipt; Item Lot Trace and Serialization Detail; Item Master; Item Master Detail; Item Master Planning Detail; Item Responsibility Assigned Results; Item Shortages; ITHC; ITHR; ITMB; ITMC; ITMI; ITPB; ITPi; Lead Times Assigned Results; LEXP; LHIS; Line Item Details + Item; LMSI; LMST; Lot Detail; Lot Inventory Transaction History Report; Lot Selection; Lot Trace; Lot Trace Issue Detail; Lot Trace Receipt Detail; LOTR; LVAL; Manufacturing Order Line Item Detail; Manufacturing Order Receipt/Reverse; Material Shortages Detail; MCST; MOAN; MOFR; MOMI; MOMT; MORI; MORV; MPIT; MPSR; MPSS; MSMT; Multi-Level Bill; Multi-Level Costed Bill; Multi-Level Where Used; MUSE; Open Order Detail; Order Completion Status; Order Cost Variance Status; Order Detail; OVAR; Package Content; Packaging Detail; Packing List; Partner Item Detail; PBCI; PBCT; PBII; PICI; PICK; Picklist Detail; POCI; POCR; POCT; PORI; PORV; POYE; Pricing Maintenance + Action Detail; Pricing Maintenance + Action List; Pricing Maintenance + Items/Customers; Pricing Maintenance + Test Order; Production; Purchase Order Receipt History; Purchased Component Detail; QSRC; QUOI; QUOT; Router/Traveler; Schedule Board; SDAB; SDAL; Selection Setup; Serial Number List; Serial Numbers Shipped; SHIP; Shipment Allocation Detail; Shipment Allocation List; Shipments by Line Item; Shipping Allocation Batch; Shortages by Order; SHPL; SSII; SSIL; Standard Costs Assigned Results; Standard Product Detail; Summarized Bill; Supply Peg Detail; Transaction Detail; VDII; VDIT; VDSC; VEIT; Vendor/Item Detail; VETI; VITI; VPFR; WIPL; WIPR; WIPS; WUSE

Phone

Phone is the primary phone number of the vendor/customer. Entry is any alphanumeric combination of up to 20 characters.

Where Used: APIP; CIMT; COBK; COCD; Contract Header Detail; CUID; CUII; CUSI; CUST; Customer Browse Detail; Customer Financial Detail; Customer Name/Address Detail; DISI; DIST; ISVI; IVPR; IVRR; POCR; POVD; Purchase Order Header Detail; QSRC; VDSC; VEDI; VEID; VEND; Vendor Browse Detail; Vendor Configuration; Vendor Master Detail; VENI; VSDI; VSDT

Rev

Customer Item Revision Level is the customer's current revision level for the customer item. Entry is any alphanumeric combination up to 2 characters.

Where Used: CIMT; Custom Product Detail

Starting Cust Item

The **Starting** field is used to request a list where the specified information appears first on the list. **Starting** entries may consist of a partial entry and if the entry is not in the list, the next highest entry appears first on the list. The **Starting** field can include one or more field combinations, each with its own entry requirements.

Where Used: A/P 1099 Distribution; A/P Payment Application Detail; A/P Payment Void Detail; A/P Received Item List; A/P Receiving Detail; A/R Payment Application Detail; APAH; APDS; APEX; APID; APIE; APII; APIR; APIV; APPA; APPD; APPI; APPO; APTX; ARAH; ARCD; AREX; ARIC; ARIH; ARPD; ARPH; ARSR; BAMT; Bank Payment Approval; BILL; BILL; BKMT; Browse Setup (customer); Browse Setup (item); Browse Setup (vendor); CACF; CCAN; CCAT; CCEX; CCMT; CIMT; CMCF; CMTA; CMTI; CNFA; COAN; COMI; COMT; Contract Item Detail/Pricing; CORV; CPMT; CUID; CUII; CUSI; CUST; FCMT; FCST; G/L Account Group/No List; G/L Account No List; G/L Batch Detail; G/L Journal Entry List; G/L Master Account Recap; G/L Org No List; G/L Org/Acct Group List; G/L Organization Group/No List; G/L Report List; G/L Source Code List; GLAG; GLAV; GLBD; GLCA; GLCI; GLDQ; GLEX; GLGQ; GLJD; GLJE; GLJI; GLJP; GLJR; GLMA; Global Extended Text Selection; GLOS; GLRD; GLRL; GLSC; GLSI; GLSS; ITBI; ITCB; Item Master; Item Shortages; ITMB; ITMI; ITPB; ITPI; IVCO; IVIA; IVIE; IVII; IVRV; LMMT; Location Selection Setup; MCST; MOAN; MOMI; MOMT; MORI; MORV; MPED; MPIT; MSMT; NMTA; OPSL; Orders on Shipment; ORST; Packaging Detail; PASS; PBCI; PBCT; PBMI; PBMT; PCMT; PCST; PICI; PICK; POAN; POAS; POCI; POCT; POMI; POMT; PORI; PORV; REDI; RTMT; RVED; SBOL; Selection Setup; Serial Number List; Serial Numbers Shipped; SHIP; Shipments by Line Item; SHPI; SSII; STAD; SUND; SUNR; SUPD; SUPR; TEXT; TXTA; VAT Summary (APSM Module); VATT; VEDI; VEID; VEND; VENI; Workcenter Master

CCAT – Customer Catalog

Use this screen to maintain catalog items that can be entered on a customer order. The item number, description and restricted class code for the catalog item are displayed and are available for update. The associated inventory item number, unit of measure and item description also display.

Transportation Shortcuts

You can use shortcut keys or transport buttons to go to the following related screens.

Destination	Shortcut Key(s)
COMT (Customer Order) (not available after SOPM Module installation)	F8
ITMB (Item Master)	F9
BILL (Single Level Bill)	F10

Browse Windows

You can open browse windows by choosing **Browse/Detail** from the **Tools** menu in the following fields:

Browse	From Fields
Item Browse	Item

For more information, see "Selecting from a Browse List" in the Fourth Shift Basics manual.

Web Links

If you use Web UI, you can link to other screens by clicking tabs or hyperlinks.

Go to Screen...	By clicking...
ITMB (Item Master)	Screen label: Item
ITMC (Item/Work Center Cost Data)	Screen label: Item
ITPB (Item Price Book)	Screen label: Item

Reports

Customer Catalog

Lists catalog items.

Access Method

To generate the report, choose **Print** or **Print Preview** from the **File** menu. The Report screen appears before the report is generated, allowing you to select a range of data for the report. For more information on reporting in general, see "Printing and Reporting" in the Fourth Shift Basics manual.

Report Template

The default template for this report is CusCCAT.rdl.

For more information on report templates, see "Reporting for SQL Server Systems" in the System Help topics.

Fields**Catalog Item**

Catalog Item is the unique identifier for a catalog item that may be entered on a customer order. A single item may have many catalog items connected to it. Entry is any alphanumeric combination of up to 25 characters.

Where Used: CCAT; COAN; COCD; COMI; COMT; Customer Order; Invoice Line Item Detail; Line Item Details + Customer Item; Order Detail; Packing List

Catalog Item Description

Catalog Item Description identifies the catalog item in terms of its characteristics. Entry is any alphanumeric combination of up to 70 characters.

Where Used: CCAT; Customer Order; Line Item Details + Customer Item; Standard Product Detail

Description

Item Description identifies the item in terms of its characteristics. When space is limited, a partial description is displayed. Entry is any alphanumeric combination of up to 70 characters.

Where Used: A/P Received Item List; ABCR; Advance Ship Notice Line; APPI; APPV; Available Pricing; AVII; AVIT; BILL; BILL; Bill of Material; Bill of Material Detail; Browse Setup (item); Capacity Planning; CCAN; CCAT; CMLB; COBK; COMP; Comparison Bill; Comparison of Summarized Bills; Contract Item Detail; Contract Item Detail/Pricing; CORV; Cost Estimate by Lot Size; Costed Bill Detail; CSLB; Custom Product Component Detail; Customer Item + General; Customer Order; Customer Order Receipt/Reverse; CWIP; Demand Peg Detail; Dispatch List; Engineering; FCST; ICCR; IHIR; INVA; Inventory Allocation; Inventory History List; Inventory Transaction History Report; INVR; IORD; IPPD; ISVI; ITBI; ITCB; ITCI; Item + Alternates; Item + Quantity; Item Availability; Item Availability + Quantity; Item Browse; Item Browse Detail; Item History; Item Lot Trace and Serialization Detail; Item Master; Item Master Detail; Item Master Planning Detail; Item Responsibility Assigned Results; ITMB; ITMC; ITMI; ITPB; ITPI; Job Estimates and Performance Report; Lead Time; Lead Time Analysis; Lead Times Assigned Results; LEXP; Line Item Details + Item; LMSI; LMST; Location Index; Lot Detail; Lot Inventory Transaction History Report; Lot Trace; Lot Trace Issue Detail; Lot Trace Receipt Detail; LOTR; LVAL; Manufacturing Order Line Item Detail; Manufacturing Order Receipt/Reverse; Material Exposure; MBIL; MCST; MOMI; MOMT; MORI; MORV; MPSR; MPSS; MSMT; Multi-Level Bill; Multi-Level Costed Bill; Multi-Level Where Used; MUSE; Open Order Detail; OPSL; Order Completion Status; Order Cost Variance Status; Order Detail; Order Line Items; OVAR; Package Content; Packaging Detail; Partner Item Detail; PBCI; PBCT; PBII; PICI; PICK; Picklist Detail; POAN; POAS; POCI; POGR; POCT; POMI; POMT; PORI; PORR; PORV; POYE; Production; Purchase Order Line Item Detail; Purchase Order Line Item Detail (CPMT); Purchase Order Line Items; Purchase Order Receipt History; Purchased Component Detail; QSRC; QUOI; QUOT; Router/Traveler; SDAB; SDAL; Shipment Allocation Detail; Shipments by Line Item; Shipping Detail; Shortages by Order;

SHPL; Single-Level Configuration Bill of Material Report; SSII; SSIL; Standard Costs Assigned Results; Standard Product Detail; Summarized Bill; Supply Peg Detail; Transaction Detail; VDII; VDIT; VDSC; VITI; Where Used; WIPR; WUSE

Function

Function codes are four-character abbreviations for screen names. Each screen has a unique code used for identification and transportation. For example, ITMB identifies the Item Master screen. Entry is 4 alphanumeric characters.

Where Used: screens and reports

Item

Item is the unique identifier for a part, whether it be a piece part, tool, raw material, an assembly or finished product. All items are set up using the ITMB screen. Within a product structure, an item can be a component as well as a parent. Entry is any alphanumeric combination of up to 30 characters.

Where Used: A/P Received Item List; ABCR; Advance Ship Notice Line; Allowance/Charge Detail (Detail); APPI; APPV; AUDT; Available for Shipping Allocation Batch; AVII; AVIT; Bill of Material Accuracy Results; Browse Setup (item); Capacity Planning; CBIL; CCAN; CCAT; CIMT; CINV; COAN; COBK; COCD; COMI; COMP; Comparison Bill; Comparison of Summarized Bills; COMT; Contract Item Detail; Contract Item Detail/Pricing; Contract Summary; CORV; CSTU; Cumulative Detail; Customer Item + General; Customer Order; Customer Order Line Price Adjustment; Customer Order Receipt/Reverse; CWIP; Demand Peg Detail; Engineering; FCST; GASN; ICCR; IHIR; IMTR; INVA; Inventory Adjustment Application; Inventory Allocation; Inventory History List; Inventory Transaction History Report; INVR; IORD; IPPD; ISVI; ITBI; ITCB; ITCI; Item + Quantity; Item Availability; Item Availability + Quantity; Item Browse; Item Browse Detail; Item History; Item Lot Receipt; Item Lot Trace and Serialization Detail; Item Master; Item Master Detail; Item Master Planning Detail; Item Responsibility Assigned Results; Item Shortages; ITHC; ITHR; ITMB; ITMC; ITMI; ITPB; ITPI; Lead Times Assigned Results; LEXP; LHIS; Line Item Details + Item; LMSI; LMST; Lot Detail; Lot Inventory Transaction History Report; Lot Selection; Lot Trace; Lot Trace Issue Detail; Lot Trace Receipt Detail; LOTR; LVAL; Manufacturing Order Line Item Detail; Manufacturing Order Receipt/Reverse; Material Shortages Detail; MCST; MOAN; MOFR; MOMI; MOMT; MORI; MORV; MPIT; MPSR; MPSS; MSMT; Multi-Level Bill; Multi-Level Costed Bill; Multi-Level Where Used; MUSE; Open Order Detail; Order Completion Status; Order Cost Variance Status; Order Detail; OVAR; Package Content; Packaging Detail; Packing List; Partner Item Detail; PBCI; PBCT; PBII; PICI; PICK; Picklist Detail; POCI; POCR; POCT; PORI; PORV; POYE; Pricing Maintenance + Action Detail; Pricing Maintenance + Action List; Pricing Maintenance + Items/Customers; Pricing Maintenance + Test Order; Production; Purchase Order Receipt History; Purchased Component Detail; QSRC; QUOI; QUOT; Router/Traveler; Schedule Board; SDAB; SDAL; Selection Setup; Serial Number List; Serial Numbers Shipped; SHIP; Shipment Allocation Detail; Shipment Allocation List; Shipments by Line Item; Shipping Allocation Batch; Shortages by Order; SHPL; SSII; SSIL; Standard Costs Assigned Results; Standard Product Detail; Summarized Bill; Supply Peg Detail; Transaction Detail; VDII; VDIT; VDSC; VEIT; Vendor/Item Detail; VETI; VITI; VPIR; WIPL; WIPR; WIPS; WUSE

R

Restricted Class Code identifies the catalog item as restricted. If a restricted catalog item is placed on order, a warning message will display during order entry but the catalog item will still be entered on the customer order. **Restricted Class Codes** are:

0 = Class code 0
1 = Class code 1
2 = Class code 2
3 = Class code 3
4 = Class code 4
5 = Class code 5
6 = Class code 6
7 = Class code 7
8 = Class code 8
9 = Class code 9
A = Class code A
B = Class code B
C = Class code C
D = Class code D
E = Class code E
F = Class code F
G = Class code G
H = Class code H
I = Class code I
J = Class code J
K = Class code K
L = Class code L
M = Class code M
N = Class code N
O = Class code O
P = Class code P
Q = Class code Q
R = Class code R
S = Class code S
T = Class code T
U = Class code U
V = Class code V
W = Class code W
X = Class code X
Y = Class code Y
Z = Class code Z

Where Used: CCAT

Starting Catalog Item

The **Starting** field is used to request a list where the specified information appears first on the list. **Starting** entries may consist of a partial entry and if the entry is not in the list, the next highest entry appears first on the list. The **Starting** field can include one or more field combinations, each with its own entry requirements.

Where Used: A/P 1099 Distribution; A/P Payment Application Detail; A/P Payment Void Detail; A/P Received Item List; A/P Receiving Detail; A/R Payment Application Detail; APAH; APDS; APEX; APID; APIE; APII; APIR; APIV; APPA; APPD; APPI; APPO; APTX; ARAH; ARCD; AREX; ARIC; ARIH; ARPD; ARPH; ARSR; BAMT; Bank Payment Approval; BILL; BILL; BKMT; Browse Setup (customer); Browse Setup (item); Browse Setup (vendor); CACF; CCAN; CCAT; CCEX; CCMT; CIMT; CMCF; CMTA; CMTI; CNFA; COAN; COMI; COMT; Contract Item Detail/Pricing; CORV; CPMT; CUID; CUII; CUSI; CUST; FCMT; FCST; G/L Account Group/No List; G/L Account No List; G/L Batch Detail; G/L Journal Entry List; G/L Master Account Recap; G/L Org No List; G/L Org/Acct Group List; G/L Organization Group/No List; G/L Report List; G/L Source Code List; GLAG; GLAV; GLBD; GLCA; GLCI; GLDQ; GLEX; GLGQ; GLJD; GLJE; GLJI; GLJP; GLJR; GLMA; Global Extended Text Selection; GLOS; GLRD; GLRL; GLSC; GLSI; GLSS; ITBI; ITCB; Item Master; Item Shortages; ITMB; ITMI; ITPB; ITPI; IVCO; IVIA; IVIE; IVII; IVRV; LMMT; Location Selection Setup; MCST; MOAN; MOMI; MOMT; MORI; MORV; MPED; MPIT; MSMT; NMTA; OPSL; Orders on Shipment; ORST; Packaging Detail; PASS; PBCI; PBCT; PBMI; PBMT; PCMT; PCST; PICI; PICK; POAN; POAS; POCI; POCT; POMI; POMT; PORI; PORV; REDI; RTMT; RVED; SBOL; Selection Setup; Serial Number List; Serial Numbers Shipped; SHIP; Shipments by Line Item; SHPI; SSII; STAD; SUND; SUNR; SUPD; SUPR; TEXT; TXTA; VAT Summary (APSM Module); VATT; VEDI; VEID; VEND; VENI; Workcenter Master

UM

Unit of Measure identifies the standard unit for an item used in the manufacturing process. Entry is up to 4 alphanumeric characters.

Where Used: A/P PO/Inv Variance by Invoice; A/P Receiving Detail; APEX; APPI; APPV; APUV; Available for Shipping Allocation Batch; AVII; AVIT; BILL; BILL; Bill of Material; Bill of Material Detail; CCAT; CINV; CMLB; COBK; COMI; COMT; Contract Header Detail; Contract Item Detail; Contract Item Detail/Pricing; CORV; Costed Bill Detail; CPMT; CSLB; Custom Product Component Detail; Custom Product Detail; Customer Order; Customer Order Line Price Adjustment; Customer Order Receipt/Reverse; CWIP; Demand Peg Detail; Engineering; FCST; ICCR; IHIR; INVA; Inventory Allocation; INVR; IORD; IPPD; ITBI; ITCB; ITCI; Item + Quantity; Item Availability + Quantity; Item Browse Detail; Item History; Item Lot Receipt; Item Lot Trace and Serialization Detail; Item Master; Item Master Detail; Item Master Planning Detail; Item Responsibility Assigned Results; Item Shortages; ITHC; ITHR; ITMB; ITMC; ITMI; ITPB; ITPI; IVPR; IVRR; JEST; Job Estimates and Performance Report; Lead Times Assigned Results; LEXP; LHis; Line Item Details + Item; LMSI; LMST; Location Index; Lot Detail; Lot Trace; Lot Trace Issue Detail; Lot Trace Receipt Detail; LOTR; LVAL; Manufacturing Order Line Item Detail; Manufacturing Order Receipt/Reverse; Material Exposure; MBIL; MCST; MOMI; MOMT; MORI; MORV; MPIT; MPSR; MPSS; MSMT; Multi-Currency; Multi-Level Bill; Multi-Level Where Used; MUSE; Open Order Detail; OPSL; Order Completion Status; Order Cost Variance Status; Order Detail; Order Line Items; OVAR; Packaging Detail; Packing List; Partner Item Detail; PBCI; PBCT; PCST; PICI; PICK; Picklist Detail; POCI; POCR; POCT; POMI; POMT; PORI; PORR; PORV; POSR; POVD; Pricing Maintenance + Action Detail; Pricing Maintenance + Action List; Pricing Maintenance + Test Order; Production; Purchase Order Line Item Detail; Purchase Order Line Item Detail (CPMT); Purchase Order Line Items; Purchase Order Receipt History; Purchased Component Detail; QUOI; QUOT; Router/Traveler; SDAB; SDAL; Shipment Allocation Detail; Shipments by Line Item; Shipping Allocation Batch; Shipping Detail; Shortages by Order; SHPL; Single-Level Configuration Bill of Material Report; SSII; SSIL; Standard Costs Assigned Results; Standard Product Detail; Summarized Bill; Supply Peg Detail; Transaction Detail; VDII; VDI; VDSC; VEIT; Vendor/Item Detail; VETI; VPRF; Where Used; WIPR; Workcenter Master; WUSE

COAN – Customer Order Action

Use this screen to view and act on recommended actions for customer orders. Recommendations are automatically generated by different functions. The COAN screen conveniently collects all these generated recommendations to direct your attention to what actions are needed to meet commitments to customers.

Transportation Shortcuts

You can use shortcut keys or transport buttons to go to the following related screens.

Destination	Shortcut Key(s)
Material Shortages Detail	F8
SDAL (Supply/Demand Analysis)	F9
COMT (Customer Order) (not available after SOPM Module installation)	F10

Additional Information

Window / Action	Available From	Shortcut Key(s)
Display the item quantity (Order Qty and Shipped Quantity) that is available to promise	Remaining Required Quantity or Ship Date	F4

Browse Windows

You can open browse windows by choosing **Browse/Detail** from the **Tools** menu in the following fields:

Browse	From Fields
Customer Browse	Starting Customer Id

For more information, see "Selecting from a Browse List" in the Fourth Shift Basics manual.

Web Links

If you use Web UI, you can link to other screens by clicking tabs or hyperlinks.

Go to Screen...	By clicking...
Material Shortages Detail	Tab at top of screen
COMT (Customer Order) (CUSM only)	Next Step button
COMT (Customer Order) (CUSM only)	Screen label: Co Number
COCD (Customer Orders by Customer Id)	Screen label: Id

Go to Screen...	By clicking...
CUID (Customer Master by Customer Id) (CUSM only)	Screen label: Id
ITMB (Item Master)	Screen label: Item/catalog Item
SDAL (Supply/Demand Analysis)	Screen label: Item/catalog Item
SSII (Stock Status Inquiry by Item)	Screen label: Item/catalog Item

Reports

Customer Order Action

Lists all recommended customer order actions.

Access Method

To generate the report, choose **Print** or **Print Preview** from the **File** menu. The Report screen appears before the report is generated, allowing you to select a range of data for the report. For more information on reporting in general, see "Printing and Reporting" in the Fourth Shift Basics manual.

Report Template

For more information on report templates, see "Reporting for SQL Server Systems" in the System Help topics.

Screen Reference

Customer Order Action

Lists all recommended customer order actions.

Access Method

To generate the report, choose **Print** or **Print Preview** from the **File** menu. The Report screen appears before the report is generated, allowing you to select a range of data for the report. For more information on reporting in general, see "Printing and Reporting" in the Fourth Shift Basics manual.

Report Template

For more information on report templates, see "Reporting for SQL Server Systems" in the System Help topics.

Responding to Action Messages

The listed action messages may be displayed on the COAN screen based on the other transactions entered into the system. Use the recommendations for each action message to determine what you need to do when one of these action messages is displayed. Once the recommended action is taken, the action message is deleted the next time the task, which created the message, is run.

ACK: Print Order Acknowledgment

When a line item was released on the specified order or when order information has changed, a printed order acknowledgment was not generated. If the ACK action message line is in use when the report is printed, the message is not automatically deleted.

Screen	Action
COMT/BOPR/SOPM	Print the order acknowledgment.

CLO: Order Closure Requested/Suggested

Ship activity will generate this message if an auto close is not allowed when the **Shipped Quantity** is greater than or equal to the **Order Qty**.

Screen	Action
COAN	Press F4 in the Remaining Required Quantity field to view the Order Qty and Shipped Quantity . Determine if the ordered line item should be closed (no more expected shipments).
COAN/COMT	If the line item should be closed, change the Ln# Sta to closed (5). The message will be deleted by SREV.
COAN	If the line item should not be closed, manually delete the CLO message.
SOPM	If the line item should be closed, change the status to Completed. The message will be deleted by SREV.

CRH: Order on Credit Hold

For CUSM, SREV has detected a **Ln# Sta = 9** (credit hold) for a line item that should be released.

For SOP, SREV and SOPM transactional activity (order line add or change) can generate messages for customers or order lines where the customer or order is or should be on hold.

Screen	Action
CUSM/Customer Financial Detail	Determine the customer's credit status.
COAN (CUSM only)	Change the Ln# Sta to open (3) to take the order off hold but not yet release the order. Change the Ln# Sta to 4 to release the order. SREV will delete the message.
COMT	Change the Ln# Sta to open (3) and SREV will delete the message.
COMT	Change the Ln# Sta to 4 to release the order and the message will be deleted automatically from COAN.
SOPM/Customer/ Credit and Financial tabs	Determine the customer's credit and financial status.
SOPM	When the customer and/or order are taken off hold and the credit limit isn't exceeded, SREV will automatically delete the message.

CRW: Credit Limit Exceeded

SREV has detected that the order is due for release, but the customer's credit status is questionable. Currently, the customer's accounts receivable balance plus outstanding orders is greater than the **Credit Limit** established on the Customer Master or the customer has an outstanding balance greater than 30 days old.

SOPM transactional activity (order line add or change) can also automatically create CRW messages for a customer for the same credit condition as above. In addition, a CRW message can be created for an order line if the Ship Date is within the order lead time as defined on CNFG.

Note: Any CRW messages for customer need to be deleted manually using the COAN screen. This applies to both CUSM and SOPM order entry systems.

Screen	Action
CUSM/Customer Financial Detail	Determine the customer's credit status.
COAN	Change the Ln# Sta as appropriate to released (4) and SREV will delete the message.
COAN	Change the Ln# Sta to credit hold (9) and the message will be changed to CRH on COAN.
COMT	Change the Ln# Sta to 4 to release the order and the message will be deleted automatically from COAN.
COMT	Change the Ln# Sta to credit hold (9) and SREV will delete the message.
SOPM/Customer/ Credit and Financial tabs	Determine the customer's credit and financial status.
SOPM	When the order line is changed to Released, the message will be deleted automatically from COAN. SREV can delete the message if allowed to Remove the Hold condition.

OPD: Order Past Due--Reschedule/Expedite

SREV has detected that the **Ship Date** is in a past-due time frame.

Screen	Action
COAN/COMT	Update the Ship Date on the COAN screen or update the Prom Divrvy date or the Tr LT (transportation lead time) on the COMT screen to recalculate the Ship Date . The message will be deleted by SREV.
COAN/SOPM	Update the Ship Date . The message will be deleted by SREV.

PIK: Pick Customer Order (if SHPM is not installed)

One of the released line items on the order needs to be shipped. The SREV task has detected that the system date plus the **Order Lead Time** is after the **Ship Date**.

Screen	Action
PICK	Pick/ship the line item.

PPL: Print Picklist

At least one line on the order has been released. The picklist is authorized to be printed.

Screen	Action
PICK/STAD/BOPR	Print the picklist. The message will be automatically deleted from COAN when the picklist is printed.

REL: Order is Due for Release

The order should be released because the system date plus the **Order Lead Time** is after the **Ship Date**.

Screen	Action
COAN	Change the Ln# Sta to released (4). SREV will delete the message.
COMT/SOPM	Change the Ln# Sta to released (4). The message will be deleted automatically from COAN.

SCH: Reschedule Existing Order

SREV has detected that the calculated **Reqst Ship** date is before or after the calculated **Ship Date** for the line item. The **Reqst Ship** date is based on the **Reqst Divry** date entered for the line item on the Standard Product Detail screen. The **Ship Date** is based on the **Prom Divry** date entered for the line item on the COMT screen. Both shipping dates take transportation lead time into consideration.

Screen	Action
n/a	Reschedule the order so the shipping date matches the requested shipping date.
COAN/COMT/ Standard Product Detail	Update the Ship Date on the COAN screen or update the Prom Divry date or the Tr LT on the COMT screen to recalculate the Ship Date or to change the Reqst Divry date on the Standard Product Detail screen. SREV will delete the message.
SOPM	Update the Ship Date or the Requested Date/Transportation Leadtime on the line's Item Details General tab. SREV will delete the message.

Fields

Catalog Item

Catalog Item is the unique identifier for a catalog item that may be entered on a customer order. A single item may have many catalog items connected to it. Entry is any alphanumeric combination of up to 25 characters.

Where Used: CCAT; COAN; COCD; COMI; COMT; Customer Order; Invoice Line Item Detail; Line Item Details + Customer Item; Order Detail; Packing List

CO Number

Customer Order Number is the user-defined identifier for a customer order. Entry is any alphanumeric combination of up to 30 characters.

Where Used: Advance Ship Notice Line; Advance Ship Notice Order Detail; Available for Shipping Allocation Batch; COAN; COCD; COMI; COMT; CORV; CPMT; Custom Product Component Detail; Custom Product Detail; Customer + Credit; Customer Order; Customer Order + Order Header; Customer Order Header Detail; Customer Order Line Price Adjustment; Customer Order Receipt/Reverse; CWIP; Demand Peg Detail; GASN; Inventory Allocation; IVPR; IVRR; JEST; Job Estimates and Performance Report; Material Shortages Detail; MOAN; MSMT; OPSL; Order Detail; Orders on Shipment; Package Content; Packaging Detail; PICI; PICK; Picklist Detail; PORI; PORV; Pricing Maintenance + Test Order; Purchased Component Detail; Serial Number List; SHIP; Shipment Allocation Detail; Shipment Order Detail; Shipping Allocation Batch; SHPI; SHPL; STAD; Standard Product Detail; Supply Peg Detail

CSR

Customer Service Representative identifies the person responsible for handling this customer's account. Entry is any alphanumeric combination of up to 3 characters.

Where Used: COAN; COMI; COMT; CORV; CPMT; CUID; CUII; CUSI; CUST; Custom Product Component Detail; Custom Product Detail; Customer + General; Customer Browse Detail; Customer Financial Detail; Customer Name/Address Detail; Customer Order + Order Detail; Customer Order Header Detail; Customer Order Receipt/Reverse; Demand Peg Detail; Global Settings; IVPR; IVRR; JEST; Job Estimates and Performance Report; Material Shortages Detail; MPED; MSCF; OPSL; ORST; PICI; PICK; Picklist Detail; Pricing Maintenance + Test Order; REDI; RVED; STAD; Standard Product Detail; Transaction Detail

Cust Id

Customer Identification is the identification number assigned to a customer. Entry is any alphanumeric combination of up to 13 characters.

Where Used: Advance Ship Notice Carrier Detail; Advance Ship Notice Shipment Detail; ARAH; ARCD; ARCJ; ARCP; ARCR; AREX; ARIC; ARIH; ARIP; ARIR; ARPD; ARPH; ARRJ; ARSC; ARSR; ARST; ARTB; ARTX; Available Customer Shipments; Available for Shipping Allocation Batch; Browse Setup (customer); Browse Setup (order); CIMT; CINV; COAN; COBK; COCD; COMI; COMT; CORV; COYE; CPMT; CUID; CUII; Cumulative Detail; CUPB; CUPI; CUSI; CUST; Custom Product Component Detail; Custom Product Detail; Customer; Customer Browse; Customer Browse Detail; Customer Financial Detail; Customer Invoice List; Customer Item + General; Customer Name/Address Detail; Customer Order; Customer Order + Order Header; Customer Order Header Detail; Customer Order Receipt/Reverse;

Customer Payment List; Demand Peg Detail; EDIX; EXRU; G/L Distribution (ARSM Module); GASN; Inbound Conversion Detail; Inventory Adjustment Application; Invoice Header Detail; Invoice Line Item Detail; IORD; IVCO; IVIA; IVIE; IVII; IVPP; IVPR; IVRR; IVRV; JEST; Job Estimates and Performance Report; Lot Trace Issue Detail; Lot Trace Receipt Detail; Material Shortages Detail; MOAN; MPED; MPIT; MSMT; OPSL; Order Browse; Order Detail; ORST; Outbound Conversion Detail; Partner Item Detail; PCMT; PICI; PICK; Picklist Detail; Pricing Maintenance + Items/Customers; Pricing Maintenance + Test Order; SBOL; Serial Number List; SHIP; Ship to Browse; Ship to Browse Detail; Shipment Allocation Detail; Shipment Allocation List; Shipping Allocation Batch; SHPI; SHPL; STAD; Standard Product Detail; Supply Peg Detail; Transaction Detail

Day Var

Days Variance is the difference in shop days between the **Rqst Ship** date and the **Ship Date**. If the **Days Variance** is more than 999, *** is displayed.

Where Used: COAN; Demand Peg Detail; Supply Peg Detail

Function

Function codes are four-character abbreviations for screen names. Each screen has a unique code used for identification and transportation. For example, ITMB identifies the Item Master screen. Entry is 4 alphanumeric characters.

Where Used: screens and reports

Item

Item is the unique identifier for a part, whether it be a piece part, tool, raw material, an assembly or finished product. All items are set up using the ITMB screen. Within a product structure, an item can be a component as well as a parent. Entry is any alphanumeric combination of up to 30 characters.

Where Used: A/P Received Item List; ABCR; Advance Ship Notice Line; Allowance/Charge Detail (Detail); APPI; APPV; AUDT; Available for Shipping Allocation Batch; AVII; AVIT; Bill of Material Accuracy Results; Browse Setup (item); Capacity Planning; CBIL; CCAN; CCAT; CIMT; CINV; COAN; COBK; COCD; COMI; COMP; Comparison Bill; Comparison of Summarized Bills; COMT; Contract Item Detail; Contract Item Detail/Pricing; Contract Summary; CORV; CSTU; Cumulative Detail; Customer Item + General; Customer Order; Customer Order Line Price Adjustment; Customer Order Receipt/Reverse; CWIP; Demand Peg Detail; Engineering; FCST; GASN; ICCR; IHIR; IMTR; INVA; Inventory Adjustment Application; Inventory Allocation; Inventory History List; Inventory Transaction History Report; INVR; IORD; IPPD; ISVI; ITBI; ITCB; ITCI; Item + Quantity; Item Availability; Item Availability + Quantity; Item Browse; Item Browse Detail; Item History; Item Lot Receipt; Item Lot Trace and Serialization Detail; Item Master; Item Master Detail; Item Master Planning Detail; Item Responsibility Assigned Results; Item Shortages; ITHC; ITHR; ITMB; ITMC; ITMI; ITPB; ITPI; Lead Times Assigned Results; LEXP; LHSI; Line Item Details + Item; LMSI; LMST; Lot Detail; Lot Inventory Transaction History Report; Lot Selection; Lot Trace; Lot Trace Issue Detail; Lot Trace Receipt Detail; LOTR; LVAL; Manufacturing Order Line Item Detail; Manufacturing Order Receipt/Reverse; Material Shortages Detail; MCST; MOAN; MOFR; MOMI; MOMT; MORI; MORV; MPIT; MPSR; MPSS; MSMT; Multi-Level Bill; Multi-Level Costed Bill; Multi-Level Where Used; MUSE; Open Order Detail; Order Completion Status; Order Cost Variance Status; Order Detail; OVAR; Package Content; Packaging Detail; Packing List; Partner Item Detail; PBCI; PBCT; PBII; PICI; PICK; Picklist Detail; POCI; POCR; POCT; PORI; PORV; POYE; Pricing Maintenance + Action Detail; Pricing Maintenance + Action List; Pricing

Maintenance + Items/Customers; Pricing Maintenance + Test Order; Production; Purchase Order Receipt History; Purchased Component Detail; QSRC; QUOI; QUOT; Router/Traveler; Schedule Board; SDAB; SDAL; Selection Setup; Serial Number List; Serial Numbers Shipped; SHIP; Shipment Allocation Detail; Shipment Allocation List; Shipments by Line Item; Shipping Allocation Batch; Shortages by Order; SHPL; SSII; SSIL; Standard Costs Assigned Results; Standard Product Detail; Summarized Bill; Supply Peg Detail; Transaction Detail; VDII; VDI; VDSC; VEIT; Vendor/Item Detail; VETI; VITI; VPFR; WIPL; WIPR; WIPS; WUSE

Ln#

Line Number is the identification of a line item on an order. The **Line Number** is system-assigned. Entry is up to 3 numbers.

Where Used: A/P Invoice Matching Detail; A/P PO/Inv Variance by Invoice; A/P Receiving Detail; Advance Ship Notice Line; Advance Ship Notice Order Detail; APEX; APID; APPI; APPV; APUV; Available for Shipping Allocation Batch; Backflush Issue Reconciliation Report; Bill of Material Accuracy Results; Capacity Planning; CCAN; CINV; COAN; COCD; COMI; COMT; CORV; CPMT; CSTU; Custom Product Component Detail; Custom Product Detail; Customer Order; Customer Order + Order Header; Customer Order Line Price Adjustment; Customer Order Receipt/Reverse; CWIP; Demand Peg Detail; Dispatch List; GASN; IHIR; IMTR; Inventory Transaction History Report; IORD; Item Shortages; JEST; Job Estimates and Performance Report; LHM; LMSI; LMST; Location Index; Lot Detail; Lot Inventory Transaction History Report; Lot Trace Issue Detail; Lot Trace Receipt Detail; LOTR; LRRP; Manufacturing Order Line Item Detail; Manufacturing Order Receipt/Reverse; Material Shortages Detail; MCST; MOAN; MOFR; MOMI; MOMT; MORI; MORV; MSMT; Open Order Detail; OPSL; Order Completion Status; Order Cost Variance Status; Order Detail; Order Line Items; OVAR; Package Content; Packaging Detail; Packing List; PCMT; PCST; PICI; PICK; Picklist Detail; POAN; POAS; POMI; POMT; PORI; PORR; PORV; POSR; POVD; Pricing Maintenance + Test Order; Purchase Order Line Item Detail; Purchase Order Line Item Detail (CPMT); Purchase Order Line Items; Purchased Component Detail; Router/Traveler; Schedule Board; SDAB; Serial Number List; SHIP; Shipment Allocation Detail; Shipment Allocation List; Shipments by Line Item; Shipping Allocation Batch; Shortages by Order; SHPL; STAD; Standard Product Detail; Supply Peg Detail; Transaction Detail; TRUD; VDSC; VPFR; WIPL; WIPR; WIPS

Ln# Sta

Line Number Status indicates the item's current position within the order process. **Line Number Statuses** are:

2 = Firm Planned or Quote.

Firm Planned: For forecast line number types (1, 2, 3), the item's order quantity and scheduled date are fixed and are not automatically changed. Quote: For custom product line number types (X), the order-dependent bill of material can be attached to the item, but component demands are ignored for planning purposes. This status may be selected for new orders only.

3 = Open.

The item's order quantity and scheduled date are fixed. The order-dependent bill of material is attached to the item.

4 = Released.

The item's order quantity and scheduled date are fixed. The order-dependent bill of material is attached to the item. The order and picklist can be printed and issues/shipments can be made.

5 = Closed.

All required issues or shipments have been made for the item.

6 = Closed.

The order closure report has reported this order closure. This status is system-assigned.

7 = Closed.

The order is ready to be deleted from the active file and retained in order history. This status is system-assigned.

8 = Closed.

The order is ready to be deleted, but other line items on the same order have a **Ln# Sta** of less than 6. This status is system-assigned.

9 = Credit Hold.

The customer's credit limit has been exceeded or the order is placed on hold for another reason. The item is treated as an open order.

Line Number Status can only be incremented, except when reopening an order, which decrements **Line Number Status** from 5 to 4.

Where Used: COAN; COMI; COMT; CPMT; Custom Product Component Detail; Custom Product Detail; CWIP; Demand Peg Detail; JEST; Job Estimates and Performance Report; Material Shortages Detail; OPSL; PICI; PICK; Picklist Detail; Pricing Maintenance + Test Order; Purchased Component Detail; Shipments by Line Item; Standard Product Detail; Supply Peg Detail

Ln# Typ

Line Number Type determines the use of the item order quantity in planning, manufacturing and accounting. **Line Number Types** are:

A = Assemble-to-order.

Standard product. Reserved for future use.

C = Standard product**X = Custom product****1 = Customer Forecast Type 1.****2 = Customer Forecast Type 2.****3 = Customer Forecast Type 3.****B = By-product. Created as part of another order.****U = Tool return.**

Created as part of another order.

P = Purchased (not available for customer orders)

Forecast line types are included in data extracts as **Ln# Typ = F**.

Where Used: CINV; COAN; COMI; COMT; CORV; CPMT; Custom Product Component Detail; Custom Product Detail; Customer Order; Customer Order Receipt/Reverse; CWIP; Demand Peg Detail; IHIR; JEST; Job Estimates and Performance Report; Material Shortages Detail; OPSL; Order Detail; OVAR; PICI; PICK; Picklist Detail; Pricing Maintenance + Test Order; Purchased Component Detail; Serial Number List; SHIP; Standard Product Detail; Supply Peg Detail; Transaction Detail

Msg Code

Message Code indicates the type of action that needs to be taken to resolve an exception condition.

Where Used: CCAN; COAN; Demand Peg Detail; Material Shortages Detail; MOAN; MSCF; POAN; POAS; Purchased Component Detail; STAD; Supply Peg Detail

Msg Code to Display

Message Code to Display is used to request only a specific message code to be displayed. Use **Message Code to Display** = ALL to display all message codes. Entry is up to 3 characters. Default is ALL.

Where Used: COAN; MOAN; POAN; POAS

Msg Count

Message Count is the number of action messages or recommendations currently associated with the specified line. **Message Count** = *** when a message code is specified in the **Msg Code to Display** field (if available).

Where Used: COAN; MOAN; POAN; POAS; SDAL; STAD; Stockrooms; Supply Peg Detail

Remaining Required Quantity

Remaining Required Quantity is the total item **Order Qty** minus the shipped or issued quantity of items to date. Entry is up to 10 numbers. Decimal places are allowed.

Where Used: COAN; Custom Product Component Detail; Material Shortages Detail; Order Detail; Shipments by Line Item

Rqst Ship

Requested Shipping date is the date the items should be shipped to meet the customer commitment. The **Requested Shipping** date is calculated using the requested delivery date and the transportation lead time for the ordered item.

Where Used: COAN; Demand Peg Detail; Picklist Detail; Pricing Maintenance + Test Order

Ship Date

Ship Date is the date the items are scheduled to be shipped or were shipped. The **Ship Date** is calculated using the promised delivery date and the transportation lead time for the ordered item.

Where Used: Advance Ship Notice Carrier Detail; Advance Ship Notice Shipment Detail; ARIP; Available for Shipping Allocation Batch; COAN; Customer Invoice List; Customer Order; Demand Peg Detail; EXRU; GASN; Invoice Header Detail; IVCO; IVPP; IVPR; IVRR; IVRV; Material Shortages Detail; Order Detail; Picklist Detail; SHIP; Shipment Allocation Detail; Shipping Allocation Batch; STAD; Transaction Detail

Starting Customer Id

The **Starting** field is used to request a list where the specified information appears first on the list. **Starting** entries may consist of a partial entry and if the entry is not in the list, the next

highest entry appears first on the list. The **Starting** field can include one or more field combinations, each with its own entry requirements.

Where Used: A/P 1099 Distribution; A/P Payment Application Detail; A/P Payment Void Detail; A/P Received Item List; A/P Receiving Detail; A/R Payment Application Detail; APAH; APDS; APEX; APID; APIE; APII; APIR; APIV; APPA; APPD; APPI; APPO; APTX; ARAH; ARCD; AREX; ARIC; ARIH; ARPD; ARPH; ARSR; BAMT; Bank Payment Approval; BILL; BILL; BKMT; Browse Setup (customer); Browse Setup (item); Browse Setup (vendor); CACF; CCAN; CCAT; CCEX; CCMT; CIMT; CMCF; CMTA; CMTI; CNFA; COAN; COMI; COMT; Contract Item Detail/Pricing; CORV; CPMT; CUID; CUII; CUSI; CUST; FCMT; FCST; G/L Account Group/No List; G/L Account No List; G/L Batch Detail; G/L Journal Entry List; G/L Master Account Recap; G/L Org No List; G/L Org/Acct Group List; G/L Organization Group/No List; G/L Report List; G/L Source Code List; GLAG; GLAV; GLBD; GLCA; GLCI; GLDQ; GLEX; GLGQ; GLJD; GLJE; GLJI; GLJP; GLJR; GLMA; Global Extended Text Selection; GLOS; GLRD; GLRL; GLSC; GLSI; GLSS; ITBI; ITCB; Item Master; Item Shortages; ITMB; ITMI; ITPB; ITPI; IVCO; IVIA; IVIE; IVII; IVRV; LMMT; Location Selection Setup; MCST; MOAN; MOMI; MOMT; MORI; MORV; MPED; MPIT; MSMT; NMTA; OPSL; Orders on Shipment; ORST; Packaging Detail; PASS; PBCI; PBCT; PBMI; PBMT; PCMT; PCST; PICI; PICK; POAN; POAS; POCI; POCT; POMI; POMT; PORI; PORV; REDI; RTMT; RVED; SBOL; Selection Setup; Serial Number List; Serial Numbers Shipped; SHIP; Shipments by Line Item; SHPI; SSII; STAD; SUND; SUNR; SUPD; SUPR; TEXT; TXTA; VAT Summary (APSM Module); VATT; VEDI; VEID; VEND; VENI; Workcenter Master

Material Shortages Detail

Use this screen to check material shortages for an item. The Material Shortages Detail screen lists shortages for all remaining line items on an order. In this way, you can verify that the order can be completed in full. Prior to releasing an order, material shortages are checked against the item's bill of material. After opening an order, shortages are checked against the item's picklist.

When you first enter the Material Shortages Detail screen, line item information is displayed in the upper part of the screen and existing material shortages for components or line items are listed in the lower part of the screen. The fields included for display depend on whether you are viewing purchase order components (from the POAN screen), customer order line items (from the COAN screen) or custom order components (from the MOAN screen). Scroll through the list to view all shortages.

Features

Transportation Shortcuts

You can use shortcut keys or transport buttons to go to the following related screens.

Destination	Shortcut Key(s)
Previous screen	F8

Web Links

If you use Web UI, you can link to other screens by clicking tabs or hyperlinks.

Go to Screen...	By clicking...
Return	Tab at top of screen
BILL (Single Level Bill)	Screen label: Component
ITMB (Item Master)	Screen label: Component
ITMC (Item/Work Center Cost Data)	Screen label: Component
SDAL (Supply/Demand Analysis)	Screen label: Component
SSII (Stock Status Inquiry by Item)	Screen label: Component

Reports

A standard report is not generated for this screen. Use the Print Screen key or any screen capture program to create an image of the screen.

Screen Reference

Material Shortages Detail – Calculation Information

The following calculations are used by the Material Shortages Detail screen to determine the available quantity (number of items that can be issued to orders) and the short quantity (number of items still needed to fill orders).

Available Quantity

Available Quantity is the sum of:

```
[On-Hand + (In-Inspection * Yield)] - (Total Allocations for this item -
Required Quantity for this order)
```

for the item.

Short Quantity

Short quantity is the difference between the **Required Quantity** and the **Avail Quantity** for an item.

Fields

Avail Quantity

Available Quantity is the number of items that can be issued to orders. **Available Quantity** for the item is the sum of:

```
[On-Hand + (In-Inspection * Yield)] - (Total Allocations for this
item - Required Quantity for this order)
```

Where Used: **Material Item Shortages**; Material Shortages Detail; Order Detail; Router/Traveler

Buyr

Buyer code is used to identify the person responsible for handling the purchase of the item. The suggested entry is the buyer's initials. Entry is any alphanumeric combination of up to 3 characters.

Where Used: A/P Receiving Detail; ABCR; APIE; APII; APIR; APPI; APPO; APPV; AVII; BILL; BILL; Bill of Material; Bill of Material Detail; Buyer/Planner Code Maintenance; Contract Header Detail; Contract Purchase Orders; Contract Summary; Custom Product Detail; CWIP; Demand Peg Detail; IORD; IPPD; Item Browse Detail; Item Master; Item Master Planning Detail; Item Responsibility Assigned Results; ITHC; Lead Times Assigned Results; Line Item Details + Custom Product; Material Shortages Detail; MBIL; MPSR; MSCF; MSMT; Multi-Level Bill; Multi-Level Where Used; ORST; OVAR; PCST; PICI; PICK; Picklist Detail; PO Split by Vendor; POAN; POAS; POCI; POCP; POCR; POCT; POMI; POMT; PORI; PORV; Production; Purchase Order Header Detail; Purchase Order Line Item Detail (CPMT); Purchased Component Detail; QUOI; QUOT; SDAB; SSII; Standard Costs Assigned Results; Summarized Bill; VDSC; VPFR; Where Used; WIPR; Workcenter Master

CO Number

Customer Order Number is the user-defined identifier for a customer order. Entry is any alphanumeric combination of up to 30 characters.

Where Used: Advance Ship Notice Line; Advance Ship Notice Order Detail; Available for Shipping Allocation Batch; COAN; COCD; COMI; COMT; CORV; CPMT; Custom Product Component Detail; Custom Product Detail; Customer + Credit; Customer Order; Customer Order + Order Header; Customer Order Header Detail; Customer Order Line Price

Adjustment; Customer Order Receipt/Reverse; CWIP; Demand Peg Detail; GASN; Inventory Allocation; IVPR; IVRR; JEST; Job Estimates and Performance Report; Material Shortages Detail; MOAN; MSMT; OPSL; Order Detail; Orders on Shipment; Package Content; Packaging Detail; PICI; PICK; Picklist Detail; PORI; PORV; Pricing Maintenance + Test Order; Purchased Component Detail; Serial Number List; SHIP; Shipment Allocation Detail; Shipment Order Detail; Shipping Allocation Batch; SHPI; SHPL; STAD; Standard Product Detail; Supply Peg Detail

Component

Component is a term that describes the structural relationship between an item and its parent assembly in a bill of material. A **Component** is used in the manufacture of a parent, and it may be a part, raw material or a subassembly. Entry is any alphanumeric combination of up to 30 characters.

Where Used: Backflush Issue Reconciliation Report; BILL; BILL; Bill of Material; Bill of Material Detail; CMLB; Comparison Bill; Comparison of Summarized Bills; Costed Bill Detail; CPMT; CSLB; Custom Product Component Detail; Demand Peg Detail; Engineering; Exceptions; Job Estimates and Performance Report; Lead Time; Location Index; Material Exposure; Material Item Shortages; Material Shortages Detail; MBIL; MCST; Multi-Level Bill; Multi-Level Costed Bill; Multi-Level Where Used; MUSE; OPSL; OVAR; PCST; PICI; PICK; Picklist Detail; Production; Router/Traveler; Single-Level Configuration Bill of Material Report; Summarized Bill; Where Used; WUSE

CSR

Customer Service Representative identifies the person responsible for handling this customer's account. Entry is any alphanumeric combination of up to 3 characters.

Where Used: COAN; COMI; COMT; CORV; CPMT; CUID; CUII; CUSI; CUST; Custom Product Component Detail; Custom Product Detail; Customer + General; Customer Browse Detail; Customer Financial Detail; Customer Name/Address Detail; Customer Order + Order Detail; Customer Order Header Detail; Customer Order Receipt/Reverse; Demand Peg Detail; Global Settings; IVPR; IVRR; JEST; Job Estimates and Performance Report; Material Shortages Detail; MPED; MSCF; OPSL; ORST; PICI; PICK; Picklist Detail; Pricing Maintenance + Test Order; REDI; RVED; STAD; Standard Product Detail; Transaction Detail

CT

Component Type distinguishes various types of relationships between a component and its parent assembly in a bill of material. The **Component Type** indicates how a component is used in the manufacture of a parent. The **Component Types** are:

N = Normal.

Component is consumed in the manufacture of its parent.

P = Phantom.

Component is used for structure purposes only (e.g., a transient subassembly consumed in the manufacture of its parent).

R = Resource or Workcenter.

Component is used in the planning process of the manufacture of its parent (e.g., labor hours).

X = Reference.

Component is for information purposes. Reference items are included on the picklist. Reference items are not included in the parent's rolled costs and are typically not required for issue in the manufacturing of the parent.

D = Document.

Component is used for information purposes only. It is not included on the picklist.

B = By-product.

The manufacture of the parent results in the creation of this component.

C = Co-product.

Component is derived from the manufacture of the parent. The manufacture of the co-product, in turn, produces the parent.

T = Tool.

Component is used in the manufacture of the parent.

U = Tool return.

Component is used in, and returned after, the manufacture of the parent.

M = Module.

Component represents a group of components for which requirements are generated for custom product orders. A module component is used for structure purposes only, such as a transient subassembly consumed in the manufacture of its parent. Module components explode requirements for the child components; the module component itself is never required.

V = Purchased material.

Component not defined on the Item Master is required for a custom product customer order.

W = Outside operation or service.

Component, such as heat treating or plating, is required for a custom product customer order.

Y = Phantom parent.

Requirements have been exploded to the next level to meet requirements.

Z = Phantom child.

Component is used in the manufacture of the phantoms parent.

An item's use as a component is limited by its **Item Type**. The Component Types available are based on the information displayed on the screen and not all types are available on all screens.

Where Used: BILL; BILL; Bill of Material; Bill of Material Detail; Comparison Bill; Costed Bill Detail; CPMT; CSLB; Custom Product Component Detail; CWIP; Demand Peg Detail; Engineering; Job Estimates and Performance Report; Location Index; Material Shortages Detail; MBIL; MCST; Multi-Level Bill; OPSL; Order Cost Variance Status; OVAR; PCST; Production; Purchased Component Detail; Single-Level Configuration Bill of Material Report; Summarized Bill; WIPL; WIPR

Cust Id

Customer Identification is the identification number assigned to a customer. Entry is any alphanumeric combination of up to 13 characters.

Where Used: Advance Ship Notice Carrier Detail; Advance Ship Notice Shipment Detail; ARAH; ARCD; ARCJ; ARCP; ARCR; AREX; ARIC; ARIH; ARIP; ARIR; ARPD; ARPH; ARRJ; ARSC; ARSR; ARST; ARTB; ARTX; Available Customer Shipments; Available for Shipping Allocation Batch; Browse Setup (customer); Browse Setup (order); CIMT; CINV; COAN; COBK; COCD; COMI; COMT; CORV; COYE; CPMT; CUID; CUII; Cumulative Detail; CUPB; CUPI; CUSI; CUST; Custom Product Component Detail; Custom Product Detail; Customer; Customer Browse; Customer Browse Detail; Customer Financial Detail; Customer Invoice List; Customer Item + General; Customer Name/Address Detail; Customer Order; Customer Order + Order Header; Customer Order Header Detail; Customer Order Receipt/Reverse; Customer Payment List; Demand Peg Detail; EDIX; EXRU; G/L Distribution (ARSM Module); GASN; Inbound Conversion Detail; Inventory Adjustment Application; Invoice Header Detail; Invoice Line Item Detail; IORD; IVCO; IVIA; IVIE; IVII; IVPP; IVPR; IVRR; IVRV; JEST; Job Estimates and Performance Report; Lot Trace Issue Detail; Lot Trace Receipt Detail; Material Shortages Detail; MOAN; MPED; MPIT; MSMT; OPSL; Order Browse; Order Detail; ORST; Outbound Conversion Detail; Partner Item Detail; PCMT; PICI; PICK; Picklist Detail; Pricing Maintenance + Items/Customers; Pricing Maintenance + Test Order; SBOL; Serial Number List; SHIP; Ship to Browse; Ship to Browse Detail; Shipment Allocation Detail; Shipment Allocation List; Shipping Allocation Batch; SHPI; SHPL; STAD; Standard Product Detail; Supply Peg Detail; Transaction Detail

Day Var

Days Variance is the difference in shop days between the **Need Date/Need Dock** and the **Sched Date/Prom Dock**. If the **Days Variance** is more than 999, or if the item is an order point quantity item, *** is displayed.

Where Used: Demand Peg Detail; Material Shortages Detail; MOAN; MSMT; POAN; POAS; Purchased Component Detail; Supply Peg Detail; VPFR

Function

Function codes are four-character abbreviations for screen names. Each screen has a unique code used for identification and transportation. For example, ITMB identifies the Item Master screen. Entry is 4 alphanumeric characters.

Where Used: screens and reports

Gateway WC

Gateway Workcenter identifies the starting point for a manufactured item. The gateway workcenter is defined on the Location Master as the **Bin** identifier and must have a **Stk** identifier of WC.

Where Used: Browse Setup (order); CCAN; Demand Peg Detail; Item Browse Detail; Item Master Planning Detail; Lot Trace Issue Detail; Lot Trace Receipt Detail; Manufacturing Order Line Item Detail; Manufacturing Order Receipt/Reverse; Material Shortages Detail; MCST; MOAN; MOFR; MOMI; MOMT; MORI; MORV; MSMT; Order Browse; ORST; PICI; PICK; Picklist Detail; Production; Router/Traveler; Shortages by Order; Supply Peg Detail

Item

Item is the unique identifier for a part, whether it be a piece part, tool, raw material, an assembly or finished product. All items are set up using the ITMB screen. Within a product structure, an item can be a component as well as a parent. Entry is any alphanumeric combination of up to 30 characters.

Where Used: A/P Received Item List; ABCR; Advance Ship Notice Line; Allowance/Charge Detail (Detail); APPI; APPV; AUDT; Available for Shipping Allocation Batch; AVII; Bill of Material Accuracy Results; Browse Setup (item); Capacity Planning; CBIL; CCAN; CCAT; CIMT; CINV; COAN; COBK; COCD; COMI; COMP; Comparison Bill; Comparison of Summarized Bills; COMT; Contract Item Detail; Contract Item Detail/Pricing; Contract Summary; CORV; CSTU; Cumulative Detail; Customer Item + General; Customer Order; Customer Order Line Price Adjustment; Customer Order Receipt/Reverse; CWIP; Demand Peg Detail; Engineering; FCST; GASN; ICCR; IHIR; IMTR; INVA; Inventory Adjustment Application; Inventory Allocation; Inventory History List; Inventory Transaction History Report; INVR; IORD; IPPD; ISVI; ITBI; ITCB; ITCI; Item + Quantity; Item Availability; Item Availability + Quantity; Item Browse; Item Browse Detail; Item History; Item Lot Receipt; Item Lot Trace and Serialization Detail; Item Master; Item Master Detail; Item Master Planning Detail; Item Responsibility Assigned Results; Item Shortages; ITHC; ITHR; ITMB; ITMC; ITMI; ITPB; ITPJ; Lead Times Assigned Results; LEXP; LHS; Line Item Details + Item; LMSI; LMST; Lot Detail; Lot Inventory Transaction History Report; Lot Selection; Lot Trace; Lot Trace Issue Detail; Lot Trace Receipt Detail; LOTR; LVAL; Manufacturing Order Line Item Detail; Manufacturing Order Receipt/Reverse; Material Shortages Detail; MCST; MOAN; MOFR; MOMI; MOMT; MORI; MORV; MPIT; MPSR; MPSS; MSMT; Multi-Level Bill; Multi-Level Costed Bill; Multi-Level Where Used; MUSE; Open Order Detail; Order Completion Status; Order Cost Variance Status; Order Detail; OVAR; Package Content; Packaging Detail; Packing List; Partner Item Detail; PBCI; PBCT; PBII; PICI; PICK; Picklist Detail; POCI; POCR; POCT; PORI; PORV; POYE; Pricing Maintenance + Action Detail; Pricing Maintenance + Action List; Pricing Maintenance + Items/Customers; Pricing Maintenance + Test Order; Production; Purchase Order Receipt History; Purchased Component Detail; QSRC; QUOI; QUOT; Router/Traveler; Schedule Board; SDAB; SDAL; Selection Setup; Serial Number List; Serial Numbers Shipped; SHIP; Shipment Allocation Detail; Shipment Allocation List; Shipments by Line Item; Shipping Allocation Batch; Shortages by Order; SHPL; SSII; SSIL; Standard Costs Assigned Results; Standard Product Detail; Summarized Bill; Supply Peg Detail; Transaction Detail; VDII; VDIJ; VDSC; VEIT; Vendor/Item Detail; VETI; VITI; VPFR; WIPL; WIPR; WIPS; WUSE

Ln#

Line Number is the identification of a line item on an order. The **Line Number** is system-assigned. Entry is up to 3 numbers.

Where Used: A/P Invoice Matching Detail; A/P PO/Inv Variance by Invoice; A/P Receiving Detail; Advance Ship Notice Line; Advance Ship Notice Order Detail; APEX; APID; APPI; APPV; APUV; Available for Shipping Allocation Batch; Backflush Issue Reconciliation Report; Bill of Material Accuracy Results; Capacity Planning; CCAN; CINV; COAN; COCD; COMI; COMT; CORV; CPMT; CSTU; Custom Product Component Detail; Custom Product Detail; Customer Order; Customer Order + Order Header; Customer Order Line Price Adjustment; Customer Order Receipt/Reverse; CWIP; Demand Peg Detail; Dispatch List; GASN; IHIR; IMTR; Inventory Transaction History Report; IORD; Item Shortages; JEST; Job Estimates and Performance Report; LHS; LMSI; LMST; Location Index; Lot Detail; Lot Inventory Transaction History Report; Lot Trace Issue Detail; Lot Trace Receipt Detail; LOTR; LRRP; Manufacturing Order Line Item Detail; Manufacturing Order Receipt/Reverse; Material Shortages Detail; MCST; MOAN; MOFR; MOMI; MOMT; MORI; MORV; MSMT; Open Order Detail; OPSL; Order Completion Status; Order Cost Variance Status; Order Detail; Order Line Items; OVAR; Package Content; Packaging Detail; Packing List; PCMT; PCST; PICI; PICK; Picklist Detail; POAN; POAS; POMI; POMT; PORI; PORR; PORV; POSR; POVD; Pricing Maintenance + Test Order; Purchase Order Line Item Detail; Purchase Order Line Item Detail (CPMT); Purchase Order Line Items; Purchased Component Detail; Router/Traveler; Schedule Board; SDAB; Serial Number List; SHIP; Shipment Allocation Detail; Shipment Allocation List; Shipments by Line Item; Shipping Allocation Batch; Shortages by Order; SHPL; STAD;

Standard Product Detail; Supply Peg Detail; Transaction Detail; TRUD; VDSC; VPFR; WIPL; WIPR; WIPS

Ln# Sta

Line Number Status indicates the item's current position within the order process. **Line Number Statuses** are:

blank = Order Point Quantity Level Reached.

PREV and MRP have determined that the order point quantity of the item has been reached.

1 = MRP Planned Order.

MRP has automatically planned an order for the item.

2 = Firm Planned.

The item's order quantity and scheduled date are fixed and are not automatically changed.

3 = Open.

The item's order quantity and scheduled date are fixed. The order-dependent bill of material is attached to the item.

4 = Released.

The item's order quantity and scheduled date are fixed. The order-dependent bill of material is attached to the item. The order and picklist can be printed and receipts/issues can be made.

5 = Closed.

All required receipts or issues have been made for the item.

6 = Closed.

The order closure report has reported this order closure.

7 = Closed.

The order is ready to be deleted from the active file and retained in order history.

Line Number Status can in most cases only be incremented. You can reopen an order, which decrements the **Line Number Status** from 5 to 4. For purchase orders, **Line Number Status** = 4 can be changed to 3 if no receipts were completed for that line item and the line is not **Ln# Typ** = S.

Where Used: Capacity Planning; CCAN; Demand Peg Detail; Dispatch List; IHIR; Item Shortages; Location Index; Manufacturing Order Line Item Detail; Manufacturing Order Receipt/Reverse; Material Shortages Detail; MCST; MOAN; MOMI; MOMT; MORI; MORV; MSMT; Open Order Detail; Order Completion Status; Order Cost Variance Status; Order Line Items; PCST; PICI; PICK; Picklist Detail; POAN; POAS; POMI; POMT; PORI; PORR; PORV; Purchase Order Line Item Detail; Purchase Order Line Item Detail (CPMT); Purchase Order Line Items; Purchased Component Detail; Router/Traveler; Schedule Board; Shortages by Order; Supply Peg Detail; Transaction Detail; WIPL; WIPR; WIPS

Ln# Sta

Line Number Status indicates the item's current position within the order process. **Line Number Statuses** are:

2 = Firm Planned or Quote.

Firm Planned: For forecast line number types (1, 2, 3), the item's order quantity and scheduled date are fixed and are not automatically changed. **Quote:** For custom product line number types (X), the order-dependent bill of material can be attached to the item, but component demands are ignored for planning purposes. This status may be selected for new orders only.

3 = Open.

The item's order quantity and scheduled date are fixed. The order-dependent bill of material is attached to the item.

4 = Released.

The item's order quantity and scheduled date are fixed. The order-dependent bill of material is attached to the item. The order and picklist can be printed and issues/shipments can be made.

5 = Closed.

All required issues or shipments have been made for the item.

6 = Closed.

The order closure report has reported this order closure. This status is system-assigned.

7 = Closed.

The order is ready to be deleted from the active file and retained in order history. This status is system-assigned.

8 = Closed.

The order is ready to be deleted, but other line items on the same order have a **Ln# Sta** of less than 6. This status is system-assigned.

9 = Credit Hold.

The customer's credit limit has been exceeded or the order is placed on hold for another reason. The item is treated as an open order.

Line Number Status can only be incremented, except when reopening an order, which decrements **Line Number Status** from 5 to 4.

Where Used: COAN; COMI; COMT; CPMT; Custom Product Component Detail; Custom Product Detail; CWIP; Demand Peg Detail; JEST; Job Estimates and Performance Report; Material Shortages Detail; OPSL; PICI; PICK; Picklist Detail; Pricing Maintenance + Test Order; Purchased Component Detail; Shipments by Line Item; Standard Product Detail; Supply Peg Detail

Ln# Typ

Line Number Type determines the use of the item order quantity in planning, manufacturing and accounting. **Line Number Types** are:

A = Assemble-to-order.

Standard product. Reserved for future use.

C = Standard product

X = Custom product

1 = Customer Forecast Type 1.

2 = Customer Forecast Type 2.

3 = Customer Forecast Type 3.

B = By-product. Created as part of another order.

U = Tool return.

Created as part of another order.

P = Purchased (not available for customer orders)

Forecast line types are included in data extracts as **Ln# Typ = F**.

Where Used: CINV; COAN; COMI; COMT; CORV; CPMT; Custom Product Component Detail; Custom Product Detail; Customer Order; Customer Order Receipt/Reverse; CWIP; Demand Peg Detail; IHIR; JEST; Job Estimates and Performance Report; Material Shortages Detail; OPSL; Order Detail; OVAR; PICI; PICK; Picklist Detail; Pricing Maintenance + Test Order; Purchased Component Detail; Serial Number List; SHIP; Standard Product Detail; Supply Peg Detail; Transaction Detail

Ln# Typ

Line Number Type determines the use of the item order quantity in planning, manufacturing and accounting. **Line Number Types** available depend on the screen where the transaction is completed; these include:

B = By-product.

Created as part of another order.

M = Manufacturing.

Dependent demands are automatically created.

R = Rework.

Dependent demands are not automatically created but are manually added.

U = Tool Return.

Created as part of another order.

X = Custom Product.

Make-to-order and engineer-to-order products.

Where Used: Capacity Planning; CCAN; Demand Peg Detail; Dispatch List; IHIR; Item Shortages; Location Index; Manufacturing Order Line Item Detail; Manufacturing Order Receipt/Reverse; Material Shortages Detail; MCST; MOAN; MOMI; MOMT; MORI; MORV; Order Completion Status; Order Cost Variance Status; Order Line Items; OVAR; PICI; PICK; Picklist Detail; Router/Traveler; Schedule Board; Shortages by Order; Supply Peg Detail; WIPL; WIPR; WIPS

Ln# Typ

Line Number Type determines the use of the item order quantity in planning, purchasing, and accounting. **Line Number Types** are:

B = By-product.

Created as part of another order.

G = General ledger account

M = Manufacturing order

P = Purchased

S = Supplied.

Purchased with supplied material.

U = Tool Return.

Created as part of another order.

V = Non-inventory items.

Purchased from vendor for custom order.

W = Outside Vendor.

Work done by outside vendor for custom product.

Where Used: APPI; APPV; CCAN; Demand Peg Detail; IHIR; Material Shortages Detail; OVAR; PCST; PIC1; PICK; Picklist Detail; POAN; POAS; POMI; POMT; PORI; PORR; PORV; POSR; POVD; Purchase Order Line Item Detail; Purchase Order Line Item Detail (CPMT); Purchase Order Line Items; Purchased Component Detail; Supply Peg Detail; WIPL; WIPR; WIPS

MB

Make-Buy Code indicates if a part is normally purchased or manufactured. **Make-Buy Code** also directs appropriate action messages to the **Buyr** (B or S) or **Plnr** (M). **Make-Buy Codes** are:

M = Make.

Manufactured in-house.

B = Buy.

Purchased; no parts supplied to vendor.

S = Supplied.

Purchased; parts supplied to vendor.

Where Used: ABCR; AVII; BIL1; BILL; Bill of Material; Bill of Material Detail; COMP; Costed Bill Detail; CSLB; Demand Peg Detail; Engineering; FCST; IHIR; IORD; IPPD; Item Availability; Item Browse Detail; Item History; Item Lot Trace and Serialization Detail; Item Master; Item Master Detail; Item Master Planning Detail; Item Responsibility Assigned Results; Item Shortages; ITHC; ITHR; ITMB; ITMI; Lead Time Analysis; Lead Times Assigned Results; Lot Size Multiple Detail; Lot Trace; LSDA; LVAL; Material Exposure; Material Shortages Detail; MBIL; MPSR; MPSS; MSMT; Multi-Level Bill; PBC1; PBCT; Production; QUOI; QUOT; SDAB; SDAL; Shortages by Order; Single-Level Configuration Bill of Material Report; SSII; Standard Costs Assigned Results; Summarized Bill; Supply Peg Detail

MO Number

Manufacturing Order Number is the user-defined identifier for a manufacturing order. Entry is any alphanumeric combination of up to 30 characters.

Where Used: CCAN; CSTU; Demand Peg Detail; Manufacturing Order Line Item Detail; Manufacturing Order Receipt/Reverse; Material Shortages Detail; MCST; MOAN; MOFR; MOMI; MOMT; MORI; MORV; PIC1; PICK; Picklist Detail; PORI; PORV; Supply Peg Detail; WIPL; WIPR; WIPS

Msg Code

Message Code indicates the type of action that needs to be taken to resolve an exception condition.

Where Used: CCAN; COAN; Demand Peg Detail; Material Shortages Detail; MOAN; MSCF; POAN; POAS; Purchased Component Detail; STAD; Supply Peg Detail

Need Date

Need Date is the date the component is needed in the next higher-level assembly. This date is calculated by MRP.

Where Used: CORV; Demand Peg Detail; IORD; Location Index; Manufacturing Order Line Item Detail; Material Shortages Detail; MCST; MOAN; MOFR; MOMI; MOMT; MORI; MORV; MSMT; Order Completion Status; Order Line Items; Router/Traveler; Shortages by Order; Supply Peg Detail

Need Dock

Need to Dock is the date that receipt of the item is needed at the dock. This date is calculated by MRP.

Where Used: Demand Peg Detail; IORD; Material Shortages Detail; POAN; POAS; POMI; POMT; POVD; Purchase Order Line Item Detail; Purchase Order Line Item Detail (CPMT); Purchase Order Line Items; Purchased Component Detail; Supply Peg Detail; VDSC

On Order Quantity

On Order Quantity is the total number of items on open or released manufacturing and purchase orders (Ln# Sta = 3 or 4).

Where Used: Inventory Status; Item + Quantity; Item Availability; Item Availability + Quantity; Item Shortages; Location Index; Material Shortages Detail; Production; Shortages by Order; SSII; Summarized Bill

Open/Suggested Order Qty

Open Quantity is the difference between the quantity ordered and the quantity received.

Open Quantity is stated as 0 (zero) if more items have been received than ordered.

Where Used: Custom Product Component Detail; Customer Order Receipt/Reverse; IORD; Location Index; Manufacturing Order Receipt/Reverse; Material Shortages Detail; MOAN; MOFR; Open Order Detail; POAN; POAS; PORI; PORR; PORV; POVD; Purchased Component Detail; Supply Peg Detail; VDSC

Plnr

Planner code is used to identify the person responsible for planning the production or usage of an item. The suggested entry is the planner's initials. Entry is any alphanumeric combination of up to 3 characters.

Where Used: ABCR; AVII; BILI; BILL; Bill of Material; Bill of Material Detail; Buyer/Planner Code Maintenance; Custom Product Detail; CWIP; Demand Peg Detail; IORD; IPPD; Item Browse Detail; Item Master; Item Master Planning Detail; Item Responsibility Assigned Results; ITHC; Lead Times Assigned Results; Line Item Details + Custom Product; Manufacturing Order Line Item Detail; Manufacturing Order Receipt/Reverse; Material Shortages Detail; MBIL; MCST; MOAN; MOMI; MOMT; MORI; MORV; MPSR; MSCF; MSMT; Multi-Level Bill; Multi-Level Where Used; ORST; OVAR; PICI; PICK; Picklist Detail; Production; Purchase Order Line Item Detail; QUOI; QUOT; Router/Traveler; SDAB;

Shortages by Order; Single-Level Configuration Bill of Material Report; SSII; Standard Costs Assigned Results; Summarized Bill; Where Used; WIPR; Workcenter Master

PO Number

Purchase Order Number is the user-defined identifier for a purchase order. Entry is any alphanumeric combination of up to 30 characters.

Where Used: Advance Ship Notice Order Detail; APPO; CCAN; Contract Purchase Orders; CSTU; Demand Peg Detail; Material Shortages Detail; Open Order Detail; PCST; PICI; PICK; Picklist Detail; POAN; POAS; POMI; POMT; PORI; PORR; PORV; POSR; POVD; Purchase Order Header Detail; Purchase Order Line Item Detail (CPMT); Purchase Order Receipt History; Purchased Component Detail; Supply Peg Detail; Transaction Detail; VPFR; WIPL; WIPR; WIPS

Prom Dock

Promise to Dock is the date that receipt of the item is expected at the dock. **Promise to Dock** is adjusted to the first shop date prior to the date entered if the date is not a shop day.

Where Used: CCAN; CSTU; Demand Peg Detail; IMTR; IORD; Material Shortages Detail; Open Order Detail; OVAR; PCST; PICI; PICK; Picklist Detail; POAN; POAS; POMI; POMT; PORI; PORR; PORV; POSR; POVD; Purchase Order Line Item Detail; Purchase Order Line Item Detail (CPMT); Purchase Order Line Items; Purchase Order Receipt History; Purchased Component Detail; Supply Peg Detail; VDSC; VPFR

Pt Use

Point of Use is a key field that, along with the **Seqn** field, defines the sort sequence of components in a bill of material. The **Point of Use** field accepts any information you choose to enter, but the intended use is to identify the "work center" where the component should be delivered when assembling the parent, the "find number" of the component referenced on the drawing for the parent, or the "component reference designator" of the component on a printed circuit board. If the **Point of Use** field is not applicable in your company, you may enter 0 (zero). Entry is any alphanumeric combination of up to 5 characters.

Where Used: BILL; BILL; Bill of Material; Bill of Material Detail; Capacity Planning; Comparison Bill; Custom Product Component Detail; Demand Peg Detail; Dispatch List; Engineering; Exceptions; Job Estimates and Performance Report; Lead Time; Location Index; LRRP; Material Item Shortages; Material Shortages Detail; MBIL; Multi-Level Bill; Multi-Level Where Used; MUSE; Order Cost Variance Status; OVAR; PICI; PICK; Picklist Detail; Pricing Maintenance + Test Order; Production; Purchase Order Line Item Detail; Purchase Order Line Item Detail (CPMT); Router/Traveler; Schedule Board; Single-Level Configuration Bill of Material Report; TRUD; Where Used; WUSE

Remaining Required Quantity

Remaining Required Quantity is the total item **Order Qty** minus the shipped or issued quantity of items to date. Entry is up to 10 numbers. Decimal places are allowed.

Where Used: COAN; Custom Product Component Detail; Material Shortages Detail; Order Detail; Shipments by Line Item

Required Date

Required Date is the date the component item is needed for the assembly of the line item, taking lead time offset into consideration.

Where Used: Item Shortages; Material Shortages Detail; OPSL; Picklist Detail; Pricing Maintenance + Test Order; Router/Traveler; Shortages by Order

Required Quantity

Required Quantity is the number of component items required for the parent item. Entry is up to 10 numbers. Decimal places are allowed.

Where Used: Capacity Planning; Custom Product Component Detail; Item Shortages; Location Index; Material Shortages Detail; Picklist Detail; Purchase Order Line Item Detail (CPMT); Router/Traveler; Schedule Board; Shortages by Order

Schd Date

Scheduled Date is the planned completion date or shipment date for an item.

Where Used: CORV; CSTU; Demand Peg Detail; IORD; Location Index; Manufacturing Order Line Item Detail; Material Shortages Detail; MCST; MOAN; MOFR; MOMI; MOMT; MORI; MORV; MSMT; Order Completion Status; Order Line Items; Router/Traveler; SDAB; Shortages by Order; Supply Peg Detail

Seq

Sequence Number is a key field that, along with the **Pt Use** field, defines the sort sequence of components in a bill of material. The field accepts any information you choose to enter, but the intended purpose is to identify the operation sequence number on the parent's routing that calls out the component. If the **Sequence Number** is not applicable in your company, you may enter 0 (zero). Entry is up to 3 numbers.

Where Used: Backflush Issue Reconciliation Report; BILL; BILL; Bill of Material; Bill of Material Detail; Capacity Planning; CINV; Comparison Bill; CPMT; Custom Product Component Detail; CWIP; Demand Peg Detail; Dispatch List; Engineering; Exceptions; Job Estimates and Performance Report; Lead Time; Location Index; LRRP; Material Shortages Detail; MBIL; MCST; Multi-Level Bill; Multi-Level Where Used; MUSE; OPSL; Order Cost Variance Status; OVAR; PCST; PICI; PICK; Picklist Detail; PORI; PORV; Production; Purchase Order Line Item Detail; Purchase Order Line Item Detail (CPMT); Purchased Component Detail; Router/Traveler; Schedule Board; Single-Level Configuration Bill of Material Report; TRUD; Where Used; WIPL; WIPR; WUSE

Ship Date

Ship Date is the date the items are scheduled to be shipped or were shipped. The **Ship Date** is calculated using the promised delivery date and the transportation lead time for the ordered item.

Where Used: Advance Ship Notice Carrier Detail; Advance Ship Notice Shipment Detail; ARIP; Available for Shipping Allocation Batch; COAN; Customer Invoice List; Customer Order; Demand Peg Detail; EXRU; GASN; Invoice Header Detail; IVCO; IVPP; IVPR; IVRR; IVRV; Material Shortages Detail; Order Detail; Picklist Detail; SHIP; Shipment Allocation Detail; Shipping Allocation Batch; STAD; Transaction Detail

Short Quantity

Short Quantity is the difference between the **Required Quantity** and the **Avail Quantity** for an item.

Where Used: Material Shortages Detail

Vendor Id

Vendor Identification is the unique identifier for a vendor. Entry is any alphanumeric combination of up to 13 characters.

Where Used: A/P Invoice Matching Detail; A/P Payment Detail; A/P Receiving Detail; APAH; APCA; APCK; APCR; APCV; APCW; APDS; APEX; APID; APIE; APIH; APII; APIP; APIR; APIV; APPA; APPD; APPH; APPO; Approved Vendor Items; Approved Vendors; APRC; APRG; APRL; APRQ; APTB; APTP; APTX; APUV; APVT; AVII; Browse Setup (order); Browse Setup (vendor); CCAN; Contract Selection; Contract Summary; Demand Peg Detail; DISI; DIST; EDIX; EXRU; G/L Distribution (APSM Module); Inbound Conversion Detail; ISVI; Lot Trace Issue Detail; Lot Trace Receipt Detail; Material Shortages Detail; MPED; MSMT; Open Order Detail; Order Browse; ORST; Outbound Conversion Detail; Payee Detail; PCST; PICI; PICK; Picklist Detail; POAN; POAS; POCI; POCP; POCR; POCT; POMI; POMT; PORI; PORV; POVD; POYE; Purchase Order Header Detail; Purchase Order Line Item Detail (CPMT); Purchase Order Receipt History; Purchased Component Detail; QSRC; QUOI; QUOT; Selection Setup; Supply Peg Detail; VDII; VDIT; VDSC; VEDI; VEID; VEIT; VEND; Vendor Browse; Vendor Browse Detail; Vendor Configuration; Vendor Master Detail; Vendor/Item Detail; VENI; VETI; VPFR; VSDI; VSDT

COBK – Customer Order Backlog Report

The COBK (Customer Order Backlog Report) task lists, by week, the value of open and released customer orders presently in the system. The total value of orders is presented for past due weeks, the next nine weeks and beyond nine weeks. A summary at the end of the report totals customer orders for each week. The Customer Order Backlog Report can be used for planning and reallocation decisions.

The Customer Order Backlog Report can be requested for an item range or a customer range. Both the item and customer option can be generated in a summary or detailed format. When the detailed format is requested, open and released orders are listed for each item or customer along with totals.

Use the COBK report printed in foreign currencies to review orders with a foreign customer.

Parameters

To request a Customer Order Backlog Report, enter the COBK task as one of the sequenced tasks in a batch process. See "Batch Processing" in the System Administration manual for the task prerequisites and processing frequency.

The COBK task has the following parameters:

	Task Parameter	Format	Entry Is...
1:	Customer or Item Range Type	C or I	Required
2:	Detail or Summary	D or S	Required
3:	Customer or Item Range; or All	FX..X TX..X or FALL	Required
4:	Print in Foreign Currency	M	Optional

Parameter 1: Customer or Item Range Type

Specify whether the report will include a customer range or an item range. Choose **C** (customer) to report a customer range. Choose **I** (item) to include an item range. A range type must be selected.

Parameter 2: Detail or Summary

Choose **D** to select a **Detail** report format or **S** to select a **Summary**. A report format must be selected.

Parameter 3: Customer or Item Range

Specify the beginning and end of the customer or item range for the COBK report. Enter **FALL** to print the COBK report for all customers or items. A range must be specified.

Parameter 4: Foreign Currency

Choose **M** to print the COBK report in foreign currency when a customer range type is selected. The total value of orders for each customer is printed in the customer's currency and in the local currency when this parameter is specified. If foreign currency printing is not selected, the report prints in the local currency.

Example

For example, to request a detailed Customer Order Backlog Report as the first task in the process and for all customers, the **Seq Num**, **Task** and **Parameters** fields in the task line are entered like this:

01 COBK C D FALL

Entry Field	Example Value	Description
Seq Num	01	First task in process
Task	COBK	Customer Order Backlog Report
Parameter 1	C	Report by customer range
Parameter 2	D	Detail
Parameter 3	FALL	All customers

To print the Customer Order Backlog Report, use the BEXE (Batch Process Execution) screen to execute the process in which the COBK task is entered. Check the LOG file produced if the COBK task does not execute successfully.

Reports

Backlog Report by Customer

List the value of open and released customer orders presently in the system by week.

Access Method

To generate the report, execute the task as part of a batch process on the BEXE screen. For more information on reporting in general, see "Printing and Reporting" in the Fourth Shift Basics manual.

Report Template

This report is not a template-based report.

Backlog Report by Customer--Foreign Currency

List the value of open and released foreign currency customer orders presently in the system by week.

Access Method

To generate the report, execute the task as part of a batch process on the BEXE screen. For more information on reporting in general, see "Printing and Reporting" in the Fourth Shift Basics manual.

Report Template

This report is not a template-based report.

Fields

Contact

Contact is the name of the person at the vendor/customer who is the primary contact when items are ordered. Entry is any alphanumeric combination of up to 40 characters.

Where Used: APIP; CIMT; COBK; COCD; COMT; Contract Header Detail; CUID; CUII; CUSI; CUST; Customer Browse Detail; Customer Financial Detail; Customer Name/Address Detail; DISI; DIST; ISVI; POGR; POVD; Purchase Order Header Detail; QSRC; VDSC; VEDI;

VEID; VEND; Vendor Browse Detail; Vendor Configuration; Vendor Master Detail; VENI;
VSDI; VSDT

Customer Id

Customer Identification is the identification number assigned to a customer. Entry is any alphanumeric combination of up to 13 characters.

Where Used: Advance Ship Notice Carrier Detail; Advance Ship Notice Shipment Detail; ARAH; ARCD; ARCJ; ARCP; ARCR; AREX; ARIC; ARIH; ARIP; ARIR; ARPD; ARPH; ARRJ; ARSC; ARSR; ARST; ARTB; ARTX; Available Customer Shipments; Available for Shipping Allocation Batch; Browse Setup (customer); Browse Setup (order); CIMT; CINV; COAN; COBK; COCD; COMI; COMT; CORV; COYE; CPMT; CUID; CUII; Cumulative Detail; CUPB; CUPI; CUSI; CUST; Custom Product Component Detail; Custom Product Detail; Customer; Customer Browse; Customer Browse Detail; Customer Financial Detail; Customer Invoice List; Customer Item + General; Customer Name/Address Detail; Customer Order; Customer Order + Order Header; Customer Order Header Detail; Customer Order Receipt/Reverse; Customer Payment List; Demand Peg Detail; EDIX; EXRU; G/L Distribution (ARSM Module); GASN; Inbound Conversion Detail; Inventory Adjustment Application; Invoice Header Detail; Invoice Line Item Detail; IORD; IVCO; IVIA; IVIE; IVII; IVPP; IVPR; IVRR; IVRV; JEST; Job Estimates and Performance Report; Lot Trace Issue Detail; Lot Trace Receipt Detail; Material Shortages Detail; MOAN; MPED; MPIT; MSMT; OPSL; Order Browse; Order Detail; ORST; Outbound Conversion Detail; Partner Item Detail; PCMT; PICI; PICK; Picklist Detail; Pricing Maintenance + Items/Customers; Pricing Maintenance + Test Order; SBOL; Serial Number List; SHIP; Ship to Browse; Ship to Browse Detail; Shipment Allocation Detail; Shipment Allocation List; Shipping Allocation Batch; SHPI; SHPL; STAD; Standard Product Detail; Supply Peg Detail; Transaction Detail

Customer Name

Customer Name is the name of a customer. Entry is any alphanumeric combination of up to 60 characters.

Where Used: ARAH; ARCD; ARCJ; ARCR; AREX; ARIC; ARIH; ARIP; ARIR; ARPD; ARPH; ARRJ; ARSC; ARSR; ARTB; ARTX; Available Customer Shipments; Browse Setup (customer); Browse Setup (order); CIMT; COBK; COCD; COMI; COMT; CORV; COYE; CPMT; CUID; CUII; CUPB; CUPI; CUSI; CUST; Custom Product Component Detail; Custom Product Detail; Customer; Customer + Address; Customer + General; Customer Browse; Customer Browse Detail; Customer Financial Detail; Customer Invoice List; Customer Item + General; Customer Name/Address Detail; Customer Order; Customer Order Header Detail; Customer Order Receipt/Reverse; Customer Payment List; EDIX; EXRU; G/L Distribution (ARSM Module); IVCO; IVIA; IVPP; JEST; Job Estimates and Performance Report; Lot Trace Issue Detail; Lot Trace Receipt Detail; OPSL; Order Browse; Order Detail; ORST; PICI; PICK; Picklist Detail; Pricing Maintenance + Test Order; SBOL; Serial Number List; SHIP; Ship to Browse Detail; Shipment Allocation List; Shipping Detail; SHPI; SHPL; STAD; Standard Product Detail

Description

Item Description identifies the item in terms of its characteristics. When space is limited, a partial description is displayed. Entry is any alphanumeric combination of up to 70 characters.

Where Used: A/P Received Item List; ABCR; Advance Ship Notice Line; APPI; APPV; Available Pricing; AVII; AVIT; BILL; BILL; Bill of Material; Bill of Material Detail; Browse Setup (item); Capacity Planning; CCAN; CCAT; CMLB; COBK; COMP; Comparison Bill; Comparison

of Summarized Bills; Contract Item Detail; Contract Item Detail/Pricing; CORV; Cost Estimate by Lot Size; Costed Bill Detail; CSLB; Custom Product Component Detail; Customer Item + General; Customer Order; Customer Order Receipt/Reverse; CWIP; Demand Peg Detail; Dispatch List; Engineering; FCST; ICCR; IHIR; INVA; Inventory Allocation; Inventory History List; Inventory Transaction History Report; INVR; IORD; IPPD; ISVI; ITBI; ITCB; ITCI; Item + Alternates; Item + Quantity; Item Availability; Item Availability + Quantity; Item Browse; Item Browse Detail; Item History; Item Lot Trace and Serialization Detail; Item Master; Item Master Detail; Item Master Planning Detail; Item Responsibility Assigned Results; ITMB; ITMC; ITMI; ITPB; ITPI; Job Estimates and Performance Report; Lead Time; Lead Time Analysis; Lead Times Assigned Results; LEXP; Line Item Details + Item; LMSI; LMST; Location Index; Lot Detail; Lot Inventory Transaction History Report; Lot Trace; Lot Trace Issue Detail; Lot Trace Receipt Detail; LOTR; LVAL; Manufacturing Order Line Item Detail; Manufacturing Order Receipt/Reverse; Material Exposure; MBIL; MCST; MOMI; MOMT; MORI; MORV; MPSR; MPSS; MSMT; Multi-Level Bill; Multi-Level Costed Bill; Multi-Level Where Used; MUSE; Open Order Detail; OPSL; Order Completion Status; Order Cost Variance Status; Order Detail; Order Line Items; OVAR; Package Content; Packaging Detail; Partner Item Detail; PBCI; PBCT; PBII; PICI; PICK; Picklist Detail; POAN; POAS; POCI; POCR; POCT; POMI; POMT; PORI; PORR; PORV; POYE; Production; Purchase Order Line Item Detail; Purchase Order Line Item Detail (CPMT); Purchase Order Line Items; Purchase Order Receipt History; Purchased Component Detail; QSRC; QUOI; QUOT; Router/Traveler; SDAB; SDAL; Shipment Allocation Detail; Shipments by Line Item; Shipping Detail; Shortages by Order; SHPL; Single-Level Configuration Bill of Material Report; SSII; SSIL; Standard Costs Assigned Results; Standard Product Detail; Summarized Bill; Supply Peg Detail; Transaction Detail; VDII; VDIT; VDSC; VITI; Where Used; WIPR; WUSE

Function

Function codes are four-character abbreviations for screen names. Each screen has a unique code used for identification and transportation. For example, ITMB identifies the Item Master screen. Entry is 4 alphanumeric characters.

Where Used: screens and reports

Item

Item is the unique identifier for a part, whether it be a piece part, tool, raw material, an assembly or finished product. All items are set up using the ITMB screen. Within a product structure, an item can be a component as well as a parent. Entry is any alphanumeric combination of up to 30 characters.

Where Used: A/P Received Item List; ABCR; Advance Ship Notice Line; Allowance/Charge Detail (Detail); APPI; APPV; AUDT; Available for Shipping Allocation Batch; AVII; AVIT; Bill of Material Accuracy Results; Browse Setup (item); Capacity Planning; CBIL; CCAN; CCAT; CIMT; CINV; COAN; COBK; COCD; COMI; COMP; Comparison Bill; Comparison of Summarized Bills; COMT; Contract Item Detail; Contract Item Detail/Pricing; Contract Summary; CORV; CSTU; Cumulative Detail; Customer Item + General; Customer Order; Customer Order Line Price Adjustment; Customer Order Receipt/Reverse; CWIP; Demand Peg Detail; Engineering; FCST; GASN; ICCR; IHIR; IMTR; INVA; Inventory Adjustment Application; Inventory Allocation; Inventory History List; Inventory Transaction History Report; INVR; IORD; IPPD; ISVI; ITBI; ITCB; ITCI; Item + Quantity; Item Availability; Item Availability + Quantity; Item Browse; Item Browse Detail; Item History; Item Lot Receipt; Item Lot Trace and Serialization Detail; Item Master; Item Master Detail; Item Master Planning Detail; Item Responsibility Assigned Results; Item Shortages; ITHC; ITHR; ITMB; ITMC; ITMI; ITPB; ITPI; Lead Times Assigned Results; LEXP; LHIS; Line Item Details + Item; LMSI; LMST; Lot Detail;

Lot Inventory Transaction History Report; Lot Selection; Lot Trace; Lot Trace Issue Detail; Lot Trace Receipt Detail; LOTR; LVAL; Manufacturing Order Line Item Detail; Manufacturing Order Receipt/Reverse; Material Shortages Detail; MCST; MOAN; MOFR; MOMI; MOMT; MORI; MORV; MPIT; MPSR; MPSS; MSMT; Multi-Level Bill; Multi-Level Costed Bill; Multi-Level Where Used; MUSE; Open Order Detail; Order Completion Status; Order Cost Variance Status; Order Detail; OVAR; Package Content; Packaging Detail; Packing List; Partner Item Detail; PBCI; PBCT; PBII; PICI; PICK; Picklist Detail; POCI; POCR; POCT; PORI; PORV; POYE; Pricing Maintenance + Action Detail; Pricing Maintenance + Action List; Pricing Maintenance + Items/Customers; Pricing Maintenance + Test Order; Production; Purchase Order Receipt History; Purchased Component Detail; QSRC; QUOI; QUOT; Router/Traveler; Schedule Board; SDAB; SDAL; Selection Setup; Serial Number List; Serial Numbers Shipped; SHIP; Shipment Allocation Detail; Shipment Allocation List; Shipments by Line Item; Shipping Allocation Batch; Shortages by Order; SHPL; SSII; SSIL; Standard Costs Assigned Results; Standard Product Detail; Summarized Bill; Supply Peg Detail; Transaction Detail; VDII; VDI; VDIT; VDSC; VEIT; Vendor/Item Detail; VETI; VITI; VPRF; WIPL; WIPR; WIPS; WUSE

Past Due

Past Due is the value of customer orders that are past-due as of today's date.

Where Used: COBK

Phone

Phone is the primary phone number of the vendor/customer. Entry is any alphanumeric combination of up to 20 characters.

Where Used: APIP; CIMT; COBK; COCD; Contract Header Detail; CUID; CUII; CUSI; CUST; Customer Browse Detail; Customer Financial Detail; Customer Name/Address Detail; DISI; DIST; ISVI; IVPR; IVRR; POCR; POVD; Purchase Order Header Detail; QSRC; VDSC; VEDI; VEID; VEND; Vendor Browse Detail; Vendor Configuration; Vendor Master Detail; VENI; VSDI; VSDT

UM

Unit of Measure identifies the standard unit for an item used in the manufacturing process. Entry is up to 4 alphanumeric characters.

Where Used: A/P PO/Inv Variance by Invoice; A/P Receiving Detail; APEX; APPI; APPV; APUV; Available for Shipping Allocation Batch; AVII; AVIT; BILL; BILL; Bill of Material; Bill of Material Detail; CCAT; CINV; CMLB; COBK; COMI; COMT; Contract Header Detail; Contract Item Detail; Contract Item Detail/Pricing; CORV; Costed Bill Detail; CPMT; CSLB; Custom Product Component Detail; Custom Product Detail; Customer Order; Customer Order Line Price Adjustment; Customer Order Receipt/Reverse; CWIP; Demand Peg Detail; Engineering; FCST; ICCR; IHIR; INVA; Inventory Allocation; INVR; IORD; IPPD; ITBI; ITCB; ITCI; Item + Quantity; Item Availability + Quantity; Item Browse Detail; Item History; Item Lot Receipt; Item Lot Trace and Serialization Detail; Item Master; Item Master Detail; Item Master Planning Detail; Item Responsibility Assigned Results; Item Shortages; ITHC; ITHR; ITMB; ITMC; ITMI; ITPB; ITPI; IVPR; IVRR; JEST; Job Estimates and Performance Report; Lead Times Assigned Results; LEXP; LHis; Line Item Details + Item; LMSI; LMST; Location Index; Lot Detail; Lot Trace; Lot Trace Issue Detail; Lot Trace Receipt Detail; LOTR; LVAL; Manufacturing Order Line Item Detail; Manufacturing Order Receipt/Reverse; Material Exposure; MBIL; MCST; MOMI; MOMT; MORI; MORV; MPIT; MPSR; MPSS; MSMT; Multi-Currency; Multi-Level Bill; Multi-Level Where Used; MUSE; Open Order Detail; OPSL; Order Completion Status; Order Cost Variance Status; Order Detail; Order Line Items; OVAR; Packaging Detail; Packing List;

Partner Item Detail; PBCI; PBCT; PCST; PICI; PICK; Picklist Detail; POCI; POCR; POCT; POMI; POMT; PORI; PORR; PORV; POSR; POVD; Pricing Maintenance + Action Detail; Pricing Maintenance + Action List; Pricing Maintenance + Test Order; Production; Purchase Order Line Item Detail; Purchase Order Line Item Detail (CPMT); Purchase Order Line Items; Purchase Order Receipt History; Purchased Component Detail; QUOI; QUOT; Router/Traveler; SDAB; SDAL; Shipment Allocation Detail; Shipments by Line Item; Shipping Allocation Batch; Shipping Detail; Shortages by Order; SHPL; Single-Level Configuration Bill of Material Report; SSII; SSIL; Standard Costs Assigned Results; Standard Product Detail; Summarized Bill; Supply Peg Detail; Transaction Detail; VDII; VDIT; VDSC; VEIT; Vendor/Item Detail; VETI; VPRF; Where Used; WIPR; Workcenter Master; WUSE

Week

Week indicates the total value of orders for the item or for the customer as of the date displayed for each week.

Where Used: COBK

COBP – Customer Order Export

The Customer Order Export task replaces the customer order acknowledgement printing process by generating files that can be used to transmit customer orders electronically or to produce translated orders. However, customer orders can be reprinted when the individual customer order is displayed, for audit trail purposes.

Several types of customer order information files are generated:

- customer order header
- customer order line item detail
- text message
- custom product component information

Each type is placed in a sequentially numbered destination file. For example, if the filename Cofile.txt is selected as the destination file, the files created are: COFILE1.TXT, COFILE2.TXT, COFILE3.TXT and COFILE4.TXT.

For more information, see "Order Acknowledgment" in the **Reports** section of the Order Entry manual. See also "Order Acknowledgment File Layouts" under "System Administration" in the **Setting Up the Module** section of the Order Entry manual for a list of the fields included in each destination file.

Parameters

To request a Customer Order Export, enter the COBP task as one of the sequenced tasks in a batch process. Use the COBP task in place of the BOPR (Batch Order Print) task for printing order acknowledgements.

The COBP task has the following parameters:

	Task Parameter	Format	Entry Is...
1:	Filename and Format	NX..X FX	Required
2:	Export Append Flag	A	Optional

Parameter 1: File Name and Format (A, D)

A set of files is created containing customer order information. A maximum of 7 characters can be specified for the filename and maximum of three characters for the extension. The eighth character is reserved for the sequential file number.

Specify the format of the output file created by the COBP task. The formats available include: ASCII or dBASE formats. A file name must be specified. If no directory is specified, the files are created in the MFGSYS directory.

If you have specified a format that is no longer supported, the ASCII format is substituted. A message is recorded in the log file.

Parameter 2: Export Append Flag

Indicate whether you want to add the customer order information to the end of the specified file. In this way, you are adding rows of information to the existing file. Enter an **A** if you want to append to the existing file.

Example

For example, to request a Customer Order Export as the first task in the process using:

- the filename ACK1015.DBF
- dBASE format

the **Seq Num**, **Task** and **Parameters** fields in the task line are entered like this:

```
01 COBP NACK1015.DBF FD
```

Entry Field	Example Value	Description
Seq Num	01	First task in process
Task	COBP	Customer Order Export
Parameter 1	NACK1015.DBF	Filename
Parameter 1	FD	File format

To run the Customer Order Export, use the BEXE (Batch Process Execution) screen to execute the process in which the COBP task is entered. Check the LOG file produced if the COBP task does not execute successfully.

Note: The COBP task generates a set of files containing order acknowledgement information. Use your standard procedures to transmit this information to customers, as needed.

COCF – Order Entry Configuration

The Order Entry Configuration screen enables you to set confirmation options that can be displayed when entering a sales order for an item marked obsolete. This screen is new to the Fourth Shift 7.50 system, but uses two fields that were originally located on the CNFG screen: **Duplicate Customer PO Notification** and **Credit Check Co Line**.

The COCF screen is available for both the SOPM and CUSM systems.

Features

Transportation Shortcuts

You can use shortcut keys or transport buttons to go to the following related screens.

Destination	Shortcut Key(s)
COMT (Customer Order)	F8
CUID (Customer Master by Customer Id)	F9
ITMB (Item Master)	F10

Web Links

If you use Web UI, you can link to other screens by clicking tabs or hyperlinks.

Note: There are no tabs or hyperlinks available for this screen.

Reports

A standard report is not generated for this screen. Use the Print Screen key or any screen capture program to create an image of the screen.

Fields

Allow Movement of Shipping Inventory

Allow Movement of Shipping Inventory indicates that allocated shipping inventory can be moved from a shipping inventory location to another shipping inventory location.

N = No.

Do not allow the movement of Shipping Inventory.

Y = Yes.

Allow movement of Shipping Inventory.

Calculate Promised Dock Date Based on Shop Calendar

Calculate Promised Dock Date Based on Shop Calendar indicates whether the Promised Dock Date will be calculated by using working days per the Shop Calendar or calendar days.

N = Do not use Shop Calendar to calculate Promised Dock Date.

Y = Use Shop Calendar to calculate Promised Dock Date.

Note: This field is only available for SOPM systems.

Where Used: COCF

Important: Changes to this setting will only affect new SOP workstation sessions. Therefore it is recommended that prior to changing this option, all SOP users exit their current sessions.

Consume Customer Credit By Customer Chain

Consume Customer Credit By Customer Chain indicates whether to consume credit for the parent's Bill To account for the entire customer chain or if an order for a customer should consume credit for the designated Bill To customer. Options include:

N = Consume customer credit by Bill To

Y = Consume customer credit by Customer Chain

Note: This field is only available for SOPM systems.

Where Used: COCF

Credit Check Co Line

The **Customer Order Credit Check** field allows you to select the level of restriction you want to place on new orders for a customer related to their credit limit. Options are:

0 = No customer credit limit review for new orders or additions to orders

1 = The system issues a warning for orders only when customer has exceeded credit limit

2 = Customer order increase is not allowed if it places the customer or order on credit hold (applies to SOPM only)

3 = Customer order amount increase is not allowed if customer has exceeded credit limit

Where Used: COCF

Duplicate Customer Po Notification

Duplicate Customer Po Notification indicates whether to display a duplicate customer PO warning message when the same customer PO is used more than once on the Customer Order (COMT) or SOPM screen. Codes are:

Y = Display the message

N = Do not display the message

Where Used: COCF

Obsolete Item Enforcement for Co Entry

Obsolete Item Enforcement for Customer Order Entry indicates whether to display a warning message on the COMT screen when the transaction contains obsolete items. Codes are:

- 0 = Do not display the message**
- 1 = Display the message only**
- 2 = Display the message and require a confirmation**
- 3 = Display the message and prevent the transaction**

Where Used: COCF

Print CO Header Standard Text on Pick List

Print CO Header Standard Text on Pick List indicates whether the Pick List report will display the standard text from the CO Header.

- N = Do not print text**
- Y = Print text**

Note: This field is only available for CUSM systems.

Where Used: COCF

Print CO Line Standard Text on Pick List

Print CO Line Standard Text on Pick List indicates whether the Pick List report will display the standard text from the CO Line.

- N = Do not print text**
- Y = Print text**

Note: This field is only available for CUSM systems.

Where Used: COCF

Write SOP Archive Transactions

Write SOP Archive Transactions indicates whether SOPM customer and order entry transactional activity will write archive records that record customer and order entry activity. See "Sales Order Processing Import File Layouts" in SOPM documentation for additional information. This option can also create Logon/Logout information. The CNFG File Writing Configuration option of "No" to "Write to the Archive file" can override the option to create these records in the ARCHIVE.FIL. However, SOP transactional activity will still be recorded in a database table. See "File Writing Configuration" in the System Control documentation for further details.

- N = Do not write SOP Archive Transactions**
- Y = Write SOP Archive Transactions (Default)**

Note: This field is only available for Sales Order Processing (SOPM) systems.

Important: Changes to this setting will only affect new SOP workstation sessions. Therefore it is recommended that prior to changing this option, all SOP users exit their current sessions.

Where Used: COCF

COCD – Customer Orders by Customer Id

Use this screen to review all open and released orders currently in the system for a specific customer. The Customer Orders by Customer Id screen identifies each order by customer purchase order number, customer order number, line number, item, ordered quantity, balance due, and promised delivery date. The COCD screen provides the order and quantity information necessary for effective communication with customers.

Transportation Shortcuts

You can use shortcut keys or transport buttons to go to the following related screens.

Destination	Shortcut Key(s)
COMT (Customer Order) (not available after SOPM Module installation)	F8
COAN (Customer Order Action)	F9
CUID (Customer Master) (not available after SOPM Module installation)	F10

Browse Windows

You can open browse windows by choosing **Browse/Detail** from the **Tools** menu in the following fields:

Browse	From Fields
Customer Browse	Customer Id

For more information, see "Selecting from a Browse List" in the Fourth Shift Basics manual.

Web Links

If you use Web UI, you can link to other screens by clicking tabs or hyperlinks.

Go to Screen...	By clicking...
COMT (Customer Order)	Screen label: Co Number
CUID (Customer Master by Customer Id)	Screen label: Id
ITMB (Item Master)	Screen label: Item/catalog Item
SSII (Stock Status Inquiry by Item)	Screen label: Item/catalog Item

Reports

Customer Orders by Customer Id

Lists all the open and released orders for a customer range.

Access Method

To generate the report, choose **Print** or **Print Preview** from the **File** menu. The Report screen appears before the report is generated, allowing you to select a range of data for the report. For more information on reporting in general, see "Printing and Reporting" in the Fourth Shift Basics manual.

Report Template

For more information on report templates, see "Reporting for SQL Server Systems" in the System Help topics.

Fields**Addr**

Address is the first and second lines of information identifying a location. Each line entry is any alphanumeric combination of up to 60 characters.

Where Used: A/P Payment Detail; Available Customer Shipments; CNFG; CNFI; COCD; COMI; COMT; Customer + Address; Customer Browse Detail; Customer Name/Address Detail; Customer Order Header Detail; DISI; DIST; ISVI; IVIE; IVII; Name, Address & Contacts; Payee Detail; Payer Detail; Purchase Order Header Detail; QSRC; SBOL; SHIP; Ship to Browse; Ship to Browse Detail; VDSC; Vendor Browse Detail; Vendor Master Detail; VSDI; VSDT

Balance Due

Balance Due is the difference between the **Ordered Quantity** and the shipped quantity for the item.

Where Used: COCD; Pricing Maintenance + Test Order

C

Country is the name of the country associated with an address. Entry is any alphanumeric combination of up to 15 characters.

Where Used: A/P Payment Detail; Available Customer Shipments; CNFG; CNFI; COCD; COMI; COMT; Customer + Address; Customer Browse Detail; Customer Name/Address Detail; Customer Order Header Detail; DISI; DIST; ISVI; IVIE; IVII; Name, Address & Contacts; Payee Detail; Pricing Maintenance + Test Order; Purchase Order Header Detail; QSRC; SBOL; SHIP; Ship to Browse; Ship to Browse Detail; Vendor Browse Detail; Vendor Master Detail; VSDI; VSDT

Catalog Item

Catalog Item is the unique identifier for a catalog item that may be entered on a customer order. A single item may have many catalog items connected to it. Entry is any alphanumeric combination of up to 25 characters.

Where Used: CCAT; COAN; COCD; COMI; COMT; Customer Order; Invoice Line Item Detail; Line Item Details + Customer Item; Order Detail; Packing List

City

City is the name of the city associated with an address. Entry is any alphanumeric combination of up to 15 characters.

Where Used: A/P Payment Detail; Available Customer Shipments; CNFG; CNFI; COCD; COMI; COMT; Customer + Address; Customer Browse Detail; Customer Name/Address Detail; Customer Order Header Detail; DISI; DIST; ISVI; IVIE; IVII; Name, Address & Contacts; Payee Detail; Payer Detail; Purchase Order Header Detail; QSRC; SBOL; SHIP; Ship to Browse; Ship to Browse Detail; Vendor Browse Detail; Vendor Master Detail; VSDI; VSDT

CO Number

Customer Order Number is the user-defined identifier for a customer order. Entry is any alphanumeric combination of up to 30 characters.

Where Used: Advance Ship Notice Line; Advance Ship Notice Order Detail; Available for Shipping Allocation Batch; COAN; COCD; COMI; COMT; CORV; CPMT; Custom Product Component Detail; Custom Product Detail; Customer + Credit; Customer Order; Customer Order + Order Header; Customer Order Header Detail; Customer Order Line Price Adjustment; Customer Order Receipt/Reverse; CWIP; Demand Peg Detail; GASN; Inventory Allocation; IVPR; IVRR; JEST; Job Estimates and Performance Report; Material Shortages Detail; MOAN; MSMT; OPSL; Order Detail; Orders on Shipment; Package Content; Packaging Detail; PICI; PICK; Picklist Detail; PORI; PORV; Pricing Maintenance + Test Order; Purchased Component Detail; Serial Number List; SHIP; Shipment Allocation Detail; Shipment Order Detail; Shipping Allocation Batch; SHPI; SHPL; STAD; Standard Product Detail; Supply Peg Detail

Contact

Contact is the name of the person at the vendor/customer who is the primary contact when items are ordered. Entry is any alphanumeric combination of up to 40 characters.

Where Used: APIP; CIMT; COBK; COCD; COMT; Contract Header Detail; CUID; CUII; CUSI; CUST; Customer Browse Detail; Customer Financial Detail; Customer Name/Address Detail; DISI; DIST; ISVI; POGR; POVD; Purchase Order Header Detail; QSRC; VDSC; VEDI; VEID; VEND; Vendor Browse Detail; Vendor Configuration; Vendor Master Detail; VENI; VSDI; VSDT

Customer Id

Customer Identification is the identification number assigned to a customer. Entry is any alphanumeric combination of up to 13 characters.

Where Used: Advance Ship Notice Carrier Detail; Advance Ship Notice Shipment Detail; ARAH; ARCD; ARCJ; ARCP; ARCR; ARES; ARIC; ARIH; ARIP; ARIR; ARPD; ARPH; ARRJ; ARSC; ARSR; ARST; ARTB; ARTX; Available Customer Shipments; Available for Shipping Allocation Batch; Browse Setup (customer); Browse Setup (order); CIMT; CINV; COAN; COBK; COCD; COMI; COMT; CORV; COYE; CPMT; CUID; CUII; Cumulative Detail; CUPB; CUPI; CUSI; CUST; Custom Product Component Detail; Custom Product Detail; Customer; Customer Browse; Customer Browse Detail; Customer Financial Detail; Customer Invoice List; Customer Item + General; Customer Name/Address Detail; Customer Order; Customer Order + Order Header; Customer Order Header Detail; Customer Order Receipt/Reverse; Customer Payment List; Demand Peg Detail; EDIX; EXRU; G/L Distribution (ARSM Module); GASN; Inbound Conversion Detail; Inventory Adjustment Application; Invoice Header Detail;

Invoice Line Item Detail; IORD; IVCO; IVIA; IVIE; IVII; IVPP; IVPR; IVRR; IVRV; JEST; Job Estimates and Performance Report; Lot Trace Issue Detail; Lot Trace Receipt Detail; Material Shortages Detail; MOAN; MPED; MPIT; MSMT; OPSP; Order Browse; Order Detail; ORST; Outbound Conversion Detail; Partner Item Detail; PCMT; PICI; PICK; Picklist Detail; Pricing Maintenance + Items/Customers; Pricing Maintenance + Test Order; SBOL; Serial Number List; SHIP; Ship to Browse; Ship to Browse Detail; Shipment Allocation Detail; Shipment Allocation List; Shipping Allocation Batch; SHPI; SHPL; STAD; Standard Product Detail; Supply Peg Detail; Transaction Detail

Customer PO Number

Customer Purchase Order Number is the identification used by the customer when referring to this order. Entry is any alphanumeric combination of up to 30 characters.

Where Used: Advance Ship Notice Item Detail; Advance Ship Notice Order Detail; Advance Ship Notice Shipment Detail; ARCR; ARIC; ARIP; COCD; COMI; COMT; CORV; Cumulative Detail; Customer Invoice List; Customer Order + Order Header; Customer Order Header Detail; GASN; Invoice Header Detail; IVPR; IVRR; Job Estimates and Performance Report; Line Item Detail; Orders on Shipment; Packing List; PCMT; SHIP; Shipment Order Detail; SHPI

Function

Function codes are four-character abbreviations for screen names. Each screen has a unique code used for identification and transportation. For example, ITMB identifies the Item Master screen. Entry is 4 alphanumeric characters.

Where Used: screens and reports

Item

Item is the unique identifier for a part, whether it be a piece part, tool, raw material, an assembly or finished product. All items are set up using the ITMB screen. Within a product structure, an item can be a component as well as a parent. Entry is any alphanumeric combination of up to 30 characters.

Where Used: A/P Received Item List; ABCR; Advance Ship Notice Line; Allowance/Charge Detail (Detail); APPI; APPV; AUDT; Available for Shipping Allocation Batch; AVII; AVIT; Bill of Material Accuracy Results; Browse Setup (item); Capacity Planning; CBIL; CCAN; CCAT; CIMT; CINV; COAN; COBK; COCD; COMI; COMP; Comparison Bill; Comparison of Summarized Bills; COMT; Contract Item Detail; Contract Item Detail/Pricing; Contract Summary; CORV; CSTU; Cumulative Detail; Customer Item + General; Customer Order; Customer Order Line Price Adjustment; Customer Order Receipt/Reverse; CWIP; Demand Peg Detail; Engineering; FCST; GASN; ICCR; IHIR; IMTR; INVA; Inventory Adjustment Application; Inventory Allocation; Inventory History List; Inventory Transaction History Report; INVR; IORD; IPPD; ISVI; ITBI; ITCB; ITCI; Item + Quantity; Item Availability; Item Availability + Quantity; Item Browse; Item Browse Detail; Item History; Item Lot Receipt; Item Lot Trace and Serialization Detail; Item Master; Item Master Detail; Item Master Planning Detail; Item Responsibility Assigned Results; Item Shortages; ITHC; ITHR; ITMB; ITMC; ITMI; ITPB; ITPJ; Lead Times Assigned Results; LEXP; LHSI; Line Item Details + Item; LMSI; LMST; Lot Detail; Lot Inventory Transaction History Report; Lot Selection; Lot Trace; Lot Trace Issue Detail; Lot Trace Receipt Detail; LOTR; LVAL; Manufacturing Order Line Item Detail; Manufacturing Order Receipt/Reverse; Material Shortages Detail; MCST; MOAN; MOFR; MOMI; MOMT; MORI; MORV; MPIT; MPSR; MPSS; MSMT; Multi-Level Bill; Multi-Level Costed Bill; Multi-Level Where Used; MUSE; Open Order Detail; Order Completion Status; Order Cost Variance

Status; Order Detail; OVAR; Package Content; Packaging Detail; Packing List; Partner Item Detail; PBCI; PBCT; PBII; PICI; PICK; Picklist Detail; POCI; POCR; POCT; PORI; PORV; POYE; Pricing Maintenance + Action Detail; Pricing Maintenance + Action List; Pricing Maintenance + Items/Customers; Pricing Maintenance + Test Order; Production; Purchase Order Receipt History; Purchased Component Detail; QSRC; QUOI; QUOT; Router/Traveler; Schedule Board; SDAB; SDAL; Selection Setup; Serial Number List; Serial Numbers Shipped; SHIP; Shipment Allocation Detail; Shipment Allocation List; Shipments by Line Item; Shipping Allocation Batch; Shortages by Order; SHPL; SSII; SSIL; Standard Costs Assigned Results; Standard Product Detail; Summarized Bill; Supply Peg Detail; Transaction Detail; VDII; VDI; VDIT; VDSC; VEIT; Vendor/Item Detail; VETI; VITI; VPFR; WIPL; WIPR; WIPS; WUSE

Ln#

Line Number is the identification of a line item on an order. The **Line Number** is system-assigned. Entry is up to 3 numbers.

Where Used: A/P Invoice Matching Detail; A/P PO/Inv Variance by Invoice; A/P Receiving Detail; Advance Ship Notice Line; Advance Ship Notice Order Detail; APEX; APID; APPI; APPV; APUV; Available for Shipping Allocation Batch; Backflush Issue Reconciliation Report; Bill of Material Accuracy Results; Capacity Planning; CCAN; CINV; COAN; COCD; COMI; COMT; CORV; CPMT; CSTU; Custom Product Component Detail; Custom Product Detail; Customer Order; Customer Order + Order Header; Customer Order Line Price Adjustment; Customer Order Receipt/Reverse; CWIP; Demand Peg Detail; Dispatch List; GASN; IHIR; IMTR; Inventory Transaction History Report; IORD; Item Shortages; JEST; Job Estimates and Performance Report; LHis; LMSI; LMST; Location Index; Lot Detail; Lot Inventory Transaction History Report; Lot Trace Issue Detail; Lot Trace Receipt Detail; LOTR; LRRP; Manufacturing Order Line Item Detail; Manufacturing Order Receipt/Reverse; Material Shortages Detail; MCST; MOAN; MOFR; MOMI; MOMT; MORI; MORV; MSMT; Open Order Detail; OPSL; Order Completion Status; Order Cost Variance Status; Order Detail; Order Line Items; OVAR; Package Content; Packaging Detail; Packing List; PCMT; PCST; PICI; PICK; Picklist Detail; POAN; POAS; POMI; POMT; PORI; PORR; PORV; POSR; POVD; Pricing Maintenance + Test Order; Purchase Order Line Item Detail; Purchase Order Line Item Detail (CPMT); Purchase Order Line Items; Purchased Component Detail; Router/Traveler; Schedule Board; SDAB; Serial Number List; SHIP; Shipment Allocation Detail; Shipment Allocation List; Shipments by Line Item; Shipping Allocation Batch; Shortages by Order; SHPL; STAD; Standard Product Detail; Supply Peg Detail; Transaction Detail; TRUD; VDSC; VPFR; WIPL; WIPR; WIPS

Line Status Type

Line Status Type allows you to view a subset of the orders by line status. **Line Status Type** includes:

A = Active orders. Displays Line Statuses 3 - Open, 4 - Released, and 9 - Credit Hold

P = Pre-active. Displays Line Status 2 - Firm Planned or Quote orders, including forecasts and custom products.

C = Completed/Closed. Displays Line Statuses 5, 6, and 7 - Closed.

Name

Customer Name is the name of a customer. Entry is any alphanumeric combination of up to 60 characters.

Where Used: ARAH; ARCD; ARCJ; ARCR; AREX; ARIC; ARIH; ARIP; ARIR; ARPD; ARPH; ARRJ; ARSC; ARSR; ARTB; ARTX; Available Customer Shipments; Browse Setup (customer); Browse Setup (order); CIMT; COBK; COCD; COMI; COMT; CORV; COYE; CPMT; CUID; CUII; CUPB; CUPI; CUSI; CUST; Custom Product Component Detail; Custom Product Detail; Customer; Customer + Address; Customer + General; Customer Browse; Customer Browse Detail; Customer Financial Detail; Customer Invoice List; Customer Item + General; Customer Name/Address Detail; Customer Order; Customer Order Header Detail; Customer Order Receipt/Reverse; Customer Payment List; EDIX; EXRU; G/L Distribution (ARSM Module); IVCO; IVIA; IVPP; JEST; Job Estimates and Performance Report; Lot Trace Issue Detail; Lot Trace Receipt Detail; OPSL; Order Browse; Order Detail; ORST; PICI; PICK; Picklist Detail; Pricing Maintenance + Test Order; SBOL; Serial Number List; SHIP; Ship to Browse Detail; Shipment Allocation List; Shipping Detail; SHPI; SHPL; STAD; Standard Product Detail

Ordered Quantity

Order Quantity is the number of items ordered at the specified unit of measure. Entry is up to 10 numbers.

Where Used: Available Pricing; CINV; COCD; COMI; COMT; Contract Header Detail; Contract Item Detail; Contract Item Detail/Pricing; CORV; CPMT; CSTU; Cumulative Detail; Custom Product Component Detail; Custom Product Detail; Customer Order; CWIP; Demand Peg Detail; IORD; IVPR; IVRR; JEST; Job Estimates and Performance Report; Line Item Details + Item; Manufacturing Order Line Item Detail; MCST; MOFR; MOMI; MOMT; MORI; MORV; MSMT; Open Order Detail; OPSL; Order Detail; Order Line Items; OVAR; Packing List; PCST; PICI; PICK; Picklist Detail; POCR; POMI; POMT; PORR; POSR; POVD; Pricing Maintenance + Test Order; Purchase Order Line Item Detail; Purchase Order Line Item Detail (CPMT); Purchase Order Line Items; Purchased Component Detail; SDAB; Shipment Allocation Detail; Shipments by Line Item; Standard Product Detail; Supply Peg Detail; Transaction Detail; VDSC; VPFR; WIPR; WIPS

Phone

Phone is the primary phone number of the vendor/customer. Entry is any alphanumeric combination of up to 20 characters.

Where Used: APIP; CIMT; COBK; COCD; Contract Header Detail; CUID; CUII; CUSI; CUST; Customer Browse Detail; Customer Financial Detail; Customer Name/Address Detail; DISI; DIST; ISVI; IVPR; IVRR; POCR; POVD; Purchase Order Header Detail; QSRC; VDSC; VEDI; VEID; VEND; Vendor Browse Detail; Vendor Configuration; Vendor Master Detail; VENI; VSDI; VSDT

Prom Dlvry

Promised Delivery is the date that the items are committed to be at the customer site. The transportation lead time is used with the **Promised Delivery** date to calculate the shipping date.

Where Used: Available Pricing; COCD; COMI; COMT; CPMT; Custom Product Component Detail; Custom Product Detail; EXRU; IORD; Job Estimates and Performance Report; OPSL; Purchased Component Detail; Standard Product Detail; Transaction Detail

St

State is the identification of the state or province associated with an address. Entry is any alphanumeric combination of up to 10 characters.

Where Used: A/P Payment Detail; APTP; Available Customer Shipments; CNFG; CNFI; COCD; COMI; COMT; Customer + Address; Customer Browse Detail; Customer Name/Address Detail; Customer Order Header Detail; DISI; DIST; ISVI; IVIE; IVII; Name, Address & Contacts; Payee Detail; Payer Detail; Pricing Maintenance + Test Order; Purchase Order Header Detail; QSRC; SBOL; SHIP; Ship to Browse; Ship to Browse Detail; Vendor Browse Detail; Vendor Master Detail; VSDI; VSDT

Zip

Zip Code is the postal delivery number associated with an address. Entry is any alphanumeric combination of up to 12 characters.

Where Used: A/P Payment Detail; Available Customer Shipments; CNFG; CNFI; COCD; COMI; COMT; Customer Browse Detail; Customer Name/Address Detail; Customer Order Header Detail; DISI; DIST; ISVI; IVIE; IVII; Name, Address & Contacts; Payee Detail; Payer Detail; Pricing Maintenance + Test Order; Purchase Order Header Detail; QSRC; SBOL; SHIP; Ship to Browse; Ship to Browse Detail; Vendor Browse Detail; Vendor Master Detail; VSDI; VSDT

COMT – Customer Order

Use the Customer Order screen to create new customer orders, add new items to existing orders, change and delete items from orders, and delete customer orders. The Customer Order screen is replaced by the Customer Order application once the SOPM Module is installed.

Two versions of this screen are available: one for maintenance and one for inquiry use only. The information displayed is the same, only the ability to change the information changes depending on the screen you access.

- The COMT (Customer Order) screen allows you to view and update customer orders.
- The COMI (Customer Order Inquiry) screen only allows you to view this information.

See "Entry and Inquiry Screens" under "Screen Types" in the **Using Fourth Shift** section of the Fourth Shift Basics manual for more information.

You can also print an order acknowledgement for the displayed customer order from the COMT screen. For more information, see "Order Acknowledgment" in the **Reports** section of the Order Entry manual. Optionally, you can export order acknowledgment information to a set of text files instead of printing the documents. The files generated by the COBP (Customer Order Export) task contain the same information printed by the COMT screen.

Transportation Shortcuts

You can use shortcut keys or transport buttons to go to the following related screens.

Destination	Shortcut Key(s)
Customer Order Header Detail (CO Header section)	F8
Custom Product Detail (Line Item section; Ln# Typ = A or X)	F8
Standard Product Detail (Line Item section; Ln# Typ = C)	F8
CPMT (Custom Product Maintenance) (Line Item section Ln# Typ = A or X)	F9
CUID (Customer Master by Customer Id) (CO Header section)	F9
SDAL (Supply/Demand Analysis) (Line Item section; Ln# Typ = C)	F9
COCD (Customer Orders by Customer Id) (CO Header section)	F10
IORD (Open and Released Orders by Item) (Line Item section; Ln# Typ = C)	F10
OPSL (Option Selection) (Line Item section; Ln# Typ = A or X)	F10

Additional Information

Window / Action	Available From	Shortcut Key(s)
Item Availability	Order Qty Prom Dlvry	ALT+F4
Item Book And Breakpoint Select	Unit Price (if APBM is installed)	ALT+F8
Quantity Breaks and Expedite Fees	Any location on the Item Book And Breakpoint Select window	Enter
Order Number Assignment	CO Number	ALT+F8
Currency Information	Any location on the screen	ALT+C
Display the item description based on the type of item that was originally identified	Item	F4
Display the date the quantity is available	Order Qty (no Prom Dlvry)	F4
Display the availability of the quantity on the date	Order Qty (and Prom Dlvry)	F4
Display the quantity available on the date	Prom Dlvry (no Order Qty)	F4
Scroll through ship ids until the desired information is displayed. Make changes as necessary and press ENTER	Ship Id	F4
Based on the transportation lead time and promised delivery date, display the calculated shipping date	Tr LT	F4
For quoted customer items (LS = Q) display the quoted price, or the Customer Item Price defined for a previous order on the Custom Product Detail screen	Unit Price (field empty)	F4
For standard items (LS = S) display the calculated price	Unit Price (field empty)	F4
Display the adjusted price, or the comparison between the item's standard price and the actual price entered	Unit Price (value entered)	F4

Browse Windows

You can open browse windows by choosing **Browse/Detail** from the **Tools** menu in the following fields:

Browse	From Fields
Customer Browse	Cust Id
Item Browse	Item on the COMT screen
Order Browse	CO Number
Ship to Browse	Ship to on the COMT screen

For more information, see "Selecting from a Browse List" in the Fourth Shift Basics manual.

Default Data Entry Masks

You can set up a default data entry mask by choosing **Default Setup** from the **Tools** menu in the following sections of the screen:

Section
Line Item section

For more information, see "Default Data Entry Masks" in the Fourth Shift Basics manual.

Web Links

If you use Web UI, you can link to other screens by clicking tabs or hyperlinks.

Go to Screen...	By clicking...
Detail	Tab at top of screen
COCD (Customer Orders by Customer Id)	Next Step button
IORD (Open and Released Orders by Item)	Next Step button
OPSL (Option Selection)	Next Step button
COAN (Customer Order Action)	Screen label: Csr
COCD (Customer Orders by Customer Id)	Screen label: Id
CUID (Customer Master by Customer Id)	Screen label: Id
CCAT (Customer Catalog)	Screen label: Item/catalog Item
ITMB (Item Master)	Screen label: Item/catalog Item
ITPB (Item Price Book)	Screen label: Item/catalog Item
SSII (Stock Status Inquiry by Item)	Screen label: Item/catalog Item

Go to Screen...	By clicking...
CCOT (Customer Contact Master)	Screen label: Cust Id

Reports

Order Acknowledgment (custom product items)

The order acknowledgment lists customer order detail. Optionally, you can export order acknowledgment information to a set of text files instead of printing the documents using the COBP (Customer Order Export) task in the Order Entry module.

An alternate order acknowledgment is available with the Sales Order Processing Module. See the Sales Order Processing manual for more information.

When you print the order acknowledgment, any ACK action messages for the order are deleted. If you Print Preview an order acknowledgment from the COMT screen, it is treated as having been printed. **Do not** Print Preview an order acknowledgment unless you are ready to print it. A REPRINT message is added to an order acknowledgment when the acknowledgment is printed or previewed more than once.

The information shown on the order acknowledgment is derived from several sources.

- The company name is taken from the CNFG (System Installation Setup) screen.
- The date and number format used is based on the **Print Format** field on the Customer Name/Address Detail screen.
- The customer order **CO Number, CSR, Ord Sta** and **CO Rev Date** are copied from the COMT screen.
- The header standard and extended text comes from the Customer Order Header Detail screen.
- Customer order line item information comes from the **Line Item** section on the COMT screen. Line item information can be printed based on the Item Master or customer item as the primary description. The **Prt** field on the Customer Financial Detail screen determines which description is used. If the **Prt** field = C, the customer item is used. If **Prt** = I, the Item Master is used.
- Line item standard and extended text is copied from the Standard Product Detail screen.
- Currency information is printed based on the currency information defined for the customer order.
- Optionally, the order acknowledgment can be printed with the U.S. Postal Service required format using the **Address Format** field on the CNFG (System Installation Setup) screen.
- Detail custom product text is copied from the Custom Product Detail screen when **Print Text on Ext Documents** = Y.
- The components listed for the custom product are based on the configuration established on the OPSL or CPMT screen.

Access Method

To generate the report, choose **Print** or **Print Preview** from the **File** menu. For more information on reporting in general, see "Printing and Reporting" in the Fourth Shift Basics manual.

Report Template

The default template for this report is CusCOP1.rdl.

For more information on report templates, see "Reporting for SQL Server Systems" in the System Help topics.

Screen Reference**Order Acknowledgment (standard items)**

The order acknowledgment lists customer order detail. Optionally, you can export order acknowledgment information to a set of text files instead of printing the documents using the COBP (Customer Order Export) task in the Order Entry module.

An alternate order acknowledgment is available with the Sales Order Processing Module. See the Sales Order Processing manual for more information.

When you print the order acknowledgment, any ACK action messages for the order are deleted. If you Print Preview an order acknowledgment from the COMT screen, it is treated as having been printed. **Do not** Print Preview an order acknowledgment unless you are ready to print it. A REPRINT message is added to an order acknowledgment when the acknowledgment is printed or previewed more than once.

The information shown on the order acknowledgment is derived from several sources.

- The company name is taken from the CNFG (System Installation Setup) screen.
- The date and number format used is based on the **Print Format** field on the Customer Name/Address Detail screen.
- The customer order **CO Number, CSR, Ord Sta** and **CO Rev Date** are copied from the COMT screen.
- The header standard and extended text comes from the Customer Order Header Detail screen.
- Customer order line item information comes from the **Line Item** section on the COMT screen. Line item information can be printed based on the Item Master or customer item as the primary description. The **Prt** field on the Customer Financial Detail screen determines which description is used. If the **Prt** field = C, the customer item is used. If **Prt** = I, the Item Master is used.
- Line item standard and extended text is copied from the Standard Product Detail screen.
- Currency information is printed based on the currency information defined for the customer order.
- Optionally, the order acknowledgment can be printed with the U.S. Postal Service required format using the **Address Format** field on the CNFG (System Installation Setup) screen.
- Detail custom product text is copied from the Custom Product Detail screen when **Print Text on Ext Documents** = Y.
- The components listed for the custom product are based on the configuration established on the OPSL or CPMT screen.

Access Method

To generate the report, choose **Print** or **Print Preview** from the **File** menu. For more information on reporting in general, see "Printing and Reporting" in the Fourth Shift Basics manual.

Report Template

For more information on report templates, see "Reporting for SQL Server Systems" in the System Help topics.

Format

The Customer Order screen has two sections: **CO Header** and **Line Item**.

The **CO Header** section identifies the customer order number, customer address, shipping address, order terms, customer credit balance and the total number of line items on the customer order.

The **Line Item** section lists the items on order. Information includes pricing option, order quantity, promised delivery date, transportation lead time, unit and extended price, and the status and type of line item. The maximum number of lines on an order is 899. Line numbers 900 through 999 are reserved for manually entered lines on an invoice.

Note: The **Ctrl Curr**, **Order Ex Rate** and **Add Exchange Rate** fields are available for foreign customers only when the MCMM Module is installed.

Available-to-Promise

An item that is set up on the Item Master Planning Detail screen to calculate available-to-promise quantities (**ATP = Y or P**) can be checked when entering the order. Note that inventory transactions entered using the INVA (Inventory Adjustment) screen are not included in ATP calculations until the B ATP (Available to Promise) or ATPS (Available to Promise Server) task is run.

In the **Order Qty** or **Prom Divry** field, press F4 or select **Browse/Detail** from the **Tools** menu. By using these two fields, you can deal with a customer who has both a quantity and date in mind, a specific quantity in mind, or a specific date in mind.

Order Qty Entry	Prom Divry Entry	Active Field	Message Displayed
desired quantity	blank	Order Qty	date quantity is available
blank	delivery date	Prom Divry	quantity available on date
desired quantity	delivery date	Order Qty	availability of quantity on date

Price/Item Cross-Reference

Based on the price type entered in the **LS** (line selector) field, the item is entered as the Item Master item, customer item or catalog number. The Item Master item is displayed in the **Item** field if the Item Master item or the customer item is entered. The Catalog Item is displayed in the **Item** field if a catalog number is entered.

Press F4 in the **Item** field for the item description based on the type of item that was originally identified.

Press F4 in the **Unit Price** field to see the calculations for the price.

If you enter a new **Unit Price**, press F4 in the **Unit Price** field to view a comparison between the item's standard price and the actual price entered.

The price used for **Unit Price** and **Extd Price**, displayed in the status bar, calculations is based on the price type entered in the **LS** (line selector) field, the **Price Adjustment** field and the type of item originally identified in the **Item** field.

Shipping Date

The shipping date takes the **Tr LT** (transportation lead time) into consideration in order to meet the **Prom Dlvry** date. After entering the transportation lead time and the promised delivery date, press F4 in the **Tr LT** field. The calculated shipping date is displayed in the status bar.

Shop Calendar Adjustments

Customer order lines contain two critical dates which are:

- **Promised Delivery Date.** This date is entered on the COMT (Customer Order) screen. It is the date the item is committed to be at customer site.
- **Ship Date.** This date is calculated using the Promised Delivery Date and the transportation lead time. The Ship Date is the date used as the basis for calculating other system requirements for manufacturing.

The Ship Date can be viewed on the COMT (Customer Order) screen by positioning the cursor in the **Tr LT** field and selecting Status Message from the Help menu.

Adjustments to the shop calendar effect these dates. If you change the number of shop days after the calculated Ship Date (by changing them to non-shop days), the reevaluation process resets the Promised Delivery Date. The calculation uses the originally calculated Ship Date and applies the transportation lead time, in shop days, again.

- If you **add** shop days after the calculated ship date, the Promised Delivery Date is reset to an earlier date.
- If you **remove** shop days after the calculated ship date, the Promised Delivery Date is reset to a later date.

If you wish to adjust the Ship Date for the line, reenter the Promised Delivery Date and allow the system to recalculate the Ship Date based on the new number of shop calendar days.

Shipping Addresses

Each customer can have several shipping addresses. Each **Ship to** address is associated with a user-defined **Ship to Id**. Shipping addresses are organized sequentially by **Ship to Id**.

The first sequential **Ship to Id** and its associated address are displayed for the specified customer. You can use F4 to display each shipping address that has been established for the customer. Use this feature to select the shipping address you want to use for the order.

Fields

Add Ex Rate

Add Exchange Rate is the exchange rate that will be used in adding a new line item. This field defaults to the exchange rate of the selected line when in Add mode. Leaving this field blank will cause the current exchange rate to be used when adding a line. If the transaction requires triangulation, you can toggle between the first and second legs of the calculation by

pressing ALT+C. Entry in this field must be greater than zero and up to 9999999999 preceded by a calculation operator * or /.

Where Used: COMI; COMT; IVIE; IVII

Addr

Address is the first and second lines of information identifying a location. Each line entry is any alphanumeric combination of up to 60 characters.

Where Used: A/P Payment Detail; Available Customer Shipments; CNFG; CNFI; COCD; COMI; COMT; Customer + Address; Customer Browse Detail; Customer Name/Address Detail; Customer Order Header Detail; DISI; DIST; ISVI; IVIE; IVII; Name, Address & Contacts; Payee Detail; Payer Detail; Purchase Order Header Detail; QSRC; SBOL; SHIP; Ship to Browse; Ship to Browse Detail; VDSC; Vendor Browse Detail; Vendor Master Detail; VSDI; VSDT

C

Country is the name of the country associated with an address. Entry is any alphanumeric combination of up to 15 characters.

Where Used: A/P Payment Detail; Available Customer Shipments; CNFG; CNFI; COCD; COMI; COMT; Customer + Address; Customer Browse Detail; Customer Name/Address Detail; Customer Order Header Detail; DISI; DIST; ISVI; IVIE; IVII; Name, Address & Contacts; Payee Detail; Pricing Maintenance + Test Order; Purchase Order Header Detail; QSRC; SBOL; SHIP; Ship to Browse; Ship to Browse Detail; Vendor Browse Detail; Vendor Master Detail; VSDI; VSDT

Catalog Item

Catalog Item is the unique identifier for a catalog item that may be entered on a customer order. A single item may have many catalog items connected to it. Entry is any alphanumeric combination of up to 25 characters.

Where Used: CCAT; COAN; COCD; COMI; COMT; Customer Order; Invoice Line Item Detail; Line Item Details + Customer Item; Order Detail; Packing List

City

City is the name of the city associated with an address. Entry is any alphanumeric combination of up to 15 characters.

Where Used: A/P Payment Detail; Available Customer Shipments; CNFG; CNFI; COCD; COMI; COMT; Customer + Address; Customer Browse Detail; Customer Name/Address Detail; Customer Order Header Detail; DISI; DIST; ISVI; IVIE; IVII; Name, Address & Contacts; Payee Detail; Payer Detail; Purchase Order Header Detail; QSRC; SBOL; SHIP; Ship to Browse; Ship to Browse Detail; Vendor Browse Detail; Vendor Master Detail; VSDI; VSDT

CO Number

Customer Order Number is the user-defined identifier for a customer order. Entry is any alphanumeric combination of up to 30 characters.

Where Used: Advance Ship Notice Line; Advance Ship Notice Order Detail; Available for Shipping Allocation Batch; COAN; COCD; COMI; COMT; CORV; CPMT; Custom Product Component Detail; Custom Product Detail; Customer + Credit; Customer Order; Customer Order + Order Header; Customer Order Header Detail; Customer Order Line Price Adjustment; Customer Order Receipt/Reverse; CWIP; Demand Peg Detail; GASN; Inventory Allocation; IVPR; IVRR; JEST; Job Estimates and Performance Report; Material Shortages Detail; MOAN; MSMT; OPSL; Order Detail; Orders on Shipment; Package Content; Packaging Detail; PICI; PICK; Picklist Detail; PORI; PORV; Pricing Maintenance + Test Order; Purchased Component Detail; Serial Number List; SHIP; Shipment Allocation Detail; Shipment Order Detail; Shipping Allocation Batch; SHPI; SHPL; STAD; Standard Product Detail; Supply Peg Detail

CO Rev Date

Customer Order Revision Date is the date of the last change made to the customer order. The **Customer Order Revision Date** is changed to the system date when the customer order is revised.

Where Used: COMI; COMT; CORV; CPMT; Custom Product Component Detail; Custom Product Detail; Customer Order Header Detail; Customer Order Receipt/Reverse; CWIP; JEST; Job Estimates and Performance Report; Line Item Details + Custom Product; OPSL; PICI; PICK; Picklist Detail; Standard Product Detail

CO Ref

Customer Order Reference is used to record user-defined information about the CO. Entry is any 30 Alphanumeric characters.

Where Used:

Contact

Contact is the name of the person at the vendor/customer who is the primary contact when items are ordered. Entry is any alphanumeric combination of up to 40 characters.

Where Used: APIP; CIMT; COBK; COCD; COMT; Contract Header Detail; CUID; CUII; CUSI; CUST; Customer Browse Detail; Customer Financial Detail; Customer Name/Address Detail; DISI; DIST; ISVI; POGR; POVD; Purchase Order Header Detail; QSRC; VDSC; VEDI; VEID; VEND; Vendor Browse Detail; Vendor Configuration; Vendor Master Detail; VENI; VSDI; VSDT

Credit Balance

Credit Balance is the amount of credit available based on the **Credit Limit** decreased by the sum of outstanding accounts receivable and orders not yet shipped.

Where Used: COMI; COMT; Customer Browse Detail; Customer Order Header Detail

CSR

Customer Service Representative identifies the person responsible for handling this customer's account. Entry is any alphanumeric combination of up to 3 characters.

Where Used: COAN; COMI; COMT; CORV; CPMT; CUID; CUII; CUSI; CUST; Custom Product Component Detail; Custom Product Detail; Customer + General; Customer Browse

Detail; Customer Financial Detail; Customer Name/Address Detail; Customer Order + Order Detail; Customer Order Header Detail; Customer Order Receipt/Reverse; Demand Peg Detail; Global Settings; IVPR; IVRR; JEST; Job Estimates and Performance Report; Material Shortages Detail; MPED; MSCF; OPSL; ORST; PICI; PICK; Picklist Detail; Pricing Maintenance + Test Order; REDI; RVED; STAD; Standard Product Detail; Transaction Detail

Ctrl Curr

Controlling Currency identifies which currency is constant (does not change with exchange rate fluctuations) for an order or invoice. A default **Controlling Currency** can be established for each vendor or customer, but it can also be changed for each order or invoice. Entry options include:

L = Local.

Local prices do not change with exchange rate fluctuations.

F = Foreign.

Foreign prices do not change with exchange rate fluctuations.

R = Rate.

A fixed rate is established between trading partners for orders and invoices. The rate-controlled currency is treated like foreign controlled for customer orders or A/R invoices and local controlled for purchase orders or A/P invoices. The fixed rate does not change with exchange rate fluctuations.

Where Used: APCR; APCW; APID; APIE; APII; APIP; APPA; APRG; APRL; APRQ; ARCR; ARIP; COMI; COMT; Contract Header Detail; Customer + General; Customer Financial Detail; Customer Order + Order Totals; Customer Order Header Detail; EXRU; IVIE; IVII; IVPP; Open Order Detail; POCL; POCR; POCT; POMI; POMT; Purchase Order Header Detail; Vendor Invoice Browse; Vendor Master Detail

Cust Id

Customer Identification is the identification number assigned to a customer. Entry is any alphanumeric combination of up to 13 characters.

Where Used: Advance Ship Notice Carrier Detail; Advance Ship Notice Shipment Detail; ARAH; ARCD; ARCJ; ARCP; ARCR; ARES; ARIC; ARIH; ARIP; ARIR; ARPD; ARPH; ARRJ; ARSC; ARSR; ARST; ARTB; ARTX; Available Customer Shipments; Available for Shipping Allocation Batch; Browse Setup (customer); Browse Setup (order); CIMT; CINV; COAN; COBK; COCD; COMI; COMT; CORV; COYE; CPMT; CUID; CUII; Cumulative Detail; CUPB; CUPI; CUSI; CUST; Custom Product Component Detail; Custom Product Detail; Customer; Customer Browse; Customer Browse Detail; Customer Financial Detail; Customer Invoice List; Customer Item + General; Customer Name/Address Detail; Customer Order; Customer Order + Order Header; Customer Order Header Detail; Customer Order Receipt/Reverse; Customer Payment List; Demand Peg Detail; EDIX; EXRU; G/L Distribution (ARSM Module); GASN; Inbound Conversion Detail; Inventory Adjustment Application; Invoice Header Detail; Invoice Line Item Detail; IORD; IVCO; IVIA; IVIE; IVII; IVPP; IVPR; IVRR; IVRV; JEST; Job Estimates and Performance Report; Lot Trace Issue Detail; Lot Trace Receipt Detail; Material Shortages Detail; MOAN; MPED; MPIT; MSMT; OPSL; Order Browse; Order Detail; ORST; Outbound Conversion Detail; Partner Item Detail; PCMT; PICI; PICK; Picklist Detail; Pricing Maintenance + Items/Customers; Pricing Maintenance + Test Order; SBOL; Serial Number List; SHIP; Ship to Browse; Ship to Browse Detail; Shipment Allocation Detail; Shipment Allocation List; Shipping Allocation Batch; SHPI; SHPL; STAD; Standard Product Detail; Supply Peg Detail; Transaction Detail

Customer Name/Address

Customer Name is the name of a customer. Entry is any alphanumeric combination of up to 60 characters.

Where Used: ARAH; ARCD; ARCJ; ARCR; AREX; ARIC; ARIH; ARIP; ARIR; ARPD; ARPH; ARRJ; ARSC; ARSR; ARTB; ARTX; Available Customer Shipments; Browse Setup (customer); Browse Setup (order); CIMT; COBK; COCD; COMI; COMT; CORV; COYE; CPMT; CUID; CUII; CUPB; CUPI; CUSI; CUST; Custom Product Component Detail; Custom Product Detail; Customer; Customer + Address; Customer + General; Customer Browse; Customer Browse Detail; Customer Financial Detail; Customer Invoice List; Customer Item + General; Customer Name/Address Detail; Customer Order; Customer Order Header Detail; Customer Order Receipt/Reverse; Customer Payment List; EDIX; EXRU; G/L Distribution (ARSM Module); IVCO; IVIA; IVPP; JEST; Job Estimates and Performance Report; Lot Trace Issue Detail; Lot Trace Receipt Detail; OPSL; Order Browse; Order Detail; ORST; PICI; PICK; Picklist Detail; Pricing Maintenance + Test Order; SBOL; Serial Number List; SHIP; Ship to Browse Detail; Shipment Allocation List; Shipping Detail; SHPI; SHPL; STAD; Standard Product Detail

Customer PO Number

Customer Purchase Order Number is the identification used by the customer when referring to this order. Entry is any alphanumeric combination of up to 30 characters.

Where Used: Advance Ship Notice Item Detail; Advance Ship Notice Order Detail; Advance Ship Notice Shipment Detail; ARCR; ARIC; ARIP; COCD; COMI; COMT; CORV; Cumulative Detail; Customer Invoice List; Customer Order + Order Header; Customer Order Header Detail; GASN; Invoice Header Detail; IVPR; IVRR; Job Estimates and Performance Report; Line Item Detail; Orders on Shipment; Packing List; PCMT; SHIP; Shipment Order Detail; SHPI

E-Mail

E-Mail is the e-mail address for a customer or vendor. Entry is any alphanumeric combination of up to 50 characters.

Where Used: COMT; CUID; CUII; CUSI; CUST; Customer + Address; Customer Name/Address Detail; PASS; VEDI; VEID; VEND; VENI

Extd Price

Extended Price equals the unit price times the ordered quantity.

Where Used: A/P Receiving Detail; COMI; COMT; CPMT; Custom Product Component Detail; Custom Product Detail; Customer Order; IVIE; IVII; IVPR; IVRR; JEST; Job Estimates and Performance Report; OPSL; PCST; POMI; POMT; POSR; Pricing Maintenance + Test Order; Purchase Order Line Item Detail; Purchase Order Line Item Detail (CPMT); Standard Product Detail; VDSC

FOB

Free on Board Point identifies the location where the buyer takes title of the shipped items. Entry is any alphanumeric combination of up to 20 characters.

Where Used: COMI; COMT; Customer Browse Detail; Customer Name/Address Detail; Customer Order + Shipping; Customer Order Header Detail; IVIE; IVII; IVPR; IVRR; Packing

List; Preferences + General; Purchase Order Header Detail; Trade Class + General;
Transaction Detail

Frft Code

Freight Charge Code identifies the method of charging the customer for freight. **Freight Charge Codes** are:

0 = Paid.

Freight costs are paid.

1 = Invoice.

Prepay freight and add to invoice.

2 = Customer.

Carrier collects freight costs from customer.

Where Used: COMI; COMT; Customer Browse Detail; Customer Name/Address Detail; Customer Order Header Detail; Pricing Maintenance + Test Order; SHIP; Shipment Order Detail; Transaction Detail

Function

Function codes are four-character abbreviations for screen names. Each screen has a unique code used for identification and transportation. For example, ITMB identifies the Item Master screen. Entry is 4 alphanumeric characters.

Where Used: screens and reports

Inv/COD

Invoice or Cash on Delivery indicates the method of collecting payment from the customer for charges related to this customer order. Entry options include:

1 = Invoice.

Invoice for payment.

2 = COD.

Collect payment upon delivery.

Where Used: COMI; COMT; Customer Order Header Detail; Shipment Order Detail; Transaction Detail

Item

Item is the unique identifier for a part, whether it be a piece part, tool, raw material, an assembly or finished product. All items are set up using the ITMB screen. Within a product structure, an item can be a component as well as a parent. Entry is any alphanumeric combination of up to 30 characters.

Where Used: A/P Received Item List; ABCR; Advance Ship Notice Line; Allowance/Charge Detail (Detail); APPI; APPV; AUDT; Available for Shipping Allocation Batch; AVII; AVIT; Bill of Material Accuracy Results; Browse Setup (item); Capacity Planning; CBIL; CCAN; CCAT; CIMT; CINV; COAN; COBK; COCD; COMI; COMP; Comparison Bill; Comparison of Summarized Bills; COMT; Contract Item Detail; Contract Item Detail/Pricing; Contract Summary; CORV; CSTU; Cumulative Detail; Customer Item + General; Customer Order;

Customer Order Line Price Adjustment; Customer Order Receipt/Reverse; CWIP; Demand Peg Detail; Engineering; FCST; GASN; ICCR; IHIR; IMTR; INVA; Inventory Adjustment Application; Inventory Allocation; Inventory History List; Inventory Transaction History Report; INVR; IORD; IPPD; ISVI; ITBI; ITCB; ITCI; Item + Quantity; Item Availability; Item Availability + Quantity; Item Browse; Item Browse Detail; Item History; Item Lot Receipt; Item Lot Trace and Serialization Detail; Item Master; Item Master Detail; Item Master Planning Detail; Item Responsibility Assigned Results; Item Shortages; ITHC; ITHR; ITMB; ITMC; ITMI; ITPB; ITPI; Lead Times Assigned Results; LEXP; LHS; Line Item Details + Item; LMSI; LMST; Lot Detail; Lot Inventory Transaction History Report; Lot Selection; Lot Trace; Lot Trace Issue Detail; Lot Trace Receipt Detail; LOTR; LVAL; Manufacturing Order Line Item Detail; Manufacturing Order Receipt/Reverse; Material Shortages Detail; MCST; MOAN; MOFR; MOMI; MOMT; MORI; MORV; MPIT; MPSR; MPSS; MSMT; Multi-Level Bill; Multi-Level Costed Bill; Multi-Level Where Used; MUSE; Open Order Detail; Order Completion Status; Order Cost Variance Status; Order Detail; OVAR; Package Content; Packaging Detail; Packing List; Partner Item Detail; PBCI; PBCT; PBII; PICI; PICK; Picklist Detail; POCI; POCR; POCT; PORI; PORV; POYE; Pricing Maintenance + Action Detail; Pricing Maintenance + Action List; Pricing Maintenance + Items/Customers; Pricing Maintenance + Test Order; Production; Purchase Order Receipt History; Purchased Component Detail; QSRC; QUOI; QUOT; Router/Traveler; Schedule Board; SDAB; SDAL; Selection Setup; Serial Number List; Serial Numbers Shipped; SHIP; Shipment Allocation Detail; Shipment Allocation List; Shipments by Line Item; Shipping Allocation Batch; Shortages by Order; SHPL; SSII; SSIL; Standard Costs Assigned Results; Standard Product Detail; Summarized Bill; Supply Peg Detail; Transaction Detail; VDII; VDI; VDSC; VEIT; Vendor/Item Detail; VETI; VITI; VPFR; WIPL; WIPR; WIPS; WUSE

Lines

Line Items this Order is the total count of line items on the order. The total count automatically reflects any additions or deletions of items on the order.

Where Used: COMI; COMT; CORV; Customer Order Header Detail; MOMI; MOMT; MORI; MORV

Ln#

Line Number is the identification of a line item on an order. The **Line Number** is system-assigned. Entry is up to 3 numbers.

Where Used: A/P Invoice Matching Detail; A/P PO/Inv Variance by Invoice; A/P Receiving Detail; Advance Ship Notice Line; Advance Ship Notice Order Detail; APEX; APID; APPI; APPV; APUV; Available for Shipping Allocation Batch; Backflush Issue Reconciliation Report; Bill of Material Accuracy Results; Capacity Planning; CCAN; CINV; COAN; COCD; COMI; COMT; CORV; CPMT; CSTU; Custom Product Component Detail; Custom Product Detail; Customer Order; Customer Order + Order Header; Customer Order Line Price Adjustment; Customer Order Receipt/Reverse; CWIP; Demand Peg Detail; Dispatch List; GASN; IHIR; IMTR; Inventory Transaction History Report; IORD; Item Shortages; JEST; Job Estimates and Performance Report; LHS; LMSI; LMST; Location Index; Lot Detail; Lot Inventory Transaction History Report; Lot Trace Issue Detail; Lot Trace Receipt Detail; LOTR; LRRP; Manufacturing Order Line Item Detail; Manufacturing Order Receipt/Reverse; Material Shortages Detail; MCST; MOAN; MOFR; MOMI; MOMT; MORI; MORV; MSMT; Open Order Detail; OPSL; Order Completion Status; Order Cost Variance Status; Order Detail; Order Line Items; OVAR; Package Content; Packaging Detail; Packing List; PCMT; PCST; PICI; PICK; Picklist Detail; POAN; POAS; POMI; POMT; PORI; PORR; PORV; POSR; POVD; Pricing Maintenance + Test Order; Purchase Order Line Item Detail; Purchase Order Line Item Detail (CPMT); Purchase Order Line Items; Purchased Component Detail; Router/Traveler; Schedule Board;

SDAB; Serial Number List; SHIP; Shipment Allocation Detail; Shipment Allocation List; Shipments by Line Item; Shipping Allocation Batch; Shortages by Order; SHPL; STAD; Standard Product Detail; Supply Peg Detail; Transaction Detail; TRUD; VDSC; VPFR; WIPL; WIPR; WIPS

Ln# Sta

Line Number Status indicates the item's current position within the order process. **Line Number Statuses** are:

2 = Firm Planned or Quote.

Firm Planned: For forecast line number types (1, 2, 3), the item's order quantity and scheduled date are fixed and are not automatically changed. Quote: For custom product line number types (X), the order-dependent bill of material can be attached to the item, but component demands are ignored for planning purposes. This status may be selected for new orders only.

3 = Open.

The item's order quantity and scheduled date are fixed. The order-dependent bill of material is attached to the item.

4 = Released.

The item's order quantity and scheduled date are fixed. The order-dependent bill of material is attached to the item. The order and picklist can be printed and issues/ shipments can be made.

5 = Closed.

All required issues or shipments have been made for the item.

6 = Closed.

The order closure report has reported this order closure. This status is system-assigned.

7 = Closed.

The order is ready to be deleted from the active file and retained in order history. This status is system-assigned.

8 = Closed.

The order is ready to be deleted, but other line items on the same order have a **Ln# Sta** of less than 6. This status is system-assigned.

9 = Credit Hold.

The customer's credit limit has been exceeded or the order is placed on hold for another reason. The item is treated as an open order.

Line Number Status can only be incremented, except when reopening an order, which decrements **Line Number Status** from 5 to 4.

Where Used: COAN; COMI; COMT; CPMT; Custom Product Component Detail; Custom Product Detail; CWIP; Demand Peg Detail; JEST; Job Estimates and Performance Report; Material Shortages Detail; OPSL; PICI; PICK; Picklist Detail; Pricing Maintenance + Test Order; Purchased Component Detail; Shipments by Line Item; Standard Product Detail; Supply Peg Detail

Ln# Typ

Line Number Type determines the use of the item order quantity in planning, manufacturing and accounting. **Line Number Types** are:

A = Assemble-to-order.

Standard product. Reserved for future use.

C = Standard product

X = Custom product

1 = Customer Forecast Type 1.

2 = Customer Forecast Type 2.

3 = Customer Forecast Type 3.

B = By-product. Created as part of another order.

U = Tool return.

Created as part of another order.

P = Purchased (not available for customer orders)

Forecast line types are included in data extracts as **Ln# Typ = F**.

Where Used: CINV; COAN; COMI; COMT; CORV; CPMT; Custom Product Component Detail; Custom Product Detail; Customer Order; Customer Order Receipt/Reverse; CWIP; Demand Peg Detail; IHIR; JEST; Job Estimates and Performance Report; Material Shortages Detail; OPSL; Order Detail; OVAR; PICI; PICK; Picklist Detail; Pricing Maintenance + Test Order; Purchased Component Detail; Serial Number List; SHIP; Standard Product Detail; Supply Peg Detail; Transaction Detail

LS

Line Selector identifies the item used to determine the order price. **Line Selectors** are:

B = Catalog.

Catalog information is used for pricing.

Q = Quote.

Customer Item information is used for pricing.

S = Standard.

Item Master information is used for pricing.

Where Used: COMI; COMT; CPMT; Custom Product Component Detail; Custom Product Detail; JEST; Job Estimates and Performance Report; OPSL; Purchased Component Detail; Standard Product Detail; Transaction Detail

Ord Sta

Order Status indicates the order's current position within the order process. **Order Status** is automatically displayed for an order, based on the line number status of the line items attached to the order. The order status is the highest status of any of the active line items. When all line items are closed, the order changes to complete or closed. **Order Statuses** are:

1 = Preliminary.

The order header is identified and basic information is entered.

2 = Firm Planned.

All active line items have a **Ln# Sta** = 2 (firm planned).

3 = Open.

The highest **Ln# Sta** of all active line items is 3 (open).

4 = Released.

Paperwork is produced and receipts or issues can be made for at least one of the line items. The highest active **Ln# Sta** = 4 (released).

5, 6, 7 = Complete or Closed.

All required receipts, shipments or issues have been made for all the line items. Adding a line item to a completed order changes the **Order Status** to REL. All order line items are closed (**Ln# Sta** = 5, 6 or 7).

9 = Credit Hold.

The customer's credit limit has been exceeded or the order is placed on hold for another reason. The item is treated as an open order.

Where Used: COMI; COMT; Contract Purchase Orders; CORV; CPMT; Custom Product Component Detail; Custom Product Detail; Customer Order + Order Header; Customer Order Header Detail; Customer Order Receipt/Reverse; EDIX; IORD; JEST; Job Estimates and Performance Report; Manufacturing Order Line Item Detail; Manufacturing Order Receipt/Reverse; MCST; MOMI; MOMT; MORI; MORV; OPSL; Order Browse; ORST; PCST; PICI; PICK; Picklist Detail; POMI; POMT; PORI; PORV; Purchase Order Header Detail; Purchase Order Line Item Detail (CPMT); Router/Traveler; Shortages by Order; Standard Product Detail; WIPR

Order Ex Rate

Order Exchange Rate is the average exchange rate of all lines on the order. Since conversions for EMU member states require triangulation through the euro currency, a second order exchange rate may be displayed.

Where Used: COMI; COMT; Customer Order Header Detail; EXRU; Purchase Order Header Detail

Order Qty

Order Quantity is the number of items ordered at the specified unit of measure. Entry is up to 10 numbers.

Where Used: Available Pricing; CINV; COCD; COMI; COMT; Contract Header Detail; Contract Item Detail; Contract Item Detail/Pricing; CORV; CPMT; CSTU; Cumulative Detail; Custom Product Component Detail; Custom Product Detail; Customer Order; CWIP; Demand Peg Detail; IORD; IVPR; IVRR; JEST; Job Estimates and Performance Report; Line Item Details + Item; Manufacturing Order Line Item Detail; MCST; MOFR; MOMI; MOMT; MORI; MORV; MSMT; Open Order Detail; OPSL; Order Detail; Order Line Items; OVAR; Packing List; PCST; PICI; PICK; Picklist Detail; POCR; POMI; POMT; PORR; POSR; POVD; Pricing Maintenance + Test Order; Purchase Order Line Item Detail; Purchase Order Line Item Detail (CPMT); Purchase Order Line Items; Purchased Component Detail; SDAB; Shipment Allocation Detail; Shipments by Line Item; Standard Product Detail; Supply Peg Detail; Transaction Detail; VDSC; VPFR; WIPR; WIPS

Order Total

Order Total is the sum of the extended price of all line items. Any changes made to the order quantity or unit price of an item changes the Order Total calculation. If you use a multi-currency system, this is true for the controlling currency. For the non-controlling currency, the Order Total is the converted controlling currency amount.

Where Used: COMI; COMT; Customer Order + Order Totals; Customer Order Header Detail; EXRU; POMI; POMT; Pricing Maintenance + Test Order

Prom Dlvry

Promised Delivery is the date that the items are committed to be at the customer site. The transportation lead time is used with the **Promised Delivery** date to calculate the shipping date.

Where Used: Available Pricing; COCD; COMI; COMT; CPMT; Custom Product Component Detail; Custom Product Detail; EXRU; IORD; Job Estimates and Performance Report; OPSL; Purchased Component Detail; Standard Product Detail; Transaction Detail

RF

Replace Forecast indicates whether this customer order consumes forecast or is additive to forecast.

Y = Yes.

This customer order consumes forecast.

N = No.

This customer order is additive to forecast.

In the Sales Order Processing Module, X (select) = yes and blank = no.

Where Used: COMI; COMT; CPMT; Custom Product Component Detail; Custom Product Detail; Customer Order; Job Estimates and Performance Report; OPSL; Standard Product Detail

Rounding

Rounding represents the difference between the Total Lines value and the Order Total value on the order.

Where Used: COMI; COMT; Customer Order Header Detail; POMI; POMT

Ship to

Ship to is the delivery location. Entry is any alphanumeric combination of up to 60 characters.

Where Used: ARIP; Available Customer Shipments; Browse Setup (ship to); COMI; COMT; Customer Name/Address Detail; Customer Order Header Detail; IVIE; IVII; IVPR; IVRR; Lot Trace Issue Detail; Packing List; Purchase Order Header Detail; SHIP; Ship to Browse; Ship to Browse Detail; SHPL

Ship to Id

Ship to Identification is the identification assigned to the delivery location. Entry is any alphanumeric combination of up to 13 characters.

Where Used: Available Customer Shipments; Browse Setup (ship to); COMI; COMT; Cumulative Detail; Customer Name/Address Detail; Customer Order + Order Header; Customer Order Header Detail; Inbound Conversion Detail; IVIE; IVII; Line Item Detail; Lot Trace Issue Detail; MPED; Order Detail; Outbound Conversion Detail; PCMT; SBOL; SHIP; Ship to Browse; Ship to Browse Detail; SHPI; SHPL; STAD; Transaction Detail

Ship Via

Ship Via specifies the transportation for the items on the order. Entry is any alphanumeric combination of up to 30 characters.

Where Used: COMI; COMT; Customer Master; Customer Order + Shipping; Customer Order Header Detail; IVIE; IVII; IVPR; IVRR; Packing List; Preferences + General; Pricing Maintenance + Test Order; Shipping Detail; STAD; Trade Class + General; Transaction Detail

ST

Source Type is the user-defined code that identifies the customer price-book preference or the origin of the customer demand such as domestic, international and so on.

Where Used: Available Pricing; COMI; COMT; Customer Order; Job Estimates and Performance Report; Pricing Maintenance + Test Order

St

State is the identification of the state or province associated with an address. Entry is any alphanumeric combination of up to 10 characters.

Where Used: A/P Payment Detail; APTP; Available Customer Shipments; CNFG; CNFI; COCD; COMI; COMT; Customer + Address; Customer Browse Detail; Customer Name/Address Detail; Customer Order Header Detail; DISI; DIST; ISVI; IVIE; IVII; Name, Address & Contacts; Payee Detail; Payer Detail; Pricing Maintenance + Test Order; Purchase Order Header Detail; QSRC; SBOL; SHIP; Ship to Browse; Ship to Browse Detail; Vendor Browse Detail; Vendor Master Detail; VSDI; VSDT

Starting Ln#

The **Starting** field is used to request a list where the specified information appears first on the list. **Starting** entries may consist of a partial entry and if the entry is not in the list, the next highest entry appears first on the list. The **Starting** field can include one or more field combinations, each with its own entry requirements.

Where Used: A/P 1099 Distribution; A/P Payment Application Detail; A/P Payment Void Detail; A/P Received Item List; A/P Receiving Detail; A/R Payment Application Detail; APAH; APDS; APEX; APID; APIE; APII; APIR; APIV; APPA; APPD; APPI; APPO; APTX; ARAH; ARCD; AREX; ARIC; ARIH; ARPD; ARPH; ARSR; BAMT; Bank Payment Approval; BILL; BILL; BKMT; Browse Setup (customer); Browse Setup (item); Browse Setup (vendor); CACF; CCAN; CCAT; CCEX; CCMT; CIMT; CMCF; CMTA; CMTI; CNFA; COAN; COMI; COMT; Contract Item Detail/Pricing; CORV; CPMT; CUID; CUII; CUSI; CUST; FCMT; FCST; G/L Account Group/No List; G/L Account No List; G/L Batch Detail; G/L Journal Entry List; G/L Master Account Recap; G/L Org No List; G/L Org/Acct Group List; G/L Organization Group/No List; G/L Report List; G/L Source Code List; GLAG; GLAV; GLBD; GLCA; GLCI; GLDQ; GLEX; GLGQ; GLJD; GLJE; GLJI; GLJP; GLJR; GLMA; Global Extended Text Selection; GLOS; GLRD; GLRL; GLSC; GLSI; GLSS; ITBI; ITCB; Item Master; Item Shortages; ITMB; ITMI; ITPB; ITPI; IVCO; IVIA; IVIE; IVII; IVRV; LMMT; Location Selection Setup; MCST;

MOAN; MOMI; MOMT; MORI; MORV; MPED; MPIT; MSMT; NMTA; OPSL; Orders on Shipment; ORST; Packaging Detail; PASS; PBCI; PBCT; PBMI; PBMT; PCMT; PCST; PICI; PICK; POAN; POAS; POCI; POCT; POMI; POMT; PORI; PORV; REDI; RTMT; RVED; SBOL; Selection Setup; Serial Number List; Serial Numbers Shipped; SHIP; Shipments by Line Item; SHPI; SSII; STAD; SUND; SUNR; SUPD; SUPR; TEXT; TXTA; VAT Summary (APSM Module); VATT; VEDI; VEID; VEND; VENI; Workcenter Master

Terms

Standard Terms identify the terms of payment for this order. **Standard Terms** can be chosen from one of three types:

D = Discount Days.

This is a payment schedule that allows discounts for early payment:

Category	Description
Cash %	The percentage discount allowed if payment is made within the number of days indicated by Cash Days .
Cash Days	The number of days allowed to take advantage of the discount specified by Cash % . Entry is up to 3 numbers.
Net Date	The specific date when payment is expected before the account is considered delinquent or discount opportunity is lost. Entry is 6 numbers in your system date format.
Discount	Discount amount allowed.
Net Days	The number of days allowed for payment before the account is considered delinquent. Entry is up to 3 numbers.
Lost?	Indicates whether a cash discount is still available for an invoice. Y = Yes . The invoice has passed the cash discount deadline. N = No . The invoice has not passed the cash discount deadline.

M = Monthly Account.

This is a payment schedule that defines a specific day of the month that payments are due:

Category	Description
Due Day	The day of the month on which payments are due. Entry is the range 1-31.
Cutoff Day	The day of the month the invoice must be produced to qualify for payment on the next monthly due date. Entry is the range 1-31.
Months Delay	The number of months to delay the normal due date. Entry is the range 0-99.

S = Specific Terms.

This allows multiple payment amounts and due dates to be specified when an invoice is created to allow an installment payment schedule to be specified.

Category	Description
Pay #	The date due and amount of the payment term.
Net	The day the net amount is due. Default is 30 days from invoice creation.

Where Used: A/P Invoice Matching Detail; A/P Payment Detail; A/P Receiving Detail; APID; APIE; APIH; APII; APPA; APPO; ARCR; ARIH; COMI; COMT; Contract Header Detail; Customer Financial Detail; Customer Order Header Detail; DISI; DIST; ISVI; IVCO; IVIE; IVII; IVPR; IVRR; Packing List; POCR; Purchase Order Header Detail; QSRC; Standard Terms; Vendor Browse Detail; Vendor Master Detail; VSDI; VSDT

Total Lines

Total Lines represents the sum of all the line items on the customer order.

Where Used: COMI; COMT; Customer Order Header Detail

Total Non-ATP Inventory

Total Non-ATP is the total item stock saved in the locations where the **Included in ATP** field is set to *N* on the LMMT (Location Master) screen, including On-hand and Inspection items.

Where Used: MPSS; Supply Peg Detail

Tr LT

Transportation Lead Time is the number of working days normally required to transport items to the customer. **Transportation Lead Time** is used to calculate the shipping date based on the **Prom Divry** date. Entry is up to 2 numbers.

Where Used: COMI; COMT; CPMT; Custom Product Component Detail; Custom Product Detail; Job Estimates and Performance Report; OPSL; Purchased Component Detail; Standard Product Detail; Transaction Detail

UM

Unit of Measure identifies the standard unit for an item used in the manufacturing process. Entry is up to 4 alphanumeric characters.

Where Used: A/P PO/Inv Variance by Invoice; A/P Receiving Detail; APEX; APPI; APPV; APUV; Available for Shipping Allocation Batch; AVII; AVIT; BILL; BILL; Bill of Material; Bill of Material Detail; CCAT; CINV; CMLB; COBK; COMI; COMT; Contract Header Detail; Contract Item Detail; Contract Item Detail/Pricing; CORV; Costed Bill Detail; CPMT; CSLB; Custom Product Component Detail; Custom Product Detail; Customer Order; Customer Order Line Price Adjustment; Customer Order Receipt/Reverse; CWIP; Demand Peg Detail; Engineering; FCST; ICCR; IHIR; INVA; Inventory Allocation; INVR; IORD; IPPD; ITBI; ITCB; ITCI; Item + Quantity; Item Availability + Quantity; Item Browse Detail; Item History; Item Lot Receipt; Item Lot Trace and Serialization Detail; Item Master; Item Master Detail; Item Master Planning Detail; Item Responsibility Assigned Results; Item Shortages; ITHC; ITHR; ITMB; ITMC; ITMI;

ITPB; ITPI; IVPR; IVRR; JEST; Job Estimates and Performance Report; Lead Times Assigned Results; LEXP; LHis; Line Item Details + Item; LMSI; LMST; Location Index; Lot Detail; Lot Trace; Lot Trace Issue Detail; Lot Trace Receipt Detail; LOTR; LVAL; Manufacturing Order Line Item Detail; Manufacturing Order Receipt/Reverse; Material Exposure; MBIL; MCST; MOMI; MOMT; MORI; MORV; MPIT; MPSR; MPSS; MSMT; Multi-Currency; Multi-Level Bill; Multi-Level Where Used; MUSE; Open Order Detail; OPSL; Order Completion Status; Order Cost Variance Status; Order Detail; Order Line Items; OVAR; Packaging Detail; Packing List; Partner Item Detail; PBCI; PBCT; PCST; PICI; PICK; Picklist Detail; POCl; POCR; POCT; POMI; POMT; PORI; PORR; PORV; POSR; POVD; Pricing Maintenance + Action Detail; Pricing Maintenance + Action List; Pricing Maintenance + Test Order; Production; Purchase Order Line Item Detail; Purchase Order Line Item Detail (CPMT); Purchase Order Line Items; Purchase Order Receipt History; Purchased Component Detail; QUOI; QUOT; Router/Traveler; SDAB; SDAL; Shipment Allocation Detail; Shipments by Line Item; Shipping Allocation Batch; Shipping Detail; Shortages by Order; SHPL; Single-Level Configuration Bill of Material Report; SSII; SSIL; Standard Costs Assigned Results; Standard Product Detail; Summarized Bill; Supply Peg Detail; Transaction Detail; VDII; VDIT; VDSC; VEIT; Vendor/Item Detail; VETI; VPRF; Where Used; WIPR; Workcenter Master; WUSE

Unit Price

Unit Price is the price per unit of the item being ordered. Entry up to 16 numbers. Decimals are allowed.

Where Used: Advance Ship Notice Line; Allowance/Charge Detail (Detail); APEX; Available Pricing; COMI; COMT; Contract Item Detail; Contract Item Detail/Pricing; CPMT; Cumulative Detail; Custom Product Component Detail; Custom Product Detail; FCST; Inventory Adjustment Application; Invoice Line Item Detail; Item Availability; IVIE; IVII; IVPR; IVRR; JEST; Job Estimates and Performance Report; MPSR; MPSS; Open Order Detail; OPSL; PCST; POMI; POMT; POVD; Pricing Maintenance + Test Order; Purchase Order Line Item Detail; Purchase Order Line Item Detail (CPMT); Purchase Order Receipt History; Quantity Breakpoints and Price Formulas; Quantity Breaks and Expedite Fees; Standard Product Detail; Transaction Detail; VDSC

Zip

Zip Code is the postal delivery number associated with an address. Entry is any alphanumeric combination of up to 12 characters.

Where Used: A/P Payment Detail; Available Customer Shipments; CNFG; CNFI; COCD; COMI; COMT; Customer Browse Detail; Customer Name/Address Detail; Customer Order Header Detail; DISI; DIST; ISVI; IVIE; IVII; Name, Address & Contacts; Payee Detail; Payer Detail; Pricing Maintenance + Test Order; Purchase Order Header Detail; QSRC; SBOL; SHIP; Ship to Browse; Ship to Browse Detail; Vendor Browse Detail; Vendor Master Detail; VSDI; VSDT

Item Book And Breakpoint Select

The Item Book And Breakpoint Select window is opened from the **Unit Price** field on the COMT (Customer Order) or CPMT (Custom Product Maintenance) screen. The Item Book And Breakpoint Select window identifies the price books that contain the ordered item and are associated with, and in effect for, the customer. Pending price book display is based on parameters specified on the Advanced Price Book Configuration window.

- Use the Item Book And Breakpoint Select window to select a price book.
- Use the related Quantity Breaks and Expedite Fees window to select a unit price for the item.

The Item Book And Breakpoint Select window is available once the Advanced Price Book Module (APBM) is installed. Press ALT+F8 in the **Unit Price** field to open the window.

Format

When you first open the Item Book And Breakpoint Select window, the line marker is positioned on the price book that provides the lowest **Unit Price** for the **Order Qty**, based on the following criteria:

- The price book contains the item and has valid **Price Book Effectivity** dates.
- The price book is used by the customer and has valid **Customer Effectivity** dates. These effectivity dates can be disabled using the **Disable** fields on the Advanced Price Book Configuration window.
- The displayed **Unit Price** and **Expedite Fee** reflect the applicable breakpoint based on the **Order Qty**.

Several features on the Item Book And Breakpoint Select window are controlled by parameters defined on the Advanced Price Book Configuration window.

- Pending price books are displayed when the **Price Book In Effectivity** date is within a user-specified number of days of the current system date. In this way, customers can be advised of the impact of pending price changes. Price books are flagged as **Pending** next to the effectivity dates.
- The **Unit Price** can be selected from a pending price book when the **Price Book In Effectivity** date is within a user-specified number of days of the current system date.
- The **ST** (source type) field for a line item on the COMT (Customer Order) screen can be matched to the customer preferred priced book. The **Customer Preference** identifier must first be specified when the price book and customer relationship is established.

The **SP** (*special*) field is displayed for special promotion price books. The **SP** field corresponds to the **Customer Sp** field. The **Customer Sp** field is specified when establishing a price book-customer relationship.

The **Pending** field is displayed when the price book effectivity date falls within the range specified on the Advanced Price Book Configuration window.

The following dates should be compared to the **Price Book Effectivity** dates and the **Customer Effectivity** dates to determine the applicability of a price book:

- order date (system date)
- **Ship Date**
- **Prom Dlvry** date

Additional Information

Window / Action	Available From	Shortcut Key(s)
Quantity Breaks and Expedite Fees	Any location on the screen	Enter

Web Links

If you use Web UI, you can link to other screens by clicking tabs or hyperlinks.

Go to Screen...	By clicking...
ITMB (Item Master)	Screen label: Item
SSII (Stock Status Inquiry by Item)	Screen label: Item
ITMC (Item/Work Center Cost Data)	Screen label: Item
ITPB (Item Price Book)	Screen label: Item
WUSE (Single Level Where Used Inquiry)	Screen label: Item
PBMT (Price Book Master)	Screen label: Price Book Name

Fields

Description

Item Description identifies the item in terms of its characteristics. When space is limited, a partial description is displayed. Entry is any alphanumeric combination of up to 70 characters.

Description

Price Book Description identifies the price book in terms of its characteristics. When space is limited, a partial description is displayed.

In Effectivity

Price Book In Effectivity Date is the date the price book becomes effective.

Item

Item is the unique identifier for a part, whether it be a piece part, tool, raw material, an assembly or finished product. All items are set up using the ITMB screen. Within a product structure, an item can be a component as well as a parent. Entry is any alphanumeric combination of up to 30 characters.

Order Qty

Order Quantity is the number of items ordered at the specified unit of measure. Entry is up to 10 numbers.

Out Effectivity

Price Book Out Effectivity Date is the last date that the price book is effective.

Price Book Name

Price Book Name is the unique identifier for a price book. Entry is any alphanumeric combination of up to 15 characters.

Prom Dlvry

Promised Delivery is the date that the items are committed to be at the customer site. The transportation lead time is used with the **Promised Delivery** date to calculate the shipping date.

SP

Customer Special designates that the price book used by the customer is a special promotion. The price book is flagged as special on the Available Pricing window. Entry is 1 alphanumeric character.

ST

Source Type is the user-defined code that identifies the customer price-book preference or the origin of the customer demand such as domestic, international and so on.

Unit Price

Unit Price is the price per unit of the item being ordered. Entry up to 16 numbers. Decimals are allowed.

Customer Order Header Detail

Use this screen to enter text to further define any special conditions associated with the customer order to be printed on the order acknowledgment. The Customer Order Header Detail screen can also be used to add tax and sales category information to the order, and change price and commission information on an order-by-order basis. The Customer Order Header Detail screen is replaced by the Customer Order application once the SOPM Module is installed.

For transactions that require triangulation through the euro currency, the floating exchange rate between the euro currency and the non-member currency can only be modified if the transaction is rate controlled (**Ctrl Curr = R**) and there are no lines on the order. The fixed exchange rate between the euro currency and the member state cannot be modified.

Features

Transportation Shortcuts

You can use shortcut keys or transport buttons to go to the following related screens.

Destination	Shortcut Key(s)
Previous screen	F8

Browse Windows

You can open browse windows by choosing **Browse/Detail** from the **Tools** menu in the following fields:

Browse	From Fields
Commission Code Browse	Commission Code

For more information, see "Selecting from a Browse List" in the Fourth Shift Basics manual.

Additional Information

Window	Available From	Shortcut Key(s)
Currency Information	Any location on the screen	ALT+C
Extended Text	Any location on the screen	ALT+T

Web Links

If you use Web UI, you can link to other screens by clicking tabs or hyperlinks.

Go to Screen...	By clicking...
Customer Order	Tab at top of screen

Go to Screen...	By clicking...
CMTA (Commission Code Table)	Screen label: Commission Code
COAN (Customer Order Action)	Screen label: Csr
COCD (Customer Orders by Customer Id)	Screen label: Id
CUID (Customer Master by Customer Id)	Screen label: Id
CCOT (Customer Contact Master)	Screen label: Cust Id

Reports

A standard report is not generated for this screen. Use the Print Screen key or any screen capture program to create an image of the screen.

Fields

Addr

Address is the first and second lines of information identifying a location. Each line entry is any alphanumeric combination of up to 60 characters.

Where Used: A/P Payment Detail; Available Customer Shipments; CNFG; CNFI; COCD; COMI; COMT; Customer + Address; Customer Browse Detail; Customer Name/Address Detail; Customer Order Header Detail; DISI; DIST; ISVI; IVIE; IVII; Name, Address & Contacts; Payee Detail; Payer Detail; Purchase Order Header Detail; QSRC; SBOL; SHIP; Ship to Browse; Ship to Browse Detail; VDSC; Vendor Browse Detail; Vendor Master Detail; VSDI; VSDT

C

Country is the name of the country associated with an address. Entry is any alphanumeric combination of up to 15 characters.

Where Used: A/P Payment Detail; Available Customer Shipments; CNFG; CNFI; COCD; COMI; COMT; Customer + Address; Customer Browse Detail; Customer Name/Address Detail; Customer Order Header Detail; DISI; DIST; ISVI; IVIE; IVII; Name, Address & Contacts; Payee Detail; Pricing Maintenance + Test Order; Purchase Order Header Detail; QSRC; SBOL; SHIP; Ship to Browse; Ship to Browse Detail; Vendor Browse Detail; Vendor Master Detail; VSDI; VSDT

Certificate No

Certificate Number is the tax exemption certificate number. Entry is any alphanumeric combination of up to 20 characters.

Where Used: Customer + Financial; Customer Name/Address Detail; Customer Order + Taxes; Customer Order Header Detail; Ship to Browse Detail

City

City is the name of the city associated with an address. Entry is any alphanumeric combination of up to 15 characters.

Where Used: A/P Payment Detail; Available Customer Shipments; CNFG; CNFI; COCD; COMI; COMT; Customer + Address; Customer Browse Detail; Customer Name/Address Detail; Customer Order Header Detail; DISI; DIST; ISVI; IVIE; IVII; Name, Address & Contacts; Payee Detail; Payer Detail; Purchase Order Header Detail; QSRC; SBOL; SHIP; Ship to Browse; Ship to Browse Detail; Vendor Browse Detail; Vendor Master Detail; VSDI; VSDT

CO Amount

Order Total is the sum of the extended price of all line items. Any changes made to the order quantity or unit price of an item changes the Order Total calculation. If you use a multi-currency system, this is true for the controlling currency. For the non-controlling currency, the Order Total is the converted controlling currency amount.

Where Used: COMI; COMT; Customer Order + Order Totals; Customer Order Header Detail; EXRU; POMI; POMT; Pricing Maintenance + Test Order

CO Number

Customer Order Number is the user-defined identifier for a customer order. Entry is any alphanumeric combination of up to 30 characters.

Where Used: Advance Ship Notice Line; Advance Ship Notice Order Detail; Available for Shipping Allocation Batch; COAN; COCD; COMI; COMT; CORV; CPMT; Custom Product Component Detail; Custom Product Detail; Customer + Credit; Customer Order; Customer Order + Order Header; Customer Order Header Detail; Customer Order Line Price Adjustment; Customer Order Receipt/Reverse; CWIP; Demand Peg Detail; GASN; Inventory Allocation; IVPR; IVRR; JEST; Job Estimates and Performance Report; Material Shortages Detail; MOAN; MSMT; OPSL; Order Detail; Orders on Shipment; Package Content; Packaging Detail; PICI; PICK; Picklist Detail; PORI; PORV; Pricing Maintenance + Test Order; Purchased Component Detail; Serial Number List; SHIP; Shipment Allocation Detail; Shipment Order Detail; Shipping Allocation Batch; SHPI; SHPL; STAD; Standard Product Detail; Supply Peg Detail

CO Rev Date

Customer Order Revision Date is the date of the last change made to the customer order. The **Customer Order Revision Date** is changed to the system date when the customer order is revised.

Where Used: COMI; COMT; CORV; CPMT; Custom Product Component Detail; Custom Product Detail; Customer Order Header Detail; Customer Order Receipt/Reverse; CWIP; JEST; Job Estimates and Performance Report; Line Item Details + Custom Product; OPSL; PICI; PICK; Picklist Detail; Standard Product Detail

Commission Code

Commission Code is the user-defined identifier for salespersons' commissions. The overall commission for a sale is calculated at the time of invoicing. Entry is any alphanumeric combination of up to 3 characters.

Where Used: ARIR; CMTA; CMTI; Custom Product Detail; Customer + General; Customer Browse Detail; Customer Name/Address Detail; Customer Order + Order Detail; Customer Order Header Detail; Inventory Adjustment Application; Invoice Line Item Detail; IVCO; IVIE; IVII; Line Item Details + General; Pricing Maintenance + Test Order; Standard Product Detail

Credit Balance

Credit Balance is the amount of credit available based on the **Credit Limit** decreased by the sum of outstanding accounts receivable and orders not yet shipped.

Where Used: COMI; COMT; Customer Browse Detail; Customer Order Header Detail

CSR

Customer Service Representative identifies the person responsible for handling this customer's account. Entry is any alphanumeric combination of up to 3 characters.

Where Used: COAN; COMI; COMT; CORV; CPMT; CUID; CUII; CUSI; CUST; Custom Product Component Detail; Custom Product Detail; Customer + General; Customer Browse Detail; Customer Financial Detail; Customer Name/Address Detail; Customer Order + Order Detail; Customer Order Header Detail; Customer Order Receipt/Reverse; Demand Peg Detail; Global Settings; IVPR; IVRR; JEST; Job Estimates and Performance Report; Material Shortages Detail; MPED; MSCF; OPSL; ORST; PICI; PICK; Picklist Detail; Pricing Maintenance + Test Order; REDI; RVED; STAD; Standard Product Detail; Transaction Detail

Ctrl Curr

Controlling Currency identifies which currency is constant (does not change with exchange rate fluctuations) for an order or invoice. A default **Controlling Currency** can be established for each vendor or customer, but it can also be changed for each order or invoice. Entry options include:

L = Local.

Local prices do not change with exchange rate fluctuations.

F = Foreign.

Foreign prices do not change with exchange rate fluctuations.

R = Rate.

A fixed rate is established between trading partners for orders and invoices. The rate-controlled currency is treated like foreign controlled for customer orders or A/R invoices and local controlled for purchase orders or A/P invoices. The fixed rate does not change with exchange rate fluctuations.

Where Used: APCR; APCW; APID; APIE; APII; APIP; APPA; APRG; APRL; APRQ; ARCR; ARIP; COMI; COMT; Contract Header Detail; Customer + General; Customer Financial Detail; Customer Order + Order Totals; Customer Order Header Detail; EXRU; IVIE; IVII; IVPP; Open Order Detail; POCI; POCR; POCT; POMI; POMT; Purchase Order Header Detail; Vendor Invoice Browse; Vendor Master Detail

Cust Id

Customer Identification is the identification number assigned to a customer. Entry is any alphanumeric combination of up to 13 characters.

Where Used: Advance Ship Notice Carrier Detail; Advance Ship Notice Shipment Detail; ARAH; ARCD; ARCJ; ARCP; ARCR; AREX; ARIC; ARIH; ARIP; ARIR; ARPD; ARPH; ARRJ; ARSC; ARSR; ARST; ARTB; ARTX; Available Customer Shipments; Available for Shipping Allocation Batch; Browse Setup (customer); Browse Setup (order); CIMT; CINV; COAN; COBK; COCD; COMI; COMT; CORV; COYE; CPMT; CUID; CUII; Cumulative Detail; CUPB; CUPI; CUSI; CUST; Custom Product Component Detail; Custom Product Detail; Customer; Customer Browse; Customer Browse Detail; Customer Financial Detail; Customer Invoice List; Customer Item + General; Customer Name/Address Detail; Customer Order; Customer Order + Order Header; Customer Order Header Detail; Customer Order Receipt/Reverse; Customer Payment List; Demand Peg Detail; EDIX; EXRU; G/L Distribution (ARSM Module); GASN; Inbound Conversion Detail; Inventory Adjustment Application; Invoice Header Detail; Invoice Line Item Detail; IORD; IVCO; IVIA; IVIE; IVII; IVPP; IVPR; IVRR; IVRV; JEST; Job Estimates and Performance Report; Lot Trace Issue Detail; Lot Trace Receipt Detail; Material Shortages Detail; MOAN; MPED; MPIT; MSMT; OPSL; Order Browse; Order Detail; ORST; Outbound Conversion Detail; Partner Item Detail; PCMT; PICI; PICK; Picklist Detail; Pricing Maintenance + Items/Customers; Pricing Maintenance + Test Order; SBOL; Serial Number List; SHIP; Ship to Browse; Ship to Browse Detail; Shipment Allocation Detail; Shipment Allocation List; Shipping Allocation Batch; SHPI; SHPL; STAD; Standard Product Detail; Supply Peg Detail; Transaction Detail

Customer Name/Address

Customer Name is the name of a customer. Entry is any alphanumeric combination of up to 60 characters.

Where Used: ARAH; ARCD; ARCJ; ARCR; AREX; ARIC; ARIH; ARIP; ARIR; ARPD; ARPH; ARRJ; ARSC; ARSR; ARTB; ARTX; Available Customer Shipments; Browse Setup (customer); Browse Setup (order); CIMT; COBK; COCD; COMI; COMT; CORV; COYE; CPMT; CUID; CUII; CUPB; CUPI; CUSI; CUST; Custom Product Component Detail; Custom Product Detail; Customer; Customer + Address; Customer + General; Customer Browse; Customer Browse Detail; Customer Financial Detail; Customer Invoice List; Customer Item + General; Customer Name/Address Detail; Customer Order; Customer Order Header Detail; Customer Order Receipt/Reverse; Customer Payment List; EDIX; EXRU; G/L Distribution (ARSM Module); IVCO; IVIA; IVPP; JEST; Job Estimates and Performance Report; Lot Trace Issue Detail; Lot Trace Receipt Detail; OPSL; Order Browse; Order Detail; ORST; PICI; PICK; Picklist Detail; Pricing Maintenance + Test Order; SBOL; Serial Number List; SHIP; Ship to Browse Detail; Shipment Allocation List; Shipping Detail; SHPI; SHPL; STAD; Standard Product Detail

Customer PO Number

Customer Purchase Order Number is the identification used by the customer when referring to this order. Entry is any alphanumeric combination of up to 30 characters.

Where Used: Advance Ship Notice Item Detail; Advance Ship Notice Order Detail; Advance Ship Notice Shipment Detail; ARCR; ARIC; ARIP; COCD; COMI; COMT; CORV; Cumulative Detail; Customer Invoice List; Customer Order + Order Header; Customer Order Header Detail; GASN; Invoice Header Detail; IVPR; IVRR; Job Estimates and Performance Report; Line Item Detail; Orders on Shipment; Packing List; PCMT; SHIP; Shipment Order Detail; SHPI

Default Tax Exempt Reason

Exempt indicates whether or not the customer pays taxes on purchases for this line item and taxing authority. **Exempt** is established for the customer but can be changed for each line item.

N = No.

The purchase is not tax-exempt.

Y = Yes.

The purchase is tax-exempt.

0 = User Defined

1 = User Defined

2 = User Defined

3 = User Defined

4 = User Defined

5 = User Defined

6 = User Defined

7 = User Defined

8 = User Defined

9 = User Defined

Where Used: ARTX; Custom Product Detail; Customer + Financial; Customer Name/Address Detail; Customer Order + Taxes; Customer Order Header Detail; Invoice Line Item Detail; IVIE; IVII; Line Item Details + Taxes; Ship to Browse Detail; Standard Product Detail

Ext Text

Extended Text identifies whether an extended text message exists for this information.

Where Used: Contract Header Detail; Contract Item Detail; Contract Item Detail/Pricing; Custom Product Detail; Customer Financial Detail; Customer Order Header Detail; Invoice Header Detail; Order Line Items; POCR; Purchase Order Header Detail; Purchase Order Line Item Detail; Purchase Order Line Items; SBOL; Standard Product Detail

FOB

Free on Board Point identifies the location where the buyer takes title of the shipped items. Entry is any alphanumeric combination of up to 20 characters.

Where Used: COMI; COMT; Customer Browse Detail; Customer Name/Address Detail; Customer Order + Shipping; Customer Order Header Detail; IVIE; IVII; IVPR; IVRR; Packing List; Preferences + General; Purchase Order Header Detail; Trade Class + General; Transaction Detail

Frft Code

Freight Charge Code identifies the method of charging the customer for freight. **Freight Charge Codes** are:

0 = Paid.

Freight costs are paid.

1 = Invoice.

Prepay freight and add to invoice.

2 = Customer.

Carrier collects freight costs from customer.

Where Used: COMI; COMT; Customer Browse Detail; Customer Name/Address Detail; Customer Order Header Detail; Pricing Maintenance + Test Order; SHIP; Shipment Order Detail; Transaction Detail

Function

Function codes are four-character abbreviations for screen names. Each screen has a unique code used for identification and transportation. For example, ITMB identifies the Item Master screen. Entry is 4 alphanumeric characters.

Where Used: screens and reports

Inv/COD

Invoice or Cash on Delivery indicates the method of collecting payment from the customer for charges related to this customer order. Entry options include:

1 = Invoice.

Invoice for payment.

2 = COD.

Collect payment upon delivery.

Where Used: COMI; COMT; Customer Order Header Detail; Shipment Order Detail; Transaction Detail

Line Items This Order

Line Items this Order is the total count of line items on the order. The total count automatically reflects any additions or deletions of items on the order.

Where Used: COMI; COMT; CORV; Customer Order Header Detail; MOMI; MOMT; MORI; MORV

Ord Sta

Order Status indicates the order's current position within the order process. **Order Status** is automatically displayed for an order, based on the line number status of the line items attached to the order. The order status is the highest status of any of the active line items. When all line items are closed, the order changes to complete or closed. **Order Statuses** are:

1 = Preliminary.

The order header is identified and basic information is entered.

2 = Firm Planned.

All active line items have a **Ln# Sta** = 2 (firm planned).

3 = Open.

The highest **Ln# Sta** of all active line items is 3 (open).

4 = Released.

Paperwork is produced and receipts or issues can be made for at least one of the line items. The highest active **Ln# Sta = 4** (released).

5, 6, 7 = Complete or Closed.

All required receipts, shipments or issues have been made for all the line items. Adding a line item to a completed order changes the **Order Status** to REL. All order line items are closed (**Ln# Sta = 5, 6 or 7**).

9 = Credit Hold.

The customer's credit limit has been exceeded or the order is placed on hold for another reason. The item is treated as an open order.

Where Used: COMI; COMT; Contract Purchase Orders; CORV; CPMT; Custom Product Component Detail; Custom Product Detail; Customer Order + Order Header; Customer Order Header Detail; Customer Order Receipt/Reverse; EDIX; IORD; JEST; Job Estimates and Performance Report; Manufacturing Order Line Item Detail; Manufacturing Order Receipt/Reverse; MCST; MOMI; MOMT; MORI; MORV; OPSL; Order Browse; ORST; PCST; PICI; PICK; Picklist Detail; POMI; POMT; PORI; PORV; Purchase Order Header Detail; Purchase Order Line Item Detail (CPMT); Router/Traveler; Shortages by Order; Standard Product Detail; WIPR

Order Ex Rate

Order Exchange Rate is the average exchange rate of all lines on the order. Since conversions for EMU member states require triangulation through the euro currency, a second order exchange rate may be displayed.

Where Used: COMI; COMT; Customer Order Header Detail; EXRU; Purchase Order Header Detail

Price Adjustment

Price Adjustment is the percentage discount allowed or surcharge placed on an order from this customer. The value in this field is used to calculate the Unit Price for an item on an order line. **Price Adjustment** indicators for screen or import data entry are:

S = Surcharge

D = Discount

Entry is up to 99.99 percent with a fixed decimal place.

The entry for a surcharge price adjustment will add the price adjustment percent to 100%. The entry for a discount price adjustment will subtract the price adjustment percent from 100%.

Where Used: Allowance/Charge Detail (Detail); Custom Product Detail; Customer + Financial; Customer Browse Detail; Customer Name/Address Detail; Customer Order + Order Detail; Customer Order Header Detail; Line Item Details + General; Pricing Maintenance + Test Order; Standard Product Detail

Rounding

Rounding represents the difference between the Total Lines value and the Order Total value on the order.

Where Used: COMI; COMT; Customer Order Header Detail; POMI; POMT

Sales Categories

Sales Categories are user-defined groups of customers or products that may be totaled together. Entry is any alphanumeric combination of up to 3 characters.

Where Used: Customer Order + Order Detail; Customer Order Header Detail; Invoice Header Detail; Pricing Maintenance + Test Order

Ship to

Ship to is the delivery location. Entry is any alphanumeric combination of up to 60 characters.

Where Used: ARIP; Available Customer Shipments; Browse Setup (ship to); COMI; COMT; Customer Name/Address Detail; Customer Order Header Detail; IVIE; IVII; IVPR; IVRR; Lot Trace Issue Detail; Packing List; Purchase Order Header Detail; SHIP; Ship to Browse; Ship to Browse Detail; SHPL

Ship to Id

Ship to Identification is the identification assigned to the delivery location. Entry is any alphanumeric combination of up to 13 characters.

Where Used: Available Customer Shipments; Browse Setup (ship to); COMI; COMT; Cumulative Detail; Customer Name/Address Detail; Customer Order + Order Header; Customer Order Header Detail; Inbound Conversion Detail; IVIE; IVII; Line Item Detail; Lot Trace Issue Detail; MPED; Order Detail; Outbound Conversion Detail; PCMT; SBOL; SHIP; Ship to Browse; Ship to Browse Detail; SHPI; SHPL; STAD; Transaction Detail

Ship Via

Ship Via specifies the transportation for the items on the order. Entry is any alphanumeric combination of up to 30 characters.

Where Used: COMI; COMT; Customer Order + Shipping; Customer Order Header Detail; IVIE; IVII; IVPR; IVRR; Packing List; Preferences + General; Pricing Maintenance + Test Order; Shipping Detail; STAD; Trade Class + General; Transaction Detail

St

State is the identification of the state or province associated with an address. Entry is any alphanumeric combination of up to 10 characters.

Where Used: A/P Payment Detail; APTP; Available Customer Shipments; CNFG; CNFI; COCD; COMI; COMT; Customer + Address; Customer Browse Detail; Customer Name/Address Detail; Customer Order Header Detail; DISI; DIST; ISVI; IVIE; IVII; Name, Address & Contacts; Payee Detail; Payer Detail; Pricing Maintenance + Test Order; Purchase Order Header Detail; QSRC; SBOL; SHIP; Ship to Browse; Ship to Browse Detail; Vendor Browse Detail; Vendor Master Detail; VSDI; VSDT

Tax Code

Tax Code is the user-defined identifier for the federal, state, county or municipal taxing authority. Entry is any alphanumeric combination of up to 2 characters for federal and state **Tax Codes**. Entry is any alphanumeric combination of up to 3 characters for county and municipal **Tax Codes**.

Where Used: ARTX; Customer Name/Address Detail; Customer Order Header Detail; Invoice Header Detail; IVCO; Ship to Browse Detail; TXTA

Tax Rate

Tax Rate is the rate at which the taxing authority calculates taxes based on taxable sales. A **Tax Rate** is associated with each **Tax Code**. Entry is the range of .000 through 99.999. An entry of .000 will result in no tax being computed.

Where Used: Customer + Financial; Customer Name/Address Detail; Customer Order + Taxes; Customer Order Header Detail; Invoice Header Detail; Line Item Details + Taxes; Ship to Browse Detail; TXTA

Terms

Standard Terms identify the terms of payment for this order. **Standard Terms** can be chosen from one of three types:

D = Discount Days.

This is a payment schedule that allows discounts for early payment:

Category	Description
Cash %	The percentage discount allowed if payment is made within the number of days indicated by Cash Days .
Cash Days	The number of days allowed to take advantage of the discount specified by Cash % . Entry is up to 3 numbers.
Net Date	The specific date when payment is expected before the account is considered delinquent or discount opportunity is lost. Entry is 6 numbers in your system date format.
Discount	Discount amount allowed.
Net Days	The number of days allowed for payment before the account is considered delinquent. Entry is up to 3 numbers.
Lost?	Indicates whether a cash discount is still available for an invoice. Y = Yes . The invoice has passed the cash discount deadline. N = No . The invoice has not passed the cash discount deadline.

M = Monthly Account.

This is a payment schedule that defines a specific day of the month that payments are due:

Category	Description
Due Day	The day of the month on which payments are due. Entry is the range 1-31.
Cutoff Day	The day of the month the invoice must be produced to qualify for payment on the next monthly due date. Entry is the range 1-31.
Months Delay	The number of months to delay the normal due date. Entry is the range 0-99.

S = Specific Terms.

This allows multiple payment amounts and due dates to be specified when an invoice is created to allow an installment payment schedule to be specified.

Category	Description
Pay #	The date due and amount of the payment term.
Net	The day the net amount is due. Default is 30 days from invoice creation.

Where Used: A/P Invoice Matching Detail; A/P Payment Detail; A/P Receiving Detail; APID; APIE; APIH; APII; APPA; APPO; ARCR; ARIH; COMI; COMT; Contract Header Detail; Customer Financial Detail; Customer Order Header Detail; DISI; DIST; ISVI; IVCO; IVIE; IVII; IVPR; IVRR; Packing List; POCR; Purchase Order Header Detail; QSRC; Standard Terms; Vendor Browse Detail; Vendor Master Detail; VSDI; VSDT

Text No

Text Number identifies a set of text entered for descriptive purposes. The system assigns a **Text Number** for each unique set of text, providing the capability of reusing the text for a similar situation. Entry is up to 6 numbers.

Where Used: Bill of Material Detail; Contract Header Detail; Contract Item Detail; Contract Item Detail/Pricing; CORV; Custom Product Component Detail; Custom Product Detail; Customer Financial Detail; Customer Name/Address Detail; Customer Order Header Detail; Invoice Header Detail; Item Lot Receipt; Item Lot Trace and Serialization Detail; Item Master Detail; Item Master Planning Detail; LMSI; LMST; Lot Trace; Manufacturing Order Line Item Detail; MOMI; MOMT; MORI; MORV; Order Line Items; Packaging Detail; Picklist Detail; POCR; Production; Purchase Order Header Detail; Purchase Order Line Item Detail; Purchase Order Line Item Detail (CPMT); Purchase Order Line Items; Purchased Component Detail; SBOL; SHIP; Standard Product Detail; TEXT; TXWU; Vendor Configuration; Vendor Master Detail; Vendor/Item Detail

Total Lines

Total Lines represents the sum of all the line items on the customer order.

Where Used: COMI; COMT; Customer Order Header Detail

VAT Customer Code

VAT Customer Code is used to select value added tax categories associated with this customer. This code, together with the **VAT Product Code** of the ordered item, is used to determine which **VAT Code** to apply when calculating tax on a customer order line item. Entry is any alphanumeric combination of up to 5 characters.

Where Used: Customer + Financial; Customer Name/Address Detail; Customer Order + Taxes; Customer Order Header Detail; IVIE; IVII; Ship to Browse Detail; VATT

VAT Id

VAT Identification is an identifier given by the taxing authority for tax audit purposes. Entry is any alphanumeric combination of up to 20 characters.

Where Used: Customer + Financial; Customer Name/Address Detail; Customer Order + Taxes; Customer Order Header Detail; Ship to Browse Detail; TXCF; Vendor Browse Detail; Vendor Master Detail

Zip

Zip Code is the postal delivery number associated with an address. Entry is any alphanumeric combination of up to 12 characters.

Where Used: A/P Payment Detail; Available Customer Shipments; CNFG; CNFI; COCD; COMI; COMT; Customer Browse Detail; Customer Name/Address Detail; Customer Order Header Detail; DISI; DIST; ISVI; IVIE; IVII; Name, Address & Contacts; Payee Detail; Payer Detail; Pricing Maintenance + Test Order; Purchase Order Header Detail; QSRC; SBOL; SHIP; Ship to Browse; Ship to Browse Detail; Vendor Browse Detail; Vendor Master Detail; VSDI; VSDT

Quantity Breaks and Expedite Fees

The Quantity Breaks and Expedite Fees window is opened via the Item Book And Breakpoint Select window during the order entry process. The Quantity Breaks and Expedite Fees window displays price information for the ordered item and highlighted price book. You can select the suggested unit price or choose a price related to a different quantity breakpoint. You can also choose to override the expedite fees, based on the parameters specified on the Advanced Price Book Configuration window.

The line marker is positioned on the quantity breakpoint that provides the lowest **Unit Price** for the order quantity, based on the price book highlighted in the Item Book And Breakpoint Select window.

Two features on the Quantity Breaks and Expedite Fees window is controlled by parameters defined on the Advanced Price Book Configuration window:

- Selecting price information from a different quantity breakpoint
- Overriding the **Expedite Fees**
 - **I**—Include the Expedite Fee with the unit price
 - **E**—Exclude the Expedite Fee

Transportation Shortcuts

You can use shortcut keys to go to the following related screens.

Destination	Shortcut Key(s)
Previous screen	ESC

Fields

Description

Price Book Description identifies the price book in terms of its characteristics. When space is limited, a partial description is displayed.

Expedite Fee

Expedite Fee is the amount added to the order's unit price and is calculated using the **Expedite Fee Formula**.

Expedite Thru

Expedite Thru is the last date that the **Expedite Fee** is effective.

From Quantity Breakpoint

From Quantity Breakpoint indicates the lowest value in the breakpoint range and is automatically assigned by the system based on the **Thru Quantity Breakpoint** value of the previous breakpoint range.

In Effectivity

Price Book In Effectivity Date is the date the price book becomes effective.

Include or Exclude Expedite Fee

Include or Exclude Expedite Fee indicates whether or not to apply an expedite fee for the price book quantity breakpoint. The expedite fee options include:

I = Include the Expedite Fee with the unit price

E = Exclude the Expedite Fee

Note: This field is only displayed when the expedite fee is applicable to the selected price book quantity breakpoint.

Out Effectivity

Price Book Out Effectivity Date is the last date that the price book is effective.

Price Book Name

Price Book Name is the unique identifier for a price book. Entry is any alphanumeric combination of up to 15 characters.

SP

Customer Special designates that the price book used by the customer is a special promotion. The price book is flagged as special on the Available Pricing window. Entry is 1 alphanumeric character.

ST

Source Type is the user-defined code that identifies the customer price-book preference or the origin of the customer demand such as domestic, international and so on.

Thru Quantity Breakpoint

Thru Quantity Breakpoint indicates the highest value in the breakpoint range. Entry is up to 10 numbers.

Unit Price

Unit Price is the price per unit of the item being ordered. Entry up to 16 numbers. Decimals are allowed.

Custom Product Detail

Use this screen to view and maintain detail information for a custom product. The Custom Product Detail screen is accessed from both the COMT and CPMT screens. In addition to custom product detail information, the Custom Product Detail screen is used to maintain customer item information, adjust custom product on-hand inventory and add descriptive text.

Features

Transportation Shortcuts

You can use shortcut keys or transport buttons to go to the following related screens.

Destination	Shortcut Key(s)
Previous screen	F8

Additional Information

Window	Available From	Shortcut Key(s)
Currency Information	Any location on the screen	ALT+C
Extended Text	Any location on the screen	ALT+T

Browse Windows

You can open browse windows by choosing **Browse/Detail** from the **Tools** menu in the following fields:

Browse	From Fields
Commission Code	Commission code

For more information, see "Selecting from a Browse List" in the Fourth Shift Basics manual.

Web Links

If you use Web UI, you can link to other screens by clicking tabs or hyperlinks.

Go to Screen...	By clicking...
Return	Tab at top of screen
POAN (Buyer Action by Item)	Screen label: Buyr
CORV (CO Receipt/Reverse Ln# Selection)	Screen label: Co Number
CMTA (Commission Code Table)	Screen label: Commission Code

Go to Screen...	By clicking...
COAN (Customer Order Action)	Screen label: Csr
BILL (Single Level Bill)	Screen label: Family Item
ITMB (Item Master)	Screen label: Family Item
COCD (Customer Orders by Customer Id)	Screen label: Id
CUID (Customer Master by Customer Id)	Screen label: Id
MOAN (Planner Action)	Screen label: Plnr
CCOT (Customer Contact Master)	Screen label: Cust Id

Reports

A standard report is not generated for this screen. Use the Print Screen key or any screen capture program to create an image of the screen.

Screen Reference

Custom Product Detail – Format

The Custom Product Detail screen is accessed from both the COMT and CPMT screens. The Custom Product Detail screen is accessed from the **Line Item** section of the COMT screen and the **Header** section of the CPMT screen. The Custom Product Detail screen has two sections: **Custom Product Identification** and **Custom Product Detail**.

- The **Custom Product Identification** section displays basic information on the customer order and the custom product line item. The **Cust Item** and **Desc** fields are open for customer item maintenance.
- The **Custom Product Detail** section allows you to specify price adjustment, commission code, tax, account and customer item information for the custom product. The **Custom Product Detail** section also displays custom product completion status and allows you to adjust custom product on-hand inventory.

The **Custom Product Detail** section changes based on the tax method selected.

Fields

Buyr

Buyer code is used to identify the person responsible for handling the purchase of the item. The suggested entry is the buyer's initials. Entry is any alphanumeric combination of up to 3 characters.

Where Used: A/P Receiving Detail; ABCR; APIE; APII; APIR; APPI; APPO; APPV; AVII; AVIT; BILL; BILL; Bill of Material; Bill of Material Detail; Buyer/Planner Code Maintenance;

Contract Header Detail; Contract Purchase Orders; Contract Summary; Custom Product Detail; CWIP; Demand Peg Detail; IORD; IPPD; Item Browse Detail; Item Master; Item Master Planning Detail; Item Responsibility Assigned Results; ITHC; Lead Times Assigned Results; Line Item Details + Custom Product; Material Shortages Detail; MBIL; MPSR; MSCF; MSMT; Multi-Level Bill; Multi-Level Where Used; ORST; OVAR; PCST; PICI; PICK; Picklist Detail; POAN; POAS; POCI; POCP; POCR; POCT; POMI; POMT; PORI; PORV; Production; Purchase Order Header Detail; Purchase Order Line Item Detail (CPMT); Purchased Component Detail; QUOI; QUOT; SDAB; SSII; Standard Costs Assigned Results; Summarized Bill; VDSC; VPRF; Where Used; WIPR; Workcenter Master

CO Number

Customer Order Number is the user-defined identifier for a customer order. Entry is any alphanumeric combination of up to 30 characters.

Where Used: Advance Ship Notice Line; Advance Ship Notice Order Detail; Available for Shipping Allocation Batch; COAN; COCD; COMI; COMT; CORV; CPMT; Custom Product Component Detail; Custom Product Detail; Customer + Credit; Customer Order; Customer Order + Order Header; Customer Order Header Detail; Customer Order Line Price Adjustment; Customer Order Receipt/Reverse; CWIP; Demand Peg Detail; GASN; Inventory Allocation; IVPR; IVRR; JEST; Job Estimates and Performance Report; Material Shortages Detail; MOAN; MSMT; OPSL; Order Detail; Orders on Shipment; Package Content; Packaging Detail; PICI; PICK; Picklist Detail; PORI; PORV; Pricing Maintenance + Test Order; Purchased Component Detail; Serial Number List; SHIP; Shipment Allocation Detail; Shipment Order Detail; Shipping Allocation Batch; SHPI; SHPL; STAD; Standard Product Detail; Supply Peg Detail

CO Rev Date

Customer Order Revision Date is the date of the last change made to the customer order. The **Customer Order Revision Date** is changed to the system date when the customer order is revised.

Where Used: COMI; COMT; CORV; CPMT; Custom Product Component Detail; Custom Product Detail; Customer Order Header Detail; Customer Order Receipt/Reverse; CWIP; JEST; Job Estimates and Performance Report; Line Item Details + Custom Product; OPSL; PICI; PICK; Picklist Detail; Standard Product Detail

Commission Code

Commission Code is the user-defined identifier for salespersons' commissions. The overall commission for a sale is calculated at the time of invoicing. Entry is any alphanumeric combination of up to 3 characters.

Where Used: ARIR; CMTA; CMTI; Custom Product Detail; Customer + General; Customer Browse Detail; Customer Name/Address Detail; Customer Order + Order Detail; Customer Order Header Detail; Inventory Adjustment Application; Invoice Line Item Detail; IVCO; IVIE; IVII; Line Item Details + General; Pricing Maintenance + Test Order; Standard Product Detail

CSR

Customer Service Representative identifies the person responsible for handling this customer's account. Entry is any alphanumeric combination of up to 3 characters.

Where Used: COAN; COMI; COMT; CORV; CPMT; CUID; CUII; CUSI; CUST; Custom Product Component Detail; Custom Product Detail; Customer + General; Customer Browse Detail; Customer Financial Detail; Customer Name/Address Detail; Customer Order + Order Detail; Customer Order Header Detail; Customer Order Receipt/Reverse; Demand Peg Detail; Global Settings; IVPR; IVRR; JEST; Job Estimates and Performance Report; Material Shortages Detail; MPED; MSCF; OPSL; ORST; PICI; PICK; Picklist Detail; Pricing Maintenance + Test Order; REDI; RVED; STAD; Standard Product Detail; Transaction Detail

Cust Item

Customer Item is the identification assigned to the item by the customer. Entry is any alphanumeric combination of up to 30 characters.

Where Used: CIMT; CPMT; Cumulative Detail; Custom Product Component Detail; Custom Product Detail; Customer Item + General; Customer Order; Customer Order Receipt/Reverse; JEST; Job Estimates and Performance Report; Line Item Details + Customer Item; MPIT; OPSL; Partner Item Detail; PCMT; Shipments by Line Item; Standard Product Detail; Transaction Detail

Cust Item CO Rev

Customer Item Revision Level is the customer's current revision level for the customer item. Entry is any alphanumeric combination up to 2 characters.

Where Used: CIMT; Custom Product Detail

Cust PO Ln#

Customer Purchase Order Line Number is a reference field which can be used to record the corresponding line number from the customer purchase order. For example, this line number may be needed by an EDI system for tracking purposes. This line number is not used by the system. Entry is up to 10 alphanumeric characters.

Where Used: Custom Product Detail; GASN; Pricing Maintenance + Test Order; Standard Product Detail

Customer Id

Customer Identification is the identification number assigned to a customer. Entry is any alphanumeric combination of up to 13 characters.

Where Used: Advance Ship Notice Carrier Detail; Advance Ship Notice Shipment Detail; ARAH; ARCD; ARCJ; ARCP; ARCR; AREX; ARIC; ARIH; ARIP; ARIR; ARPD; ARPH; ARRJ; ARSC; ARSR; ARST; ARTB; ARTX; Available Customer Shipments; Available for Shipping Allocation Batch; Browse Setup (customer); Browse Setup (order); CIMT; CINV; COAN; COBK; COCD; COMI; COMT; CORV; COYE; CPMT; CUID; CUII; Cumulative Detail; CUPB; CUPI; CUSI; CUST; Custom Product Component Detail; Custom Product Detail; Customer; Customer Browse; Customer Browse Detail; Customer Financial Detail; Customer Invoice List; Customer Item + General; Customer Name/Address Detail; Customer Order; Customer Order + Order Header; Customer Order Header Detail; Customer Order Receipt/Reverse; Customer Payment List; Demand Peg Detail; EDIX; EXRU; G/L Distribution (ARSM Module); GASN; Inbound Conversion Detail; Inventory Adjustment Application; Invoice Header Detail; Invoice Line Item Detail; IORD; IVCO; IVIA; IVIE; IVII; IVPP; IVPR; IVRR; IVRV; JEST; Job Estimates and Performance Report; Lot Trace Issue Detail; Lot Trace Receipt Detail; Material Shortages Detail; MOAN; MPED; MPIT; MSMT; OPSL; Order Browse; Order Detail; ORST;

Outbound Conversion Detail; Partner Item Detail; PCMT; PICI; PICK; Picklist Detail; Pricing Maintenance + Items/Customers; Pricing Maintenance + Test Order; SBOL; Serial Number List; SHIP; Ship to Browse; Ship to Browse Detail; Shipment Allocation Detail; Shipment Allocation List; Shipping Allocation Batch; SHPI; SHPL; STAD; Standard Product Detail; Supply Peg Detail; Transaction Detail

Customer Item Price

Customer Item Price is the quoted price for the customer item and is used as the unit price on customer orders when **LS = Q** (quote). Entry is up to 10 numbers. Decimal places are allowed.

Where Used: Custom Product Detail; Customer Item + General; Line Item Details + Customer Item; Pricing Maintenance + Test Order

Customer Item Tr LT

Customer Item Transportation Lead Time is the number of days, according to the customer, required to transport this item to the customer site. Entry is up to 2 numbers.

Where Used: CIMT; Custom Product Detail; Line Item Details + Customer Item; Standard Product Detail

Date Last Ship

Date Last Ship is the last time any quantity of the item was sent out to the vendor/customer.

Where Used: Custom Product Detail; Picklist Detail; Standard Product Detail

Desc

Customer Item Description is the description assigned to the item by the customer. Entry is any alphanumeric combination of up to 70 characters.

Where Used: CIMT; Custom Product Component Detail; Custom Product Detail; Customer Item + General; Customer Order; Customer Order Receipt/Reverse; JEST; Job Estimates and Performance Report; Line Item Details + Customer Item; OPSL; Partner Item Detail; Shipments by Line Item; Standard Product Detail

Ext Text

Extended Text identifies whether an extended text message exists for this information.

Where Used: Contract Header Detail; Contract Item Detail; Contract Item Detail/Pricing; Custom Product Detail; Customer Financial Detail; Customer Order Header Detail; Invoice Header Detail; Order Line Items; POCR; Purchase Order Header Detail; Purchase Order Line Item Detail; Purchase Order Line Items; SBOL; Standard Product Detail

Extd Price

Extended Price equals the unit price times the ordered quantity.

Where Used: A/P Receiving Detail; COMI; COMT; CPMT; Custom Product Component Detail; Custom Product Detail; Customer Order; IVIE; IVII; IVPR; IVRR; JEST; Job Estimates and Performance Report; OPSL; PCST; POMI; POMT; POSR; Pricing Maintenance + Test

Order; Purchase Order Line Item Detail; Purchase Order Line Item Detail (CPMT); Standard Product Detail; VDSC

Family Item

Family Item is the identification of the group used for production planning and master scheduling or the Item Master identification used to enter an order for a non-standard product. Entry is any alphanumeric combination up to 15 characters.

Where Used: CPMT; Custom Product Component Detail; Custom Product Detail; JEST; Job Estimates and Performance Report; OPSL; Purchased Component Detail; Single-Level Configuration Bill of Material Report

Function

Function codes are four-character abbreviations for screen names. Each screen has a unique code used for identification and transportation. For example, ITMB identifies the Item Master screen. Entry is 4 alphanumeric characters.

Where Used: screens and reports

In Ship Qty

Shipping Quantity is the number of units issued to customer orders. **Shipping Quantity** is decreased when material is shipped. It is considered unavailable for material planning purposes, shipment allocation purposes, for issue and for component availability checks.

Where Used: Available for Shipping Allocation Batch; Custom Product Detail; Inventory History List; INVR; Item Availability; Item History; ITHR; Line Item Details + Custom Product; MPSR; MPSS; Production; Shipment Allocation Detail; Shipment Allocation List; Shipping Allocation Batch; SSII; Standard Product Detail

Inv

Custom Product Inventory Account Number is the account number used to update the general ledger when inventory transactions take place for outside purchased materials and the custom product. Entry is up to 20 alphanumeric characters.

Where Used: Custom Product Detail; Line Item Details + Custom Product

Issued Qty

Issue Quantity is the number of items issued. Entry is up to 10 numbers. Default value is 0.

Where Used: Backflush Issue Reconciliation Report; Custom Product Component Detail; Custom Product Detail; CWIP; Demand Peg Detail; Inventory History List; Item History; ITHR; Line Item Details + Custom Product; MCST; Order Detail; OVAR; PCST; PICI; PICK; Picklist Detail; Purchase Order Line Item Detail (CPMT); Shortages by Order; WIPL; WIPR

Line Ex Rate

Line Exchange Rate is the ratio of **Foreign Unit Price** to **Local Unit Price** for this line item. A new **Line Exchange Rate** can be defined by entering a new exchange rate. Leaving this field blank will cause the field to default to the current exchange rate. Fixed exchange rates cannot be changed on this screen. If the transaction requires triangulation, you can toggle between

the first and second legs of the calculation by pressing ALT+C. Entry in this field must be greater than zero and up to 9999999999 preceded by a calculation operator * or /.

Where Used: CPMT; Custom Product Component Detail; Custom Product Detail; JEST; OPSL; Standard Product Detail

Ln#

Line Number is the identification of a line item on an order. The **Line Number** is system-assigned. Entry is up to 3 numbers.

Where Used: A/P Invoice Matching Detail; A/P PO/Inv Variance by Invoice; A/P Receiving Detail; Advance Ship Notice Line; Advance Ship Notice Order Detail; APEX; APID; APPI; APPV; APUV; Available for Shipping Allocation Batch; Backflush Issue Reconciliation Report; Bill of Material Accuracy Results; Capacity Planning; CCAN; CINV; COAN; COCD; COMI; COMT; CORV; CPMT; CSTU; Custom Product Component Detail; Custom Product Detail; Customer Order; Customer Order + Order Header; Customer Order Line Price Adjustment; Customer Order Receipt/Reverse; CWIP; Demand Peg Detail; Dispatch List; GASN; IHIR; IMTR; Inventory Transaction History Report; IORD; Item Shortages; JEST; Job Estimates and Performance Report; LHis; LMSI; LMST; Location Index; Lot Detail; Lot Inventory Transaction History Report; Lot Trace Issue Detail; Lot Trace Receipt Detail; LOTR; LRRP; Manufacturing Order Line Item Detail; Manufacturing Order Receipt/Reverse; Material Shortages Detail; MCST; MOAN; MOFR; MOMI; MOMT; MORI; MORV; MSMT; Open Order Detail; OPSL; Order Completion Status; Order Cost Variance Status; Order Detail; Order Line Items; OVAR; Package Content; Packaging Detail; Packing List; PCMT; PCST; PICI; PICK; Picklist Detail; POAN; POAS; POMI; POMT; PORI; PORR; PORV; POSR; POVD; Pricing Maintenance + Test Order; Purchase Order Line Item Detail; Purchase Order Line Item Detail (CPMT); Purchase Order Line Items; Purchased Component Detail; Router/Traveler; Schedule Board; SDAB; Serial Number List; SHIP; Shipment Allocation Detail; Shipment Allocation List; Shipments by Line Item; Shipping Allocation Batch; Shortages by Order; SHPL; STAD; Standard Product Detail; Supply Peg Detail; Transaction Detail; TRUD; VDSC; VPFR; WIPL; WIPR; WIPS

Ln# Sta

Line Number Status indicates the item's current position within the order process. **Line Number Statuses** are:

2 = Firm Planned or Quote.

Firm Planned: For forecast line number types (1, 2, 3), the item's order quantity and scheduled date are fixed and are not automatically changed. Quote: For custom product line number types (X), the order-dependent bill of material can be attached to the item, but component demands are ignored for planning purposes. This status may be selected for new orders only.

3 = Open.

The item's order quantity and scheduled date are fixed. The order-dependent bill of material is attached to the item.

4 = Released.

The item's order quantity and scheduled date are fixed. The order-dependent bill of material is attached to the item. The order and picklist can be printed and issues/shipments can be made.

5 = Closed.

All required issues or shipments have been made for the item.

6 = Closed.

The order closure report has reported this order closure. This status is system-assigned.

7 = Closed.

The order is ready to be deleted from the active file and retained in order history. This status is system-assigned.

8 = Closed.

The order is ready to be deleted, but other line items on the same order have a **Ln# Sta** of less than 6. This status is system-assigned.

9 = Credit Hold.

The customer's credit limit has been exceeded or the order is placed on hold for another reason. The item is treated as an open order.

Line Number Status can only be incremented, except when reopening an order, which decrements **Line Number Status** from 5 to 4.

Where Used: COAN; COMI; COMT; CPMT; Custom Product Component Detail; Custom Product Detail; CWIP; Demand Peg Detail; JEST; Job Estimates and Performance Report; Material Shortages Detail; OPSL; PICI; PICK; Picklist Detail; Pricing Maintenance + Test Order; Purchased Component Detail; Shipments by Line Item; Standard Product Detail; Supply Peg Detail

Ln# Typ

Line Number Type determines the use of the item order quantity in planning, manufacturing and accounting. **Line Number Types** are:

A = Assemble-to-order.

Standard product. Reserved for future use.

C = Standard product

X = Custom product

1 = Customer Forecast Type 1.

2 = Customer Forecast Type 2.

3 = Customer Forecast Type 3.

B = By-product. Created as part of another order.

U = Tool return.

Created as part of another order.

P = Purchased (not available for customer orders)

Forecast line types are included in data extracts as **Ln# Typ = F**.

Where Used: CINV; COAN; COMI; COMT; CORV; CPMT; Custom Product Component Detail; Custom Product Detail; Customer Order; Customer Order Receipt/Reverse; CWIP; Demand Peg Detail; IHIR; JEST; Job Estimates and Performance Report; Material Shortages Detail; OPSL; Order Detail; OVAR; PICI; PICK; Picklist Detail; Pricing Maintenance + Test Order; Purchased Component Detail; Serial Number List; SHIP; Standard Product Detail; Supply Peg Detail; Transaction Detail

LS

Line Selector identifies the item used to determine the order price. **Line Selectors** are:

B = Catalog.

Catalog information is used for pricing.

Q = Quote.

Customer Item information is used for pricing.

S = Standard.

Item Master information is used for pricing.

Where Used: COMI; COMT; CPMT; Custom Product Component Detail; Custom Product Detail; JEST; Job Estimates and Performance Report; OPSL; Purchased Component Detail; Standard Product Detail; Transaction Detail

Name

Customer Name is the name of a customer. Entry is any alphanumeric combination of up to 60 characters.

Where Used: ARAH; ARCD; ARCJ; ARCR; AREX; ARIC; ARIH; ARIP; ARIR; ARPD; ARPH; ARRJ; ARSC; ARSR; ARTB; ARTX; Available Customer Shipments; Browse Setup (customer); Browse Setup (order); CIMT; COBK; COCD; COMI; COMT; CORV; COYE; CPMT; CUID; CUII; CUPB; CUPI; CUSI; CUST; Custom Product Component Detail; Custom Product Detail; Customer; Customer + Address; Customer + General; Customer Browse; Customer Browse Detail; Customer Financial Detail; Customer Invoice List; Customer Item + General; Customer Name/Address Detail; Customer Order; Customer Order Header Detail; Customer Order Receipt/Reverse; Customer Payment List; EDIX; EXRU; G/L Distribution (ARSM Module); IVCO; IVIA; IVPP; JEST; Job Estimates and Performance Report; Lot Trace Issue Detail; Lot Trace Receipt Detail; OPSL; Order Browse; Order Detail; ORST; PICI; PICK; Picklist Detail; Pricing Maintenance + Test Order; SBOL; Serial Number List; SHIP; Ship to Browse Detail; Shipment Allocation List; Shipping Detail; SHPI; SHPL; STAD; Standard Product Detail

On Hand Qty

On Hand Quantity is the amount of inventory available for issue. Entry is up to 10 numbers.

Where Used: CINV; Custom Product Detail; Inventory Status; INVR; Item + Quantity; Item Availability; Item Availability + Quantity; Item Shortages; LEXP; Line Item Details + Custom Product; LMSI; LMST; Location Index; Lot Detail; MPSR; MPSS; Production; Shortages by Order; SSII

Ord Sta

Order Status indicates the order's current position within the order process. **Order Status** is automatically displayed for an order, based on the line number status of the line items attached to the order. The order status is the highest status of any of the active line items. When all line items are closed, the order changes to complete or closed. **Order Statuses** are:

1 = Preliminary.

The order header is identified and basic information is entered.

2 = Firm Planned.

All active line items have a **Ln# Sta** = 2 (firm planned).

3 = Open.

The highest **Ln# Sta** of all active line items is 3 (open).

4 = Released.

Paperwork is produced and receipts or issues can be made for at least one of the line items. The highest active **Ln# Sta** = 4 (released).

5, 6, 7 = Complete or Closed.

All required receipts, shipments or issues have been made for all the line items. Adding a line item to a completed order changes the **Order Status** to REL. All order line items are closed (**Ln# Sta** = 5, 6 or 7).

9 = Credit Hold.

The customer's credit limit has been exceeded or the order is placed on hold for another reason. The item is treated as an open order.

Where Used: COMI; COMT; Contract Purchase Orders; CORV; CPMT; Custom Product Component Detail; Custom Product Detail; Customer Order + Order Header; Customer Order Header Detail; Customer Order Receipt/Reverse; EDIX; IORD; JEST; Job Estimates and Performance Report; Manufacturing Order Line Item Detail; Manufacturing Order Receipt/Reverse; MCST; MOMI; MOMT; MORI; MORV; OPSL; Order Browse; ORST; PCST; PICI; PICK; Picklist Detail; POMI; POMT; PORI; PORV; Purchase Order Header Detail; Purchase Order Line Item Detail (CPMT); Router/Traveler; Shortages by Order; Standard Product Detail; WIPR

Order Qty

Order Quantity is the number of items ordered at the specified unit of measure. Entry is up to 10 numbers.

Where Used: Available Pricing; CINV; COCD; COMI; COMT; Contract Header Detail; Contract Item Detail; Contract Item Detail/Pricing; CORV; CPMT; CSTU; Cumulative Detail; Custom Product Component Detail; Custom Product Detail; Customer Order; CWIP; Demand Peg Detail; IORD; IVPR; IVRR; JEST; Job Estimates and Performance Report; Line Item Details + Item; Manufacturing Order Line Item Detail; MCST; MOFR; MOMI; MOMT; MORI; MORV; MSMT; Open Order Detail; OPSL; Order Detail; Order Line Items; OVAR; Packing List; PCST; PICI; PICK; Picklist Detail; POCR; POMI; POMT; PORR; POSR; POVD; Pricing Maintenance + Test Order; Purchase Order Line Item Detail; Purchase Order Line Item Detail (CPMT); Purchase Order Line Items; Purchased Component Detail; SDAB; Shipment Allocation Detail; Shipments by Line Item; Standard Product Detail; Supply Peg Detail; Transaction Detail; VDSC; VPFR; WIPR; WIPS

Ovr

Commission Code Override indicates whether the **Commission Code** is different from that which has been established on the Customer Master.

Y = Yes.

The **Commission Code** has been changed for this order.

N = No.

The **Commission Code** has not been changed and matches the Customer Master.

Where Used: Custom Product Detail; Standard Product Detail

Plnr

Planner code is used to identify the person responsible for planning the production or usage of an item. The suggested entry is the planner's initials. Entry is any alphanumeric combination of up to 3 characters.

Where Used: ABCR; AVII; AVIT; BILI; BILL; Bill of Material; Bill of Material Detail; Buyer/Planner Code Maintenance; Custom Product Detail; CWIP; Demand Peg Detail; IORD; IPPD; Item Browse Detail; Item Master; Item Master Planning Detail; Item Responsibility Assigned Results; ITHC; Lead Times Assigned Results; Line Item Details + Custom Product; Manufacturing Order Line Item Detail; Manufacturing Order Receipt/Reverse; Material Shortages Detail; MBIL; MCST; MOAN; MOMI; MOMT; MORI; MORV; MPSR; MSCF; MSMT; Multi-Level Bill; Multi-Level Where Used; ORST; OVAR; PICI; PICK; Picklist Detail; Production; Purchase Order Line Item Detail; QUOI; QUOT; Router/Traveler; SDAB; Shortages by Order; Single-Level Configuration Bill of Material Report; SSII; Standard Costs Assigned Results; Summarized Bill; Where Used; WIPR; Workcenter Master

Price Adjustment

Price Adjustment is the percentage discount allowed or surcharge placed on an order from this customer. The value in this field is used to calculate the Unit Price for an item on an order line. **Price Adjustment** indicators for screen or import data entry are:

S = Surcharge

D = Discount

Entry is up to 99.99 percent with a fixed decimal place.

The entry for a surcharge price adjustment will add the price adjustment percent to 100%. The entry for a discount price adjustment will subtract the price adjustment percent from 100%.

Where Used: Allowance/Charge Detail (Detail); Custom Product Detail; Customer + Financial; Customer Browse Detail; Customer Name/Address Detail; Customer Order + Order Detail; Customer Order Header Detail; Line Item Details + General; Pricing Maintenance + Test Order; Standard Product Detail

Price Source

Price Source identifies the origin of the item's price. **Price Sources** are:

B = Catalog

C = Cost plus

M = Manual

P = Price roll-up

Q = Quote

S = Standard

Where Used: Custom Product Detail; Pricing Maintenance + Test Order; Standard Product Detail

Prom Dlvry

Promised Delivery is the date that the items are committed to be at the customer site. The transportation lead time is used with the **Promised Delivery** date to calculate the shipping date.

Where Used: Available Pricing; COCD; COMI; COMT; CPMT; Custom Product Component Detail; Custom Product Detail; EXRU; IORD; Job Estimates and Performance Report; OPSL; Purchased Component Detail; Standard Product Detail; Transaction Detail

Quantity Recvd

Quantity Received is the number of units received for an item on an order. Entry is up to 10 numbers. Default value is 0.

Where Used: A/P Invoice Matching Detail; A/P PO/Inv Variance by Invoice; A/P Receiving Detail; APEX; APPI; APPV; APUV; CINV; CSTU; Custom Product Component Detail; Custom Product Detail; Customer Order Receipt/Reverse; CWIP; Inventory History List; IORD; Item History; ITHR; Line Item Details + Custom Product; Manufacturing Order Receipt/Reverse; MCST; Order Completion Status; OVAR; PCST; PORI; PORV; Purchase Order Line Item Detail; Purchase Order Line Item Detail (CPMT); Shortages by Order; VDSC; WIPR; WIPS

Reqst Dlvry

Requested Delivery is the date that the items are requested to be at the customer site. The transportation lead time is used with the **Requested Delivery** date to determine the requested shipping date. The **Requested Delivery** date is compared to the **Prom Dlvry** date to determine if rescheduling is necessary.

Where Used: Custom Product Detail; IORD; Job Estimates and Performance Report; Standard Product Detail

RF

Replace Forecast indicates whether this customer order consumes forecast or is additive to forecast.

Y = Yes.

This customer order consumes forecast.

N = No.

This customer order is additive to forecast.

In the Sales Order Processing Module, X (select) = yes and blank = no.

Where Used: COMI; COMT; CPMT; Custom Product Component Detail; Custom Product Detail; Customer Order; Job Estimates and Performance Report; OPSL; Standard Product Detail

Scrapped Quantity

Scrapped Quantity is the number of completed units considered unsalvageable. **Scrapped Quantity** is not currently used in the system. Entry is up to 10 numbers.

Where Used: Custom Product Detail; Line Item Details + Custom Product

Shipped Quantity

Shipped Quantity is the number of items shipped for an order.

Where Used: Advance Ship Notice Line; CINV; Custom Product Detail; Invoice Line Item Detail; IORD; IVIE; IVII; IVPR; IVRR; Line Item Details + Custom Product; Order Detail; Packing List; Picklist Detail; Shipments by Line Item; SHPL; Standard Product Detail

Stk-Bin

Stock and **Bin** identify a specific location for storing inventory. A stockroom is a place for storing inventory which contains one or more bins. The **Stock-Bin** identifier is unique and is used for material control. Entry is any alphanumeric combination, **Stk** being up to 6 characters and **Bin** being up to 12 characters.

Where Used: Available for Shipping Allocation Batch; Backflush Issue Reconciliation Report; CINV; Custom Product Detail; Custom Product Line Item Location Selection; Customer Order Receipt/Reverse; ICCR; IMTR; INVA; Inventory Allocation; Inventory Transaction History Report; INVR; Item Browse Detail; Item Master Planning Detail; LEXP; Line Item Details + Custom Product; LMMT; Location Selection; Lot Inventory Transaction History Report; Manufacturing Order Receipt/Reverse; PICI; PICK; PORI; PORV; Production; Purchase Order Line Item Detail; Purchase Order Line Item Detail (CPMT); SHIP; Shipment Allocation Detail; Shipment Allocation List; Shipping Allocation Batch; SSII; SSIL; TRUD

Tax Exempt

Exempt indicates whether or not the customer pays taxes on purchases for this line item and taxing authority. **Exempt** is established for the customer but can be changed for each line item.

N = No.

The purchase is not tax-exempt.

Y = Yes.

The purchase is tax-exempt.

0 = User Defined

1 = User Defined

2 = User Defined

3 = User Defined

4 = User Defined

5 = User Defined

6 = User Defined

7 = User Defined

8 = User Defined

9 = User Defined

Where Used: ARTX; Custom Product Detail; Customer + Financial; Customer Name/Address Detail; Customer Order + Taxes; Customer Order Header Detail; Invoice Line Item Detail; IVIE; IVII; Line Item Details + Taxes; Ship to Browse Detail; Standard Product Detail

Text No

Text Number identifies a set of text entered for descriptive purposes. The system assigns a **Text Number** for each unique set of text, providing the capability of reusing the text for a similar situation. Entry is up to 6 numbers.

Where Used: Bill of Material Detail; Contract Header Detail; Contract Item Detail; Contract Item Detail/Pricing; CORV; Custom Product Component Detail; Custom Product Detail; Customer Financial Detail; Customer Name/Address Detail; Customer Order Header Detail; Invoice Header Detail; Item Lot Receipt; Item Lot Trace and Serialization Detail; Item Master Detail; Item Master Planning Detail; LMSI; LMST; Lot Trace; Manufacturing Order Line Item Detail; MOMI; MOMT; MORI; MORV; Order Line Items; Packaging Detail; Picklist Detail; POCR; Production; Purchase Order Header Detail; Purchase Order Line Item Detail; Purchase Order Line Item Detail (CPMT); Purchase Order Line Items; Purchased Component Detail; SBOL; SHIP; Standard Product Detail; TEXT; TXWU; Vendor Configuration; Vendor Master Detail; Vendor/Item Detail

Tr LT

Transportation Lead Time is the number of working days normally required to transport items to the customer. **Transportation Lead Time** is used to calculate the shipping date based on the **Prom Dlvry** date. Entry is up to 2 numbers.

Where Used: COMI; COMT; CPMT; Custom Product Component Detail; Custom Product Detail; Job Estimates and Performance Report; OPSL; Purchased Component Detail; Standard Product Detail; Transaction Detail

UM

Unit of Measure identifies the standard unit for an item used in the manufacturing process. Entry is up to 4 alphanumeric characters.

Where Used: A/P PO/Inv Variance by Invoice; A/P Receiving Detail; APEX; APPI; APPV; APUV; Available for Shipping Allocation Batch; AVII; AVIT; BILL; BILL; Bill of Material; Bill of Material Detail; CCAT; CINV; CMLB; COBK; COMI; COMT; Contract Header Detail; Contract Item Detail; Contract Item Detail/Pricing; CORV; Costed Bill Detail; CPMT; CSLB; Custom Product Component Detail; Custom Product Detail; Customer Order; Customer Order Line Price Adjustment; Customer Order Receipt/Reverse; CWIP; Demand Peg Detail; Engineering; FCST; ICCR; IHIR; INVA; Inventory Allocation; INVR; IORD; IPPD; ITBI; ITCB; ITCI; Item + Quantity; Item Availability + Quantity; Item Browse Detail; Item History; Item Lot Receipt; Item Lot Trace and Serialization Detail; Item Master; Item Master Detail; Item Master Planning Detail; Item Responsibility Assigned Results; Item Shortages; ITHC; ITHR; ITMB; ITMC; ITMI; ITPB; ITPI; IVPR; IVRR; JEST; Job Estimates and Performance Report; Lead Times Assigned Results; LEXP; LHIS; Line Item Details + Item; LMSI; LMST; Location Index; Lot Detail; Lot Trace; Lot Trace Issue Detail; Lot Trace Receipt Detail; LOTR; LVAL; Manufacturing Order Line Item Detail; Manufacturing Order Receipt/Reverse; Material Exposure; MBIL; MCST; MOMI; MOMT; MORI; MORV; MPIT; MPSR; MPSS; MSMT; Multi-Currency; Multi-Level Bill; Multi-Level Where Used; MUSE; Open Order Detail; OPSL; Order Completion Status; Order Cost Variance Status; Order Detail; Order Line Items; OVAR; Packaging Detail; Packing List; Partner Item Detail; PBCI; PBCT; PCST; PICI; PICK; Picklist Detail; POI; POCR; POCT; POMI; POMT; PORI; PORR; PORV; POSR; POVD; Pricing Maintenance + Action Detail; Pricing Maintenance + Action List; Pricing Maintenance + Test Order; Production; Purchase Order Line Item Detail; Purchase Order Line Item Detail (CPMT); Purchase Order Line Items; Purchase Order Receipt History; Purchased Component Detail; QUOI; QUOT; Router/Traveler; SDAB; SDAL; Shipment Allocation Detail; Shipments by Line Item; Shipping Allocation Batch; Shipping Detail; Shortages by Order; SHPL; Single-Level Configuration Bill of Material Report; SSII; SSIL; Standard Costs Assigned Results; Standard Product Detail; Summarized Bill; Supply Peg Detail; Transaction Detail; VDII; VDIT; VDSC; VEIT; Vendor/Item Detail; VETI; VPFR; Where Used; WIPR; Workcenter Master; WUSE

Unit Price

Unit Price is the price per unit of the item being ordered. Entry up to 16 numbers. Decimals are allowed.

Where Used: Advance Ship Notice Line; Allowance/Charge Detail (Detail); APEX; Available Pricing; COMI; COMT; Contract Item Detail; Contract Item Detail/Pricing; CPMT; Cumulative Detail; Custom Product Component Detail; Custom Product Detail; FCST; Inventory Adjustment Application; Invoice Line Item Detail; Item Availability; IVIE; IVII; IVPR; IVRR; JEST; Job Estimates and Performance Report; MPSR; MPSS; Open Order Detail; OPSL; PCST; POMI; POMT; POVD; Pricing Maintenance + Test Order; Purchase Order Line Item Detail; Purchase Order Line Item Detail (CPMT); Purchase Order Receipt History; Quantity Breakpoints and Price Formulas; Quantity Breaks and Expedite Fees; Standard Product Detail; Transaction Detail; VDSC

VAT Code

VAT Code is the user-defined identifier for the tax rate and calculation method to be used by a customer order line item. The **VAT Code** on the customer order is determined by a **VAT Product Code** and **VAT Customer Code** combination. Entry is any alphanumeric combination of up to 2 characters.

Where Used: APVT; Custom Product Detail; Invoice Line Item Detail; Line Item Details + Taxes; Standard Product Detail; TXTA; VAT Summary (APSM Module); VAT Summary (ARSM Module); VATT

WIP

Work in Process Account Number is the account number used to update the general ledger when WIP transactions take place for the custom product. Entry is up to 20 alphanumeric characters.

Where Used: Custom Product Detail; Line Item Details + Custom Product

Standard Product Detail

Use this screen to view and maintain detail information for a line item on a customer order. Detail information includes requested delivery date, price adjustment, tax and commission information along with descriptive text.

The Standard Product Detail screen may be used to reference an item according to its customer identification. Customer item information may be the primary description printed on the order acknowledgment by entering **C** in the **Prt** (print) field on the Customer Financial Detail screen.

The Standard Product Detail screen is replaced by the Customer Order application once the SOPM Module is installed.

Features

Transportation Shortcuts

You can use shortcut keys or transport buttons to go to the following related screens.

Destination	Shortcut Key(s)
Previous screen	F8

Browse Windows

You can open browse windows by choosing **Browse/Detail** from the **Tools** menu in the following fields:

Browse	From Fields
Commission Code Browse	Commission Code

For more information, see "Selecting from a Browse List" in the Fourth Shift Basics manual.

Additional Information

Window	Available From	Shortcut Key(s)
Currency Information	Any location on the screen	ALT+C
Extended Text	Any location on the screen	ALT+T

Web Links

If you use Web UI, you can link to other screens by clicking tabs or hyperlinks.

Go to Screen...	By clicking...
Customer Order	Tab at top of screen

Go to Screen...	By clicking...
CMTA (Commission Code Table)	Screen label: Commission Code
COAN (Customer Order Action)	Screen label: Csr
COCD (Customer Orders by Customer Id)	Screen label: Id
CUID (Customer Master by Customer Id)	Screen label: Id
CCAT (Customer Catalog)	Screen label: Item
ITMB (Item Master)	Screen label: Item
ITPB (Item Price Book)	Screen label: Item
SSII (Stock Status Inquiry by Item)	Screen label: Item
CCOT (Customer Contact Master)	Screen label: Cust Id

Reports

A standard report is not generated for this screen. Use the Print Screen key or any screen capture program to create an image of the screen.

Screen Reference

Standard Product Detail – Format

The Standard Product Detail screen has four sections: **Customer Order Identification**, **Line Item Detail**, **Customer Item** and **Text**.

The **Customer Order Identification** section displays basic information on the customer order identified on the COMT or COMI screen. Information in the **Customer Order Identification** section cannot be changed on this screen.

The **Line Item Detail** section allows you to specify price adjustment, commission code and tax information for the line item. This information can differ from the order information established on the CO Header Detail screen. The **Line Item Detail** section also displays shipping information for the item. The exchange rate for the line is displayed when the MCMM Module is installed.

The **Customer Item** section displays information on how a line item is identified by the customer and calculates the order quantity based on the customer's unit of measure and conversion factor. Any changes made in this section can change the Customer Item information for this and future orders for this item when ordered by this customer. The information on already existing customer orders remains unchanged.

The following prompt is displayed when you change an existing Customer Item Unit Price:

Quoted price exists—do you want to update quote Y/N.

Y = Change price for this line item and the customer item.

N = Change price for this line item only.

Use the **Text** section to add supplemental line item information for customer use.

Fields

Catalog Item Description

Catalog Item Description identifies the catalog item in terms of its characteristics. Entry is any alphanumeric combination of up to 70 characters.

Where Used: CCAT; Customer Order; Line Item Details + Customer Item; Standard Product Detail

CO Number

Customer Order Number is the user-defined identifier for a customer order. Entry is any alphanumeric combination of up to 30 characters.

Where Used: Advance Ship Notice Line; Advance Ship Notice Order Detail; Available for Shipping Allocation Batch; COAN; COCD; COMI; COMT; CORV; CPMT; Custom Product Component Detail; Custom Product Detail; Customer + Credit; Customer Order; Customer Order + Order Header; Customer Order Header Detail; Customer Order Line Price Adjustment; Customer Order Receipt/Reverse; CWIP; Demand Peg Detail; GASN; Inventory Allocation; IVPR; IVRR; JEST; Job Estimates and Performance Report; Material Shortages Detail; MOAN; MSMT; OPSL; Order Detail; Orders on Shipment; Package Content; Packaging Detail; PICI; PICK; Picklist Detail; PORI; PORV; Pricing Maintenance + Test Order; Purchased Component Detail; Serial Number List; SHIP; Shipment Allocation Detail; Shipment Order Detail; Shipping Allocation Batch; SHPI; SHPL; STAD; Standard Product Detail; Supply Peg Detail

CO Rev Date

Customer Order Revision Date is the date of the last change made to the customer order. The **Customer Order Revision Date** is changed to the system date when the customer order is revised.

Where Used: COMI; COMT; CORV; CPMT; Custom Product Component Detail; Custom Product Detail; Customer Order Header Detail; Customer Order Receipt/Reverse; CWIP; JEST; Job Estimates and Performance Report; Line Item Details + Custom Product; OPSL; PICI; PICK; Picklist Detail; Standard Product Detail

Commission Code

Commission Code is the user-defined identifier for salespersons' commissions. The overall commission for a sale is calculated at the time of invoicing. Entry is any alphanumeric combination of up to 3 characters.

Where Used: ARIR; CMTA; CMTI; Custom Product Detail; Customer + General; Customer Browse Detail; Customer Name/Address Detail; Customer Order + Order Detail; Customer

Order Header Detail; Inventory Adjustment Application; Invoice Line Item Detail; IVCO; IVIE; IVII; Line Item Details + General; Pricing Maintenance + Test Order; Standard Product Detail

CSR

Customer Service Representative identifies the person responsible for handling this customer's account. Entry is any alphanumeric combination of up to 3 characters.

Where Used: COAN; COMI; COMT; CORV; CPMT; CUID; CUII; CUSI; CUST; Custom Product Component Detail; Custom Product Detail; Customer + General; Customer Browse Detail; Customer Financial Detail; Customer Name/Address Detail; Customer Order + Order Detail; Customer Order Header Detail; Customer Order Receipt/Reverse; Demand Peg Detail; Global Settings; IVPR; IVRR; JEST; Job Estimates and Performance Report; Material Shortages Detail; MPED; MSCF; OPSL; ORST; PICI; PICK; Picklist Detail; Pricing Maintenance + Test Order; REDI; RVED; STAD; Standard Product Detail; Transaction Detail

Cust Id

Customer Identification is the identification number assigned to a customer. Entry is any alphanumeric combination of up to 13 characters.

Where Used: Advance Ship Notice Carrier Detail; Advance Ship Notice Shipment Detail; ARAH; ARCD; ARCJ; ARCP; ARCR; ARES; ARIC; ARIH; ARIP; ARIR; ARPD; ARPH; ARRJ; ARSC; ARSR; ARST; ARTB; ARTX; Available Customer Shipments; Available for Shipping Allocation Batch; Browse Setup (customer); Browse Setup (order); CIMT; CINV; COAN; COBK; COCD; COMI; COMT; CORV; COYE; CPMT; CUID; CUII; Cumulative Detail; CUPB; CUPJ; CUSI; CUST; Custom Product Component Detail; Custom Product Detail; Customer; Customer Browse; Customer Browse Detail; Customer Financial Detail; Customer Invoice List; Customer Item + General; Customer Name/Address Detail; Customer Order; Customer Order + Order Header; Customer Order Header Detail; Customer Order Receipt/Reverse; Customer Payment List; Demand Peg Detail; EDIX; EXRU; G/L Distribution (ARSM Module); GASN; Inbound Conversion Detail; Inventory Adjustment Application; Invoice Header Detail; Invoice Line Item Detail; IORD; IVCO; IVIA; IVIE; IVII; IVPP; IVPR; IVRR; IVRV; JEST; Job Estimates and Performance Report; Lot Trace Issue Detail; Lot Trace Receipt Detail; Material Shortages Detail; MOAN; MPED; MPIT; MSMT; OPSL; Order Browse; Order Detail; ORST; Outbound Conversion Detail; Partner Item Detail; PCMT; PICI; PICK; Picklist Detail; Pricing Maintenance + Items/Customers; Pricing Maintenance + Test Order; SBOL; Serial Number List; SHIP; Ship to Browse; Ship to Browse Detail; Shipment Allocation Detail; Shipment Allocation List; Shipping Allocation Batch; SHPI; SHPL; STAD; Standard Product Detail; Supply Peg Detail; Transaction Detail

Cust PO Ln#

Customer Purchase Order Line Number is a reference field which can be used to record the corresponding line number from the customer purchase order. For example, this line number may be needed by an EDI system for tracking purposes. This line number is not used by the system. Entry is up to 10 alphanumeric characters.

Where Used: Custom Product Detail; GASN; Pricing Maintenance + Test Order; Standard Product Detail

Customer Item

Customer Item is the identification assigned to the item by the customer. Entry is any alphanumeric combination of up to 30 characters.

Where Used: CIMT; CPMT; Cumulative Detail; Custom Product Component Detail; Custom Product Detail; Customer Item + General; Customer Order; Customer Order Receipt/Reverse; JEST; Job Estimates and Performance Report; Line Item Details + Customer Item; MPIT; OPSL; Partner Item Detail; PCMT; Shipments by Line Item; Standard Product Detail; Transaction Detail

Customer Item Conv

Customer Item Conversion is used to calculate the order quantity based on the ratio between the customer's unit of measure and the stocking unit of measure. Entry is numbers only. Decimal places are allowed.

Where Used: Customer Item + General; Customer Order Receipt/Reverse; Line Item Details + Customer Item; MPIT; Pricing Maintenance + Test Order; Standard Product Detail

Customer Item Description

Customer Item Description is the description assigned to the item by the customer. Entry is any alphanumeric combination of up to 70 characters.

Where Used: CIMT; Custom Product Component Detail; Custom Product Detail; Customer Item + General; Customer Order; Customer Order Receipt/Reverse; JEST; Job Estimates and Performance Report; Line Item Details + Customer Item; OPSL; Partner Item Detail; Shipments by Line Item; Standard Product Detail

Customer Item Order Qty

Customer Item Order Quantity is the number of items being ordered based on the customer item unit of measure and the customer item conversion. Entry is up to 10 numbers. Decimal places are allowed.

Where Used: Line Item Details + Customer Item; Standard Product Detail

Customer Item Tr LT

Customer Item Transportation Lead Time is the number of days, according to the customer, required to transport this item to the customer site. Entry is up to 2 numbers.

Where Used: CIMT; Custom Product Detail; Line Item Details + Customer Item; Standard Product Detail

Customer Item UM

Customer Item Unit of Measure identifies the standard unit of measure assigned to the item by the customer. Entry is up to 4 letters.

Where Used: CIMT; Customer Item + General; Customer Order Receipt/Reverse; Line Item Details + Customer Item; MPIT; Partner Item Detail; Pricing Maintenance + Test Order; Shipments by Line Item; Standard Product Detail

Customer Item Unit Price

Customer Item Unit Price is the price per unit of the item based on the **Customer Item UM** and **Customer Item Conv**. Entry is numbers only. Decimal places are allowed.

Where Used: Standard Product Detail

Customer Name

Customer Name is the name of a customer. Entry is any alphanumeric combination of up to 60 characters.

Where Used: ARAH; ARCD; ARCJ; ARCR; AREX; ARIC; ARIH; ARIP; ARIR; ARPD; ARPH; ARRJ; ARSC; ARSR; ARTB; ARTX; Available Customer Shipments; Browse Setup (customer); Browse Setup (order); CIMT; COBK; COCD; COMI; COMT; CORV; COYE; CPMT; CUID; CUII; CUPB; CUPI; CUSI; CUST; Custom Product Component Detail; Custom Product Detail; Customer; Customer + Address; Customer + General; Customer Browse; Customer Browse Detail; Customer Financial Detail; Customer Invoice List; Customer Item + General; Customer Name/Address Detail; Customer Order; Customer Order Header Detail; Customer Order Receipt/Reverse; Customer Payment List; EDIX; EXRU; G/L Distribution (ARSM Module); IVCO; IVIA; IVPP; JEST; Job Estimates and Performance Report; Lot Trace Issue Detail; Lot Trace Receipt Detail; OPSL; Order Browse; Order Detail; ORST; PICI; PICK; Picklist Detail; Pricing Maintenance + Test Order; SBOL; Serial Number List; SHIP; Ship to Browse Detail; Shipment Allocation List; Shipping Detail; SHPI; SHPL; STAD; Standard Product Detail

Date Last Ship

Date Last Ship is the last time any quantity of the item was sent out to the vendor/customer.

Where Used: Custom Product Detail; Picklist Detail; Standard Product Detail

Desc

Item Description identifies the item in terms of its characteristics. When space is limited, a partial description is displayed. Entry is any alphanumeric combination of up to 70 characters.

Where Used: A/P Received Item List; ABCR; Advance Ship Notice Line; APPI; APPV; Available Pricing; AVII; AVIT; BILL; BILL; Bill of Material; Bill of Material Detail; Browse Setup (item); Capacity Planning; CCAN; CCAT; CMLB; COBK; COMP; Comparison Bill; Comparison of Summarized Bills; Contract Item Detail; Contract Item Detail/Pricing; CORV; Cost Estimate by Lot Size; Costed Bill Detail; CSLB; Custom Product Component Detail; Customer Item + General; Customer Order; Customer Order Receipt/Reverse; CWIP; Demand Peg Detail; Dispatch List; Engineering; FCST; ICCR; IHIR; INVA; Inventory Allocation; Inventory History List; Inventory Transaction History Report; INVR; IORD; IPPD; ISVI; ITBI; ITCB; ITCI; Item + Alternates; Item + Quantity; Item Availability; Item Availability + Quantity; Item Browse; Item Browse Detail; Item History; Item Lot Trace and Serialization Detail; Item Master; Item Master Detail; Item Master Planning Detail; Item Responsibility Assigned Results; ITMB; ITMC; ITMI; ITPB; ITPI; Job Estimates and Performance Report; Lead Time; Lead Time Analysis; Lead Times Assigned Results; LEXP; Line Item Details + Item; LMSI; LMST; Location Index; Lot Detail; Lot Inventory Transaction History Report; Lot Trace; Lot Trace Issue Detail; Lot Trace Receipt Detail; LOTR; LVAL; Manufacturing Order Line Item Detail; Manufacturing Order Receipt/Reverse; Material Exposure; MBIL; MCST; MOMI; MOMT; MORI; MORV; MPSR; MPSS; MSMT; Multi-Level Bill; Multi-Level Costed Bill; Multi-Level Where Used; MUSE; Open Order Detail; OPSL; Order Completion Status; Order Cost Variance Status; Order Detail; Order Line Items; OVAR; Package Content; Packaging Detail; Partner Item Detail; PBCI; PBCT; PBII; PICI; PICK; Picklist Detail; POAN; POAS; POCI; POCR; POCT; POMI; POMT; PORI; PORR; PORV; POYE; Production; Purchase Order Line Item Detail; Purchase Order Line Item Detail (CPMT); Purchase Order Line Items; Purchase Order Receipt History; Purchased Component Detail; QSRC; QUOI; QUOT; Router/Traveler; SDAB; SDAL; Shipment Allocation Detail; Shipments by Line Item; Shipping Detail; Shortages by Order; SHPL; Single-Level Configuration Bill of Material Report; SSII; SSIL; Standard Costs

Assigned Results; Standard Product Detail; Summarized Bill; Supply Peg Detail; Transaction Detail; VDII; VDIT; VDSC; VITI; Where Used; WIPR; WUSE

Exchange Rate

Line Exchange Rate is the ratio of **Foreign Unit Price** to **Local Unit Price** for this line item. A new **Line Exchange Rate** can be defined by entering a new exchange rate. Leaving this field blank will cause the field to default to the current exchange rate. Fixed exchange rates cannot be changed on this screen. If the transaction requires triangulation, you can toggle between the first and second legs of the calculation by pressing ALT+C. Entry in this field must be greater than zero and up to 9999999999 preceded by a calculation operator * or /.

Where Used: CPMT; Custom Product Component Detail; Custom Product Detail; JEST; OPSL; Standard Product Detail

Exempt

Exempt indicates whether or not the customer pays taxes on purchases for this line item and taxing authority. **Exempt** is established for the customer but can be changed for each line item.

N = No.

The purchase is not tax-exempt.

Y = Yes.

The purchase is tax-exempt.

0 = User Defined

1 = User Defined

2 = User Defined

3 = User Defined

4 = User Defined

5 = User Defined

6 = User Defined

7 = User Defined

8 = User Defined

9 = User Defined

Where Used: ARTX; Custom Product Detail; Customer + Financial; Customer Name/ Address Detail; Customer Order + Taxes; Customer Order Header Detail; Invoice Line Item Detail; IVIE; IVII; Line Item Details + Taxes; Ship to Browse Detail; Standard Product Detail

Ext Text

Extended Text identifies whether an extended text message exists for this information.

Where Used: Contract Header Detail; Contract Item Detail; Contract Item Detail/Pricing; Custom Product Detail; Customer Financial Detail; Customer Order Header Detail; Invoice Header Detail; Order Line Items; POCR; Purchase Order Header Detail; Purchase Order Line Item Detail; Purchase Order Line Items; SBOL; Standard Product Detail

Extd Price

Extended Price equals the unit price times the ordered quantity.

Where Used: A/P Receiving Detail; COMI; COMT; CPMT; Custom Product Component Detail; Custom Product Detail; Customer Order; IVIE; IVII; IVPR; IVRR; JEST; Job Estimates and Performance Report; OPSL; PCST; POMI; POMT; POSR; Pricing Maintenance + Test Order; Purchase Order Line Item Detail; Purchase Order Line Item Detail (CPMT); Standard Product Detail; VDSC

Function

Function codes are four-character abbreviations for screen names. Each screen has a unique code used for identification and transportation. For example, ITMB identifies the Item Master screen. Entry is 4 alphanumeric characters.

Where Used: screens and reports

In Shp Qty

Shipping Quantity is the number of units issued to customer orders. **Shipping Quantity** is decreased when material is shipped. It is considered unavailable for material planning purposes, shipment allocation purposes, for issue and for component availability checks.

Where Used: Available for Shipping Allocation Batch; Custom Product Detail; Inventory History List; INVR; Item Availability; Item History; ITHR; Line Item Details + Custom Product; MPSR; MPSS; Production; Shipment Allocation Detail; Shipment Allocation List; Shipping Allocation Batch; SSII; Standard Product Detail

Item

Item is the unique identifier for a part, whether it be a piece part, tool, raw material, an assembly or finished product. All items are set up using the ITMB screen. Within a product structure, an item can be a component as well as a parent. Entry is any alphanumeric combination of up to 30 characters.

Where Used: A/P Received Item List; ABCR; Advance Ship Notice Line; Allowance/Charge Detail (Detail); APPI; APPV; AUDT; Available for Shipping Allocation Batch; AVII; AVIT; Bill of Material Accuracy Results; Browse Setup (item); Capacity Planning; CBIL; CCAN; CCAT; CIMT; CINV; COAN; COBK; COCD; COMI; COMP; Comparison Bill; Comparison of Summarized Bills; COMT; Contract Item Detail; Contract Item Detail/Pricing; Contract Summary; CORV; CSTU; Cumulative Detail; Customer Item + General; Customer Order; Customer Order Line Price Adjustment; Customer Order Receipt/Reverse; CWIP; Demand Peg Detail; Engineering; FCST; GASN; ICCR; IHIR; IMTR; INVA; Inventory Adjustment Application; Inventory Allocation; Inventory History List; Inventory Transaction History Report; INVR; IORD; IPPD; ISVI; ITBI; ITCB; ITCI; Item + Quantity; Item Availability; Item Availability + Quantity; Item Browse; Item Browse Detail; Item History; Item Lot Receipt; Item Lot Trace and Serialization Detail; Item Master; Item Master Detail; Item Master Planning Detail; Item Responsibility Assigned Results; Item Shortages; ITHC; ITHR; ITMB; ITMC; ITMI; ITPB; ITPI; Lead Times Assigned Results; LEXP; LHS; Line Item Details + Item; LMSI; LMST; Lot Detail; Lot Inventory Transaction History Report; Lot Selection; Lot Trace; Lot Trace Issue Detail; Lot Trace Receipt Detail; LOTR; LVAL; Manufacturing Order Line Item Detail; Manufacturing Order Receipt/Reverse; Material Shortages Detail; MCST; MOAN; MOFR; MOMI; MOMT; MORI; MORV; MPIT; MPSR; MPSS; MSMT; Multi-Level Bill; Multi-Level Costed Bill; Multi-Level Where Used; MUSE; Open Order Detail; Order Completion Status; Order Cost Variance Status; Order Detail; OVAR; Package Content; Packaging Detail; Packing List; Partner Item

Detail; PBCI; PBCT; PBII; PICI; PICK; Picklist Detail; POCI; POCR; POCT; PORI; PORV; POYE; Pricing Maintenance + Action Detail; Pricing Maintenance + Action List; Pricing Maintenance + Items/Customers; Pricing Maintenance + Test Order; Production; Purchase Order Receipt History; Purchased Component Detail; QSRC; QUOI; QUOT; Router/Traveler; Schedule Board; SDAB; SDAL; Selection Setup; Serial Number List; Serial Numbers Shipped; SHIP; Shipment Allocation Detail; Shipment Allocation List; Shipments by Line Item; Shipping Allocation Batch; Shortages by Order; SHPL; SSII; SSIL; Standard Costs Assigned Results; Standard Product Detail; Summarized Bill; Supply Peg Detail; Transaction Detail; VDII; VDI; VDIT; VDSC; VEIT; Vendor/Item Detail; VETI; VITI; VPFR; WIPL; WIPR; WIPS; WUSE

Ln#

Line Number is the identification of a line item on an order. The **Line Number** is system-assigned. Entry is up to 3 numbers.

Where Used: A/P Invoice Matching Detail; A/P PO/Inv Variance by Invoice; A/P Receiving Detail; Advance Ship Notice Line; Advance Ship Notice Order Detail; APEX; APID; APPI; APPV; APUV; Available for Shipping Allocation Batch; Backflush Issue Reconciliation Report; Bill of Material Accuracy Results; Capacity Planning; CCAN; CINV; COAN; COCD; COMI; COMT; CORV; CPMT; CSTU; Custom Product Component Detail; Custom Product Detail; Customer Order; Customer Order + Order Header; Customer Order Line Price Adjustment; Customer Order Receipt/Reverse; CWIP; Demand Peg Detail; Dispatch List; GASN; IHIR; IMTR; Inventory Transaction History Report; IORD; Item Shortages; JEST; Job Estimates and Performance Report; LHis; LMSI; LMST; Location Index; Lot Detail; Lot Inventory Transaction History Report; Lot Trace Issue Detail; Lot Trace Receipt Detail; LOTR; LRRP; Manufacturing Order Line Item Detail; Manufacturing Order Receipt/Reverse; Material Shortages Detail; MCST; MOAN; MOFR; MOMI; MOMT; MORI; MORV; MSMT; Open Order Detail; OPSL; Order Completion Status; Order Cost Variance Status; Order Detail; Order Line Items; OVAR; Package Content; Packaging Detail; Packing List; PCMT; PCST; PICI; PICK; Picklist Detail; POAN; POAS; POMI; POMT; PORI; PORR; PORV; POSR; POVD; Pricing Maintenance + Test Order; Purchase Order Line Item Detail; Purchase Order Line Item Detail (CPMT); Purchase Order Line Items; Purchased Component Detail; Router/Traveler; Schedule Board; SDAB; Serial Number List; SHIP; Shipment Allocation Detail; Shipment Allocation List; Shipments by Line Item; Shipping Allocation Batch; Shortages by Order; SHPL; STAD; Standard Product Detail; Supply Peg Detail; Transaction Detail; TRUD; VDSC; VPFR; WIPL; WIPR; WIPS

Ln# Sta

Line Number Status indicates the item's current position within the order process. **Line Number Statuses** are:

2 = Firm Planned or Quote.

Firm Planned: For forecast line number types (1, 2, 3), the item's order quantity and scheduled date are fixed and are not automatically changed. Quote: For custom product line number types (X), the order-dependent bill of material can be attached to the item, but component demands are ignored for planning purposes. This status may be selected for new orders only.

3 = Open.

The item's order quantity and scheduled date are fixed. The order-dependent bill of material is attached to the item.

4 = Released.

The item's order quantity and scheduled date are fixed. The order-dependent bill of material is attached to the item. The order and picklist can be printed and issues/shipments can be made.

5 = Closed.

All required issues or shipments have been made for the item.

6 = Closed.

The order closure report has reported this order closure. This status is system-assigned.

7 = Closed.

The order is ready to be deleted from the active file and retained in order history. This status is system-assigned.

8 = Closed.

The order is ready to be deleted, but other line items on the same order have a **Ln# Sta** of less than 6. This status is system-assigned.

9 = Credit Hold.

The customer's credit limit has been exceeded or the order is placed on hold for another reason. The item is treated as an open order.

Line Number Status can only be incremented, except when reopening an order, which decrements **Line Number Status** from 5 to 4.

Where Used: COAN; COMI; COMT; CPMT; Custom Product Component Detail; Custom Product Detail; CWIP; Demand Peg Detail; JEST; Job Estimates and Performance Report; Material Shortages Detail; OPSL; PICI; PICK; Picklist Detail; Pricing Maintenance + Test Order; Purchased Component Detail; Shipments by Line Item; Standard Product Detail; Supply Peg Detail

Ln# Typ

Line Number Type determines the use of the item order quantity in planning, manufacturing and accounting. **Line Number Types** are:

A = Assemble-to-order.

Standard product. Reserved for future use.

C = Standard product

X = Custom product

1 = Customer Forecast Type 1.

2 = Customer Forecast Type 2.

3 = Customer Forecast Type 3.

B = By-product. Created as part of another order.

U = Tool return.

Created as part of another order.

P = Purchased (not available for customer orders)

Forecast line types are included in data extracts as **Ln# Typ** = F.

Where Used: CINV; COAN; COMI; COMT; CORV; CPMT; Custom Product Component Detail; Custom Product Detail; Customer Order; Customer Order Receipt/Reverse; CWIP; Demand Peg Detail; IHIR; JEST; Job Estimates and Performance Report; Material Shortages Detail; OPSL; Order Detail; OVAR; PICI; PICK; Picklist Detail; Pricing Maintenance + Test

Order; Purchased Component Detail; Serial Number List; SHIP; Standard Product Detail; Supply Peg Detail; Transaction Detail

LS

Line Selector identifies the item used to determine the order price. **Line Selectors** are:

B = Catalog.

Catalog information is used for pricing.

Q = Quote.

Customer Item information is used for pricing.

S = Standard.

Item Master information is used for pricing.

Where Used: COMI; COMT; CPMT; Custom Product Component Detail; Custom Product Detail; JEST; Job Estimates and Performance Report; OPPL; Purchased Component Detail; Standard Product Detail; Transaction Detail

Ord Sta

Order Status indicates the order's current position within the order process. **Order Status** is automatically displayed for an order, based on the line number status of the line items attached to the order. The order status is the highest status of any of the active line items. When all line items are closed, the order changes to complete or closed. **Order Statuses** are:

1 = Preliminary.

The order header is identified and basic information is entered.

2 = Firm Planned.

All active line items have a **Ln# Sta = 2** (firm planned).

3 = Open.

The highest **Ln# Sta** of all active line items is 3 (open).

4 = Released.

Paperwork is produced and receipts or issues can be made for at least one of the line items. The highest active **Ln# Sta = 4** (released).

5, 6, 7 = Complete or Closed.

All required receipts, shipments or issues have been made for all the line items. Adding a line item to a completed order changes the **Order Status** to REL. All order line items are closed (**Ln# Sta = 5, 6 or 7**).

9 = Credit Hold.

The customer's credit limit has been exceeded or the order is placed on hold for another reason. The item is treated as an open order.

Where Used: COMI; COMT; Contract Purchase Orders; CORV; CPMT; Custom Product Component Detail; Custom Product Detail; Customer Order + Order Header; Customer Order Header Detail; Customer Order Receipt/Reverse; EDIX; IORD; JEST; Job Estimates and Performance Report; Manufacturing Order Line Item Detail; Manufacturing Order Receipt/Reverse; MCST; MOMI; MOMT; MORI; MORV; OPPL; Order Browse; ORST; PCST; PICI; PICK; Picklist Detail; POMI; POMT; PORI; PORV; Purchase Order Header Detail; Purchase Order Line Item Detail (CPMT); Router/Traveler; Shortages by Order; Standard Product Detail; WIPR

Order Qty

Order Quantity is the number of items ordered at the specified unit of measure. Entry is up to 10 numbers.

Where Used: Available Pricing; CINV; COCD; COMI; COMT; Contract Header Detail; Contract Item Detail; Contract Item Detail/Pricing; CORV; CPMT; CSTU; Cumulative Detail; Custom Product Component Detail; Custom Product Detail; Customer Order; CWIP; Demand Peg Detail; IORD; IVPR; IVRR; JEST; Job Estimates and Performance Report; Line Item Details + Item; Manufacturing Order Line Item Detail; MCST; MOFR; MOMI; MOMT; MORI; MORV; MSMT; Open Order Detail; OPSL; Order Detail; Order Line Items; OVAR; Packing List; PCST; PICI; PICK; Picklist Detail; POCR; POMI; POMT; PORR; POSR; POVD; Pricing Maintenance + Test Order; Purchase Order Line Item Detail; Purchase Order Line Item Detail (CPMT); Purchase Order Line Items; Purchased Component Detail; SDAB; Shipment Allocation Detail; Shipments by Line Item; Standard Product Detail; Supply Peg Detail; Transaction Detail; VDSC; VPFR; WIPR; WIPS

Ovr

Commission Code Override indicates whether the **Commission Code** is different from that which has been established on the Customer Master.

Y = Yes.

The **Commission Code** has been changed for this order.

N = No.

The **Commission Code** has not been changed and matches the Customer Master.

Where Used: Custom Product Detail; Standard Product Detail

Price Adjustment

Price Adjustment is the percentage discount allowed or surcharge placed on an order from this customer. The value in this field is used to calculate the Unit Price for an item on an order line. **Price Adjustment** indicators for screen or import data entry are:

S = Surcharge

D = Discount

Entry is up to 99.99 percent with a fixed decimal place.

The entry for a surcharge price adjustment will add the price adjustment percent to 100%. The entry for a discount price adjustment will subtract the price adjustment percent from 100%.

Where Used: Allowance/Charge Detail (Detail); Custom Product Detail; Customer + Financial; Customer Browse Detail; Customer Name/Address Detail; Customer Order + Order Detail; Customer Order Header Detail; Line Item Details + General; Pricing Maintenance + Test Order; Standard Product Detail

Price Source

Price Source identifies the origin of the item's price. **Price Sources** are:

B = Catalog

C = Cost plus

M = Manual

P = Price roll-up

Q = Quote

S = Standard

Where Used: Custom Product Detail; Pricing Maintenance + Test Order; Standard Product Detail

Prom Dlvry

Promised Delivery is the date that the items are committed to be at the customer site. The transportation lead time is used with the **Promised Delivery** date to calculate the shipping date.

Where Used: Available Pricing; COCD; COMI; COMT; CPMT; Custom Product Component Detail; Custom Product Detail; EXRU; IORD; Job Estimates and Performance Report; OPSL; Purchased Component Detail; Standard Product Detail; Transaction Detail

Reference

Reference is the lines of user-defined data. Each line entry is any alphanumeric combination of up to 50 characters.

Reqst Dlvry

Requested Delivery is the date that the items are requested to be at the customer site. The transportation lead time is used with the **Requested Delivery** date to determine the requested shipping date. The **Requested Delivery** date is compared to the **Prom Dlvry** date to determine if rescheduling is necessary.

Where Used: Custom Product Detail; IORD; Job Estimates and Performance Report; Standard Product Detail

RF

Replace Forecast indicates whether this customer order consumes forecast or is additive to forecast.

Y = Yes.

This customer order consumes forecast.

N = No.

This customer order is additive to forecast.

In the Sales Order Processing Module, X (select) = yes and blank = no.

Where Used: COMI; COMT; CPMT; Custom Product Component Detail; Custom Product Detail; Customer Order; Job Estimates and Performance Report; OPSL; Standard Product Detail

Shipped Quantity

Shipped Quantity is the number of items shipped for an order.

Where Used: Advance Ship Notice Line; CINV; Custom Product Detail; Invoice Line Item Detail; IORD; IVIE; IVII; IVPR; IVRR; Line Item Details + Custom Product; Order Detail; Packing List; Picklist Detail; Shipments by Line Item; SHPL; Standard Product Detail

Text No

Text Number identifies a set of text entered for descriptive purposes. The system assigns a **Text Number** for each unique set of text, providing the capability of reusing the text for a similar situation. Entry is up to 6 numbers.

Where Used: Bill of Material Detail; Contract Header Detail; Contract Item Detail; Contract Item Detail/Pricing; CORV; Custom Product Component Detail; Custom Product Detail; Customer Financial Detail; Customer Name/Address Detail; Customer Order Header Detail; Invoice Header Detail; Item Lot Receipt; Item Lot Trace and Serialization Detail; Item Master Detail; Item Master Planning Detail; LMSI; LMST; Lot Trace; Manufacturing Order Line Item Detail; MOMI; MOMT; MORI; MORV; Order Line Items; Packaging Detail; Picklist Detail; POCR; Production; Purchase Order Header Detail; Purchase Order Line Item Detail; Purchase Order Line Item Detail (CPMT); Purchase Order Line Items; Purchased Component Detail; SBOL; SHIP; Standard Product Detail; TEXT; TXWU; Vendor Configuration; Vendor Master Detail; Vendor/Item Detail

Tr LT

Transportation Lead Time is the number of working days normally required to transport items to the customer. **Transportation Lead Time** is used to calculate the shipping date based on the **Prom Dlvry** date. Entry is up to 2 numbers.

Where Used: COMI; COMT; CPMT; Custom Product Component Detail; Custom Product Detail; Job Estimates and Performance Report; OPSL; Purchased Component Detail; Standard Product Detail; Transaction Detail

UM

Unit of Measure identifies the standard unit for an item used in the manufacturing process. Entry is up to 4 alphanumeric characters.

Where Used: A/P PO/Inv Variance by Invoice; A/P Receiving Detail; APEX; APPI; APPV; APUV; Available for Shipping Allocation Batch; AVII; AVIT; BILL; BILL; Bill of Material; Bill of Material Detail; CCAT; CINV; CMLB; COBK; COMI; COMT; Contract Header Detail; Contract Item Detail; Contract Item Detail/Pricing; CORV; Costed Bill Detail; CPMT; CSLB; Custom Product Component Detail; Custom Product Detail; Customer Order; Customer Order Line Price Adjustment; Customer Order Receipt/Reverse; CWIP; Demand Peg Detail; Engineering; FCST; ICCR; IHIR; INVA; Inventory Allocation; INVR; IORD; IPPD; ITBI; ITCB; ITCI; Item + Quantity; Item Availability + Quantity; Item Browse Detail; Item History; Item Lot Receipt; Item Lot Trace and Serialization Detail; Item Master; Item Master Detail; Item Master Planning Detail; Item Responsibility Assigned Results; Item Shortages; ITHC; ITHR; ITMB; ITMC; ITMI; ITPB; ITPI; IVPR; IVRR; JEST; Job Estimates and Performance Report; Lead Times Assigned Results; LEXP; LHIS; Line Item Details + Item; LMSI; LMST; Location Index; Lot Detail; Lot Trace; Lot Trace Issue Detail; Lot Trace Receipt Detail; LOTR; LVAL; Manufacturing Order Line Item Detail; Manufacturing Order Receipt/Reverse; Material Exposure; MBIL; MCST; MOMI; MOMT; MORI; MORV; MPIT; MPSR; MPSS; MSMT; Multi-Currency; Multi-Level Bill; Multi-Level Where Used; MUSE; Open Order Detail; OPSL; Order Completion Status; Order Cost Variance Status; Order Detail; Order Line Items; OVAR; Packaging Detail; Packing List; Partner Item Detail; PBCI; PBCT; PCST; PICI; PICK; Picklist Detail; POI; POCR; POCT; POMI; POMT; PORI; PORR; PORV; POSR; POVD; Pricing Maintenance + Action Detail; Pricing Maintenance + Action List; Pricing Maintenance + Test Order; Production; Purchase Order Line Item Detail; Purchase Order Line Item Detail (CPMT); Purchase Order Line Items; Purchase Order Receipt History; Purchased Component Detail; QUOI; QUOT; Router/Traveler; SDAB; SDAL; Shipment Allocation Detail; Shipments by Line Item; Shipping

Allocation Batch; Shipping Detail; Shortages by Order; SHPL; Single-Level Configuration Bill of Material Report; SSII; SSIL; Standard Costs Assigned Results; Standard Product Detail; Summarized Bill; Supply Peg Detail; Transaction Detail; VDII; VDIT; VDSC; VEIT; Vendor/Item Detail; VETI; VPFR; Where Used; WIPR; Workcenter Master; WUSE

Unit Price

Unit Price is the price per unit of the item being ordered. Entry up to 16 numbers. Decimals are allowed.

Where Used: Advance Ship Notice Line; Allowance/Charge Detail (Detail); APEX; Available Pricing; COMI; COMT; Contract Item Detail; Contract Item Detail/Pricing; CPMT; Cumulative Detail; Custom Product Component Detail; Custom Product Detail; FCST; Inventory Adjustment Application; Invoice Line Item Detail; Item Availability; IVIE; IVII; IVPR; IVRR; JEST; Job Estimates and Performance Report; MPSR; MPSS; Open Order Detail; OPSL; PCST; POMI; POMT; POVD; Pricing Maintenance + Test Order; Purchase Order Line Item Detail; Purchase Order Line Item Detail (CPMT); Purchase Order Receipt History; Quantity Breakpoints and Price Formulas; Quantity Breaks and Expedite Fees; Standard Product Detail; Transaction Detail; VDSC

VAT Code

VAT Code is the user-defined identifier for the tax rate and calculation method to be used by a customer order line item. The **VAT Code** on the customer order is determined by a **VAT Product Code** and **VAT Customer Code** combination. Entry is any alphanumeric combination of up to 2 characters.

Where Used: APVT; Custom Product Detail; Invoice Line Item Detail; Line Item Details + Taxes; Standard Product Detail; TXTA; VAT Summary (APSM Module); VAT Summary (ARSM Module); VATT

Item Availability

Use the Item Availability window to review information for the order line item. Available inventory, available to promise and lead time information is displayed. The ATP values are recalculated each time the window is opened.

Features

Transportation Shortcuts

You can use shortcut keys to go to the following related screens.

Destination	Shortcut Key(s)
Previous screen	ESC

Web Links

If you use Web UI, you can link to other screens by clicking tabs or hyperlinks.

Go to Screen...	By clicking...
ITMB (Item Master)	Screen label: Item
ITMC (Item/Work Center Cost Data)	Screen label: Item
SSII (Stock Status Inquiry by Item)	Screen label: Item
WUSE (Single Level Where Used Inquiry)	Screen label: Item

Reports

A standard report is not generated for this screen. Use the Print Screen key or any screen capture program to create an image of the screen.

Screen Reference

Item Availability – Format

The information displayed on the window varies based on the following:

- ATP recalculations are performed each time you open the window if **ATP** = Y or P for the item on the Item Master Planning Detail screen. If **ATP** = N for the item, only lead time and inventory quantity information is displayed.
- The first time you open the window for an order line item, the ATP calculation is performed based on the **Order Qty** and/or **Prom Divry** entered for the order line item. Subsequent recalculations are performed on the net increase or **ATP Qty** for the order line item.

- The **Cum ATP** and **ATP Date** fields vary based on the information entered for the order line item and the inventory available. If both the **Order Qty** and **Prom Divry** fields are entered for the order line item, two sets of **Cum ATP** and **ATP Date** fields are displayed. The first set displays the total quantity available on the date specified and the second set displays the date the total quantity is available. Only set of values is displayed if both the quantity and date specified can be met.
- You can press ESC at any time to stop the ATP calculation before the window opens. The window opens automatically and displays only lead time and inventory quantity information.

Displayed Messages

One or more of the following order availability messages are displayed at the bottom of the Item Availability window:

Order Qty is Available on xxx

Order Qty is not Avail - Max of xx Avail on xx

Total Non-ATP Inventory

Fields

Allocations

Allocations is the number and value of units committed to open and released purchase and manufacturing orders (**Ln# Sta** = 3 or 4) and released customer orders (**Ln# Sta** = 4).

Where Used: Item Availability; Item Shortages; ITHR; Location Index; Production; Shortages by Order; SSII

ATP Date

Available to Promise Date is the date when the calculated quantity is available.

Where Used: Item Availability

ATP Qty

Available-to-Promise Quantity is the quantity that is expected to be available upon order receipt after deducting dependent and customer demands prior to the next scheduled receipt.

Available-to-Promise Quantity is calculated if the parent item has a **Pln Pol** = P (production plan) or the **ATP** field on the Planning Detail screen for the parent item is Y (yes) or P (yes, batch mode). It only includes the inventory locations where **Included in ATP** is set to Y (yes).

Where Used: Item Availability

Cum ATP

Cumulative Available-to-Promise Quantity is the sum of the **Available-to-Promise Quantity** and the item's (On-Hand + In-Inspection) quantity.

Cumulative Available-to-Promise Quantity is calculated if the parent item has a **Pln Pol** = P (production plan) or the **ATP** field on the Planning Detail screen for the parent item is Y (yes) or P (yes, batch mode). It only includes the inventory locations where **Included in ATP** is set to Y (yes).

Where Used: Item Availability; MPSR; MPSS; Supply Peg Detail

Cust Dmds

Remaining Customer Demands is the total number of demands generated by actual customer orders which are not yet shipped. Open and released customer orders, including partially shipped customer orders, are included in **Remaining Customer Demands**. Forecast demands are not included in **Remaining Customer Demands**. Entry is up to 9999999999.

Where Used: Item Availability; MPSR; MPSS

Description

Item Description identifies the item in terms of its characteristics. When space is limited, a partial description is displayed. Entry is any alphanumeric combination of up to 70 characters.

Where Used: A/P Received Item List; ABCR; Advance Ship Notice Line; APPI; APPV; Available Pricing; AVII; AVIT; BILI; BILL; Bill of Material; Bill of Material Detail; Browse Setup (item); Capacity Planning; CCAN; CCAT; CMLB; COBK; COMP; Comparison Bill; Comparison of Summarized Bills; Contract Item Detail; Contract Item Detail/Pricing; CORV; Cost Estimate by Lot Size; Costed Bill Detail; CSLB; Custom Product Component Detail; Customer Item + General; Customer Order; Customer Order Receipt/Reverse; CWIP; Demand Peg Detail; Dispatch List; Engineering; FCST; ICCR; IHIR; INVA; Inventory Allocation; Inventory History List; Inventory Transaction History Report; INVR; IORD; IPPD; ISVI; ITBI; ITCB; ITCI; Item + Alternates; Item + Quantity; Item Availability; Item Availability + Quantity; Item Browse; Item Browse Detail; Item History; Item Lot Trace and Serialization Detail; Item Master; Item Master Detail; Item Master Planning Detail; Item Responsibility Assigned Results; ITMB; ITMC; ITMI; ITPB; ITPI; Job Estimates and Performance Report; Lead Time; Lead Time Analysis; Lead Times Assigned Results; LEXP; Line Item Details + Item; LMSI; LMST; Location Index; Lot Detail; Lot Inventory Transaction History Report; Lot Trace; Lot Trace Issue Detail; Lot Trace Receipt Detail; LOTR; LVAL; Manufacturing Order Line Item Detail; Manufacturing Order Receipt/Reverse; Material Exposure; MBIL; MCST; MOMI; MOMT; MORI; MORV; MPSR; MPSS; MSMT; Multi-Level Bill; Multi-Level Costed Bill; Multi-Level Where Used; MUSE; Open Order Detail; OPSL; Order Completion Status; Order Cost Variance Status; Order Detail; Order Line Items; OVAR; Package Content; Packaging Detail; Partner Item Detail; PBCI; PBCT; PBII; PICI; PICK; Picklist Detail; POAN; POAS; POCI; POCR; POCT; POMI; POMT; PORI; PORR; PORV; POYE; Production; Purchase Order Line Item Detail; Purchase Order Line Item Detail (CPMT); Purchase Order Line Items; Purchase Order Receipt History; Purchased Component Detail; QSRC; QUOI; QUOT; Router/Traveler; SDAB; SDAL; Shipment Allocation Detail; Shipments by Line Item; Shipping Detail; Shortages by Order; SHPL; Single-Level Configuration Bill of Material Report; SSII; SSIL; Standard Costs Assigned Results; Standard Product Detail; Summarized Bill; Supply Peg Detail; Transaction Detail; VDII; VDIT; VDSC; VITI; Where Used; WIPR; WUSE

External WIP

External Work in Process Quantity is the number of units issued to purchase orders which are still in external WIP. **External Work in Process Quantity** is decreased by the receipt of the completed order for the parent assembly into the stockroom. When the order is closed, any overissues are subtracted from **External Work in Process Quantity** and underissues are added to **External Work in Process Quantity**.

Where Used: Item + Quantity; Item Availability; Item Availability + Quantity; ITHR; MPSR; MPSS; Production; SSII

Fix Lead Time

Fixed Lead Time is the number of working days required for setup and queue time used in planning an order. It is added to run lead time and inspection lead time to estimate planned lead time for an order. Entry is up to 3 numbers.

Where Used: AVII; AVIT; BILL; BILL; Bill of Material; Bill of Material Detail; IPPD; Item Availability; Item Browse Detail; Item Master; Item Master Planning Detail; MBIL; MSMT; Multi-Level Bill; Multi-Level Where Used; Production; QUOI; QUOT; Single-Level Configuration Bill of Material Report; Where Used; Workcenter Master

Hold Qty

On Hold Quantity is the number of units in inventory that are awaiting disposition. Items **On Hold** have failed to meet acceptance criteria, and are examined to determine if they might still be useable. Items **On Hold** are not considered available when calculating material requirements but are included in total inventory valuation. **On Hold** inventory can be issued to a rework or repair order.

Where Used: Inventory Status; INVR; Item + Quantity; Item Availability; Item Availability + Quantity; LEXP; LMSI; LMST; Lot Detail; MPSR; MPSS; Production; Shortages by Order; SSII

Insp Lead Time

Inspection Lead Time is the number of working days normally required for inspection of an item. It is added to run lead time and fixed lead time to estimate total planned lead time for an order. For purchased items, **Inspection Lead Time** is used to determine the required dock date based on the date needed in stock. Entry is up to 3 numbers.

Where Used: AVII; AVIT; IPPD; Item Availability; Item Browse Detail; Item Master; Item Master Planning Detail; MSMT; Production; QUOI; QUOT; Single-Level Configuration Bill of Material Report; Workcenter Master

Insp Qty

Inspection Quantity is the number of units that have been received against purchase orders or manufacturing orders where the acceptance or rejection has not been reported. The **Inspection Quantity** is considered in calculating available units.

Where Used: Inventory Status; INVR; Item Availability; LEXP; LMSI; LMST; Lot Detail; MPSR; MPSS; Production; Shortages by Order; SSII

Internal WIP

Internal Work in Process Quantity is the number of units issued to manufacturing orders which are still in internal WIP or custom product WIP. **Internal Work in Process Quantity** is decreased by the receipt of the completed work order for the parent assembly into the stockroom. When the work order is closed, any overissues are subtracted from **Internal Work in Process Quantity** and underissues are added to **Internal Work in Process Quantity**.

Where Used: Item + Quantity; Item Availability; Item Availability + Quantity; Item Shortages; ITHR; MPSR; MPSS; Production; Shortages by Order; SSII

Inv Cd

Inventory Code classifies the type of inventory stored in a **Stk-Bin** location. **Inventory Codes** are:

O = On Hand.

Items considered available for issue.

H = On Hold.

Items which have failed to meet acceptance criteria. The items are not considered available.

S = Shipping.

Items issued to customer/purchase orders. Items are not considered available.

I = In-Inspection.

Items received against a purchase or manufacturing order awaiting acceptance or rejection. Items are considered available.

A = All.

Use when setting up a **Stk-Bin** location using the LMMT screen if all inventory types can be stored in the location.

Where Used: Custom Product Line Item Location Selection; Customer Order Receipt/Reverse; ICCR; IMTR; INVA; Item Availability; Inventory Transaction History Report; LEXP; LMMT; Location Selection; Lot Inventory Transaction History Report; Manufacturing Order Receipt/Reverse; PICI; PICK; PORI; PORV; SHIP; SSII; SSIL; TRUD

Item

Item is the unique identifier for a part, whether it be a piece part, tool, raw material, an assembly or finished product. All items are set up using the ITMB screen. Within a product structure, an item can be a component as well as a parent. Entry is any alphanumeric combination of up to 30 characters.

Where Used: A/P Received Item List; ABCR; Advance Ship Notice Line; Allowance/Charge Detail (Detail); APPI; APPV; AUDT; Available for Shipping Allocation Batch; AVII; AVIT; Bill of Material Accuracy Results; Browse Setup (item); Capacity Planning; CBIL; CCAN; CCAT; CIMT; CINV; COAN; COBK; COCD; COMI; COMP; Comparison Bill; Comparison of Summarized Bills; COMT; Contract Item Detail; Contract Item Detail/Pricing; Contract Summary; CORV; CSTU; Cumulative Detail; Customer Item + General; Customer Order; Customer Order Line Price Adjustment; Customer Order Receipt/Reverse; CWIP; Demand Peg Detail; Engineering; FCST; GASN; ICCR; IHIR; IMTR; INVA; Inventory Adjustment Application; Inventory Allocation; Inventory History List; Inventory Transaction History Report; INVR; IORD; IPPD; ISVI; ITBI; ITCB; ITCI; Item + Quantity; Item Availability; Item Availability + Quantity; Item Browse; Item Browse Detail; Item History; Item Lot Receipt; Item Lot Trace and Serialization Detail; Item Master; Item Master Detail; Item Master Planning Detail; Item Responsibility Assigned Results; Item Shortages; ITHC; ITHR; ITMB; ITMC; ITMI; ITPB; ITPI; Lead Times Assigned Results; LEXP; LHSI; Line Item Details + Item; LMSI; LMST; Lot Detail; Lot Inventory Transaction History Report; Lot Selection; Lot Trace; Lot Trace Issue Detail; Lot Trace Receipt Detail; LOTR; LVAL; Manufacturing Order Line Item Detail; Manufacturing Order Receipt/Reverse; Material Shortages Detail; MCST; MOAN; MOFR; MOMI; MOMT; MORI; MORV; MPIT; MPSR; MPSS; MSMT; Multi-Level Bill; Multi-Level Costed Bill; Multi-Level Where Used; MUSE; Open Order Detail; Order Completion Status; Order Cost Variance Status; Order Detail; OVAR; Package Content; Packaging Detail; Packing List; Partner Item

Detail; PBCI; PBCT; PBII; PICI; PICK; Picklist Detail; POCI; POCR; POCT; PORI; PORV; POYE; Pricing Maintenance + Action Detail; Pricing Maintenance + Action List; Pricing Maintenance + Items/Customers; Pricing Maintenance + Test Order; Production; Purchase Order Receipt History; Purchased Component Detail; QSRC; QUOI; QUOT; Router/Traveler; Schedule Board; SDAB; SDAL; Selection Setup; Serial Number List; Serial Numbers Shipped; SHIP; Shipment Allocation Detail; Shipment Allocation List; Shipments by Line Item; Shipping Allocation Batch; Shortages by Order; SHPL; SSII; SSIL; Standard Costs Assigned Results; Standard Product Detail; Summarized Bill; Supply Peg Detail; Transaction Detail; VDII; VDI; VDIT; VDSC; VEIT; Vendor/Item Detail; VETI; VITI; VPFR; WIPL; WIPR; WIPS; WUSE

MB

Make-Buy Code indicates if a part is normally purchased or manufactured. **Make-Buy Code** also directs appropriate action messages to the **Buyr** (B or S) or **Plnr** (M). **Make-Buy Codes** are:

M = Make.

Manufactured in-house.

B = Buy.

Purchased; no parts supplied to vendor.

S = Supplied.

Purchased; parts supplied to vendor.

Where Used: ABCR; AVII; AVIT; BILI; BILL; Bill of Material; Bill of Material Detail; COMP; Costed Bill Detail; CSLB; Demand Peg Detail; Engineering; FCST; IHIR; IORD; IPPD; Item Availability; Item Browse Detail; Item History; Item Lot Trace and Serialization Detail; Item Master; Item Master Detail; Item Master Planning Detail; Item Responsibility Assigned Results; Item Shortages; ITHC; ITHR; ITMB; ITMI; Lead Time Analysis; Lead Times Assigned Results; Lot Size Multiple Detail; Lot Trace; LSDA; LVAL; Material Exposure; Material Shortages Detail; MBIL; MPSR; MPSS; MSMT; Multi-Level Bill; PBCI; PBCT; Production; QUOI; QUOT; SDAB; SDAL; Shortages by Order; Single-Level Configuration Bill of Material Report; SSII; Standard Costs Assigned Results; Summarized Bill; Supply Peg Detail

Mfg Dmnds

Remaining Manufacturing Demands is the total number of manufacturing demands required for higher level items in the parent-component relationship. Entry is up to 9999999999.

Where Used: Item Availability; MPSR; MPSS

On Hand Qty

On Hand Quantity is the amount of inventory available for issue. Entry is up to 10 numbers.

Where Used: CINV; Custom Product Detail; Inventory Status; INVR; Item + Quantity; Item Availability; Item Availability + Quantity; Item Shortages; LEXP; Line Item Details + Custom Product; LMSI; LMST; Location Index; Lot Detail; MPSR; MPSS; Production; Shortages by Order; SSII

On Order

On Order Quantity is the total number of items on open or released manufacturing and purchase orders (**Ln# Sta** = 3 or 4).

Where Used: Inventory Status; Item + Quantity; Item Availability; Item Availability + Quantity; Item Shortages; Location Index; Material Shortages Detail; Production; Shortages by Order; SSI; Summarized Bill

Plan/Firm

Planned or Firm Planned Orders is the total quantity ordered for this item with **Ln# Sta** = 1 or 2. Entry is up to 9999999999.

Where Used: Item Availability; MPSR; MPSS

Run Lead Time

Run Lead Time is the average number of shop days required for a manufacturing run or vendor lead time and is used in planning an order. **Run Lead Time** is added to fixed lead time and inspection lead time to estimate planned lead time which serves to time order release. Decimal places for fractional days allowed. MRP Planning uses fractional days as reference and plans using the next whole day increment. For example, if you specify **Run LT** = 2.1, MRP Planning assumes **Run LT** = 3 for calculation purposes. Entry is up to 8 numbers.

Note: Lead times established for an item are considered to be 0 when the item is used as a phantom (**CT** = P) in a bill of material.

Where Used: AVII; AVIT; BILI; BILL; Bill of Material; IPPD; Item Availability; Item Browse Detail; Item Master; Item Master Planning Detail; MBIL; MSMT; Multi-Level Bill; Multi-Level Where Used; Production; QUOI; QUOT; Single-Level Configuration Bill of Material Report; Where Used; Workcenter Master

Ship Qty

Shipping Quantity is the number of units issued to customer orders. **Shipping Quantity** is decreased when material is shipped. It is considered unavailable for material planning purposes, shipment allocation purposes, for issue and for component availability checks.

Where Used: Available for Shipping Allocation Batch; Custom Product Detail; Inventory History List; INVR; Item Availability; Item History; ITHR; Line Item Details + Custom Product; MPSR; MPSS; Production; Shipment Allocation Detail; Shipment Allocation List; Shipping Allocation Batch; SSI; Standard Product Detail

Total Non-ATP Inventory

Total Non-ATP is the total item stock saved in the locations where the **Included in ATP** field is set to *N* on the LMMT (Location Master) screen, including On-hand and Inspection items.

Total/Total Qty

Total Quantity is the total available for the order. **Total Quantity** is the extended **Quantity** based on On Hand, In Inspection, Shipping, On Hold, Internal WIP, and External WIP quantities.

Unit Price

Unit Price is the price per unit of the item being ordered. Entry up to 16 numbers. Decimals are allowed.

Where Used: Advance Ship Notice Line; Allowance/Charge Detail (Detail); APEX; Available Pricing; COMI; COMT; Contract Item Detail; Contract Item Detail/Pricing; CPMT; Cumulative

Detail; Custom Product Component Detail; Custom Product Detail; FCST; Inventory Adjustment Application; Invoice Line Item Detail; Item Availability; IVIE; IVII; IVPR; IVRR; JEST; Job Estimates and Performance Report; MPSR; MPSS; Open Order Detail; OPSL; PCST; POMI; POMT; POVD; Pricing Maintenance + Test Order; Purchase Order Line Item Detail; Purchase Order Line Item Detail (CPMT); Purchase Order Receipt History; Quantity Breakpoints and Price Formulas; Quantity Breaks and Expedite Fees; Standard Product Detail; Transaction Detail; VDSC

ITPB – Item Price Book

Use the Item Price Book screen to view the standard unit price for each salable item on the Item Master. The standard unit price defined on the Item Price Book screen is used to calculate the total price of a line item on a customer order. This pricing system is designed to accommodate a list price/discount policy. The discount used for an item is established by customer, by order and by line item.

Established prices work in conjunction with price adjustments for each customer. A surcharge or discount can be factored into the item's price each time the customer orders the item. Prices can also be adjusted by order or by line item.

Two versions of this screen are available: one for maintenance and one for inquiry use only. The information displayed is the same, only the ability to change the information changes depending on the screen you access.

- The ITPB (Item Price Book) screen allows you to view and update unit prices.
- The ITPI (Item Price Book Inquiry) screen only allows you to view this information.

See "Entry and Inquiry Screens" under "Screen Types" in the **Using Fourth Shift** section of the Fourth Shift Basics manual for more information.

Transportation Shortcuts

You can use shortcut keys or transport buttons to go to the following related screens.

Destination	Shortcut Key(s)
ITMC (Item/Work Center Cost Data)	F8
COMT (Customer Order) (not available after SOPM Module installation)	F9
IORO (Open and Released Orders by Item)	F10

Additional Information

Window	Available From	Shortcut Key(s)
Currency Information	Any location on the screen	ALT+C

Browse Windows

You can open browse windows by choosing **Browse/Detail** from the **Tools** menu in the following fields:

Browse	From Fields
Item Browse	Starting Item

For more information, see "Selecting from a Browse List" in the Fourth Shift Basics manual.

Web Links

If you use Web UI, you can link to other screens by clicking tabs or hyperlinks.

Go to Screen...	By clicking...
ITMB (Item Master)	Screen label: Item
ITMC (Item/Work Center Cost Data)	Screen label: Item

Reports

Item Price Book

Lists unit price information for inventory items.

Access Method

To generate the report, choose **Print** or **Print Preview** from the **File** menu. The Report screen appears before the report is generated, allowing you to select a range of data for the report. For more information on reporting in general, see "Printing and Reporting" in the Fourth Shift Basics manual.

Report Template

For more information on report templates, see "Reporting for SQL Server Systems" in the System Help topics.

Fields

Currency Code

Currency Code identifies the source or target currency associated with the trading partner or bank.

- Local currency codes are defined separately for trading partner (**Curr Code** = 00000) and banking (for example, **Curr Code** = USD) transactions.
- Non-local currency codes, which are specified only if the MCMM Module is installed, are used for both trading partner and banking transactions.

Entry is an alphanumeric combination of up to 5 characters. Available characters include alphabetic letters (A-Z), numbers (0-9) and the space character ().

Where Used: A/P Payment Void Detail; APCV; APIP; APRL; AREX; ARIP; BKMT; BKTR; Cash Receipts; Cash Set Selection; Cash Set Selection Setup; CCEX; CCMT; CCON; Customer + General; Customer Financial Detail; Disbursements; EXRU; Foreign Cash Reference; G/L Transaction Detail; ITPB; ITPI; Multi-Currency; Name, Address & Contacts; Open Order Detail; Payment Selection; Vendor Master Detail

Description

Item Description identifies the item in terms of its characteristics. When space is limited, a partial description is displayed. Entry is any alphanumeric combination of up to 70 characters.

Where Used: A/P Received Item List; ABCR; Advance Ship Notice Line; APPI; APPV; Available Pricing; AVII; AVIT; BILL; BILL; Bill of Material; Bill of Material Detail; Browse Setup (item); Capacity Planning; CCAN; CCAT; CMLB; COBK; COMP; Comparison Bill; Comparison

of Summarized Bills; Contract Item Detail; Contract Item Detail/Pricing; CORV; Cost Estimate by Lot Size; Costed Bill Detail; CSLB; Custom Product Component Detail; Customer Item + General; Customer Order; Customer Order Receipt/Reverse; CWIP; Demand Peg Detail; Dispatch List; Engineering; FCST; ICCR; IHIR; INVA; Inventory Allocation; Inventory History List; Inventory Transaction History Report; INVR; IORD; IPPD; ISVI; ITBI; ITCB; ITCI; Item + Alternates; Item + Quantity; Item Availability; Item Availability + Quantity; Item Browse; Item Browse Detail; Item History; Item Lot Trace and Serialization Detail; Item Master; Item Master Detail; Item Master Planning Detail; Item Responsibility Assigned Results; ITMB; ITMC; ITMI; ITPB; ITPI; Job Estimates and Performance Report; Lead Time; Lead Time Analysis; Lead Times Assigned Results; LEXP; Line Item Details + Item; LMSI; LMST; Location Index; Lot Detail; Lot Inventory Transaction History Report; Lot Trace; Lot Trace Issue Detail; Lot Trace Receipt Detail; LOTR; LVAL; Manufacturing Order Line Item Detail; Manufacturing Order Receipt/Reverse; Material Exposure; MBIL; MCST; MOMI; MOMT; MORI; MORV; MPSR; MPSS; MSMT; Multi-Level Bill; Multi-Level Costed Bill; Multi-Level Where Used; MUSE; Open Order Detail; OPSL; Order Completion Status; Order Cost Variance Status; Order Detail; Order Line Items; OVAR; Package Content; Packaging Detail; Partner Item Detail; PBCI; PBCT; PBII; PICI; PICK; Picklist Detail; POAN; POAS; POCI; POCR; POCT; POMI; POMT; PORI; PORR; PORV; POYE; Production; Purchase Order Line Item Detail; Purchase Order Line Item Detail (CPMT); Purchase Order Line Items; Purchase Order Receipt History; Purchased Component Detail; QSRC; QUOI; QUOT; Router/Traveler; SDAB; SDAL; Shipment Allocation Detail; Shipments by Line Item; Shipping Detail; Shortages by Order; SHPL; Single-Level Configuration Bill of Material Report; SSII; SSIL; Standard Costs Assigned Results; Standard Product Detail; Summarized Bill; Supply Peg Detail; Transaction Detail; VDII; VDIT; VDSC; VITI; Where Used; WIPR; WUSE

Function

Function codes are four-character abbreviations for screen names. Each screen has a unique code used for identification and transportation. For example, ITMB identifies the Item Master screen. Entry is 4 alphanumeric characters.

Where Used: screens and reports

Item

Item is the unique identifier for a part, whether it be a piece part, tool, raw material, an assembly or finished product. All items are set up using the ITMB screen. Within a product structure, an item can be a component as well as a parent. Entry is any alphanumeric combination of up to 30 characters.

Where Used: A/P Received Item List; ABCR; Advance Ship Notice Line; Allowance/Charge Detail (Detail); APPI; APPV; AUDT; Available for Shipping Allocation Batch; AVII; AVIT; Bill of Material Accuracy Results; Browse Setup (item); Capacity Planning; CBIL; CCAN; CCAT; CIMT; CINV; COAN; COBK; COCD; COMI; COMP; Comparison Bill; Comparison of Summarized Bills; COMT; Contract Item Detail; Contract Item Detail/Pricing; Contract Summary; CORV; CSTU; Cumulative Detail; Customer Item + General; Customer Order; Customer Order Line Price Adjustment; Customer Order Receipt/Reverse; CWIP; Demand Peg Detail; Engineering; FCST; GASN; ICCR; IHIR; IMTR; INVA; Inventory Adjustment Application; Inventory Allocation; Inventory History List; Inventory Transaction History Report; INVR; IORD; IPPD; ISVI; ITBI; ITCB; ITCI; Item + Quantity; Item Availability; Item Availability + Quantity; Item Browse; Item Browse Detail; Item History; Item Lot Receipt; Item Lot Trace and Serialization Detail; Item Master; Item Master Detail; Item Master Planning Detail; Item Responsibility Assigned Results; Item Shortages; ITHC; ITHR; ITMB; ITMC; ITMI; ITPB; ITPI; Lead Times Assigned Results; LEXP; LHIS; Line Item Details + Item; LMSI; LMST; Lot Detail;

Lot Inventory Transaction History Report; Lot Selection; Lot Trace; Lot Trace Issue Detail; Lot Trace Receipt Detail; LOTR; LVAL; Manufacturing Order Line Item Detail; Manufacturing Order Receipt/Reverse; Material Shortages Detail; MCST; MOAN; MOFR; MOMI; MOMT; MORI; MORV; MPIT; MPSR; MPSS; MSMT; Multi-Level Bill; Multi-Level Costed Bill; Multi-Level Where Used; MUSE; Open Order Detail; Order Completion Status; Order Cost Variance Status; Order Detail; OVAR; Package Content; Packaging Detail; Packing List; Partner Item Detail; PBCI; PBCT; PBII; PICI; PICK; Picklist Detail; POCI; POCR; POCT; PORI; PORV; POYE; Pricing Maintenance + Action Detail; Pricing Maintenance + Action List; Pricing Maintenance + Items/Customers; Pricing Maintenance + Test Order; Production; Purchase Order Receipt History; Purchased Component Detail; QSRC; QUOI; QUOT; Router/Traveler; Schedule Board; SDAB; SDAL; Selection Setup; Serial Number List; Serial Numbers Shipped; SHIP; Shipment Allocation Detail; Shipment Allocation List; Shipments by Line Item; Shipping Allocation Batch; Shortages by Order; SHPL; SSII; SSIL; Standard Costs Assigned Results; Standard Product Detail; Summarized Bill; Supply Peg Detail; Transaction Detail; VDII; VDI; VDIT; VDSC; VEIT; Vendor/Item Detail; VETI; VITI; VPFR; WIPL; WIPR; WIPS; WUSE

Starting Item

The **Starting** field is used to request a list where the specified information appears first on the list. **Starting** entries may consist of a partial entry and if the entry is not in the list, the next highest entry appears first on the list. The **Starting** field can include one or more field combinations, each with its own entry requirements.

Where Used: A/P 1099 Distribution; A/P Payment Application Detail; A/P Payment Void Detail; A/P Received Item List; A/P Receiving Detail; A/R Payment Application Detail; APAH; APDS; APEX; APID; APIE; APII; APIR; APIV; APPA; APPD; APPI; APPO; APTX; ARAH; ARCD; AREX; ARIC; ARIH; ARPD; ARPH; ARSR; BAMT; Bank Payment Approval; BILL; BILL; BKMT; Browse Setup (customer); Browse Setup (item); Browse Setup (vendor); CACF; CCAN; CCAT; CCEX; CCMT; CIMT; CMCF; CMTA; CMTI; CNFA; COAN; COMI; COMT; Contract Item Detail/Pricing; CORV; CPMT; CUID; CUII; CUSI; CUST; FCMT; FCST; G/L Account Group/No List; G/L Account No List; G/L Batch Detail; G/L Journal Entry List; G/L Master Account Recap; G/L Org No List; G/L Org/Acct Group List; G/L Organization Group/No List; G/L Report List; G/L Source Code List; GLAG; GLAV; GLBD; GLCA; GLCI; GLDQ; GLEX; GLGQ; GLJD; GLJE; GLJI; GLJP; GLJR; GLMA; Global Extended Text Selection; GLOS; GLRD; GLRL; GLSC; GLSI; GLSS; ITBI; ITCB; Item Master; Item Shortages; ITMB; ITMI; ITPB; ITPI; IVCO; IVIA; IVIE; IVII; IVRV; LMMT; Location Selection Setup; MCST; MOAN; MOMI; MOMT; MORI; MORV; MPED; MPIT; MSMT; NMTA; OPSL; Orders on Shipment; ORST; Packaging Detail; PASS; PBCI; PBCT; PBMI; PBMT; PCMT; PCST; PICI; PICK; POAN; POAS; POCI; POCT; POMI; POMT; PORI; PORV; REDI; RTMT; RVED; SBOL; Selection Setup; Serial Number List; Serial Numbers Shipped; SHIP; Shipments by Line Item; SHPI; SSII; STAD; SUND; SUNR; SUPD; SUPR; TEXT; TXTA; VAT Summary (APSM Module); VATT; VEDI; VEID; VEND; VENI; Workcenter Master

UM

Unit of Measure identifies the standard unit for an item used in the manufacturing process. Entry is up to 4 alphanumeric characters.

Where Used: A/P PO/Inv Variance by Invoice; A/P Receiving Detail; APEX; APPI; APPV; APUV; Available for Shipping Allocation Batch; AVII; AVIT; BILL; BILL; Bill of Material; Bill of Material Detail; CCAT; CINV; CMLB; COBK; COMI; COMT; Contract Header Detail; Contract Item Detail; Contract Item Detail/Pricing; CORV; Costed Bill Detail; CPMT; CSLB; Custom Product Component Detail; Custom Product Detail; Customer Order; Customer Order Line Price Adjustment; Customer Order Receipt/Reverse; CWIP; Demand Peg Detail; Engineering;

FCST; ICCR; IHIR; INVA; Inventory Allocation; INVR; IORD; IPPD; ITBI; ITCB; ITCI; Item + Quantity; Item Availability + Quantity; Item Browse Detail; Item History; Item Lot Receipt; Item Lot Trace and Serialization Detail; Item Master; Item Master Detail; Item Master Planning Detail; Item Responsibility Assigned Results; Item Shortages; ITHC; ITHR; ITMB; ITMC; ITMI; ITPB; ITPI; IVPR; IVRR; JEST; Job Estimates and Performance Report; Lead Times Assigned Results; LEXP; LHis; Line Item Details + Item; LMSI; LMST; Location Index; Lot Detail; Lot Trace; Lot Trace Issue Detail; Lot Trace Receipt Detail; LOTR; LVAL; Manufacturing Order Line Item Detail; Manufacturing Order Receipt/Reverse; Material Exposure; MBIL; MCST; MOMI; MOMT; MORI; MORV; MPIT; MPSR; MPSS; MSMT; Multi-Currency; Multi-Level Bill; Multi-Level Where Used; MUSE; Open Order Detail; OPSL; Order Completion Status; Order Cost Variance Status; Order Detail; Order Line Items; OVAR; Packaging Detail; Packing List; Partner Item Detail; PBCI; PBCT; PCST; PICI; PICK; Picklist Detail; POCl; POCR; POCT; POMI; POMT; PORI; PORR; PORV; POSR; POVD; Pricing Maintenance + Action Detail; Pricing Maintenance + Action List; Pricing Maintenance + Test Order; Production; Purchase Order Line Item Detail; Purchase Order Line Item Detail (CPMT); Purchase Order Line Items; Purchase Order Receipt History; Purchased Component Detail; QUOI; QUOT; Router/Traveler; SDAB; SDAL; Shipment Allocation Detail; Shipments by Line Item; Shipping Allocation Batch; Shipping Detail; Shortages by Order; SHPL; Single-Level Configuration Bill of Material Report; SSII; SSIL; Standard Costs Assigned Results; Standard Product Detail; Summarized Bill; Supply Peg Detail; Transaction Detail; VDII; VDIT; VDSC; VEIT; Vendor/Item Detail; VETI; VPFR; Where Used; WIPR; Workcenter Master; WUSE

Unit Price

Standard Unit Price is the standard price in the system per unit of measure for the item. Entry is up to 16 numbers. Decimal places are allowed.

Where Used: ITPB; ITPI; Pricing Maintenance + Test Order; Transaction Detail

SREV – Shipping Order Review

The SREV (Shipping Order Review) task performs four business functions during processing:

- Shipment Status Update
- Purge Shipment Information
- Action Message Review
- Automatic Expired Order Closure (If SOPM is installed)

Shipment Status Update

When the Shipping Module is installed, the SREV task serves an important role in maintaining the relationship and status of customer orders and shipments. Shipment status values are represented on the SBOL (Shipping Bill of Lading) screen by the **Status** field and Shipment CO status values are represented on the SHIP (Shipping) screen by the **Ord/Ship Sta** field.

For Shipments at status 4 (Released), each Shipment CO status is changed from status 4 (Released) to status 5 (Closed) during the next SREV processing after shipment activity takes place. If all Shipment CO records for a Shipment are in status 5, then SREV will change the Shipment from status 4 to status 5.

During the next SREV process, Shipments at status 5 (Closed) are changed to status 6 (Inactive), the Shipment's closing date is set to the processing date and all Shipment CO records for the Shipment will become status 6.

Purge Shipment Information

SREV has the capability of deleting inactive shipments and related detail information based on a user defined Purge parameter. The parameter is defined in calendar days. Shipments with a closed date older than the specified number of calendar days are purged.

In addition to deleting the Shipment and related Shipment CO information from the database, the following related data is purged also:

- Packaging
- Shipment Serial records (if not linked to a Lot Traced record)
- Package Text
- Shipment CO Text
- Shipment Header Text and Extended Text

Action Message Review

SREV maintains some of the action messages displayed on COAN (Customer Order Action) or STAD/STID (Stockroom Action). These messages are:

- CRH - Order Credit Hold
- CRW - Credit Limit Exceeded
- OPD - Order Past Due
- PIK - Pick Customer Order (on STAD/STID if SHPM is installed)
- REL - Order Due for Release
- SCH - Reschedule Existing Order

- SHP - Order Picked/Not Shipped

More details on how SREV generates or deletes the messages can be found in the COAN or STAD help documentation.

Automatic Expired Order Closure

If SOPM is installed, SREV has the capability of automatically closing Customer Order Lines if the order line items haven't been shipped by the Expiration Date.

This activity is controlled by preferences defined with SOPM for Customer Items, Customers or Trade Classes. More detail can be found in the SOPM help documentation.

Parameters

To request Shipping Order Review, you enter the SREV task as one of the sequenced tasks in a batch process. See "Batch Processing" in the System Administration manual for the task prerequisites and processing frequency.

There are three possible setups of SREV parameter settings:

- Blank - processes Shipment Status Update, Action Message Review and Automatic Expired Order Closure (if SOPM is installed)
- A - processes Action Message Review **only**
- P - processes Purge Shipment Information **along with** Shipment Status Update, Action Message Review and Automatic Expired Order Closure (if SOPM is installed)

Note: Running multiple SREV tasks at the same time is not allowed.

The SREV task has the following parameters:

	Task Parameter	Format	Entry Is...
1:	Purge Shipment Information	P999	Optional
2:	Action Message Review Only	A	Optional

Parameter 1: Purge Shipment Information

Optionally choose to purge shipping-related information when running all other SREV processes. Specify the number of calendar days past the closing date (when **Shipment Status** changed to 6) the purge is effective. For example, enter **P30** to purge all shipping-related information with an Inactive status older than 30 days. If purging days are not specified, no shipping-related information is purged.

Parameter 2: Action Message Review Only

Optionally choose to run **only** Action Message Review. We recommend that the **A** parameter be used when you need to run SREV while other transactions are being performed.

Note: We recommend running SREV in the nightly batch with either of the following parameter setups:

- Blank - to process timely database updates (Shipment Status Update, Action Message Review, Automatic Expired Order Closure).
- 'P' - to perform all four business functions including Purge Shipment Information.

Example

For example, to request Shipping Order Review as the second task in a process, purging shipping-related information older than 30 days, the **Seq Num**, **Task** and **Parameters** fields in the task line are entered like this:

02 SREV P30

Entry Field	Example Value	Description
Seq Num	02	Second task in process
Task	SREV	Shipping Order Review
Parameter 1	P30	Purge shipping-related information older than 30 days.

To execute Shipping Order Review, use the BEXE (Batch Process Execution) screen to execute the process in which the SREV task is entered. Check the batch task log file produced if the SREV task does not execute successfully.

CUID/CUST – Customer Master

The Customer Master screen is the detailed record for each of your customers. Customer information entered on the Customer Master and the related Customer Financial Detail and Customer Name/Address Detail screens provide you with a number of ways to record different types of reference information to use as you work with these customers.

The Customer Master can be sorted by either customer name or customer identifier. In addition, two versions of each sorted screen are available: one for maintenance and one for inquiry use only. The information displayed is the same, only the ability to change the information changes depending on the screen you access. Use the following table to determine which screen matches the way you wish to work.

Sort By	For Update Mode	For Inquiry Mode
Customer identifier	CUID	CUII
Customer name	CUST	CUSI

See "Entry and Inquiry Screens" under "Screen Types" in the **Using Fourth Shift** section of the Fourth Shift Basics manual for more information.

The Customer Master screens are replaced by the Customer application once the SOPM Module is installed.

Transportation Shortcuts

You can use shortcut keys or transport buttons to go to the following related screens.

Destination	Shortcut Key(s)
Customer Name/Address Detail	F8
Price Book Usage by Customer	ALT + F8
Customer Financial Detail	F9
TXTA (Tax Code Table)	F10

Browse Windows

You can open browse windows by choosing **Browse/Detail** from the **Tools** menu in the following fields:

Browse	From Fields
Customer Browse	Customer Id Starting Customer Id on the CUID screen

For more information, see "Selecting from a Browse List" in the Fourth Shift Basics manual.

Web Links

If you use Web UI, you can link to other screens by clicking tabs or hyperlinks.

Go to Screen...	By clicking...
Name/Address Detail	Tab at top of screen
Financial Detail	Tab at top of screen
COAN (Customer Order Action)	Screen label: Csr
COCD (Customer Orders by Customer Id)	Screen label: Id
CCOT (Customer Contact Master)	Screen label: Customer Id
CCOT (Customer Contact Master)	Variable: Customer Id

Reports

Customer Master

Lists customer information.

Access Method

To generate the report, choose **Print** or **Print Preview** from the **File** menu. The Report screen appears before the report is generated, allowing you to select a range of data for the report. For more information on reporting in general, see "Printing and Reporting" in the Fourth Shift Basics manual.

Report Template

For more information on report templates, see "Reporting for SQL Server Systems" in the System Help topics.

Fields

Contact

Contact is the name of the person at the vendor/customer who is the primary contact when items are ordered. Entry is any alphanumeric combination of up to 40 characters.

Where Used: APIP; CIMT; COBK; COCD; **COMT**; Contract Header Detail; CUID; CUII; CUSI; CUST; Customer Browse Detail; Customer Financial Detail; Customer Name/Address Detail; DISI; DIST; ISVI; POCR; POVD; Purchase Order Header Detail; QSRC; VDSC; VEDI; VEID; VEND; Vendor Browse Detail; Vendor Configuration; Vendor Master Detail; VENI; VSDI; VSDT

CSR

Customer Service Representative identifies the person responsible for handling this customer's account. Entry is any alphanumeric combination of up to 3 characters.

Where Used: COAN; COMI; COMT; CORV; CPMT; CUID; CUII; CUSI; CUST; Custom Product Component Detail; Custom Product Detail; Customer + General; Customer Browse Detail; Customer Financial Detail; Customer Name/Address Detail; Customer Order + Order Detail; Customer Order Header Detail; Customer Order Receipt/Reverse; Demand Peg Detail;

Global Settings; IVPR; IVRR; JEST; Job Estimates and Performance Report; Material Shortages Detail; MPED; MSCF; OPSL; ORST; PICI; PICK; Picklist Detail; Pricing Maintenance + Test Order; RED1; RVED; STAD; Standard Product Detail; Transaction Detail

Customer Id

Customer Identification is the identification number assigned to a customer. Entry is any alphanumeric combination of up to 13 characters.

Where Used: Advance Ship Notice Carrier Detail; Advance Ship Notice Shipment Detail; ARAH; ARCD; ARCJ; ARCP; ARCR; AREX; ARIC; ARIH; ARIP; ARIR; ARPD; ARPH; ARRJ; ARSC; ARSR; ARST; ARTB; ARTX; Available Customer Shipments; Available for Shipping Allocation Batch; Browse Setup (customer); Browse Setup (order); CIMT; CINV; COAN; COBK; COCD; COMI; COMT; CORV; COYE; CPMT; CUID; CUII; Cumulative Detail; CUPB; CUPI; CUSI; CUST; Custom Product Component Detail; Custom Product Detail; Customer; Customer Browse; Customer Browse Detail; Customer Financial Detail; Customer Invoice List; Customer Item + General; Customer Name/Address Detail; Customer Order; Customer Order + Order Header; Customer Order Header Detail; Customer Order Receipt/Reverse; Customer Payment List; Demand Peg Detail; EDIX; EXRU; G/L Distribution (ARSM Module); GASN; Inbound Conversion Detail; Inventory Adjustment Application; Invoice Header Detail; Invoice Line Item Detail; IORD; IVCO; IVIA; IVIE; IVII; IVPP; IVPR; IVRR; IVRV; JEST; Job Estimates and Performance Report; Lot Trace Issue Detail; Lot Trace Receipt Detail; Material Shortages Detail; MOAN; MPED; MPIT; MSMT; OPSL; Order Browse; Order Detail; ORST; Outbound Conversion Detail; Partner Item Detail; PCMT; PICI; PICK; Picklist Detail; Pricing Maintenance + Items/Customers; Pricing Maintenance + Test Order; SBOL; Serial Number List; SHIP; Ship to Browse; Ship to Browse Detail; Shipment Allocation Detail; Shipment Allocation List; Shipping Allocation Batch; SHPI; SHPL; STAD; Standard Product Detail; Supply Peg Detail; Transaction Detail

Customer Name

Customer Name is the name of a customer. Entry is any alphanumeric combination of up to 60 characters.

Where Used: ARAH; ARCD; ARCJ; ARCR; AREX; ARIC; ARIH; ARIP; ARIR; ARPD; ARPH; ARRJ; ARSC; ARSR; ARTB; ARTX; Available Customer Shipments; Browse Setup (customer); Browse Setup (order); CIMT; COBK; COCD; COMI; COMT; CORV; COYE; CPMT; CUID; CUII; CUPB; CUPI; CUSI; CUST; Custom Product Component Detail; Custom Product Detail; Customer; Customer + Address; Customer + General; Customer Browse; Customer Browse Detail; Customer Financial Detail; Customer Invoice List; Customer Item + General; Customer Name/Address Detail; Customer Order; Customer Order Header Detail; Customer Order Receipt/Reverse; Customer Payment List; EDIX; EXRU; G/L Distribution (ARSM Module); IVCO; IVIA; IVPP; JEST; Job Estimates and Performance Report; Lot Trace Issue Detail; Lot Trace Receipt Detail; OPSL; Order Browse; Order Detail; ORST; PICI; PICK; Picklist Detail; Pricing Maintenance + Test Order; SBOL; Serial Number List; SHIP; Ship to Browse Detail; Shipment Allocation List; Shipping Detail; SHPI; SHPL; STAD; Standard Product Detail

E-Mail

E-Mail is the e-mail address for a customer or vendor. Entry is any alphanumeric combination of up to 50 characters.

Where Used: COMT; CUID; CUII; CUSI; CUST; Customer + Address; Customer Name/Address Detail; PASS; VEDI; VEID; VEND; VENI

FOB

Free on Board Point identifies the location where the buyer takes title of the shipped items. Entry is any alphanumeric combination of up to 20 characters.

Where Used: COMI; COMT; Customer Browse Detail; Customer Master; Customer Order + Shipping; Customer Order Header Detail; IVIE; IVII; IVPR; IVRR; Packing List; Preferences + General; Purchase Order Header Detail; Trade Class + General; Transaction Detail; Vendor Master by Vendor ID

Function

Function codes are four-character abbreviations for screen names. Each screen has a unique code used for identification and transportation. For example, ITMB identifies the Item Master screen. Entry is 4 alphanumeric characters.

Where Used: screens and reports

Phone

Phone is the primary phone number of the vendor/customer. Entry is any alphanumeric combination of up to 20 characters.

Where Used: APIP; CIMT; COBK; COCD; Contract Header Detail; CUID; CUII; CUSI; CUST; Customer Browse Detail; Customer Financial Detail; Customer Name/Address Detail; DISI; DIST; ISVI; IVPR; IVRR; POCR; POVD; Purchase Order Header Detail; QSRC; VDSC; VEDI; VEID; VEND; Vendor Browse Detail; Vendor Configuration; Vendor Master Detail; VENI; VSDI; VSdT

Ship Via

Ship Via specifies the transportation for the items on the order. Entry is any alphanumeric combination of up to 30 characters.

Where Used: COMI; COMT; Customer Master; Customer Order + Shipping; Customer Order Header Detail; IVIE; IVII; IVPR; IVRR; Packing List; Preferences + General; Pricing Maintenance + Test Order; Shipping Detail; STAD; Trade Class + General; Transaction Detail

Starting Cust Name

The **Starting** field is used to request a list where the specified information appears first on the list. **Starting** entries may consist of a partial entry and if the entry is not in the list, the next highest entry appears first on the list. The **Starting** field can include one or more field combinations, each with its own entry requirements.

Where Used: A/P 1099 Distribution; A/P Payment Application Detail; A/P Payment Void Detail; A/P Received Item List; A/P Receiving Detail; A/R Payment Application Detail; APAH; APDS; APEX; APID; APIE; APII; APIR; APIV; APPA; APPD; APPI; APPO; APTX; ARAH; ARCD; AREX; ARIC; ARIH; ARPD; ARPH; ARSR; BAMT; Bank Payment Approval; BILL; BILL; BKMT; Browse Setup (customer); Browse Setup (item); Browse Setup (vendor); CACF; CCAN; CCAT; CCEX; CCMT; CIMT; CMCF; CMTA; CMTI; CNFA; COAN; COMI; COMT; Contract Item Detail/Pricing; CORV; CPMT; CUID; CUII; CUSI; CUST; FCMT; FCST; G/L Account Group/No List; G/L Account No List; G/L Batch Detail; G/L Journal Entry List; G/L Master Account Recap; G/L Org No List; G/L Org/Acct Group List; G/L Organization Group/No List; G/L Report List; G/L Source Code List; GLAG; GLAV; GLBD; GLCA; GLCI; GLDQ; GLEX; GLGQ; GLJD; GLJE; GLJI; GLJP; GLJR; GLMA; Global Extended Text Selection;

GLOS; GLRD; GLRL; GLSC; GLSI; GLSS; ITBI; ITCB; Item Master; Item Shortages; ITMB; ITMI; ITPB; ITPI; IVCO; IVIA; IVIE; IVII; IVRV; LMMT; Location Selection Setup; MCST; MOAN; MOMI; MOMT; MORI; MORV; MPED; MPIT; MSMT; NMTA; OPSL; Orders on Shipment; ORST; Packaging Detail; PASS; PBCI; PBCT; PBMI; PBMT; PCMT; PCST; PICI; PICK; POAN; POAS; POCI; POCT; POMI; POMT; PORI; PORV; REDI; RTMT; RVED; SBOL; Selection Setup; Serial Number List; Serial Numbers Shipped; SHIP; Shipments by Line Item; SHPI; SSII; STAD; SUND; SUNR; SUPD; SUPR; TEXT; TXTA; VAT Summary (APSM Module); VATT; VEDI; VEID; VEND; VENI; Workcenter Master

Starting Customer Id

The **Starting** field is used to request a list where the specified information appears first on the list. **Starting** entries may consist of a partial entry and if the entry is not in the list, the next highest entry appears first on the list. The **Starting** field can include one or more field combinations, each with its own entry requirements.

Where Used: A/P 1099 Distribution; A/P Payment Application Detail; A/P Payment Void Detail; A/P Received Item List; A/P Receiving Detail; A/R Payment Application Detail; APAH; APDS; APEX; APID; APIE; APII; APIR; APIV; APPA; APPD; APPI; APPO; APTX; ARAH; ARCD; AREX; ARIC; ARIH; ARPD; ARPH; ARSR; BAMT; Bank Payment Approval; BILL; BILL; BKMT; Browse Setup (customer); Browse Setup (item); Browse Setup (vendor); CACF; CCAN; CCAT; CCEX; CCMT; CIMT; CMCF; CMTA; CMTI; CNFA; COAN; COMI; COMT; Contract Item Detail/Pricing; CORV; CPMT; CUID; CUII; CUSI; CUST; FCMT; FCST; G/L Account Group/No List; G/L Account No List; G/L Batch Detail; G/L Journal Entry List; G/L Master Account Recap; G/L Org No List; G/L Org/Acct Group List; G/L Organization Group/No List; G/L Report List; G/L Source Code List; GLAG; GLAV; GLBD; GLCA; GLCI; GLDQ; GLEX; GLGQ; GLJD; GLJE; GLJI; GLJP; GLJR; GLMA; Global Extended Text Selection; GLOS; GLRD; GLRL; GLSC; GLSI; GLSS; ITBI; ITCB; Item Master; Item Shortages; ITMB; ITMI; ITPB; ITPI; IVCO; IVIA; IVIE; IVII; IVRV; LMMT; Location Selection Setup; MCST; MOAN; MOMI; MOMT; MORI; MORV; MPED; MPIT; MSMT; NMTA; OPSL; Orders on Shipment; ORST; Packaging Detail; PASS; PBCI; PBCT; PBMI; PBMT; PCMT; PCST; PICI; PICK; POAN; POAS; POCI; POCT; POMI; POMT; PORI; PORV; REDI; RTMT; RVED; SBOL; Selection Setup; Serial Number List; Serial Numbers Shipped; SHIP; Shipments by Line Item; SHPI; SSII; STAD; SUND; SUNR; SUPD; SUPR; TEXT; TXTA; VAT Summary (APSM Module); VATT; VEDI; VEID; VEND; VENI; Workcenter Master

Status

Customer/Vendor Status determines which activities are allowed for the customer or vendor. **Customer/Vendor Statuses** are:

A = Active.

All types of transactions are allowed for the customer or vendor.

I = Inactive.

No transactions are allowed for the customer or vendor.

P = Phase Out.

Creating or changing customer orders or purchase orders is not allowed.

Where Used: CUID; CUII; CUSI; CUST; Customer + General; VEDI; VEID; VEND; VENI

Customer Name/Address Detail

Use this screen to enter and review address information for a customer listed on the CUST or CUID (Customer Master) screen. The Customer Name/Address Detail screen allows you to enter addresses, accounting contacts and text to further define the customer you entered on the Customer Master. The Customer Name/Address Detail screen is replaced by the Customer application once the SOPM Module is installed.

This screen also sets up customer specific parameters to control the over shipment of a customer order line.

Transportation Shortcuts

You can use shortcut keys or transport buttons to go to the following related screens.

Destination	Shortcut Key(s)
Previous screen	F8
Customer Financial Detail	F9

Additional Information

Window /Action	Available From	Shortcut Key(s)
Scroll through ship ids until the desired information is displayed. Make changes as necessary and press ENTER	Ship Id	F4

Browse Windows

You can open browse windows by choosing **Browse/Detail** from the **Tools** menu in the following fields:

Browse	From Fields
Ship to Browse	Ship Id
Commission Code Browse	Commission Code field
Federal Tax Code	Tax Code field
State Tax Code	Tax Code field
County Tax Code	Tax Code field
Municipal Tax Code	Tax Code field

For more information, see "Selecting from a Browse List" in the Fourth Shift Basics manual.

Web Links

If you use Web UI, you can link to other screens by clicking tabs or hyperlinks.

Go to Screen...	By clicking...
Customer Master	Tab at top of screen
Financial Detail	Tab at top of screen
CMTA (Commission Code Table)	Screen label: Com Cd
COAN (Customer Order Action)	Screen label: Csr
COCD (Customer Orders by Customer Id)	Screen label: Cust Id
CCOT (Customer Contact Master)	Screen label: Cust Id

Reports

A standard report is not generated for this screen. Use the Print Screen key or any screen capture program to create an image of the screen.

Fields

A/R Acct No

Accounts Receivable Account Number is the account number used to update the general ledger for purchases made by this customer. Entry is up to 20 alphanumeric characters.

Where Used: Customer + Financial; Customer Name/Address Detail

Acct Contact

Accounting Contact Name is the name of the person at the vendor/customer who can answer questions about accounts receivable or accounts payable. Entry is any alphanumeric combination of up to 40 characters.

Where Used: APAH; APIP; APIV; APPH; APTB; APTP; APTX; ARAH; ARIC; ARIP; ARPH; ARTB; Customer + Financial; Customer Browse Detail; Customer Name/Address Detail; Vendor Browse Detail; Vendor Master Detail

Acct Phone

Accounting Contact Phone is the phone number of the person who is the accounting contact at the vendor/customer. Entry is any combination of up to 20 characters.

Where Used: APAH; APIP; APIV; APPH; APTB; APTP; APTX; ARAH; ARIC; ARIP; ARPH; ARTB; Customer + Financial; Customer Browse Detail; Customer Name/Address Detail; Vendor Browse Detail; Vendor Master Detail

Addr

Address is the first and second lines of information identifying a location. Each line entry is any alphanumeric combination of up to 60 characters.

Where Used: A/P Payment Detail; Available Customer Shipments; CNFG; CNFI; COCD; COMI; COMT; Customer + Address; Customer Browse Detail; Customer Name/Address Detail; Customer Order Header Detail; DISI; DIST; ISVI; IVIE; IVII; Name, Address & Contacts; Payee Detail; Payer Detail; Purchase Order Header Detail; QSRC; SBOL; SHIP; Ship to Browse; Ship to Browse Detail; VDSC; Vendor Browse Detail; Vendor Master Detail; VSDI; VSDT

Bill to

Bill to is the name written on the invoice when the invoice is sent to the customer. Entry is any alphanumeric combination of up to 60 characters.

Where Used: ARIP; ARST; Customer Name/Address Detail; IVIE; IVII; IVPR; IVRR; Pricing Maintenance + Test Order

C

Country is the name of the country associated with an address. Entry is any alphanumeric combination of up to 15 characters.

Where Used: A/P Payment Detail; Available Customer Shipments; CNFG; CNFI; COCD; COMI; COMT; Customer + Address; Customer Browse Detail; Customer Name/Address Detail; Customer Order Header Detail; DISI; DIST; ISVI; IVIE; IVII; Name, Address & Contacts; Payee Detail; Pricing Maintenance + Test Order; Purchase Order Header Detail; QSRC; SBOL; SHIP; Ship to Browse; Ship to Browse Detail; Vendor Browse Detail; Vendor Master Detail; VSDI; VSDT

Certificate No

Certificate Number is the tax exemption certificate number. Entry is any alphanumeric combination of up to 20 characters.

Where Used: Customer + Financial; Customer Name/Address Detail; Customer Order + Taxes; Customer Order Header Detail; Ship to Browse Detail

City

City is the name of the city associated with an address. Entry is any alphanumeric combination of up to 15 characters.

Where Used: A/P Payment Detail; Available Customer Shipments; CNFG; CNFI; COCD; COMI; COMT; Customer + Address; Customer Browse Detail; Customer Name/Address Detail; Customer Order Header Detail; DISI; DIST; ISVI; IVIE; IVII; Name, Address & Contacts; Payee Detail; Payer Detail; Purchase Order Header Detail; QSRC; SBOL; SHIP; Ship to Browse; Ship to Browse Detail; Vendor Browse Detail; Vendor Master Detail; VSDI; VSDT

COGS Acct No

Cost of Goods Sold Account Number is the account number used to update the general ledger when shipment transactions occur. Entry is up to 20 alphanumeric characters.

Cost of Goods Sold Account Number may be displayed either as a single summary account number or as a separate account number for each cost category. The option is controlled by

the Summarize Cost of Goods Sold Accounts field on the SHCF (Shipping Configuration) screen.

Where Used: Customer + Financial; Customer Name/Address Detail; ITCI; ITMC

Com Cd

Commission Code is the user-defined identifier for salespersons' commissions. The overall commission for a sale is calculated at the time of invoicing. Entry is any alphanumeric combination of up to 3 characters.

Where Used: ARIR; CMTA; CMTI; Custom Product Detail; Customer + General; Customer Browse Detail; Customer Name/Address Detail; Customer Order + Order Detail; Customer Order Header Detail; Inventory Adjustment Application; Invoice Line Item Detail; IVCO; IVIE; IVII; Line Item Details + General; Pricing Maintenance + Test Order; Standard Product Detail

Contact

Contact is the name of the person at the vendor/customer who is the primary contact when items are ordered. Entry is any alphanumeric combination of up to 40 characters.

Where Used: APIP; CIMT; COBK; COCD; COMT; Contract Header Detail; **COMT**; CUID; CUII; CUSI; CUST; Customer Browse Detail; Customer Financial Detail; Customer Name/Address Detail; DISI; DIST; ISVI; POCR; POVD; Purchase Order Header Detail; QSRC; VDSC; VEDI; VEID; VEND; Vendor Browse Detail; Vendor Configuration; Vendor Master Detail; VENI; VSDI; VSDT

CSR

Customer Service Representative identifies the person responsible for handling this customer's account. Entry is any alphanumeric combination of up to 3 characters.

Where Used: COAN; COMI; COMT; CORV; CPMT; CUID; CUII; CUSI; CUST; Custom Product Component Detail; Custom Product Detail; Customer + General; Customer Browse Detail; Customer Financial Detail; Customer Name/Address Detail; Customer Order + Order Detail; Customer Order Header Detail; Customer Order Receipt/Reverse; Demand Peg Detail; Global Settings; IVPR; IVRR; JEST; Job Estimates and Performance Report; Material Shortages Detail; MPED; MSCF; OPSL; ORST; PICI; PICK; Picklist Detail; Pricing Maintenance + Test Order; REDI; RVED; STAD; Standard Product Detail; Transaction Detail

Cust Class

Customer Classifications are used for reporting purposes to sort and classify customers based on classes and codes you define. Entry is 1 alphanumeric character in **Customer Class 1** through **Customer Class 6**. Entry is any alphanumeric combination of up to 6 characters in **Customer Class 7** and **Customer Class 8**.

Where Used: Customer + General; Customer Browse Detail; Customer Name/Address Detail; Pricing Maintenance + Test Order

Cust Id

Customer Identification is the identification number assigned to a customer. Entry is any alphanumeric combination of up to 13 characters.

Where Used: Advance Ship Notice Carrier Detail; Advance Ship Notice Shipment Detail; ARAH; ARCD; ARCJ; ARCP; ARCR; AREX; ARIC; ARIH; ARIP; ARIR; ARPD; ARPH; ARRJ; ARSC; ARSR; ARST; ARTB; ARTX; Available Customer Shipments; Available for Shipping Allocation Batch; Browse Setup (customer); Browse Setup (order); CIMT; CINV; COAN; COBK; COCD; COMI; COMT; CORV; COYE; CPMT; CUID; CUII; Cumulative Detail; CUPB; CUPI; CUSI; CUST; Custom Product Component Detail; Custom Product Detail; Customer; Customer Browse; Customer Browse Detail; Customer Financial Detail; Customer Invoice List; Customer Item + General; Customer Name/Address Detail; Customer Order; Customer Order + Order Header; Customer Order Header Detail; Customer Order Receipt/Reverse; Customer Payment List; Demand Peg Detail; EDIX; EXRU; G/L Distribution (ARSM Module); GASN; Inbound Conversion Detail; Inventory Adjustment Application; Invoice Header Detail; Invoice Line Item Detail; IORD; IVCO; IVIA; IVIE; IVII; IVPP; IVPR; IVRR; IVRV; JEST; Job Estimates and Performance Report; Lot Trace Issue Detail; Lot Trace Receipt Detail; Material Shortages Detail; MOAN; MPED; MPIT; MSMT; OPSL; Order Browse; Order Detail; ORST; Outbound Conversion Detail; Partner Item Detail; PCMT; PICI; PICK; Picklist Detail; Pricing Maintenance + Items/Customers; Pricing Maintenance + Test Order; SBOL; Serial Number List; SHIP; Ship to Browse; Ship to Browse Detail; Shipment Allocation Detail; Shipment Allocation List; Shipping Allocation Batch; SHPI; SHPL; STAD; Standard Product Detail; Supply Peg Detail; Transaction Detail

Cust Ord Over Ship Tolerance

CO OverShip Tolerance Percentage specifies the percentage level that determines the enforcement to use when shipping to a Customer Order line that contains a total shipped quantity that is greater than the permitted quantity. The percentage entered determines how much over the permitted quantity the total shipped quantity can be without triggering the action specified in the Over Ship Enforcement For Customer Order field. This field is only available for CUSM systems, and not used if a SOPM system is used.

E-Mail

E-Mail is the e-mail address for a customer or vendor. Entry is any alphanumeric combination of up to 50 characters.

Where Used: **COMT**; CUID; CUII; CUSI; CUST; Customer + Address; Customer Name/Address Detail; PASS; VEDI; VEID; VEND; VENI

Exmpt

Exempt indicates whether or not the customer pays taxes on purchases for this line item and taxing authority. **Exempt** is established for the customer but can be changed for each line item.

N = No.

The purchase is not tax-exempt.

Y = Yes.

The purchase is tax-exempt.

0 = User Defined

1 = User Defined

2 = User Defined

3 = User Defined

4 = User Defined

5 = User Defined

6 = User Defined

7 = User Defined

8 = User Defined

9 = User Defined

Where Used: ARTX; Custom Product Detail; Customer + Financial; Customer Name/Address Detail; Customer Order + Taxes; Customer Order Header Detail; Invoice Line Item Detail; IVIE; IVII; Line Item Details + Taxes; Ship to Browse Detail; Standard Product Detail

Fax

Fax Number is the phone number used to transmit and receive documents. Entry is any alphanumeric combination of up to 20 characters.

Where Used: Contract Header Detail; Customer Name/Address Detail; POCR; VDSC; Vendor Browse Detail; Vendor Master Detail

Freight Acct No

Freight Account Number is the account number used to update the general ledger for freight charges incurred when freight is prepaid and added to the invoice. Entry is up to 20 alphanumeric characters.

Where Used: Customer + Financial; Customer Name/Address Detail; SHCF

Frt Charge Code

Freight Charge Code identifies the method of charging the customer for freight. **Freight Charge Codes** are:

0 = Paid.

Freight costs are paid.

1 = Invoice.

Prepay freight and add to invoice.

2 = Customer.

Carrier collects freight costs from customer.

Where Used: COMI; COMT; Customer Browse Detail; Customer Name/Address Detail; Customer Order Header Detail; Pricing Maintenance + Test Order; SHIP; Shipment Order Detail; Transaction Detail

Function

Function codes are four-character abbreviations for screen names. Each screen has a unique code used for identification and transportation. For example, ITMB identifies the Item Master screen. Entry is 4 alphanumeric characters.

Where Used: screens and reports

Name/Address

Customer Name is the name of a customer. Entry is any alphanumeric combination of up to 60 characters.

Where Used: ARAH; ARCD; ARCJ; ARCR; AREX; ARIC; ARIH; ARIP; ARIR; ARPD; ARPH; ARRJ; ARSC; ARSR; ARTB; ARTX; Available Customer Shipments; Browse Setup (customer); Browse Setup (order); CIMT; COBK; COCD; COMI; COMT; CORV; COYE; CPMT; CUID; CUII; CUPB; CUPI; CUSI; CUST; Custom Product Component Detail; Custom Product Detail; Customer; Customer + Address; Customer + General; Customer Browse; Customer Browse Detail; Customer Financial Detail; Customer Invoice List; Customer Item + General; Customer Name/Address Detail; Customer Order; Customer Order Header Detail; Customer Order Receipt/Reverse; Customer Payment List; EDIX; EXRU; G/L Distribution (ARSM Module); IVCO; IVIA; IVPP; JEST; Job Estimates and Performance Report; Lot Trace Issue Detail; Lot Trace Receipt Detail; OPSL; Order Browse; Order Detail; ORST; PICI; PICK; Picklist Detail; Pricing Maintenance + Test Order; SBOL; Serial Number List; SHIP; Ship to Browse Detail; Shipment Allocation List; Shipping Detail; SHPI; SHPL; STAD; Standard Product Detail

Over Ship Enforcement For Customer Order

CO OverShip Enforcement Code specifies the level of enforcement used when shipping a customer order line that contains a total shipped quantity that is greater than the permitted quantity. This field is only available for CUSM systems and not used if an SOPM system is used. Entry options include:

0 = No Warning.

Over Shipment is allowed. The customer order line shipment occurs normally.

1 = Warning Only.

The customer order line shipment occurs normally. A warning message is displayed on SHIP: "Shipped Quantity Exceeds Tolerance Limit"

2 = Confirm.

A warning message is displayed on SHIP. The user must press CTRL+ENTER to confirm that the customer order line shipment can occur.

3 = Transaction Is Not Allowed.

A customer order line shipment cannot occur. A warning message is displayed on SHIP.

Partial Shipment

Partial Shipment indicates whether the customer accepts partial shipments for orders. The **Partial Shipment** indicator is used only by the Automated Shipping feature in the Shipping module. Partial manual shipments are allowed for all customers.

Partial Shipment indicators are:

Y = Yes.

Partial shipments are accepted.

N = No.

Partial shipments are not accepted.

Where Used: Customer Browse Detail; Customer Name/Address Detail; Order Detail

Phone

Phone is the primary phone number of the vendor/customer. Entry is any alphanumeric combination of up to 20 characters.

Where Used: APIP; CIMT; COBK; COCD; Contract Header Detail; CUID; CUII; CUSI; CUST; Customer Browse Detail; Customer Financial Detail; Customer Name/Address Detail; DISI; DIST; ISVI; IVPR; IVRR; POCR; POVD; Purchase Order Header Detail; QSRC; VDSC; VEDI; VEID; VEND; Vendor Browse Detail; Vendor Configuration; Vendor Master Detail; VENI; VSDI; VSDT

Price Adj

Price Adjustment is the percentage discount allowed or surcharge placed on an order from this customer. The value in this field is used to calculate the Unit Price for an item on an order line. **Price Adjustment** indicators for screen or import data entry are:

S = Surcharge

D = Discount

Entry is up to 99.99 percent with a fixed decimal place.

The entry for a surcharge price adjustment will add the price adjustment percent to 100%. The entry for a discount price adjustment will subtract the price adjustment percent from 100%.

Where Used: Allowance/Charge Detail (Detail); Custom Product Detail; Customer + Financial; Customer Browse Detail; Customer Name/Address Detail; Customer Order + Order Detail; Customer Order Header Detail; Line Item Details + General; Pricing Maintenance + Test Order; Standard Product Detail

Print Format

Date and Number Format identifies the format used for dates and numbers. A trading partner format is selected for each trading partner for use on external documents, such as checks, invoices, purchase orders, and order acknowledgements.

Note: The overall system date, number format, and accounting period are determined on the CNFG screen for use on all screens and internal documents.

For example, a unique format can be selected for each customer **Ship-to Id**. Entry options include:

C = Canada and China

B = Britain

E = European countries

S = Sweden

U = United States

Date and number format examples include:

Format Type	Date	Number	Example Country
C	YYMMDD	99,999.99	Canada and China
B	DDMMYY	99,999.99	Britain
E	DDMMYY	99.999,99	European countries

Format Type	Date	Number	Example Country
S	YYMMDD	99.999,99	Sweden
U	MMDDYY	99,999.99	United States

Where Used: BKMT; Customer + General; Customer Name/Address Detail; Vendor Master Detail

Print Language

Print Language identifies the language to use for this **Ship-to** when printing purchase order documents or customer order documents. **Print Language** is for reference only and is not used during the printing process. Entry is any alphanumeric combination of up to 15 characters.

Where Used: Customer Name/Address Detail; Vendor Master Detail

Region Code

Region Code identifies the sales region where the ship to customer belongs. **Region Code** is user-defined and is used for sales analysis. Entry is any alphanumeric combination of up to 3 characters.

Where Used: Customer Name/Address Detail; Ship to Browse Detail

Sales Acct No

Sales Account Number is the account number used to update the general ledger either when sales transactions take place for an item or when purchases are made by a customer. Entry is up to 20 alphanumeric characters.

Where Used: AREX; Customer + Financial; Customer Name/Address Detail; ITCI; ITMC

Ship Id

Ship to Identification is the identification assigned to the delivery location. Entry is any alphanumeric combination of up to 13 characters.

Where Used: Available Customer Shipments; Browse Setup (ship to); COMI; COMT; Cumulative Detail; Customer Name/Address Detail; Customer Order + Order Header; Customer Order Header Detail; Inbound Conversion Detail; IVIE; IVII; Line Item Detail; Lot Trace Issue Detail; MPED; Order Detail; Outbound Conversion Detail; PCMT; SBOL; SHIP; Ship to Browse; Ship to Browse Detail; SHPI; SHPL; STAD; Transaction Detail

Ship to Contact

Ship To Contact is the name of the person who is the contact for the designated Ship To location. Entry is any alphanumeric combination of up to 40 characters.

Ship to E-Mail

Ship To E-Mail is the e-mail address for the Ship To Contact. Entry is any alphanumeric combination of up to 50 characters.

Ship to Name/Address

Ship to is the delivery location. Entry is any alphanumeric combination of up to 60 characters.

Where Used: ARIP; Available Customer Shipments; Browse Setup (ship to); COMI; COMT; Customer Name/Address Detail; Customer Order Header Detail; IVIE; IVII; IVPR; IVRR; Lot Trace Issue Detail; Packing List; Purchase Order Header Detail; SHIP; Ship to Browse; Ship to Browse Detail; SHPL

St

State is the identification of the state or province associated with an address. Entry is any alphanumeric combination of up to 10 characters.

Where Used: A/P Payment Detail; APTP; Available Customer Shipments; CNFG; CNFI; COCD; COMI; COMT; Customer + Address; Customer Browse Detail; Customer Name/Address Detail; Customer Order Header Detail; DISI; DIST; ISVI; IVIE; IVII; Name, Address & Contacts; Payee Detail; Payer Detail; Pricing Maintenance + Test Order; Purchase Order Header Detail; QSRC; SBOL; SHIP; Ship to Browse; Ship to Browse Detail; Vendor Browse Detail; Vendor Master Detail; VSDI; VSDT

Tax Code

Tax Code is the user-defined identifier for the federal, state, county or municipal taxing authority. Entry is any alphanumeric combination of up to 2 characters for federal and state **Tax Codes**. Entry is any alphanumeric combination of up to 3 characters for county and municipal **Tax Codes**.

Where Used: ARTX; Customer Name/Address Detail; Customer Order Header Detail; Invoice Header Detail; IVCO; Ship to Browse Detail; TXTA

Tax Rate

Tax Rate is the rate at which the taxing authority calculates taxes based on taxable sales. A **Tax Rate** is associated with each **Tax Code**. Entry is the range of .000 through 99.999. An entry of .000 will result in no tax being computed.

Where Used: Customer + Financial; Customer Name/Address Detail; Customer Order + Taxes; Customer Order Header Detail; Invoice Header Detail; Line Item Details + Taxes; Ship to Browse Detail; TXTA

Text No

Text Number identifies a set of text entered for descriptive purposes. The system assigns a **Text Number** for each unique set of text, providing the capability of reusing the text for a similar situation. Entry is up to 6 numbers.

Where Used: Bill of Material Detail; Contract Header Detail; Contract Item Detail; Contract Item Detail/Pricing; CORV; Custom Product Component Detail; Custom Product Detail; Customer Financial Detail; Customer Name/Address Detail; Customer Order Header Detail; Invoice Header Detail; Item Lot Receipt; Item Lot Trace and Serialization Detail; Item Master Detail; Item Master Planning Detail; LMSI; LMST; Lot Trace; Manufacturing Order Line Item Detail; MOMI; MOMT; MORI; MORV; Order Line Items; Packaging Detail; Picklist Detail; POCR; Production; Purchase Order Header Detail; Purchase Order Line Item Detail; Purchase Order Line Item Detail (CPMT); Purchase Order Line Items; Purchased Component

Detail; SBOL; SHIP; Standard Product Detail; TEXT; TXWU; Vendor Configuration; Vendor Master Detail; Vendor/Item Detail

VAT Cust Code

VAT Customer Code is used to select value added tax categories associated with this customer. This code, together with the **VAT Product Code** of the ordered item, is used to determine which **VAT Code** to apply when calculating tax on a customer order line item. Entry is any alphanumeric combination of up to 5 characters.

Where Used: Customer + Financial; Customer Name/Address Detail; Customer Order + Taxes; Customer Order Header Detail; IVIE; IVII; Ship to Browse Detail; VATT

VAT Id

VAT Identification is an identifier given by the taxing authority for tax audit purposes. Entry is any alphanumeric combination of up to 20 characters.

Where Used: Customer + Financial; Customer Name/Address Detail; Customer Order + Taxes; Customer Order Header Detail; Ship to Browse Detail; TXCF; Vendor Browse Detail; Vendor Master Detail

Zip

Zip Code is the postal delivery number associated with an address. Entry is any alphanumeric combination of up to 12 characters.

Where Used: A/P Payment Detail; Available Customer Shipments; CNFG; CNFI; COCD; COMI; COMT; Customer Browse Detail; Customer Name/Address Detail; Customer Order Header Detail; DISI; DIST; ISVI; IVIE; IVII; Name, Address & Contacts; Payee Detail; Payer Detail; Pricing Maintenance + Test Order; Purchase Order Header Detail; QSRC; SBOL; SHIP; Ship to Browse; Ship to Browse Detail; Vendor Browse Detail; Vendor Master Detail; VSDI; VSDT

Customer Financial Detail

Use this screen to enter and review financial information for a customer listed on the CUST or CUID (Customer Master) screen. The Customer Financial Detail screen allows you to enter bank references, Dun & Bradstreet ratings, standard terms and text to further define the customer you entered on the Customer Master. The Customer Financial Detail screen also provides current balance and credit information. The currency code and controlling currency information can be entered if the MCMM Module is installed. Default status for pre-printed invoices and pre-printed credit memos can be setup on the Customer Financial Detail screen. The Customer Financial Detail screen is replaced by the Customer application when the SOPM Module is installed.

Features

Transportation Shortcuts

You can use shortcut keys or transport buttons to go to the following related screens.

Destination	Shortcut Key(s)
Previous screen	F8
Customer Name/Address Detail	F9

Additional Information

Window	Available From	Shortcut Key(s)
Currency Information	Any location on the screen	ALT+C
Extended Text	Any location on the screen	ALT+T
Text	Any location on the screen	F6
Delete Text	Any location on the screen	Ctrl+F6

Web Links

If you use Web UI, you can link to other screens by clicking tabs or hyperlinks.

Go to Screen...	By clicking...
Customer Master	Tab at top of screen
Name/Address Detail	Tab at top of screen
COAN (Customer Order Action)	Screen label: Csr
COCD (Customer Orders by Customer Id)	Screen label: Cust Id
CCOT (Customer Contact Master)	Screen label: Customer Id

Reports

A standard report is not generated for this screen. Use the Print Screen key or any screen capture program to create an image of the screen.

Fields

A/R Cust

Accounts Receivable Customer indicates whether the customer has been approved as an open account customer. This information is for reference only and is not used by the system.

Y = Yes.

The customer has been approved as an open account customer.

N = No.

The customer has not been approved as an open account customer.

H = Hold.

The customer has been placed on hold. Customer orders can be entered and can still be shipped or staged.

C = Credit Hold.

The customer has been placed on credit hold. Customer orders can be entered but cannot be released, shipped or staged.

Where Used: Customer Financial Detail

Balances

Balances identify the amounts owed on a customer account based on the original amounts, payment amounts, discount amounts and the payment due date. **Balances** are grouped into aging categories.

- **Cat#3.** Amount past due within the range specified by **Aging Label #3**.
- **Cat#2.** Amount past due within the range specified by **Aging Label #2**.
- **Cat#1.** Amount past due within the range specified by **Aging Label #1**.
- **Current.** Amount that is not past due up to **Cat#1**.
- **Hold/Unapp.** Amount of invoices that are on hold, balances of payments that were partially applied and unapplied cash.
- **Total A/R.** Total of all accounts receivable amounts.

Where Used: ARAG; ARAH; ARCR; ARIC; ARPH; ARTB; Customer Browse Detail; Customer Financial Detail

Bank References

Bank References are the identifications of the banks used as credit references. Entry is any alphanumeric combination of up to 30 characters.

Where Used: Customer + Financial; Customer Financial Detail

Contact

Contact is the name of the person at the vendor/customer who is the primary contact when items are ordered. Entry is any alphanumeric combination of up to 40 characters.

Where Used: APIP; CIMT; COBK; COCD; COMT; Contract Header Detail; CUID; CUII; CUSI; CUST; Customer Browse Detail; Customer Financial Detail; Customer Name/Address Detail; DISI; DIST; ISVI; POCR; POVD; Purchase Order Header Detail; QSRC; VDSC; VEDI; VEID; VEND; Vendor Browse Detail; Vendor Configuration; Vendor Master Detail; VENI; VSDI; VSDT

Credit by

Credit Limits By identifies the person who authorized the credit limit.

Where Used: Customer + Credit; Customer Financial Detail

Credit Date

Credit Limits Date is the date the credit limit was authorized.

Where Used: Customer + Credit; Customer Financial Detail

Credit Limit

Credit Limits Total is the authorized overall credit limit. Entry is up to 10 numbers. Decimal places are allowed.

Note: In CUSM, the Credit Limit must be greater than zero to generate a warning message that the credit limit has been exceeded. This condition applies to **A/R Cust** settings of **No** or **Yes**. The COCF setting for **Credit Check CO Line value** = 1 applies to this circumstance.

Where Used: ARTB; Customer + Credit; Customer Browse Detail; Customer Financial Detail; Pricing Maintenance + Test Order

CSR

Customer Service Representative identifies the person responsible for handling this customer's account. Entry is any alphanumeric combination of up to 3 characters.

Where Used: COAN; COMI; COMT; CORV; CPMT; CUID; CUII; CUSI; CUST; Custom Product Component Detail; Custom Product Detail; Customer + General; Customer Browse Detail; Customer Financial Detail; Customer Name/Address Detail; Customer Order + Order Detail; Customer Order Header Detail; Customer Order Receipt/Reverse; Demand Peg Detail; Global Settings; IVPR; IVRR; JEST; Job Estimates and Performance Report; Material Shortages Detail; MPED; MSCF; OPSL; ORST; PICI; PICK; Picklist Detail; Pricing Maintenance + Test Order; REDI; RVED; STAD; Standard Product Detail; Transaction Detail

Ctrl Curr

Controlling Currency identifies which currency is constant (does not change with exchange rate fluctuations) for an order or invoice. A default **Controlling Currency** can be established for each vendor or customer, but it can also be changed for each order or invoice. Entry options include:

L = Local.

Local prices do not change with exchange rate fluctuations.

F = Foreign.

Foreign prices do not change with exchange rate fluctuations.

R = Rate.

A fixed rate is established between trading partners for orders and invoices. The rate-controlled currency is treated like foreign controlled for customer orders or A/R invoices and local controlled for purchase orders or A/P invoices. The fixed rate does not change with exchange rate fluctuations.

Where Used: APCR; APCW; APID; APIE; APII; APIP; APPA; APRG; APRL; APRQ; ARCR; ARIP; COMI; COMT; Contract Header Detail; Customer + General; Customer Financial Detail; Customer Order + Order Totals; Customer Order Header Detail; EXRU; IVIE; IVII; IVPP; Open Order Detail; POCL; POCL; POCT; POMI; POMT; Purchase Order Header Detail; Vendor Invoice Browse; Vendor Master Detail

Curr Code

Currency Code identifies the source or target currency associated with the trading partner or bank.

- Local currency codes are defined separately for trading partner (**Curr Code** = 00000) and banking (for example, **Curr Code** = USD) transactions.
- Non-local currency codes, which are specified only if the MCMM Module is installed, are used for both trading partner and banking transactions.

Entry is an alphanumeric combination of up to 5 characters. Available characters include alphabetic letters (A-Z), numbers (0-9) and the space character ().

Where Used: A/P Payment Void Detail; APCV; APIP; APRL; AREX; ARIP; BKMT; BKTR; Cash Receipts; Cash Set Selection; Cash Set Selection Setup; CCEX; CCMT; CCON; Customer + General; Customer Financial Detail; Disbursements; EXRU; Foreign Cash Reference; G/L Transaction Detail; ITPB; ITPI; Multi-Currency; Name, Address & Contacts; Open Order Detail; Payment Selection; Vendor Master Detail

Cust Id

Customer Identification is the identification number assigned to a customer. Entry is any alphanumeric combination of up to 13 characters.

Where Used: Advance Ship Notice Carrier Detail; Advance Ship Notice Shipment Detail; ARAH; ARCD; ARCJ; ARCP; ARCR; AREX; ARIC; ARIH; ARIP; ARIR; ARPD; ARPH; ARRJ; ARSC; ARSR; ARST; ARTB; ARTX; Available Customer Shipments; Available for Shipping Allocation Batch; Browse Setup (customer); Browse Setup (order); CIMT; CINV; COAN; COBK; COCD; COMI; COMT; CORV; COYE; CPMT; CUID; CUII; Cumulative Detail; CUPB; CUPI; CUSI; CUST; Custom Product Component Detail; Custom Product Detail; Customer; Customer Browse; Customer Browse Detail; Customer Financial Detail; Customer Invoice List; Customer Item + General; Customer Name/Address Detail; Customer Order; Customer Order + Order Header; Customer Order Header Detail; Customer Order Receipt/Reverse; Customer Payment List; Demand Peg Detail; EDIX; EXRU; G/L Distribution (ARSM Module); GASN; Inbound Conversion Detail; Inventory Adjustment Application; Invoice Header Detail; Invoice Line Item Detail; IORD; IVCO; IVIA; IVIE; IVII; IVPP; IVPR; IVRR; IVRV; JEST; Job Estimates and Performance Report; Lot Trace Issue Detail; Lot Trace Receipt Detail; Material Shortages Detail; MOAN; MPED; MPIT; MSMT; OPSL; Order Browse; Order Detail; ORST; Outbound Conversion Detail; Partner Item Detail; PCMT; PICI; PICK; Picklist Detail; Pricing

Maintenance + Items/Customers; Pricing Maintenance + Test Order; SBOL; Serial Number List; SHIP; Ship to Browse; Ship to Browse Detail; Shipment Allocation Detail; Shipment Allocation List; Shipping Allocation Batch; SHPI; SHPL; STAD; Standard Product Detail; Supply Peg Detail; Transaction Detail

Customer Name

Customer Name is the name of a customer. Entry is any alphanumeric combination of up to 60 characters.

Where Used: ARAH; ARCD; ARCJ; ARCR; AREX; ARIC; ARIH; ARIP; ARIR; ARPD; ARPH; ARRJ; ARSC; ARSR; ARTB; ARTX; Available Customer Shipments; Browse Setup (customer); Browse Setup (order); CIMT; COBK; COCD; COMI; COMT; CORV; COYE; CPMT; CUID; CUII; CUPB; CUPI; CUSI; CUST; Custom Product Component Detail; Custom Product Detail; Customer; Customer + Address; Customer + General; Customer Browse; Customer Browse Detail; Customer Financial Detail; Customer Invoice List; Customer Item + General; Customer Name/Address Detail; Customer Order; Customer Order Header Detail; Customer Order Receipt/Reverse; Customer Payment List; EDIX; EXRU; G/L Distribution (ARSM Module); IVCO; IVIA; IVPP; JEST; Job Estimates and Performance Report; Lot Trace Issue Detail; Lot Trace Receipt Detail; OPSL; Order Browse; Order Detail; ORST; PICI; PICK; Picklist Detail; Pricing Maintenance + Test Order; SBOL; Serial Number List; SHIP; Ship to Browse Detail; Shipment Allocation List; Shipping Detail; SHPI; SHPL; STAD; Standard Product Detail

D&B Class

Dun & Bradstreet Class is the standard industry code (SIC) assigned to this customer or vendor by Dun & Bradstreet. Entry is any alphanumeric combination of up to 4 characters.

Where Used: Customer Browse Detail; Customer Financial Detail; Vendor Browse Detail; Vendor Master Detail

D&B Date

Dun & Bradstreet Date is the date the Dun & Bradstreet reference information was last updated.

Where Used: Customer + Credit; Customer Browse Detail; Customer Financial Detail; Vendor Browse Detail; Vendor Master Detail

D&B Rat'g

Dun & Bradstreet Rating is the rating assigned to this customer or vendor by Dun & Bradstreet. Entry is any alphanumeric combination of up to 3 characters.

Where Used: Customer + Credit; Customer Browse Detail; Customer Financial Detail; Vendor Browse Detail; Vendor Master Detail

D&B Ref

Dun & Bradstreet Reference Number is the customer or vendor's Dun & Bradstreet number. Entry must be in the format of XX-XXX-XXXX.

Where Used: Customer Browse Detail; Customer Financial Detail; Vendor Browse Detail; Vendor Master Detail

EDI Acknowledgement

EDI Acknowledgement Transaction identifies whether an acknowledgement is generated for 855 and 865 transactions. Options are:

N = No acknowledgement transaction is generated automatically for this trading partner.

Y = Send acknowledgement for 855 or 865 transactions.

An 865 acknowledgement transaction is sent if an 865 transaction exists for the trading partner.

Ext Text

Extended Text identifies whether an extended text message exists for this information.

Where Used: Contract Header Detail; Contract Item Detail; Contract Item Detail/Pricing; Custom Product Detail; Customer Financial Detail; Customer Order Header Detail; Invoice Header Detail; Order Line Items; POCR; Purchase Order Header Detail; Purchase Order Line Item Detail; Purchase Order Line Items; SBOL; Standard Product Detail

Function

Function codes are four-character abbreviations for screen names. Each screen has a unique code used for identification and transportation. For example, ITMB identifies the Item Master screen. Entry is 4 alphanumeric characters.

Where Used: screens and reports

Last Inv Date

Last Invoice Date is the date of the last invoice sent to this customer.

Where Used: Customer + Financial; Customer Financial Detail

Last Pay Date

Last Pay Date is the date on which the last payment from this customer was received.

Where Used: Customer Financial Detail

Open/Bal Forward

Open Item or Balance Forward indicates whether payments are applied to specific invoices or to an aged balance category and determines the format of the customer's statement.

O = Open item.

Payments applied to specific invoices.

B = Balance forward.

Payments applied to aged balance categories that are carried forward from the preceding period.

Where Used: Customer Financial Detail

Phone

Phone is the primary phone number of the vendor/customer. Entry is any alphanumeric combination of up to 20 characters.

Where Used: APIP; CIMT; COBK; COCD; Contract Header Detail; CUID; CUII; CUSI; CUST; Customer Browse Detail; Customer Financial Detail; Customer Name/Address Detail; DISI; DIST; ISVI; IVPR; IVRR; POCR; POVD; Purchase Order Header Detail; QSRC; VDSC; VEDI; VEID; VEND; Vendor Browse Detail; Vendor Configuration; Vendor Master Detail; VENI; VSDI; VSDT

PrePrinted Credit Memo Status

Preprinted Credit Memo Status is the default status when a preprinted credit memo is created. Values are:

A = Approved

U = Unapproved

blank = Status comes from the DEFAULT-CR-MEMO

PrePrinted Invoice Status

Preprinted Invoice Status is the default status when a preprinted invoice is created. Values are:

A = Approved

U = Unapproved

blank = Status comes from the DEFAULT-INVOICE

Prt

Print specifies the source of item information to use as the primary description on the printed invoice, shipping packing list and order acknowledgement.

C = Customer.

Prints customer information if available.

Type	Information Printed
invoice	customer item, description, quantity, UM
packing list	customer item, description item master item, description, quantity, UM
order acknowledgement	customer item, description, quantity, UM

B = Catalog.

Prints catalog information if available.

Type	Information Printed
invoice	item master item, description, quantity, UM catalog item, description

packing list	item master item, description, quantity, UM catalog item, description customer item, description
order acknowledgement	catalog item, description

I = Item Master.

Prints item master information:

Type	Information Printed
all	item master item, description, quantity, stocking UM

D = Dependent bills.

Prints customer information:

Type	Information Printed
all	customer information for components on dependent bills for custom product items

Where Used: Customer Financial Detail

Rate

Rate is the annual interest rate charged for accounts receivable that are past due. One decimal place is fixed. Entry is up to 999.99.

Where Used: Customer Financial Detail

Service Charge

Service Charge indicates whether or not there is a service charge calculated for past-due balances.

Y = Yes.

Calculate a service charge.

N = No.

Do not calculate a service charge.

Where Used: Customer Financial Detail

Start Date

Start Date is the date that service began with this vendor or customer.

Where Used: Customer + Financial; Customer Financial Detail; Vendor Master Detail

Statement Cycle

Statement Cycle is a number associated with a group of customer accounts being processed together. Entry options include:

- 1 = First cycle**
- 2 = Second cycle**
- 3 = Third cycle**
- 4 = Fourth cycle**
- 5 = Fifth cycle**

Where Used: ARCF; ARSC; ARSR; ARTB; Customer Financial Detail

Statement Print

Statement Print indicates whether or not statements should be generated for this customer. **Statement Print** indicators are:

Y = Yes.
Print statements.

N = No.
Do not print statements.

Where Used: Customer Financial Detail

Std Terms

Standard Terms identify the terms of payment for this order. **Standard Terms** can be chosen from one of three types:

D = Discount Days.

This is a payment schedule that allows discounts for early payment:

Category	Description
Cash %	The percentage discount allowed if payment is made within the number of days indicated by Cash Days .
Cash Days	The number of days allowed to take advantage of the discount specified by Cash % . Entry is up to 3 numbers.
Net Date	The specific date when payment is expected before the account is considered delinquent or discount opportunity is lost. Entry is 6 numbers in your system date format.
Discount	Discount amount allowed.
Net Days	The number of days allowed for payment before the account is considered delinquent. Entry is up to 3 numbers.
Lost?	Indicates whether a cash discount is still available for an invoice. Y = Yes . The invoice has passed the cash discount deadline. N = No . The invoice has not passed the cash discount deadline.

M = Monthly Account.

This is a payment schedule that defines a specific day of the month that payments are due:

Category	Description
Due Day	The day of the month on which payments are due. Entry is the range 1-31.
Cutoff Day	The day of the month the invoice must be produced to qualify for payment on the next monthly due date. Entry is the range 1-31.
Months Delay	The number of months to delay the normal due date. Entry is the range 0-99.

S = Specific Terms.

This allows multiple payment amounts and due dates to be specified when an invoice is created to allow an installment payment schedule to be specified.

Category	Description
Pay #	The date due and amount of the payment term.
Net	The day the net amount is due. Default is 30 days from invoice creation.

Where Used: A/P Invoice Matching Detail; A/P Payment Detail; A/P Receiving Detail; APID; APIE; APIH; APII; APPA; APPO; ARCR; ARIH; COMI; COMT; Contract Header Detail; Customer Financial Detail; Customer Order Header Detail; DISI; DIST; ISVI; IVCO; IVIE; IVII; IVPR; IVRR; Packing List; POCR; Purchase Order Header Detail; QSRC; Standard Terms; Vendor Browse Detail; Vendor Master Detail; VSDI; VSDT

Text No

Text Number identifies a set of text entered for descriptive purposes. The system assigns a **Text Number** for each unique set of text, providing the capability of reusing the text for a similar situation. Entry is up to 6 numbers.

Where Used: Bill of Material Detail; Contract Header Detail; Contract Item Detail; Contract Item Detail/Pricing; CORV; Custom Product Component Detail; Custom Product Detail; Customer Financial Detail; Customer Name/Address Detail; Customer Order Header Detail; Invoice Header Detail; Item Lot Receipt; Item Lot Trace and Serialization Detail; Item Master Detail; Item Master Planning Detail; LMSI; LMST; Lot Trace; Manufacturing Order Line Item Detail; MOMI; MOMT; MORI; MORV; Order Line Items; Packaging Detail; Picklist Detail; POCR; Production; Purchase Order Header Detail; Purchase Order Line Item Detail; Purchase Order Line Item Detail (CPMT); Purchase Order Line Items; Purchased Component Detail; SBOL; SHIP; Standard Product Detail; TEXT; TXWU; Vendor Configuration; Vendor Master Detail; Vendor/Item Detail

Unapp Cash

Unapplied Cash is the portion of all cash receipts that has not yet been applied to an invoice or aged balance category.

Where Used: ARAG; ARIC; ARPH; Customer Browse Detail; Customer Financial Detail

Unapp Crdt

Unapplied Credit is the amount of all credit memos that has not yet been applied to an invoice or aged balance category.

Where Used: ARIC; ARPH; Customer Browse Detail; Customer Financial Detail

YTD Pay'ts

Year-to-Date Payments is the total value of payments made by this customer this year to date.

Where Used: COYE; Customer Browse Detail; Customer Financial Detail; Pricing Maintenance + Test Order

YTD Sales

Year-to-Date Sales is the total amount included on invoices and credit memos as a result of shipments made to this customer this year to date. Line items from sources other than shipping activity are not included in **YTD Sales**.

Where Used: COYE; Customer + Financial; Customer Browse Detail; Customer Financial Detail; Pricing Maintenance + Test Order

YTD Shpmts

Year-to-Date Shipments is the total value of shipments to this customer this year to date.

Where Used: COYE; Customer Browse Detail; Customer Financial Detail; Pricing Maintenance + Test Order

YTD Sv Chg

Year-to-Date Service Charges is the total amount of services charges incurred by this customer this year to date.

Where Used: COYE; Customer + Financial; Customer Browse Detail; Customer Financial Detail

Price Book Usage by Customer

Use the Price Book Usage by Customer screen to view all customers in the Customer Master and the number of price books used by each customer. Open the Price Book Usage window to view and maintain price books used by a selected customer.

Data Import is available to connect price books to customers. Refer to the Data Import manual for more information.

You can access the Price Book Usage by Customer screen:

- ALT+F8 from CUID (Customer Master Inquiry)
- ALT+F8 from CUST (Customer Master)

Reports

A standard report is not generated for this screen. Use the Print Screen key or any screen capture program to create an image of the screen.

Fields

Price Book Name

Price Book Name is the unique identifier for a price book. Entry is any alphanumeric combination of up to 15 characters.

Description

Price Book Description identifies the price book in terms of its characteristics. When space is limited, a partial description is displayed.

Customer In Effectivity

Customer In Effectivity date is the date the price book becomes effective for this customer.

Customer Out Effectivity

Customer Out Effectivity date is the last date the price book is effective for this customer.

Customer Pref

Customer Preference identifies the price book-customer relationship. One customer can be associated with up to 36 price books, each having a unique **Customer Preference** character. You can enter the **Customer Preference** identifier in the **ST** field on a COMT line item prior to opening the Available Pricing window in order to display the preferred price book when the window is opened. Entry is 1 alphanumeric character A-Z or 0-9.

Customer Sp

Customer Special designates that the price book used by the customer is a special promotion. The price book is flagged as special on the Available Pricing window. Entry is 1 alphanumeric character.

Pb Typ

Price Book Type indicates which type of items are included in the price book.

Q = Customer items

C = Catalog items

I = Item Master items

CMTA – Commission Code Table

Use the Commission Code Table screen to view codes representing the methods used to determine sales commissions. You identify each code by a description, rate and primary salesperson. A commission code is identified for each customer order and can also be assigned to individual line items.

Two versions of this screen are available: one for maintenance and one for inquiry use only. The information displayed is the same, only the ability to change the information changes depending on the screen you access.

- The CMTA (Commission Code Table) screen allows you to view and update commission codes.
- The CMTI (Commission Code Table Inquiry) screen only allows you to view this information.

See "Entry and Inquiry Screens" under "Screen Types" in the **Using Fourth Shift** section of the Fourth Shift Basics manual for more information.

Features

Transportation Shortcuts

You can use shortcut keys or transport buttons to go to the following related screens.

Destination	Shortcut Key(s)
CUID (Customer Master by Customer Id) (not available after SOPM Module installation)	F8
TXTA (Tax Code Table)	F9
CNFG (System Installation Setup)	F10

Web Links

If you use Web UI, you can link to other screens by clicking tabs or hyperlinks.

There are no tabs or hyperlinks available for this screen.

Reports

Commission Code Table

Lists commission codes.

Access Method

To generate the report, choose **Print** or **Print Preview** from the **File** menu. The Report screen appears before the report is generated, allowing you to select a range of data for the report. For more information on reporting in general, see "Printing and Reporting" in the Fourth Shift Basics manual.

Report Template

For more information on report templates, see "Reporting for SQL Server Systems" in the System Help topics.

Fields**Commission Code**

Commission Code is the user-defined identifier for salespersons' commissions. The overall commission for a sale is calculated at the time of invoicing. Entry is any alphanumeric combination of up to 3 characters.

Where Used: ARIR; CMTA; CMTI; Custom Product Detail; Customer + General; Customer Browse Detail; Customer Name/Address Detail; Customer Order + Order Detail; Customer Order Header Detail; Inventory Adjustment Application; Invoice Line Item Detail; IVCO; IVIE; IVII; Line Item Details + General; Pricing Maintenance + Test Order; Standard Product Detail

Commission Rate

Commission Rate is the rate at which sales commissions are calculated for invoiced orders. A **Commission Rate** is associated with each **Commission Code**. Entry is the range of .000 through 99.999.

Where Used: CMTA; CMTI

Description

Commission Description identifies the type of commission represented by the **Commission Code**. Entry is any alphanumeric combination of up to 20 characters.

Where Used: CMTA; CMTI

Function

Function codes are four-character abbreviations for screen names. Each screen has a unique code used for identification and transportation. For example, ITMB identifies the Item Master screen. Entry is 4 alphanumeric characters.

Where Used: screens and reports

Primary Sales ID

Primary Salesperson Identification is the identifier assigned to the salesperson who is most often associated with the commission code. Entry is any alphanumeric combination of up to 6 characters.

Where Used: CMTA; CMTI

Starting Commission Code

The **Starting** field is used to request a list where the specified information appears first on the list. **Starting** entries may consist of a partial entry and if the entry is not in the list, the next highest entry appears first on the list. The **Starting** field can include one or more field combinations, each with its own entry requirements.

Where Used: A/P 1099 Distribution; A/P Payment Application Detail; A/P Payment Void Detail; A/P Received Item List; A/P Receiving Detail; A/R Payment Application Detail; APAH; APDS; APEX; APID; APIE; APII; APIR; APIV; APPA; APPD; APPI; APPO; APTX; ARAH; ARCD; AREX; ARIC; ARIH; ARPD; ARPH; ARSR; BAMT; Bank Payment Approval; BILL; BILL; BKMT; Browse Setup (customer); Browse Setup (item); Browse Setup (vendor); CACF; CCAN; CCAT; CCEX; CCMT; CIMT; CMCF; CMTA; CMTI; CNFA; COAN; COMI; COMT; Contract Item Detail/Pricing; CORV; CPMT; CUID; CUII; CUSI; CUST; FCMT; FCST; G/L Account Group/No List; G/L Account No List; G/L Batch Detail; G/L Journal Entry List; G/L Master Account Recap; G/L Org No List; G/L Org/Acct Group List; G/L Organization Group/No List; G/L Report List; G/L Source Code List; GLAG; GLAV; GLBD; GLCA; GLCI; GLDQ; GLEX; GLGQ; GLJD; GLJE; GLJI; GLJP; GLJR; GLMA; Global Extended Text Selection; GLOS; GLRD; GLRL; GLSC; GLSI; GLSS; ITBI; ITCB; Item Master; Item Shortages; ITMB; ITMI; ITPB; ITPI; IVCO; IVIA; IVIE; IVII; IVRV; LMMT; Location Selection Setup; MCST; MOAN; MOMI; MOMT; MORI; MORV; MPED; MPIT; MSMT; NMTA; OPSL; Orders on Shipment; ORST; Packaging Detail; PASS; PBCI; PBCT; PBMI; PBMT; PCMT; PCST; PICI; PICK; POAN; POAS; POCI; POCT; POMI; POMT; PORI; PORV; REDI; RTMT; RVED; SBOL; Selection Setup; Serial Number List; Serial Numbers Shipped; SHIP; Shipments by Line Item; SHPI; SSII; STAD; SUND; SUNR; SUPD; SUPR; TEXT; TXTA; VAT Summary (APSM Module); VATT; VEDI; VEID; VEND; VENI; Workcenter Master

CCOT – Customer Contact Master

The Customer Contact Master (CCOT) screen is used to create new customer related contacts or to relate an existing external or internal contact to a customer. The same contact can be related to many customers. This screen can also be used to change and delete customer contacts. If the last customer related to an external contact is deleted, the contact will automatically be deleted.

Customer Contacts will be used for the automatic sending of customer reports through email.

Two versions of the screen are available: one for maintenance (CCOT) and one for inquiry use only (CCOI). The information displayed is the same, only the ability to change the information changes depending on the screen you access.

See "Entry and Inquiry Screens" under "Screen Types" in the Using Fourth Shift section of the Fourth Shift Basics manual for more information.

Features

Transportation Shortcuts

You can use shortcut keys to go to the following related screens.

Destination	Shortcut Key(s)
Previous screen	ESC
Customer Contact Detail	F8
Ship To/Delivery Location Contact Detail	F9
CUID (Customer Master by Id)	F10 (not available if SOPM is installed)

Browse Windows

You can open browse windows by choosing **Browse/Detail** from the **Tools** menu in the following fields:

Browse	From Fields
Contact Browse	Contact Name, Title, Email Address or Contact ID (when inserting a new line)
Customer Browse	Customer ID

For more information, see "Selecting from a Browse List" in the Fourth Shift Basics manual.

Web Links

If you use Web UI, you can link to other screens by clicking tabs or hyperlinks.

Go to Screen...	By clicking...
Customer Contact Detail	Tab at top of screen
Ship To/Delivery Location Contact Detail	Tab at top of screen
CUID (Customer Master by Id)	Screen label: Customer Id
CROP (Customer Report Options)	Screen label: Customer Id
COCD (Customer Orders by Id)	Screen label: Customer Id

Reports

A standard report is not generated for this screen. Use the Print Screen key or any screen capture program to create an image of the screen.

Fields

Contact Id

Contact ID is a number assigned when the Contact is created on the Contact Master screen. It cannot be updated or re-used.

Contact Name

Contact Name is the entire name of the person or entity for a contact.

Customer Id

Customer Identification is the identification number assigned to a customer. Entry is any alphanumeric combination of up to 13 characters.

Customer Name

Customer Name is the name of a customer. Entry is any alphanumeric combination of up to 60 characters.

Email Address

Contact Email Address is the electronic mail address for a contact used when sending email.

Order By

Order by is a drop-down list box containing the sort options for display sequence for the Contacts section. It defaults to "Contact Name" and the default sort order is Contact Name, Title, Email Address, Phone Number, and Contact Id. Selecting something other than Contact Name modifies the primary sort value and maintains the rest of the default sort order. Valid sort options are:

- Contact Id

- Contact Name
- Email Address
- Phone Number
- Title

Phone Number

Phone Number is the the primary phone number for contact.

Phone Type

Phone Type indicates if the primary phone number is a business, mobile, home, or fax number.

Starting

Sets the starting Customer Id record displayed in the scrolling Customer Contacts section.

Title

Contact Title is the job title for contact.

Customer Contact Detail

Use this screen to enter or modify information for a customer related external contact or to view a customer related internal contact. Information about the external contact's name, title, email address, phone numbers, and user defined fields can be changed here. Facebook Username or Twitter Username can be maintained on the Customer Contact Detail screen also. Notes also can be maintained about the external contact on this screen. For each customer that the contact is related to, the contact can be set up as a recipient for email enabled customer reports generated for that customer.

For an Internal contact associated with a customer, data can only be displayed on Customer Contact Detail screen. Maintenance for internal contacts can only be done from the Internal Contact screen (ICOT screen). Exception: Send As field can be maintained for internal contacts.

Customer Contact Detail information is needed for the automatic sending of customer reports through email.

Features

Transportation Shortcuts

You can use shortcut keys to go to the following related screens.

Destination	Shortcut Key(s)
Previous screen	F8
Ship To/Delivery Location Contact Detail	F9
CUID (Customer Master by Id)	F10 (not available if SOPM is installed)

Additional Information

Window		Shortcut Key(s)
Contact Notes	Any location on the screen	Alt+T (pops up a Notes screen)
Contact Notes	Any location on the screen	Ctrl+T (navigates to the Notes section within the screen)

Web Links

If you use Web UI, you can link to other screens by clicking tabs or hyperlinks.

Go to Screen...	By clicking...
Customer Contact Master	Tab at top of screen
Ship To/Delivery Location Detail	Tab at top of screen

Reports

A standard report is not generated for this screen. Use the Print Screen key or any screen capture program to create an image of the screen.

Fields

Contact Id

Contact ID is a number assigned when the Contact is created on the Contact Master screen. It cannot be updated or re-used.

Contact Name

Contact Name is the entire name of the person or entity for a contact.

Contact Notes

Contact Notes stores adhoc information about a contact.

Contact Type

Contact Type indicates the type of contact and the relationship to entities within the system. It is an indication of where the contact will be used. Values include customer, vendor and internal contacts. Customer contacts are related to sales customers; vendor contacts are related to vendors in purchasing; and internal contacts are within the system's company.

Email Address

Contact Email Address is the electronic mail address for a contact used when sending email.

Facebook Username

Contact Facebook User Name is the Facebook user account name for contact.

Phone Number

Phone Number is the the primary phone number for contact.

Phone Number 2

Phone Number 2 is the second phone number for contact.

Phone Number 3

Phone Number 3 is the third phone number for contact.

Phone Type

Phone Type indicates if the primary phone number is a business, mobile, home, or fax number.

Phone Type 2

Phone Type 2 indicates if the second phone number is a business, mobile, home, or fax number.

Phone Type 3

Phone Type 3 indicates if the third phone number is a business, mobile, home, or fax number.

Reports For Customer

Reports For Customer is a list of customer-related reports for each customer that the Contact is related to. Use it to change the display of email enabled reports for each Contact/Customer combination and to setup the contact as an email recipient for the customer report.

Report Name

Report Name is the title of the report.

Send As

Email Send As Type indicates the type of email recipient. Values are:

To - To recipient is who the email is intended for.

Cc - Carbon Copy recipient receives a copy of the email.

Bcc - Blind Carbon Copy recipient receives a copy of the email but other recipients can't see that this recipient received it.

Title

Contact Title is the job title for contact.

Twitter Username

Contact Twitter User Name is the Twitter user account name for a contact.

User Defined 1- 3

Contact User Defined is a reference field that stores additional user-identified information about a contact.

Contact User Defined 2 is a reference field to store additional user identified information about a contact.

Contact User Defined 3 is a reference field to store additional user identified information about a contact.

Ship To/Delivery Location Contact Detail

Use this screen to set up a customer contact (external or internal contact) to receive (or not receive) an emailed report for a specific ship to/delivery location associated with the customer.

If the customer contact is configured on this screen, they are a recipient of email when a report run is for the ship to delivery location.

Features

Transportation Shortcuts

You can use shortcut keys to go to the following related screens.

Destination	Shortcut Key(s)
Previous screen	ESC
Previous screen	F8
Customer Contact Detail	F9
CUID (Customer Master by Id)	F10 (not available if SOPM is installed)

Web Links

If you use Web UI, you can link to other screens by clicking tabs or hyperlinks.

Go to Screen...	By clicking...
Return	Tab at top of screen
Customer Contact Master	Tab at top of screen
Ship To/Delivery Location Detail	Tab at top of screen
CUID (Customer Master by Id)	Screen label: Customer Id
CROP (Customer Report Options)	Screen label: Customer Id
COCD (Customer Orders by Id)	Screen label: Customer Id

Reports

A standard report is not generated for this screen. Use the Print Screen key or any screen capture program to create an image of the screen.

Screen Reference

Using the Screen

For one customer contact, by selecting each Ship To/Delivery Location Id, you can configure email for reports to many Ship To Address/Delivery Locations for the customer on this screen. This screen only lists reports that are, by design, determined to be relevant at the Ship To Address level for a CUSM installation. Similarly, for a SOP installation, it lists reports relevant at the Delivery Location level. The screen is used to relate a customer contact and a specific ship to/delivery location, and then configure report(s) for email based on that combination.

To remove a customer contact, Ship To Address/Delivery Location, and Report combination from email, select blank as the Send As value.

Using Ship To/Delivery Location Contact Detail and Customer Contact Detail report settings together

For a report, if a customer contact has Send As set on Customer Contact Detail screen, the contact receives all report runs for that customer. If the customer contact has Send As set on Ship To/Delivery Location Contact Detail screen, the contact receives only a report run for that ship to/delivery location. If a customer contact is setup the same for a report on both screens, the setting on Ship To/Delivery Location Contact Detail is redundant. If the customer contact is setup differently for a report on the two screens and the report run is for the ship to/delivery location, for example with a Send As of To for one and Cc for the other, the contact's email address will appear on both the To and Cc lines of the email.

Fields

Contact Id

Contact ID is a number assigned when the Contact is created on the Contact Master screen. It cannot be updated or re-used.

Contact Name

Contact Name is the entire name of the person or entity for a contact.

Customer Id

Customer Identification is the identification number assigned to a customer. Entry is any alphanumeric combination of up to 13 characters.

Customer Name

Customer Name is the name of a customer. Entry is any alphanumeric combination of up to 60 characters.

Email Address

Contact Email Address is the electronic mail address for a contact used when sending email.

Phone Number

Phone Number is the the primary phone number for contact.

Phone Type

Phone Type indicates if the primary phone number is a business, mobile, home, or fax number.

Report Name

Report Name is the title of the report.

Send As

Email Send As Type indicates the type of email recipient. Values are:

To - To recipient is who the email is intended for.

Cc - Carbon Copy recipient receives a copy of the email.

Bcc - Blind Carbon Copy recipient receives a copy of the email but other recipients can't see that this recipient received it.

Ship To/Delivery Location Id

Ship to Identification is the identification assigned to the delivery location. Entry is any alphanumeric combination of up to 13 characters.

Ship To/Delivery Location Name/Address

Ship to is the delivery location. Entry is any alphanumeric combination of up to 60 characters.

Ship To/Delivery Location State

State is the identification of the state or province associated with an address. Entry is any alphanumeric combination of up to 10 characters.

Ship To/Delivery Location Zip

Zip Code is the postal delivery number associated with an address. Entry is any alphanumeric combination of up to 12 characters.

Title

Contact Title is the job title for contact.

CROP – Customer Report Options

Use this screen to maintain customer-specific report preferences. For each customer related report, Email Print Preference for a customer can be specified as Email, Print or Both.

Transportation Shortcuts

You can use shortcut keys to go to the following related screens.

Destination	Shortcut Key(s)
Customer Report Recipient Detail	F8 (from scrolling line and if Email/Print Preference is Email or Both)
CCOT (Customer Contact Master)	F9
CUID (Customer Master by Id)	F10 (not available if SOPM is installed)

Browse Windows

You can open browse windows by choosing **Browse/Detail** from the **Tools** menu in the following fields:

Browse	From Fields
Customer Browse	Customer ID

For more information, see "Selecting from a Browse List" in the Fourth Shift Basics manual.

Web Links

If you use Web UI, you can link to other screens by clicking tabs or hyperlinks.

Go to Screen...	By clicking...
Customer Report Recipient Detail	Tab at top of screen (from scrolling line and if Email/Print Preference is Email or Both)
CUID (Customer Master by Id)	Screen label: Customer Id
CCOT (Customer Contact Master)	Screen label: Customer Id
COCD (Customer Orders by Id)	Screen label: Customer Id

Reports

A standard report is not generated for this screen. Use the Print Screen key or any screen capture program to create an image of the screen.

Fields

Customer Id

Customer Identification is the identification number assigned to a customer. Entry is any alphanumeric combination of up to 13 characters.

Customer Name

Customer Name is the name of a customer. Entry is any alphanumeric combination of up to 60 characters.

Email/Print Preference

Email Print Preference is the preference on how the trading partner wants to receive a report. Values are by email, print, or both.

Report Name

Report Name is the title of the report.

Customer Report Recipient Detail

Use this screen to display customer contact email recipients that are setup for a customer and a report. This screen shows a read-only list of customer contacts and ship to/delivery location contacts set up to receive email for the selected customer and report. Customer contacts who do not appear on this screen will not receive email for the specified customer and report.

Features

Transportation Shortcuts

You can use shortcut keys or transport buttons to go to the following related screens.

Destination	Shortcut Key(s)
CROP (Customer Report Options)	F8
CCOT (Customer Contact Master)	F9
ETPT (Email Template)	F10

Web Links

If you use Web UI, you can link to other screens by clicking tabs or hyperlinks.

Go to Screen...	By clicking...
CROP (Customer Report Options)	Tab at top of screen
CUID (Customer Master by Id)	Screen label: Customer Id
CCOT (Customer Contact Master)	Screen label: Customer Id
COCD (Customer Orders by Id)S	Screen label: Customer Id

Reports

A standard report is not generated for this screen. Use the Print Screen key or any screen capture program to create an image of the screen.

Fields

Contact Id

Contact ID is a number assigned when the Contact is created on the Contact Master screen. It cannot be updated or re-used.

Contact Name

Contact Name is the entire name of the person or entity for a contact.

Customer Id

Customer Identification is the identification number assigned to a customer. Entry is any alphanumeric combination of up to 13 characters.

Customer Name

Customer Name is the name of a customer. Entry is any alphanumeric combination of up to 60 characters.

Email Address

Contact Email Address is the electronic mail address for a contact used when sending email.

Report Name

Report Name is the title of the report.

Send As

Email Send As Type indicates the type of email recipient. Values are:

To - To recipient is who the email is intended for.

Cc - Carbon Copy recipient receives a copy of the email.

Bcc - Blind Carbon Copy recipient receives a copy of the email but other recipients can't see that this recipient received it.

Ship To/Dlvry Loc

Ship to Identification is the identification assigned to the delivery location. Entry is any alphanumeric combination of up to 13 characters.