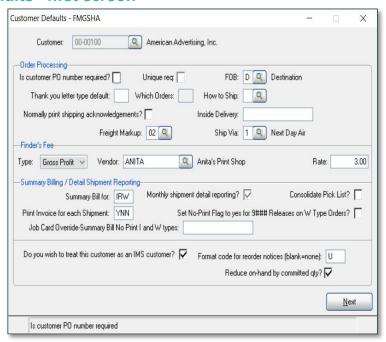# Customer Default Data

This section controls customer billing options, Inventory permission (IMS) and default settings. This document focuses on the three Customer Defaults screens.
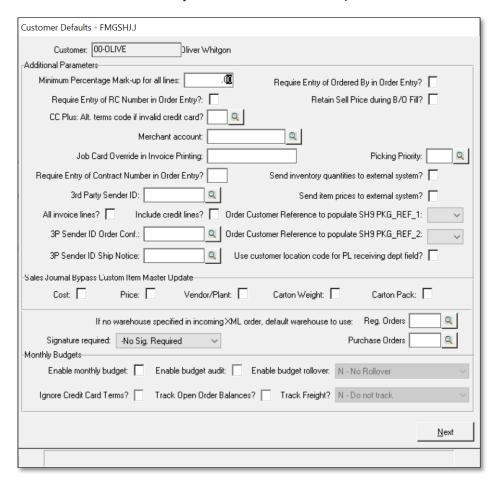
Customer Defaults - first screen

1. Order Processing section
   a. **Is Customer PO Required?-** forces a client PO # to be entered on their orders.
   b. **Unique req –** If the Custom PO Required box is checked, this forces a unique number to be entered on each order,
2. Finder's Fee section: not covered.
3. Summary Billing/Detail Shipment Reporting section. Allows Invoice information to be accumulated in a file and reported to the customer periodically.
   a. **Summary Bill For:** Order types to be included in summary bill: Enter ITW for all.
      i. **(I) Invoice, (R) Requisition, (W) Billable Requisition**
   b. **Print Invoice for each Shipment**
      i. Enter Y for Yes and N for N 3 times for each order type (example: YNN).
4. **Monthly Shipment detail reporting** – Check this option when Summary Billing or IMS permissions are activated. It records monthly shipment details to support summary billing and inventory management clients. *Best Practice! STRONGLY Recommended!*
5. **Do you wish to treat this customer as an IMS Customer** – checking this box activates inventory management functions for this customer.
6. **Format code for Reorder notices (Blank =none)** Must be a valid Flexible format code (Most companies will use formats U or V).
7. **Reduce On-hand by committed qty?** Checking this option reduces the quantity on hand by the committed amount. *Recommended as standard for all IMS Customers!*

db distributor

Customer Defaults - second screen

Non-IMS customers will advance directly to this second screen of parameters.

Additional Parameters

1. **Minimum Percentage Mark-up for all lines:**
   a. When set, upon exiting an order all lines will be reviewed and the designated markup will be applied to all lines that do not meet this criterion. *Not recommended!*
2. **Require Entry of Ordered By in Order Entry?** Checked equals Yes.
3. **Require Entry of RC Number in Order Entry?** Checked equals Yes.
   a. This information is written to the EDW file and is used for User Generated reporting.
4. **Retain Sell Price during B/O Fill?** Checked equals Yes.
5. **CC Plus: Alt Terms code if invalid credit card?** Checked equals Yes.
6. **Merchant account** – overrides default Marchant Account.
7. **Job Card Override in Invoice Printing**
   a. This is a 3-digit code that corresponds to the Invoice Delivery option setting.
   b. Allows a different set of printing rules for this customer's invoices.
   c. Also used to print invoices with a different company logo.
8. **Picking Priority** – Used with WMS (Warehouse Management System).
9. **Require Entry of Contract Number in Order Entry**
   a. When set, Order Entry requires entry of a valid Contract number in the order header.

10. **Send Inventory quantities to external system**
    a. Used with Flowpoint integrations. Covered separately.
11. **3ʳᵈ Party Sender ID** – used with Flowpoint to output invoice data. Covered separately.
12. These next 3 fields used with custom Flowpoint integration. Covered Separately.
    a. 3ʳᵈ Party Sender ID – validated field
    b. All Invoice lines
    c. Include credit Lines
        i. No Sig. Required
        ii. S-Signature Required
        iii. M-Mature Signature Required
13. **Order Customer Reference to populate SH9 PKG_REF_1 and REF_2**
    a. Drop Down allows a selection from 01 to 10
    b. These are 60 characters long
    c. This uses the FV1-OrderCustRefs file.
    d. Allows data to come in via eCommerce orders.
    e. Used for reporting purposes.
    f. Can be output to packing list.
14. **Use customer location code for PL receiving dept field** – The 'Receiving Department' is a 20-character field stored in the customer's Ship-To. It can be output to the packing list (field 95).Checking this option overrides that output with the 9-character Customer Location Code.
15. **Sales Journal Bypass Custom Item Master Update**
    a. The Sales Journal Update program will not update these fields when checked.
    b. **Cost:** Cost Unit, Cost Qty/Unit, and Cost Amt/Unit
    c. **Price:** Price Unit, Price Qty/Unit, and Price Amt/Unit
    d. **Vendor/Plant:** Vendor and Plant
    e. **Carton Weight:**
    f. **Carton Pack:**
16. **If no warehouse specified in incoming XML order, default warehouse to use:**
    a. Dropdown option for Reg. orders and Purchase Orders.
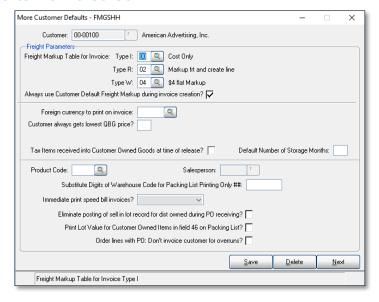   b. *Not generally used, requires special integration. Not Covered.*
17. **Monthly Budgets**
    a. Requires setup of the Budget Module, not covered.

Click Next!

Customer Defaults - third screen

1. **Freight Parameters**
   a. Set up freight mark-up by order type. See document on Freight Markups for details.
2. **Foreign currently to print on invoice:** Select from preset list (if applicable).
3. **Customer always gets lowest QBG price:** Used with price plans.
4. **Tax Items received into Customer Owned Goods at time of release**: This option charges tax on client owned releases based on the final shipping location.(not standard)
5. **Default Number of storage Months:** how long is the planned Storage for items coming into the warehouse.
   a. Defaults to order entry line.
   b. Calculates Storage Expiration to the lot during Purchase Order Receiving.
6. **Product Code and Salesperson**
   a. Override- if order line 001 has product code (selected), change the salesperson.
7. **Substitute Digits of Warehouse Code for Packing List Printing Only ##**
   a. Enter a 2-digit number to direct the printing of packing lists to a specified printer.
8. **Immediate print speed bill invoice** – requires alternate invoice printing selection.
   a. Dropdown options are:
      i. Don't ask, just print.
      ii. Ask first
      iii. No
9. **Eliminate posting of sell in lot record for dist owned during PO receiving**?
   a. The System defaults sell price on "Bill as Ship" order type to "Lot Record", at the time of receiving. Check to override.
10. **Print Lot Value for Customer Owned Items in field 46 on Packing List**
    a. Check to print the sell price for all items on Packing Lists
11. **Order lines with PO: Don't invoice customer for overruns**
    a. Check box if customer does not allow billing for overruns.
    b. Overruns can still be received into the warehouse, but this can cause a difference in the quantity in inventory and quantity billed for reconciliation purposes.