

The Customer Information Workbench provides a comprehensive view of all customer history and activity.

Analysis

- Bookings (by Rep, Cust., Group, Ship-To, Product Cat., Item)
- Time Phased Bookings (by Customer, Product Cat., Item)
- Sales History (by Sales Rep, Customer, Type, Group)
- Sales History (Bill-To Name, Ship-To, Product Cat., Item)
- Brief Sales History (by Sales Rep, Customer, Type)
- Summarized Sales History (by Rep, Shipping Zone/Item)
- Summarized Sales History (by Customer, Type/Item)
- Time Phased Sales History (by Customer, Group, Item)
- Prospect (New, List, Search)
- Customer (New, List, Search, Workbench, Types, Groups)
- Item Pricing
 - Item List Price
 - Update List Prices
 - Pricing Schedules

- Quote (New, List)
- Sales Order (New, List Open, Reschedule)
- Billing

Invoice

- Uninvoiced Shipments
- Select All Shipped Orders For Billing
- Select Order for Billing
- Billing Edit List
- Billing Selections
- Post Billing Selections
- List Unposted Invoices
- Post Invoices
- Credit Memo (New, List Unposted, Edit List, Post)
- Forms
 - Print Invoices, by Ship Via
 - Re-Print Invoices
 - Schedule Invoice for Email Delivery
 - Print / Re-Print Credit Memos

Returns (New, List Open, Workbench)

Lookup

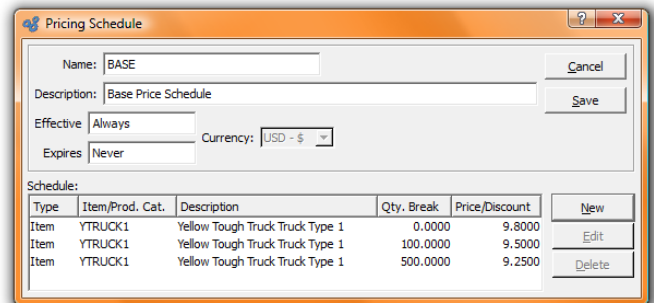
- Quote (by Customer, by Item)
- Sales Order (by Customer, Type, Customer PO, Item)
- Sales Order Status

Forms

- Print Sales Order Form
- Print Return Authorization Form
- Send Advanced Shipping Notification (ASN)
- Packing List Batch, Print Packing List

Reports

- Summarized Backlog
- Backlog (by Customer, Type, Group, S/O, Product Cat., Item)
- Partially Shipped Orders
- Inventory Availability (by Sales Order, Item)
- Earned Commissions
- Summarized Taxable Sales
- Customers (by Customer Type, Characteristic)



Pricing Schedule Assignment

- Sales
- Update Prices (by Product Category, Pricing Schedule)
- Reports
 - Prices by Customer Type, Customer, Item

Master Information

- Characteristics
- Sales Reps
- Shipping Zones, Ship Vias, Shipping Charge Types
- Tax Codes, Shipping Forms
- Sales Categories, Terms
- Sales, A/R Account Assignments
- Customer Form Assignments

Utilities

- Customer Information Export
- Reassign Customer Type by Customer Type
- Update Credit Status by Customer
- Purge Invoices, Purge Credit Memos
- Allocate Sales Order Reservations
- Archive/Restore Sales History



Note: Functionality in orange type is available only in the Standard and OpenMFG Editions.