

**OM/250
General Inquiry
Operator's Guide**

HP 250

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OM/250 General Inquiry Operator's Guide

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Printing History

New editions of this manual will incorporate all material updated since the previous edition. Update packages may be issued between editions and contain replacement and additional pages to be merged into the manual by the user. Each updated page will be indicated by a revised date at the bottom of the page. A vertical bar in the margin indicates revised text on each page. Note that pages which are rearranged due to changes on a previous page are not considered revised.

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CHAPTER 1

General Inquiry Processing

During transaction processing in the Order Entry Module, it may be necessary for one or more users to retrieve information about customers, other orders, inventory items, etc. The General Inquiry module (GI) helps you get information from the various data bases 1) without disturbing the other modules, and 2) without disturbing any of the data. The specific functions of this module are:

1. Customer Master Inquiry
2. Customer Account Status Inquiry
3. Item Master Inquiry
4. Order Inquiry

NOTE: If you would like to add other inquiry functions, contact your software representative.

Getting Started

To enter the General Inquiry module:

1. Make sure you have your OM/250 system on a volume labeled "HP250".
2. Type RUN "HP250,HP250".
3. If no other users are accessing OM/250 or FIN/250, you will be able to accept the system date or enter a new date.
4. If the following message appears, press the CONTINUE softkey.

"WARNING: POSSIBLE DATA BASE INTEGRITY PROBLEM"

Pressing continue leads you through a cycle which checks data integrity. If the check fails, return to your back-up volumes (see System Manager's Guide, Chapter 5, for back-up procedures).

5. Enter your password.

6. Press the GENERAL INQUIRY softkey, as seen below:

ACCTS RECEIVABL	ORDER ENTRY	INVENTORY CONTROL	SALES ANALYSIS	GENERAL INQUIRY			EXIT
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If the Manager password is entered, the Main Menu provides access to all General Inquiry Functions. The following inquiries are available:

GENERAL INQUIRY MAIN MENU				Date: 10/01/81			
GENERAL SYSTEMS DIVISION							
CUSTOMER MASTER	- Display master information about one or more customers.						
CUSTOMER ACCOUNT	- Display Customer Accounts Receivable data.						
IC ITEM MASTER	- Display one or more items from Inventory Control.						
ORDER INQUIRY	- Inquire about a sales order.						
Please select a function.							
CUSTOMER MASTER	CUSTOMER ACCOUNT	IC ITEM MASTER	ORDER INQUIRY				EXIT

NOTE: Not all passwords have access to all Inquiry functions. Refer to the Implementation Guide for password access rules.

Accounts Receivable Inquiry

The Customer Master and Customer Account Inquiry functions allow the following entries for retrieving information.

INQUIRE BY NAME - This function displays information for one or more customers with a name that starts with the search criterion entered. For example, if you wish to retrieve information about Acme Company you can enter:

1. Acme Company (or)
2. "AC" - this will find all customers whose name begins with "AC".

INQUIRE ALL - This function displays information for all your customers.

ENTITY XXXX ONLY - This function displays customer information for the Entity XXXX only.

CUSTOMER NUMBER - This function displays customer information for a-specified customer number.

Customer Master Inquiry

This function displays the following information for a specified customer or range of customers.

ACCOUNTS RECEIVABLE CUSTOMER INQUIRY				Date: 10/01/81
				Entity: 1000
Customer Number	10023			
Name	ACME HARDWARE COMPANY		Phone Number	
Street	5631 LONE MOUNTAIN			
City	KANSAS CITY	NEB	65432	
		Resale License Number		
Region Number	0	Trade Discount		Open Item Statement
Salesperson Number	0	Backorder	Y	Balance Forward Stmt
Customer Class	D1	Partial Shipment	Y	Credit Terms Code
				Credit Limit
Please enter a customer's name or select a function.				
1 of 2 items				
INQUIRE BY NUMBER		INQUIRE ALL	SHOW MTD/ YTD TOTAL	SHOW NEXT CUSTOMER
			ENTITY 1000 ONLY	EXIT

Customer Account Inquiry

This function displays the following account status information for a specified customer or range of customers.

ACCOUNTS RECEIVABLE CUSTOMER ACCOUNT STATUS			Date: 10/01/81		
Customer Number: 10023	Entity: 1000	<u>Invoice</u>	<u>Date</u>	<u>Balance Due</u>	
		10244	10/01/80	13,821.60	
ACME HARDWARE COMPANY 563 LONE MOUNTAIN KANSAS CITY, NEB 95432					
Date of Last Payment:					
MTD Sales:	13,290.00				
YTD Sales:	13,290.00				
Credit Limit:	15,000.00				
Net Bal Last Stat:	0.00				
Balance Outstanding:	13,821.60				
Unassigned Credit:	0.00				
NET BALANCE:	13,821.60				
Please enter a customer's name or select a function.					
1 of 2 items					
INQUIRE BY NUMBER		INQUIRE ALL	SHOW NEXT CUSTOMER	ENTITY 1000 ONLY	EXIT

Inventory Control Inquiry

The Item Master Inquiry function allows the following entries for retrieving information.

INQUIRE/NUMBER - This function displays data for a specified item number.

INQUIRE/DESCRIPTION - This function displays data for one or more items with a description that starts with the search criterion entered. For example, if you wish to retrieve information about a Wire Splicer you can enter:

1. Wire Splicer (or)
2. "W" - this will find all items whose description begins with "W".

INQUIRE ALL - This function displays information for all items in inventory.

Item Master

Upon entering the desired item or items, this function displays the following information:

GENERAL SYSTEMS DIVISION						Report: IC 018
ITEM INQUIRY						Date: 10/01/81
Item Number 5	Description 5 3/4 INCH ZINC HANDLE					U/M EA
List Price	\$2.020	Unit Cost	\$.760	Container Charge		\$0.00
Excise Tax	\$0.00	Broken Case Charge				\$.02
Qty	1-11	12-23	24-35	36-59	60-119	>120
Brk	\$2.020	\$1.919	\$1.879	\$1.818	\$1.757	\$1.697
		CLASS 1	CLASS 2	CLASS 3	CLASS 4	CLASS 5
Discounts(Price)		\$1.818	\$1.616	\$1.414	\$1.212	\$1.111
Markups (Cost)		\$1.520	\$1.444	\$1.330	\$1.216	\$1.140
Whse / Bin Number	Qty on Hand	Qty Allocated	Qty on Ord	Qty Back Ord		Qty Avail
1 130	5549	80	3000	0		8,469
2 140	0	0				
There are 0 transactions pending on this item.						
3 of 25 items.						
INQUIRE/ NUMBER	INQUIRE/ DESCRIPTN		INQUIRE ALL		DISPLAY NEXT ITEM	EXIT

Order Entry Inquiry

The Order Inquiry function allows the following modes for retrieving information.

AUTOMATIC MODE - This function selects and displays orders by Action Status.

AUTOMATIC BY DATE - This function selects and displays orders by Action Status and by Order Date, Requested Delivery Date, or Expected Ship Date.

MANUAL MODE - This function selects and displays orders by order number.

Order Inquiry

This function displays the following information for a specified order or range of orders, depending on the inquiry mode chosen.

GENERAL INQUIRY		Date: 10/01/81	
SALES ORDER INQUIRY			
Order No <u>11497</u>	Customer No <u>10006</u>	Customer P/O Number <u>1245</u>	
Bill To <u>MADISON AVENUE TECHNIQUES</u>	Ship To <u>MADISON AVENUE TECHNIQUES</u>		
Customer Class <u>00</u>	Order Date <u>10/01/80</u>	Ship Date <u>10/01/80</u>	Req Date <u>10/01/80</u>
Partial Shipment <u>Y</u>	Backorder <u>Y</u>	Salesperson No <u>0</u>	Total Line Items <u>1</u>
Credit Card Code <u> </u>	Order Amount \$ <u>26.40</u>	Prepaid \$ <u>0.00</u>	
Credit Init <u>CE</u>	Entry Init <u>CE</u>	Order Status <u>N</u>	Invoice Cycle <u>0</u> PL Count <u>0</u>
ACTION STATUS <u>AQ</u>			
Please select a function. (Now viewing 1 of 1)			
			EXIT

CHAPTER 2

General Inquiry Access Rules

The following chart outlines access rules for the General Inquiry module:

User 1 accessing:

	Customer Master	Customer Account	Item Master	Order Inquiry

Can User 2 access?				
OM/250 - FIN/250:				
Inventory Control	Y	Y	N	Y
Order Entry	Y	Y	Y	Y
Sales Analysis	Y	Y	Y	Y
Accounts Receivable	N	N	Y	Y
Accounts Payable	Y	Y	Y	Y
General Ledger	Y	Y	Y	Y
General Inquiry:				
Customer Master	Y	Y	Y	Y
Customer Account	Y	Y	Y	Y
Item Master	Y	Y	Y	Y
Order Inquiry	Y	Y	Y	Y

