

WMS: Did You Know?

From Professor Merlot



Cellar Meister Data - where do I find it?

Conversions of data files from Cellar Meister or other types of databases do not always comply with the data structure for WMS. To assist you in an easier transition from DOS programs to Windows, there are a couple of methods to find these past sales of your customers.

Here's how:

1. Function Key, F8, find a customer. This feature is available at any time when you are running WMS.

- With this form showing, you may select any customer by using the Drop Down button at the top of the form, "Select the Name..." by typing the surname and pressing Enter.

- Any Invoices or Sales for that customer selected that have been entered into WMS will show to the right of the "Press to go to..." buttons. This allows you to jump directly to that Invoice # on the right. (Note that if there is a balance owed by this customer, it will be displayed on the right of the Invoice number.)

- On the buttons at the bottom of this form, press the "Green Book" button to access the Customer History Pre-WMS information.

- This report will allow you to review the sales of "Snidely Whiplash or print a copy for him.

Name	Date	Order#	Invoice#	Qty	Product Name	Week Type
Snidely Whiplash						
	13-Mar-08	12-687	01302	1	Bergem as GR 6wk	
	03-Mar-08	25-11	01200	1	LCollage (Flat)	
	22-Feb-08	18-99	00798	1	Gewurtztraminer VC 4wk	
	15-Jan-08	17-55	00755	1	Coteau Royal GC 4wk	
	25-Oct-07	15-56	00688	2	Merlot - CS 6wk	
	02-Sep-07	13-11	00500	2	Malbec GC 4w	
	14-Mar-07	12-05	00499	1	Char'd Semillon 23L Euro Cask	
Total Product Orders for Snidely Whiplash = 9						
Total Product Orders as of Thursday Mar 13, 2008 = 9						



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2. Another method for finding a Cellar Meister customer and his past sales records is by using the Switchboard System.
 - Start at the Main Switchboard -> Sales Switchboard -> Customer Switchboard and select Customer History – Pre-WMS

- The form opens with the focus of the mouse on Drop Down button.

- Simply type in the customer's surname over the blacked out entry that is showing.

- As you type, the name will be displayed in the drop down area.

- Press the enter key if the correct name is displayed.

- Similar to the F8 function key, this form allows you to view the sales or by using the Printer button, you can print this listing for your customer.

Invo. Date	Customer's Name	Past Order#	Old Inv No.	Qty	Product
Mar 13 2008	Whiplash, Snidely	12687	1302	1	Bergamais GR 6wk
Mar 3 2008	Whiplash, Snidely	2511	1200	1	L'Collage (Plat)
Feb 22 2008	Whiplash, Snidely	1899	798	1	Gewurtztraminer VC 4wk
Jan 15 2008	Whiplash, Snidely	1755	755	1	Coteau Royal GC 4wk
Oct 25 2007	Whiplash, Snidely	1556	688	2	Merlot - CS 6wk
Sep 2 2007	Whiplash, Snidely	1311	500	2	Malbec GC 4w
Mar 14 2007	Whiplash, Snidely	1205	499	1	Chard/ Semillon 23L Euro Cask
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