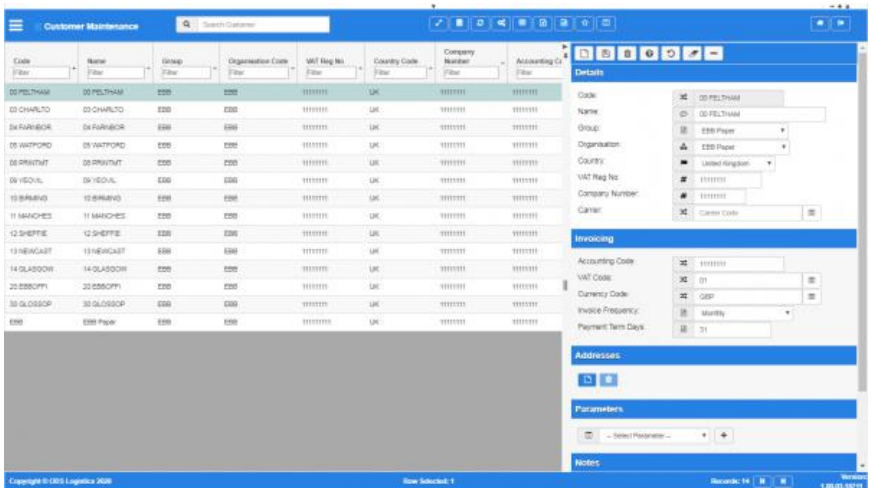
This screen allows you to maintain the customers in the system.

- 

*Customers*

You can query data by and/or choose to display data as follows:

- *Code*.
- *Name*.
- *Group*.
- *Organisation Code*.
- *VAT Reg No*.
- *Country Code*.
- *Company Number*.
- *Accounting Code*.
- *VAT Code*.
- *Currency Code*.
- *Invoice Frequency*.
- *Payment Term Days*.
- *Active*.
- *Created By*.
- *Created Date*.
- *Last Updated By*.
- *Last Updated Date*.
- *Last Active Change By*.
- *Last Active Change Date*.
- *Last Process Id*.
- *Update Counter*.

The following actions are available on the Details panel:

- **New** - create a new record.
- **Save** - save a new record or changes to an existing record.
- **Delete** - delete an existing record.
- **Help** - help on this screen.
- **Undo** - undo change made since last save.
- **Clear** - clear all fields.
- **Toggle** - toggle display of all accordion headers.

You can change or add the following information:

## Details section

- *Code*.
- *Name*.
- *Group* - a drop-down list of customer groups configured in the system. You can configure customer groups in the Customer Groups screen.

- *Organisation Code* - a drop-down list of organisations configured in the system. You can configure organisations in the Organisation screen.
- *Country Code* - a drop-down list of countries configured in the system. You can configure countries in the Countries screen...
- *Company Number*
- *VAT Reg No*.
- *Carrier* - the carrier that is used by the customer. You can maintain these in the Carriers screen. You can look up the available carrier codes using the **Lookup** button to the right of the value entry. The screen will display a pop-up window listing the available values. You can filter the values on the list by typing in the provided filter box and clicking the Filter button. You can select a value from the list, or cancel the look up by closing the window.

## Invoicing section

- *Accounting Code*.
- *VAT Code* - the VAT code used by the customer. You can maintain these in the VAT Codes screen. You can look up the available carrier codes using the **Lookup** button to the right of the value entry. The screen will display a pop-up window listing the available values. You can filter the values on the list by typing in the provided filter box and clicking the Filter button. You can select a value from the list, or cancel the look up by closing the window.
- *Currency Code* - the currency code used by the customer. You can maintain these in the Currencies screen. You can look up the available currency codes using the **Lookup** button to the right of the value entry. The screen will display a pop-up window listing the available values. You can filter the values on the list by typing in the provided filter box and clicking the Filter button. You can select a value from the list, or cancel the look up by closing the window.
- *Invoice Frequency* - a drop-down list used to determine the invoice interval, Values: Weekly; Monthly; Yearly.
- *Payment Term Days*.

## Addresses section

You can set the applicable addresses here.

You can add an address by clicking the **New** button in the section. The screen will display a pop-up window to enter the following:

- *Location* - the location code. You can enter the location code or select it from a list using the **Lookup** button to the right of the value entry. The screen will display a pop-up window showing all codes configured in the system. You can find codes by using the Filter box at the top of the pop-up and entering some characters of the code or name. You can enter a code by clicking the entry in the table or cancel by closing the window. You can configure locations in the Locations screen.
- *Type* - a drop-down list indicating the address type. Values: Billing Address; Collection Address; Delivery Address; Headquarters.

You can save your changes with the **Save** button, or discard your changes with the **Close** button.

You can remove an address by selecting it from the table and clicking the **Delete** button in the section header.

## Parameters section

You can set parameters here to control additional functionality.

You can select a parameter to add using the provided Select Parameter drop-down list and clicking the **Add** button.

The available parameters are configurable in the Customer Parameters screen.

Once you have selected the parameter, the screen will display it in this section. Parameters are displayed in the sequence which your system administrators have configured them to be displayed. Once the parameter is added, you can enter the value - in general, the screen will validate the value or will provide a list of values to select, depending on the parameter settings.

You can remove a parameter by clicking the **Cancel** button next to the parameter value.

The following parameters are currently available:

| Label | Description | Long Description | Type | Values |
|---|---|---|---|---|
| Consolidate with others | Allow Consolidate with other companies orders | Allow the consolidation of orders with orders placed by other companies | DropDownList | Yes,No |
| Fuel Base Price | Fuel Base Price | Fuel surcharge to be calculated and charged on variation of current price versus contract base price | TextBox | |
| Order Delivery Confirm Req | Order Delivery Confirmation Required | Order Delivery Confirmation Required | DropDownList | Yes,No |
| Order Received Confirm Req | Order Received Confirmation Required | Order Received Confirmation Required | DropDownList | Yes,No |

## Notes section

You can add notes through the Notes section.

You can click the **New** button in the Notes section to create a new note. This will be tagged with your user name and date/time.

Any notes may be removed by clicking the **x** in the corner of the note.

## Contacts section

You can add any number of contacts here.

You can add a contact by clicking the **New** button in the section.

You can edit an existing contact by selecting the contact row in the table and then clicking the **Edit** button in the section header.

The screen will display a pop-up window to enter the following:

- *Title*.
- *Forename*.
- *Surname*.
- *Job Title*.
    - *Contact Mediums* - a list of all contact media for the customer.
    - *Primary Phone*.
    - *Primary Email*.
    - *Primary Mobile*.

You can add additional contact media by selecting the media type from the drop-down list. The screen will add the medium to the Contact Mediums list above. Additional contact media:

- *Email*.
- *Fax*.
- *Mobile*.
- *Skype*.
- *Facebook*.
- *Twitter*.

You can delete an existing contact by selecting the contact row in the table and then clicking the **Delete** button in the section header.

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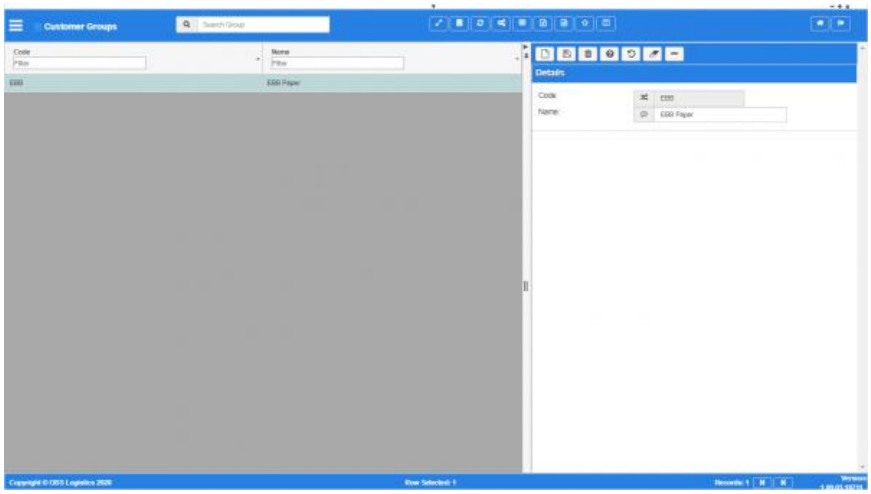
# 1 Customer Groups

This is the Customer Groups maintenance page. Customer Groups are used to link the customers together for easier filtering and configuration.

This page starts finding data - enter your query from your configured filter fields.

Results are displayed in a table and are automatically displayed if there are only a few details.

- 


*Customer groups maintenance*

List of fields displayed:

- *Code* - Group Code.
- *Name* - Group display name.

Editing one of the records can be done by clicking on a row - the selected line data will be loaded into the details panel for editing.

Adding a new record can be done by opening the detail panel and clicking the **New** button - all fields are required.

Use the **Save** button to save the entered or edited details. **Warning**: If you do not save your work, your changes will be lost



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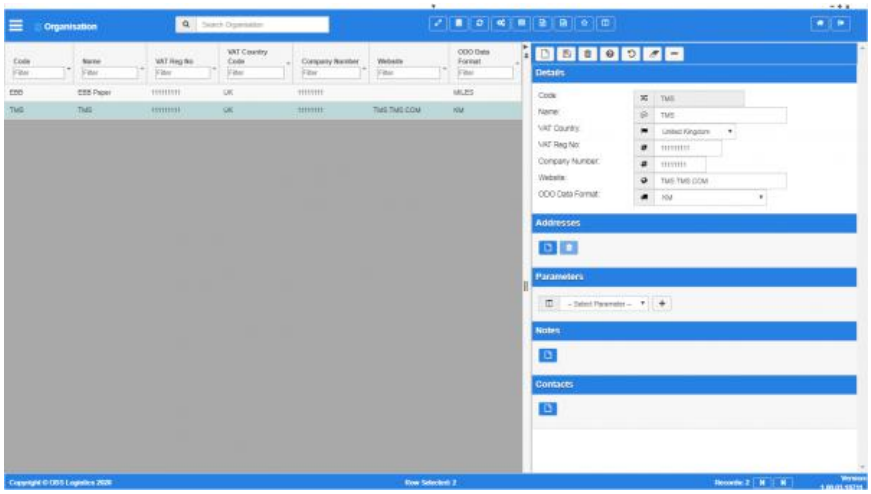
# 2 Organisation

This is the Organisation maintenance page. This is where the organisation or company is configured.

This page starts finding data - enter your query from your configured filter fields.

Results are displayed in a table and are automatically displayed if there are only a few details.




*Organisation Screen*

List of fields displayed:

- *Code* - the company code.
- *Name* - The display name of the company.
- *VAT Reg No* - registered VAT number.
- *VAT Country Code*.
- *Company Number* - the registered company number.
- *Website* - the company's website address.
- *Data Format* - ODO format, Kilometres (KM) or Miles.

Editing one of the records can be done by clicking on a row - the selected line data will be loaded into the details panel for editing.

Adding a new record can be done by opening the detail panel and clicking the **New** button - all fields are required.

Use the **Save** button to save the entered or edited details. **Warning**: If you do not save your work, your changes will be lost

When an organisation is edited after creation, more organisation data can be entered in the following sections.

## 2.1 Address Details section

- *Code* - the location code.
- *Type Code* - a drop-down list of all the location types in the system. You can configure location types in the Location Types screen.
- *Name* - the name.
- *Alternate Name* - an alternate name.
- *Address*.

- *Address 2*.
- *Address 3*.
- *Town*.
- *County*.
- *Country Code* - a drop-down list of all countries configured in the system. You can configure countries in the Countries screen.
- *Postcode*.
- *Latitude* - the GPS position of the address.
- *Longitude* - the GPS position of the address.
- *Postal Region* - a postal region for the address.

A map will be displayed showing the location.

## 2.2 Parameters section

You can set parameters here to control additional functionality.

You can select a parameter to add using the provided Select Parameter drop-down list and clicking the **Add** button.

The available parameters are configurable in the Organisation Parameters screen.

Once you have selected the parameter, the screen will display it in this section. Parameters are displayed in the sequence which your system administrators have configured them to be displayed. Once the parameter is added, you can enter the value - in general, the screen will validate the value or will provide a list of values to select, depending on the parameter settings.

You can remove a parameter by clicking the **Cancel** button next to the parameter value.

The following parameters are currently available:

| Label | Description | Long Description | Type | Values |
|---|---|---|---|---|
| Asset Debrief | Epod Asset Debrief | Are permanent assets being tracked? If so, need to update the assets | DropDownList | Yes, No |
| Auto-plan Service Level | Auto-plan Service Level | Auto-plan Service Level | DropDownList | Yes, No |
| Auto-plan Time Ahead (hours) | Auto-plan Time Ahead (hours) | Auto-plan Time Ahead (hours) | DropDownList | Yes, No |
| Calendar Working Day | Defines which days of the week are being worked | Defines which days of the week are being worked in the organisation | DropDownList | Yes, No |
| IF Reprocess | Interface Reprocess | Interface Reprocess | TextBox | String |
| IF Sleep Time | Interface Sleep Time | Interface Sleep Time | TextBox | Integer |
| IF MSA Database | Interface MSA Database | Interface MSA Database | TextBox | String |
| Enroute Collections | Epod Enroute Collections | Controls updating the trip to EN_ROUTE if not already, when debriefing collections (i.e. loading at depot) | DropDownList | Yes, No |
| Epod WS Password | Epod WS Password | EPOD Web Service Login Password | TextBox | String |
| Epod WS Username | Epod WS Username | EPOD Web Service Login Username | TextBox | String |

## 2.3 Notes section

You can add notes through the Notes section.

You can click the **New** button in the Notes section to create a new note. This will be tagged with your user name and date/time.

Any notes may be removed by clicking the **x** in the corner of the note.

## 2.4 Contacts section

You can add any number of contacts here.

You can add a contact by clicking the **New** button in the section.

You can edit an existing contact by selecting the contact row in the table and then clicking the **Edit** button in the section header.

The screen will display a pop-up window to enter the following:

- *Title*.
- *Forename*.
- *Surname*.
- *Job Title*.
    - *Contact Mediums* - a list of all contact media for the customer.
    - *Primary Phone*.
    - *Primary Email*.
    - *Primary Mobile*.

You can add additional contact media by selecting the media type from the drop-down list. The screen will add the medium to the Contact Mediums list above. Additional contact media:

- *Email*.
- *Fax*.
- *Mobile*.
- *Skype*.
- *Facebook*.
- *Twitter*.

You can delete an existing contact by selecting the contact row in the table and then clicking the **Delete** button in the section header.

# 3 Supplier

This screen allows you to maintain the suppliers in the system.

You can query data by and/or choose to display data as follows:

- *Code*.
- *Name*.
- *Group*.
- *Organisation Code*.
- *VAT Reg No*.
- *Country Code*.
- *Company Number*.
- *Accounting Code*.
- *VAT Code*.
- *Currency Code*.
- *Invoice Frequency*.
- *Payment Term Days*.
- *Active*.
- *Created By*.
- *Created Date*.
- *Last Updated By*.
- *Last Updated Date*.
- *Last Active Change By*.
- *Last Active Change Date*.
- *Last Process Id*.
- *Update Counter*.

The following actions are available on the Details panel:

- **New** - create a new record.
- **Save** - save a new record or changes to an existing record.
- **Delete** - delete an existing record.
- **Help** - help on this screen.
- **Undo** - undo change made since last save.
- **Clear** - clear all fields.
- **Toggle** - toggle display of all accordion headers.

You can change or add the following information:

## 3.1 Details section

- *Code*.
- *Name*.
- *Group* - a drop-down list of customer groups configured in the system. You can configure customer groups in the Customer Groups screen.
- *Organisation Code* - a drop-down list of organisations configured in the system. You can configure organisations in the Organisation screen.
- *Country Code* - a drop-down list of countries configured in the system. You can configure countries in the Countries screen...
- *Company Number*
- *VAT Reg No*.
- *Carrier* - the carrier code used by the supplier. You can look up a list of carrier codes configured in the system using the **Lookup** button to the right of the entry field. The screen will pop-up a window to select a carrier code. You can configure carriers in the Carriers screen.



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## 3.2 Invoicing section

- *Accounting Code*.
- *VAT Code* - the VAT code used by the supplier. You can look up a list of VAT codes configured in the system using the **Lookup** button to the right of the entry field. The screen will pop-up a window to select a VAT code. You can configure VAT codes in the VAT Codes screen.
- *Currency Code* - the currency code used by the supplier. You can look up a list of currency codes configured in the system using the **Lookup** button to the right of the entry field. The screen will pop-up a window to select a currency code. You can configure currency codes in the Currencies screen.
- *Invoice Frequency* - a drop-down list used to determine the invoice interval, Values: Weekly; Monthly; Yearly.
- *Payment Term Days*.