Customer

Contents

1 Customer

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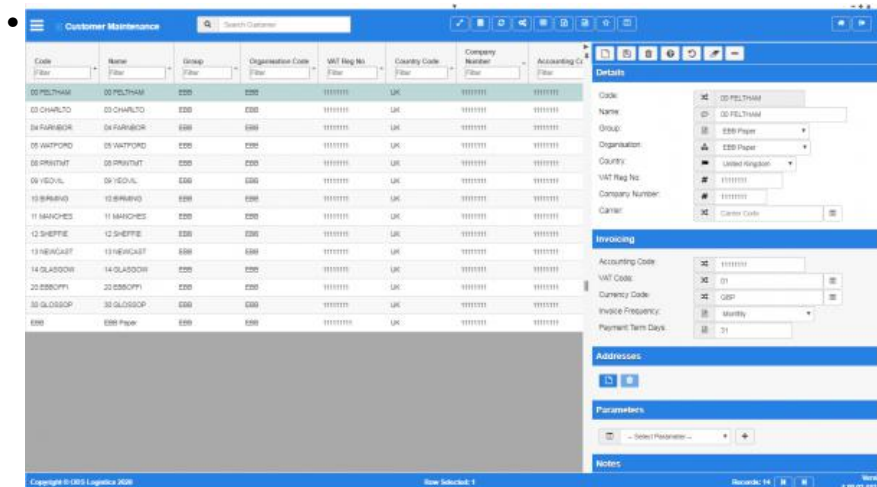
Customers

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:

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1.1 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 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.

1.2 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.*

1.3 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.

1.4 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.

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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

1.5 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.

1.6 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*.

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- *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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