

Initial Setup

Aptean Ltd
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1 Initial Setup

 **Warning:** This is an incomplete guide.

Instructions for user setup and role access to follow.

- Prior to access, the user will need to [create a profile](#)
- Once the user profile has been created, the user will need to link into a group

1.1 Initial Basic Setup

The system will be provided with the following already created:

- Organisation.
- Basic user role.
- Administrative user with password.
- All programs, menus and menu options configured in a standard way.
- Standard order statuses.
- Standard trip statuses.
- Standard parameters, including the system and system parameters configured.
- GB timezone.
- GBP currency.
- Standard VAT code.
- GB location zone.
- GB country.

Change the password for the administrative user.

1.2 Static Data Setup

Organisation Parameters

User Parameters

Role Parameters

Customer Parameters

Customer group

Customers

1.3 Geographical Data Setup

Timezones

Countries

Location types

Locations



1.4 Transport Units setup

Transport Unit Categories

Transport Unit Types

1.5 Product Setup

Pre-requirements:

- Transport Units setup

Product Group

Temperature Type

Product Type

1.6 Resource Setup

Carrier Parameters

Carrier Groups

Carriers

Person Parameters

Drivers

Carrier assignment

Vehicle Type Categories

Vehicle Types

Vehicles/Trailers

Carrier assignment

1.7 Users Setup

Pre-requirements:

- Static Data Setup
- Geographical Data Setup
- Resource Setup

Once you have configured resources, you can then configure users and roles for the system in the way that you will use them. Use the [Roles](#) administration screen for this.

For each role required, you will need to set up parameters, usually selected from the following:

| Label | Description | Long Description | Notes |
|-------|-------------|------------------|-------|
|-------|-------------|------------------|-------|



| Label | Description | Long Description | Notes |
|-------------------|--|--|--|
| Carrier | Accessible Carrier | Accessible Carrier | You will typically want to have one or many accessible carriers. |
| Customer | Accessible Customer Code | Accessible Customer Code | You may want to restrict planning and orders to a single or many customers. |
| Customer Group | Accessible Customer Group Code | Accessible Customer Group Code | You may want to restrict planning and orders to a single or many customer groups. |
| Accessible Depot | Accessible Depot | Accessible Depot for user organisation | You may want to restrict planning to a single or many depots. |
| Allow Order Amend | Allow Order Create and Amend Indicator | Allow this user to Create and Amend Orders | If this is a read-only user, you may want visibility of orders without the facility to amend them. This must be set to Yes to allow order amendments for users in that role. |
| Organisation | Accessible Organisation Code | Accessible Organisation Code | You will want to set a default organisation. |

Other parameters are available that may also be set for differing results - see the [Roles](#) screen documentation for more information.

Users may then be created using the [Users](#) administration screen and assigned to the role or roles created above.

The users may also have additional parameters created against them, usually selected from the following:

| Label | Description | Long Description | Type | Values |
|--------------|--------------|------------------------------------|--|--------|
| Owning Depot | Owning Depot | Owning Depot for user organisation | You will want to set an owning depot for the user. | |

Other parameters are available that may also be set for differing results - see the [Users](#) screen documentation for more information.

1.8 Finance Setup

Pre-requirements:

- Static Data Setup
- Service Levels Setup
- Transport Units Setup

Organisations updated

Currencies

Accounts

Payment Methods

VAT Codes

Contract Types

Rates

Contracts

1.9 Orders Setup

Pre-requirements:

- Static Data Setup



- Geographical Data Setup
- Service Levels Setup
- Transport Units Setup
- Product Setup
- Finance Setup (optional)

Order Categories

Order Parameters

Order Templates (optional)

Orders may now be created.

1.10 Fixed Routes Setup

Pre-requirements:

- Static Data Setup (optional)
- Geographical Data Setup
- Resource Setup
- Service Levels Setup (optional)

Loading/Unloading Rates

Location Zone Types

Location Zones

Fixed Route templates

1.11 Planning Setup

Pre-requirements:

- Static Data Setup
- Geographical Data Setup
- Orders Setup
- Resource Setup

Loading/Unloading Rates

You can now create trips.

