Organisation

Aptean Ltd

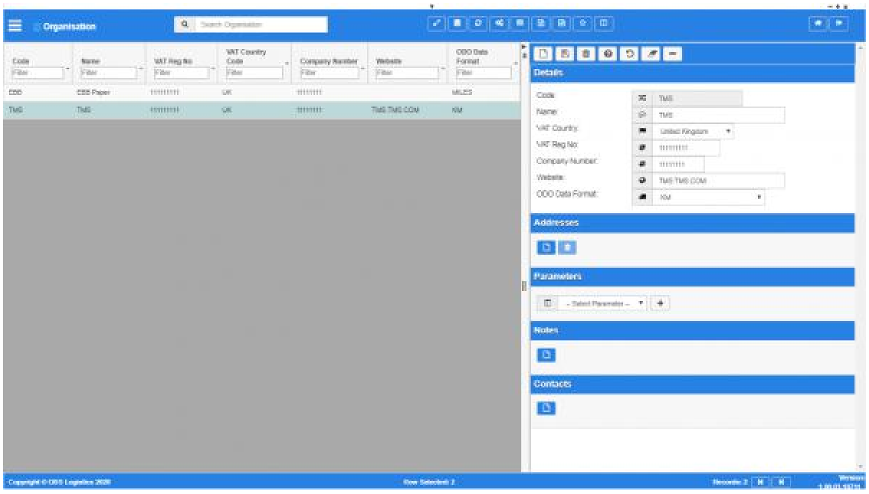
Contents

1 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.

1.1 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.

1.2 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

1.3 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.

1.4 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.