# Customers

# **Contents**

# 1 Customers

Maintenance of Customers and Cost Centres functionality is used within C-TMS software to maintain data related to Customers, Customer group and Cost Centres.

Customers may be created through the Customer Onboarding interface. Customers may also be created through Imports

- Customer Onboarding Interface
- CUSTOMER

Customer and Cost Centre maintenance form can be accessed from Maintenance Menu.

The "Customer and Cost Centre" maintenance form has 4 tabs as shown below. In this document, the functionality and the use of each of the tabs i.e. Customer, Customer Group, Cust Group Usage and Cost Centres are described in detail.



💡 **Note:** A 5th bespoke tab "New Supplier" has been added, but is not covered in detail in this document, as this is bespoke functionality.

💡 **Note:** When setting up a new customer or entire new contract, the tabs should be used in the following order:

- Cost Centre - set up a cost centre first.
- Customer Group - set up a customer group for the customer.
- Customer - set up the customer.

Please refer to the Initial Setup Guide for more information on setting up a new operation from scratch.

## 1.1 Customers

The 'Customer' tab is used to create, maintain or delete a customer. To create a customer, simply place the cursor on the 'Customer ID' column and press the **New** button. Enter the details of the customer as shown below.

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- *Customer ID -* Enter a Customer ID up to 12 Alpha numeric characters
- *Customer Name -* The full name of the Customer up to 35 Alpha numeric characters
- *Contact Name -* Enter the name of the person to be contacted in the case of any discrepancies. Up to 35 Alpha numeric characters
- *MTM Customer Code -* This was originally used for an interface with Manugistics but is now used as a prefixed two Character reference in the system generated order reference
- *Customer Group -* This should be populated if the customer is to be grouped by a customer group name. This is explained in the below section under 'Customer Group'. To select a group the user needs to click the button to the right of the Customer Group field. This will give the user a list of values (if more than one group is within the database)
- *Customer Type -* must be set 'Customer'.
- *Unison Interface Value -* must be entered only if the Order details related to the customer will be interfaced from Unison (WMS) into C-TMS. If there is no interface from Unison into C-TMS for this particular customer, then leave this field as blank.
- *Fuel Charge% -* Enter a percentage if a payment is to be added to an order in addition to that of the contract found against the Customer. 💡 **Note:** The active checkbox must be selected if using this function rather than the 'Fuel Char' to the right of the form. In order for this checkbox to be editable then a system parameter (MINIMUM_COLLECTION) needs to be set to 'N'
- *Country Code -* The associated Country Code should be entered.
- *No -* this field is the customers registered VAT number.
- *Location -* Click on the Location associated with this customer. The address details will be populated based on the location address details and then press the **Save** button. The example is shown below.



- *Order Revenue Charging Type -* Can be set as:-
    - ♦ *Actual Delivered -* Will not generate order revenue until the Actual Delivered Quantity has been entered against the order

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- ♦ *Actual Despatched* - Will not generate order revenue until the Actual Despatched Quantity has been entered against the order
- ♦ *Greatest* - Will generate order revenue based on the Greatest Quantity. Whether this be at planned or delivered
- ♦ *Planned* - Will Generate order revenue based on the planned Quantity

- *Allocation Method* **-** Can be setup as RPE or Weight. This is only set if the 'Consolidate Orders' checkbox is ticked. It allows the order charges to be consolidated when delivering more than one order to the same destination on the same trip by either Weight or RPE

**Note:** Customers added through the Customer Onboarding Interface will have had the majority of this information pre-set for it when created through that interface. This includes an account and currency configured for it automatically.

There are many additional tabs available for configuration of the customer:

- Params
- Debrief
- Carrier Preferences
- Fuel Charges
- Charges
- Cut Offs
- EPOD Params
- Portal Params
- TTM Params
- Security Charges
- Sched Thresh
- Document Output
- Fuel
- Security
- Trans Mode
- Minimums
- Cost Plus
- Pain Gain Rules
- Complete Trips
- Countries
- Standard Instructions
- WMS Params
- Remote Printer
- Handover Locations
- Screening
- Additional Text
- Prod DU CutOffs

Some of these are covered in more detail below.

## 1.1.1 Params Tab

- *Order Header Contract* - This is to be used in conjunction with the DU Type Contract Charges parameter. If the DU Type Contract charges flag is set, this indicates that the customer contract is defined with line level tariffs. The parameter means that a customer may also apply a charge based on the order header, in addition to line level tariffs.

- *Consolidate Orders* - The 'Consolidate Order' flag should be checked when the customer orders needs to be consolidated for charge benefits. See the Consolidation section below for more details.

- *POD Document Available* - The 'POD document available' flag should be checked only if the POD documents are to be stored in TOKAIRO for this customer.

## 1.1.2 Debrief Tab

- *Mandatory* - controls which fields are required in Trip Debrief for this customer:
    - ♦ *Order Reason Code*
    - ♦ *Time Reason Code*
    - ♦ *Item Reason Code*

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- *Trip Debrief level*
    - ♦ *Off*
    - ♦ *Items only*
    - ♦ *Lines only*
    - ♦ *Lines and Items*
- *Delivery Threshold (mins)* - for Early and Late times

Also available are customer-specific flags:

- *Network Available*
- *Collect Casings*
- *Pay on Delivery*

## 1.1.3 Charges Tab

This Tab allows the user to add additional charges on any given day by either a % on top of the contract or a fixed fee. This adds an extra payment onto the order when the order revenue is generated.

## 1.1.4 EPOD Params Tab

Here you can set whether jobs for this customer should be sent to C-ePOD.

## 1.1.5 Portal Params Tab

- *Asset Return Orders*
    - ♦ *Item Content Type* - ASSET or CLAIM
    - ♦ *Item Label Required/Format.*
    - ♦ *Item Content Label Required/Format*
    - ♦ *Manifest Required*
    - ♦ *Open Manifest Days*
    - ♦ *Close Manifest Days*
- *Weekend Delivery*

## 1.1.6 TTM Params Tab

- *LOTS Owner* - This is the Owner (Usually the Unison WMS Owner) for the Live order Tracking System and if set against the Customer, will send any orders created in the database to the LOTS (Portal TTM) system.

You should also check the messages that should be sent for orders for this customer.

- *Send Order Message*
- *Send ALC Message*
- *Send MAR message*
- *Send LOA message*

## 1.1.7 Document Output Tab

This tab can be used to specify documents such as

- *Label Format (Zebra or PDF),*
- *Supporting Document Format* - choose from a drop-down list of formats.
- Full Address - checkbox indicating whether the full address should be used.

The Label Format determines which label is generated for customer orders from the orders screen. This command only controls the labels on the C-TMS and not those generated on the Portal.

## 1.1.8 Security Charges Tab

This is applied to the order revenue to generate a security charge. In addition to defining a percentage, you may indicate the effective date and a minimum charge. When an invoice is generated for the customer, the total security charges will be totalled. If the total for the security charges are less than the minimum amount, an additional payment is created to top up the security charges to the minimum amount.

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## 1.1.9 Additional Text Tab

5 additional multi-purpose text fields are supplied for capturing any data important to store against the customer record.

Note that this is typically used for additional data interfaced from external system, but can be edited and maintained here.

## 1.1.10 Editing a Customer

To edit a customer place the cursor on the Customer ID column and then edit the customer details on the right hand side of the form and click on the **Save** button to save your changes.

## 1.1.11 Deleting a customer

A customer can be deleted by placing the cursor on a particular customer in the Customer ID flag and then click on the **Delete** button. A confirmation prompt will be shown after which the customer will be deleted. Note that the Customer cannot be deleted if there are child records associated to the customer i.e. Orders and Trips. This is kept this way for audit purposes

## 1.1.12 Consolidation

You can define consolidation customers through the *Consolidation* button provided in the Customers screen.
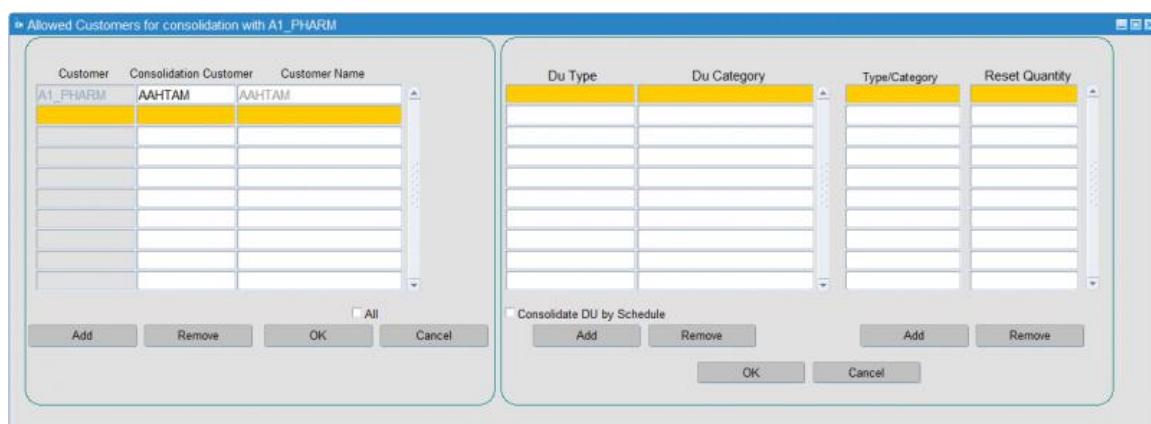


You can define the customers to whom the selected customer can consolidate, or choose all customers.

You can also define consolidation at the group level, to consolidate all customers within a group.

You can define the DU types and categories to be consolidate, and enter the reset quantity by DU Category.

The example below illustrates this feature.

Let the charges to transporting a given number of pallets from a location to another is as per given below:

| No of Pallets | Charge |
|---|---|
| 1 | 100 |
| 2 | 90.00 |
| 3 | 80.00 |
| 4 | 70.00 |
| 5 | 60.00 |
| 6 | 50.00 |
| 7 | 40.00 |

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| No of Pallets | Charge |
|---|---|
| 8 | 30.00 |
| 9 | 20.00 |
| 10 | 10.00 |

Assume that a customer, say KRAFT has 3 orders that need to be transported to Tesco Warrington in the same day. If the orders are to transport individually, then the charge for the each of the orders based on the number of pallets to be transported in given in the Charge column of the table below (charge derived from the table above). If the 'Consolidate Orders' flag is checked, then the orders will be consolidated and the customer charged for 9 pallets at 20.00.

| Order No | Pallets | Charge | Total |
|---|---|---|---|
| 1 | 4 | 70 | 280 |
| 2 | 3 | 80 | 240 |
| 3 | 2 | 90 | 180 |
| Total | 9 | - | 700 |
| Total by Consolidation | 9 | 20 | 180 |

# 1.2 Customer Group

Customer Group is used within C-TMS to group a number of Customer ID into a single group. This will allow access control of the locations/sites to view and manipulate orders.

To create a 'Customer Group', place the cursor on the Customer Group column and click on the **New** button. The samples given below demonstrate the creation of a Customer Group.





- *Consol Orders* - This works the same as the Consolidate orders section at the Customer Level accept the user can set it Group level rather than individual Customers

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- *EFX Group* - This box should be Checked if the Customer is using EFX for internal carrier charging between different businesses operating under the same Company banner
- *TOK Group* - This flag should be checked only if the POD documents are to be stored in TOKAIRO for this Customer Group

- *Allocation Method* - Can be setup as RPE or Weight. This is only set if the 'Consolidate Orders' checkbox is ticked. It allows the order charges to be consolidated when delivering more than one order to the same destination on the same trip by either Weight or RPE

In the example given below, the Customer has been associated to the Customer Group that was created as part of this exercise.
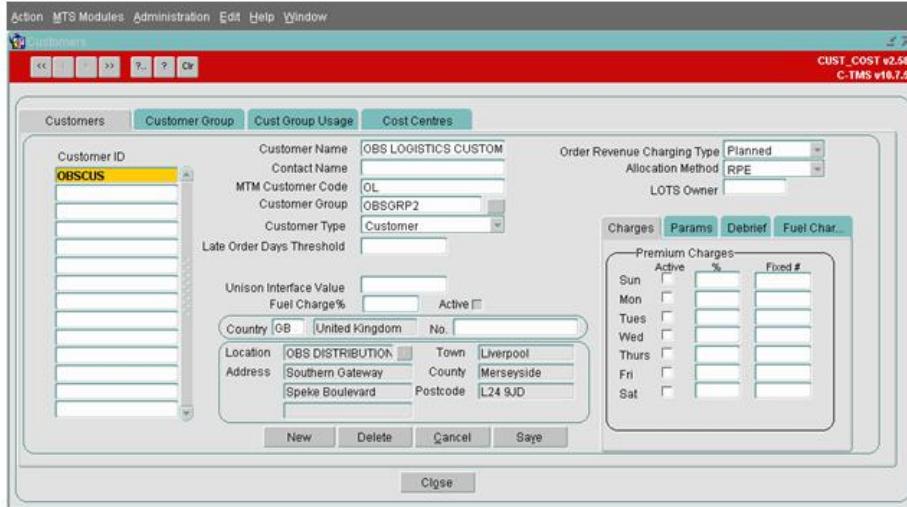


## 1.2.1 Deleting a Customer Group

A Customer Group can be deleted by placing the cursor on a particular customer group and then click on the **Delete** button. A confirmation prompt will be shown after which the customer group will be deleted. Note that the Customer Group cannot be deleted if there are child records associated to the customer group i.e. Orders and Trips. This is kept this way for audit purposes

# 1.3 Customer Group Usage

Customer Group Usage is usually used when a company has several businesses operating within the same database.

The customer group usage screen allows users to associate locations with a customer group for segregation purposes.

Location Usage can be defined at a customer or a customer group level. If defined at a customer group level, then this screen will show the locations assigned to this group.

The tab is only visible when the system parameter ?MTS_LOCATION_USAGE? is set to either the value ?CUST_GROUP? for Customer Group usage level or ?CUST? for a Customer usage level.

This allows the user to add Locations to a specific Customer Group and if the user is setup to only see that particular Customer Group then they will only be able to create orders and trips using the locations assigned within this Tab page.

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To add locations to a customer group:

Select the button next to the 'Cust Group' field and select the relevant Customer Group from the list of values that is populated



Then select the button next to the 'Location Id' **field** and select the relevant Location from the list of values that is populated



To add more locations select the **New** Button. This will highlight another line in Yellow and allow the user to repeat the same process. Delete a location by highlighting the required Location and then click the **Delete** Button.

# 1.4 Cost Centre

A 'Cost Centre' is associated to an Order based on the set up done in this form.



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## 1.4.1 Creating a new Cost Centre

Select the **New** Button; this will highlight a new line to allow the user to enter the new data



Enter the Cost Centre name; this can be 12 alpha numeric characters



- *Cost Centre Code -* This is a prefixed two Character reference will be shown in system generated order reference
- *Load Rate Type -* This can be DU Quantity or Weight. This decides which load rates to look at within the resource maintenance screen. Load rates are entered against every location and it defines the load and un-load times. The times can be entered against the Despatch unit or the weight.. When the Transport Planner plans the trip with an order or orders it will calculate the load rates as well as time and distance and enter the appropriate times against each stop to best fit the order time windows.
- *Internal Revenue -* 'Internal Revenue' flag is checked, and when a 'Trip Status' is changed from 'Planned' to 'Accepted' then the system would validate to check if an contract exists between the two 'Cost Centres' that are involved in the trip.
- *VAT Country -* The country code the Cost Centre falls within. The 'No' field is the Registered VAT Number.
- *Location -* Click on the Location associated with this Cost Centre. The address details will be populated based on the location address details and then press the **Save** button. This Location is used on the invoice when printed.

## 1.4.2 Deleting a cost centre

A Cost Centre can be deleted by placing the cursor on a particular Cost Centre Name and then click on the **Delete** button. A confirmation prompt will be shown after which the Cost Centre will be deleted. Note that the Cost Centre cannot be deleted if there are child records associated to it i.e. Orders and Trips. This is kept this way for audit purposes

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## 1.5 New Supplier

This screen can be used to create a new supplier.

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