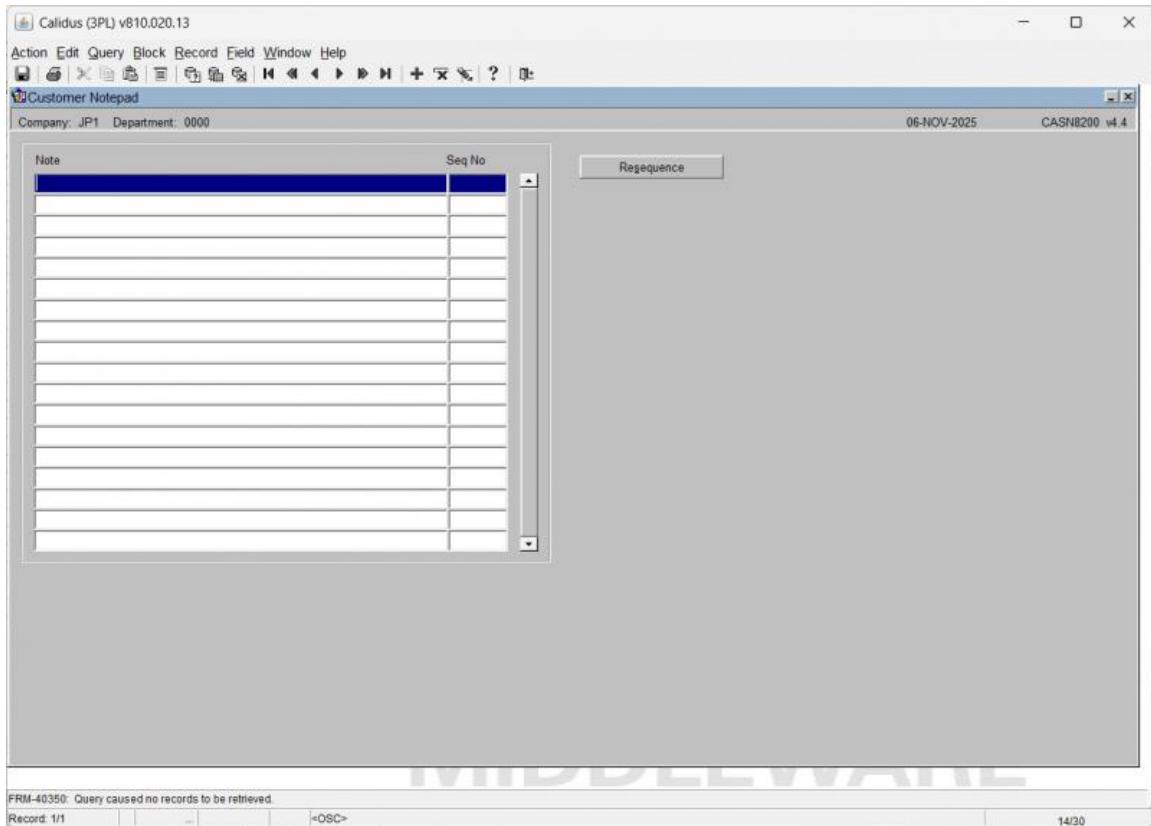This is the *Customer Notepad* screen (*CASN8200*).

The following fields document the data grid for notes:

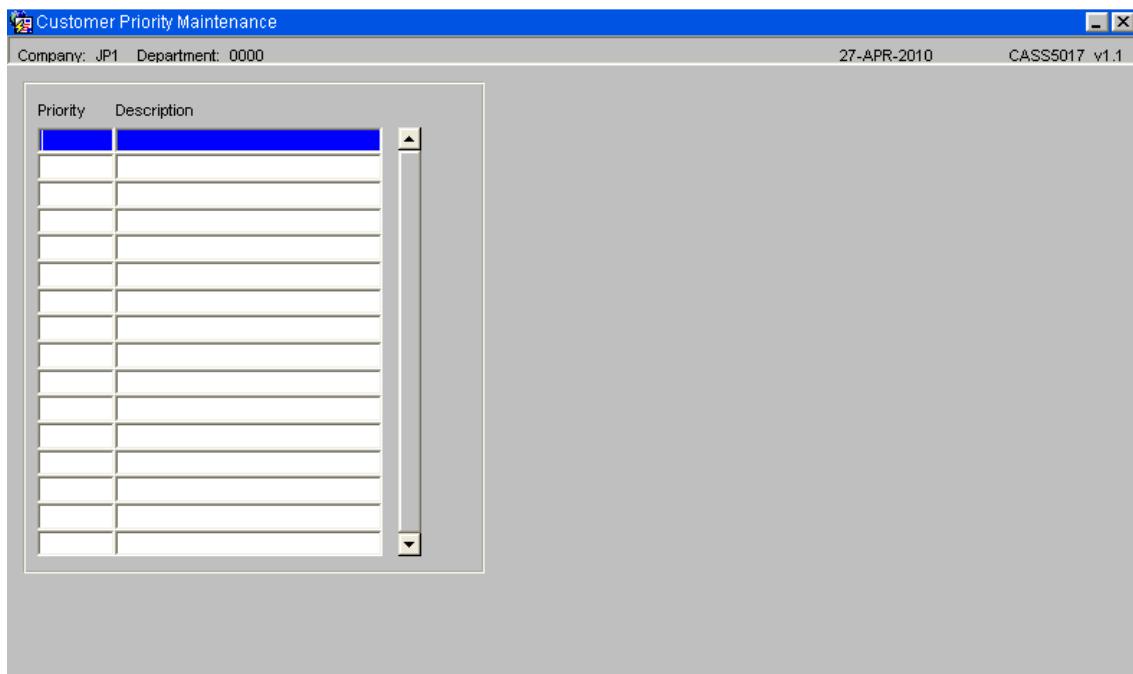| Field Name	Description
Note	The text field used to enter or view notes related to the customer.
Seq No	The sequential number assigned to each note entry.

Action Buttons:

- **Resequence**: An action button that re-sorts based on the *Seq No* field for all notes currently displayed in the grid.

Contents

1 CASS5017 Customer Priority Maintenance

Used for cross docking and order segregation, a priority set against a customer will determine which customers can be cross docked to.

Field Name	Description	Options	Generic Value
Priority **	The priority code used	1 character free text field	?X?
Description	The description of the priority code	30 character free text field	Defined by the client

2 SOPCPLT01A Customer Pallet Type Maintenance for Cubing

This is the Customer Pallet Type Maintenance for Cubing screen.

Here, you provide the pallet building dimensions for pick pallet types. This will be used by some pick allocation and list processes to ensure that pallets are built restrained to customer restrictions.

You can specify:

- Pallet Type

- Build Height
- Min Build Height
- Max Build Height
- Max Weight

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3 SOPCUCL01A Customer Class Maintenance
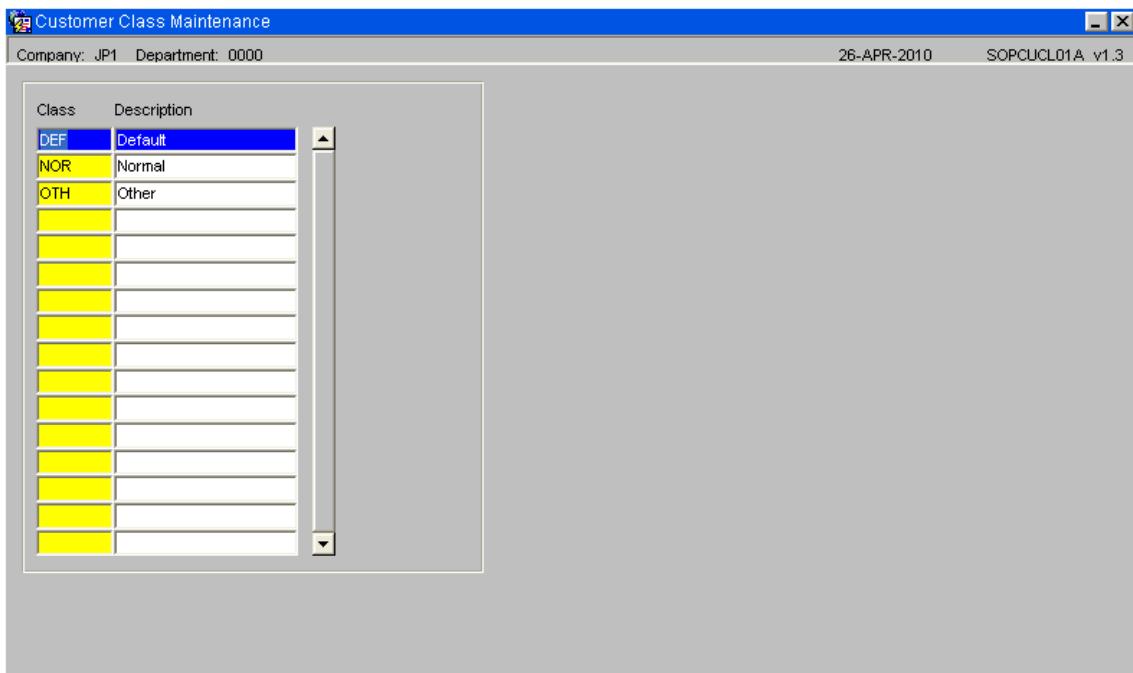
Field Name	Description	Options	Generic Value
Class **	Code used to determine the type of customer (i.e. retail, wholesale etc)	4 character free text field	Defined by the client
Description	Description of the customer class	20 character free text field or left blank	Defined by the client

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4 SOPSTER01A Sales Territory Maintenance

This is the Sales Territory Maintenance screen.
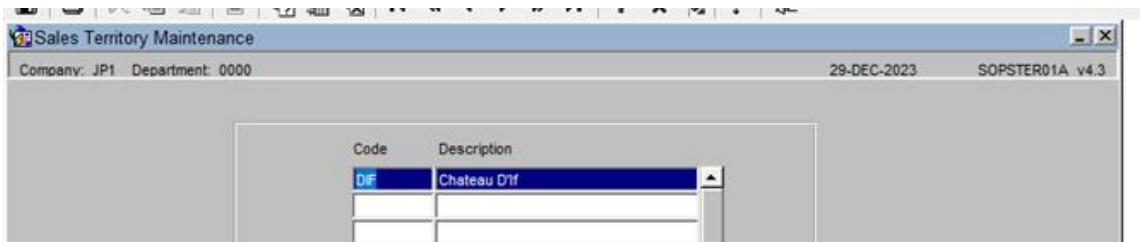
Here you can maintain the sales territories *Code* and *Description*.

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5 SOS0050 Customer Address Maintenance

This screen displays all the customer addresses with options to search by certain selection criteria.

5.1 Full Address Tab

The screen will allow the following details to be updated:-

- Customer type
- Name
- Address line 1
- Address line 2
- Town
- County
- Post code
- Vehicle type
- Route code
- Carrier code
- Despatch instructions
- Contact
- Phone number
- E-mail address

5.1.1 Settings Tab

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Customer Type

The customer type and description. A list of values available.

Vehicle Type

The default vehicle type for this customer. A list of values available.

Town

To display the approximately the first 12 characters of the customer?s town. Longer town names will be truncated. The ?Full Address? tab should be used to edit the town.

Route

The customer?s default route code. A list of values will be available. Route codes are set up for each warehouse. The customer?s default route code will only apply to the anticipated orders assigned to the warehouse that the route code belongs to

Warehouse Assignment Method

The ?Warehouse Assignment Method? will have the following values:-

Primary Preferred % - Use primary warehouse first if over a % order lines can be fulfilled by primary warehouse.

Primary Preferred Always - Always use primary warehouse first. Any remaining lines will be assigned a warehouse using the normal warehouse assignment rules.

Primary Only - Only ever use the primary warehouse for this customer. If any stock is unavailable in the primary warehouse then the order will be short.

Normal - Normal warehouse assignment rules. If the warehouse assignment is blank then this is the value that will be used.

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5.1.1.1 Delivery Instructions Tab

The ?Delivery Instructions? tab can be used to enter picking text, which will be printed on the pick list and despatch text which will be printed underneath the ?Special Instructions? heading on the PIPP format despatch note.

5.1.1.2 Warehouse Search List Tab

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Cust Code	Post Code	Postcode Part Used	Town (or county)	Whs 1	Whs 2	Whs 3	Whs 4	Whs 5	Whs 6	Whs 7	Whs 8	Whs 9	Whs 10
BAW	BAW 111	Default Search	Bawtry	COV	BAW								
COV	CV1 444	Default Search	Coventry	COV	BAW	LIV							
DL_5A1	CH43 324	CH43	5a1 address town	BAW	COV	LIV							
D_ALTON	AL3 9RT	Default Search	A234567890B234567890(	COV	BAW	LIV							
D_COV	CV1 333	Default Search	Coventry	COV	BAW	LIV							
D_MORETON	CH46 6AF	Default Search	Moreton	COV	BAW	LIV							
D_OXTON	CH42 9QW	CH	Prenton	BAW	COV	LIV							
D_PRENTON	CH43 9TL	CH	Prenton	BAW	COV	LIV							
H_ARR	CH43 9XX	CH43	Upton Village	BAW	COV	LIV							
H_BIR	BR11 3ER	Default Search	Birmingham	COV	BAW	LIV							
H_CLAT	CH64 1TT	Default Search	Clatterbridge	COV	BAW	LIV							
H_LEEDS	LE9 1JJ	Default Search	Leeds	COV	BAW	LIV							

The ?Warehouse Search List? tab will show the first ten warehouses in the warehouse search list for each customer based on the customer type and post code.

5.1.1.3 Selection Criteria Tab

The selection criteria tab will be used to restrict the number of customers found and to search for customers with specific details.

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Customer Address Maintenance				
Company: JP1 Department: 0000			15-MAR-2011	SOS005

Full Address	Settings	Delivery Instructions	Warehouse Search List	Selection Criteria

Clear All Selection Criteria

Cust Code	Post Code
BAW	BAW 111
COV	CV1 444
DL_5A1	CH43 324
D_ALTON	AL3 9RT
D_COV	CV1 333
D_MORETON	CH46 6AF
D_OXTON	CH42 9QW
D_PRENTON	CH43 9TL
H_ARR	CH43 9XX
H_BIR	BR11 3ER
H_CLAT	CH64 1TT
H_LEEDS	LE9 1JJ

Customer:
Type:
Postcode:
Name:
Address Line 1:
Address Line 2:
Town:
County:
Country Code:
Route:
Vehicle:
Phone:
Created by User:
Last Changed by User:
Creation Date:
Last Changed Date:
Search Address for:
Search Contact For:
Address Type: Delivery Address
Address Number: First Address
Primary Warehouse:
Warehouse Assignment Method:
Sort By Primary Warehouse:

Find Customers

- The first part of the Postcode, Name, Address Line 1, Address Line 2, Town, County, Route or Phone Number can be entered to find records that match the start of the entered criteria.

- To search for a vehicle type, the drop down list will be used to select a value from the list of valid vehicle types.

- The ?Search Address for? field will allow text to be entered. The Name, Address Line 1, Address Line 2, Town and County fields will be searched for a match.

The ?Search Contact for? field will allow text to be entered. The contact field will be searched for a match.

- This search will not be case sensitive. E.g. ?Hospital? will match ?HOSPITAL?. If a ?+? is entered then the system will return the records where the selected value is blank. E.g. If a ?Route Code? of ?+? was searched for, then the system would find all customers that do not have a default route code set up.

- When all the required selection criteria have been entered, the ?Find Customers? button should be clicked. This will find the customers using the entered selection criteria.

- A ?Delivery Instructions? tab will be available to view / amend any customer specific despatch or pick instructions. A ?Customer Type? tab will be available to view / amend the customer type.

Selection Criteria The selection criteria tab will be changed to include ?Primary Warehouse? and ?Warehouse Assignment Rule? to allow customers to be found by these two selection criteria. An extra option will be included to allow the customers to be sorted by the primary warehouse.

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6 SOS1010 Substitute Products Maintenance

If a stock code can be substituted by another stock code then these can be created using Substitute Product Maintenance, SOS1010. The stock code on the order file (generic SKU) will be set up as the main product and the stock codes (NCP codes), used in the WMS, will be linked to it as the main product.
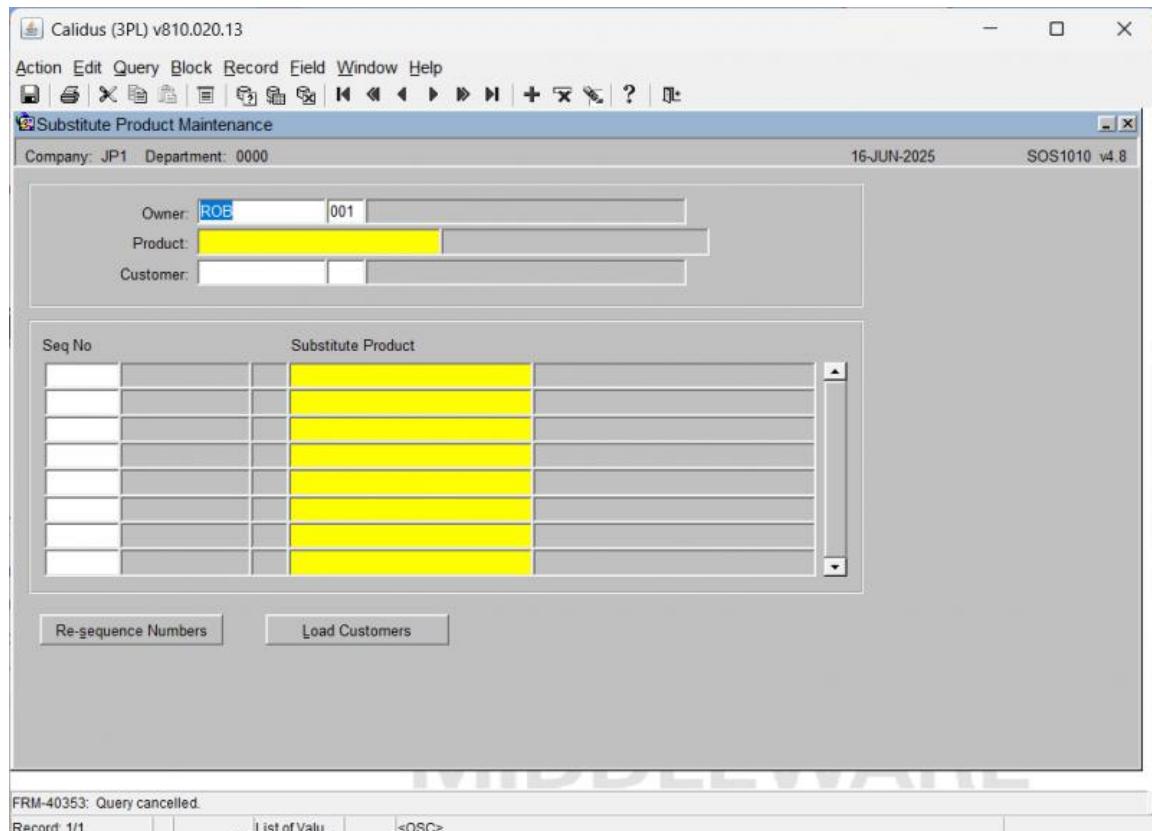

NB. The substitutes will need to be created for each warehouse.

The substitute products will be selected using the allocation rule of the generic sku. If this allocation rule returns more than 1 possible substitute product then the sequence number on this maintenance screen will be used to decide which product to use.
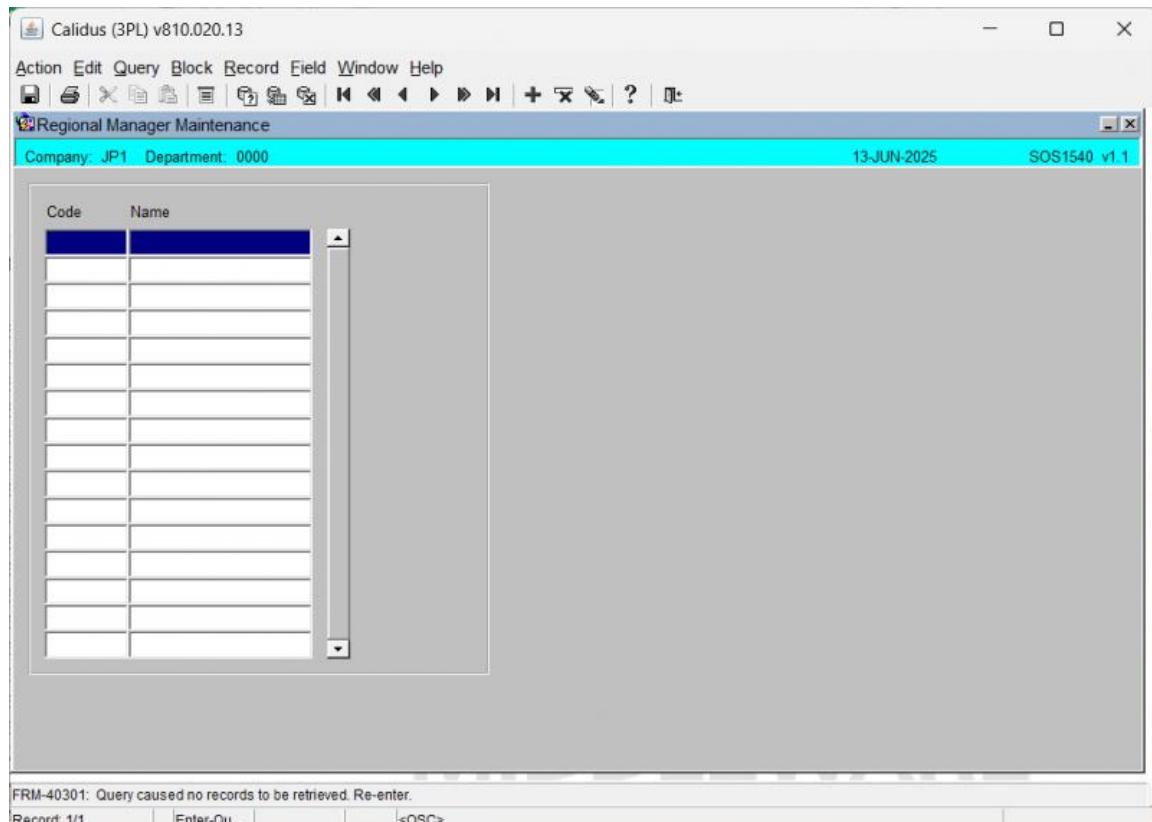
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7 SOS1530 Area Manager Maintenance

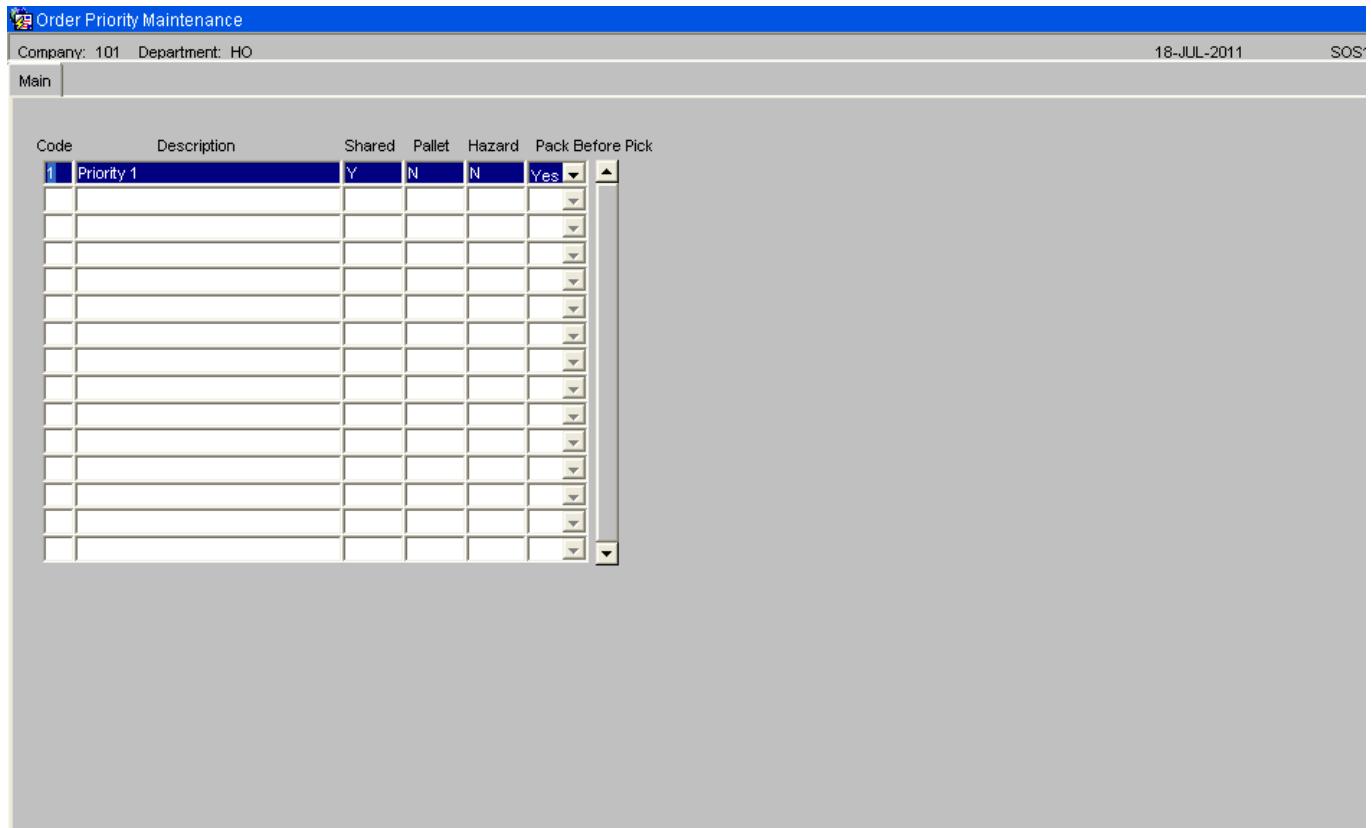This is the Area Manager maintenance screen, where you can maintain area managers.

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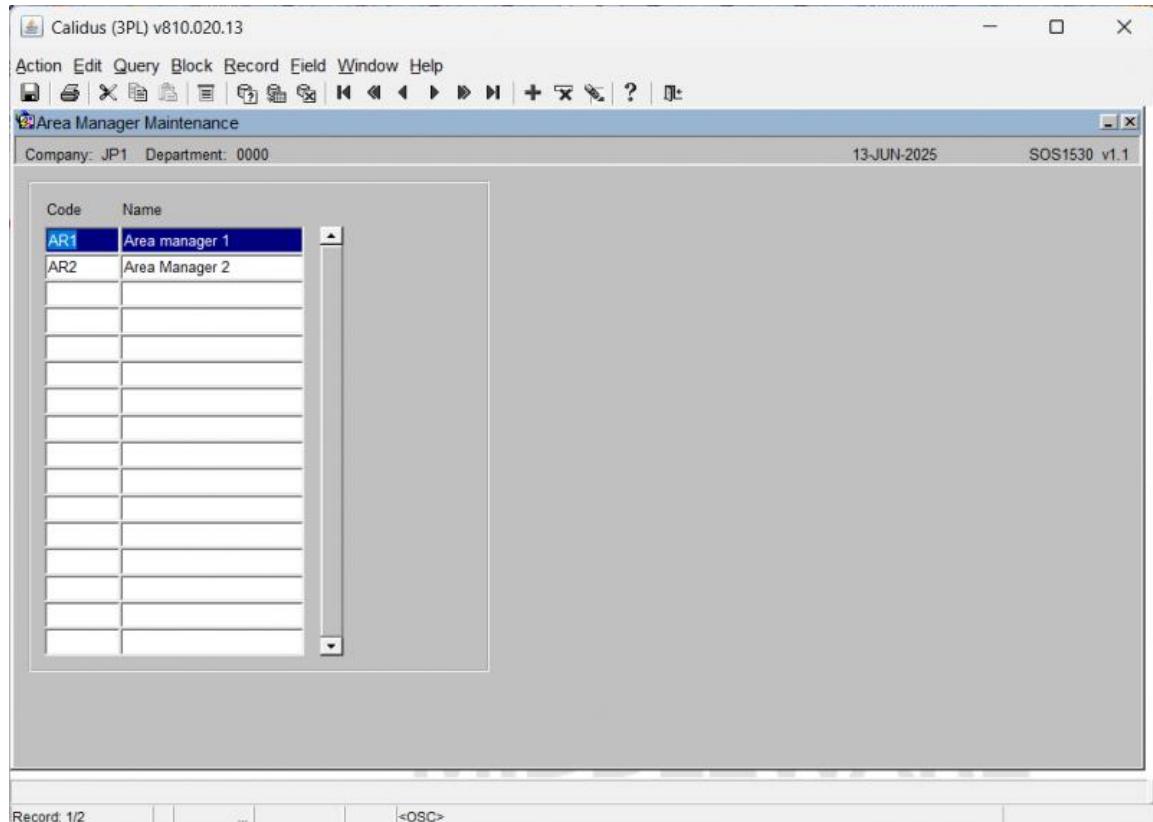
8 SOS1540 Regional Managers Maintenance

This is the regional managers maintenance screen.

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9 SOS1600 Order Priority Maintenance

For Metapack processing, the WMS ?Order Priority? data setup must correspond to the same data in the Metapack ?SERVICE GROUP? data setup.

For Order Management Layer, the order priority will be set to the value received on the EDI order file in the emergency order flag field. This is expected to be **?Y?** or **?N?**. These two values will need setting up on ?Order Priority Maintenance? screen.

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10 SOS7100 Deals Maintenance

This is the Deals maintenance screen.

This screen allows you to set up stock codes that are part of a deal and will register discounts against the order.

💡 **Note:** This functionality applies to NOMS processing ONLY.

10.1 Examples

The following example requires the user to order 2 of either of these stock codes to register the deal.

💡 **Note:** A stock code can not be applied to more than one active deal at any one time

In this example, users will need to order BOTH stock codes to gain the deal. If the 'Number of Items' was more than one, then that would be the quantity required to active the deal.

Whereas in this example, users simply need to order this stock codes to gain the deal - £0.15 off every unit

ordered.

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11 WHS0055 Carrier Codes Maintenance
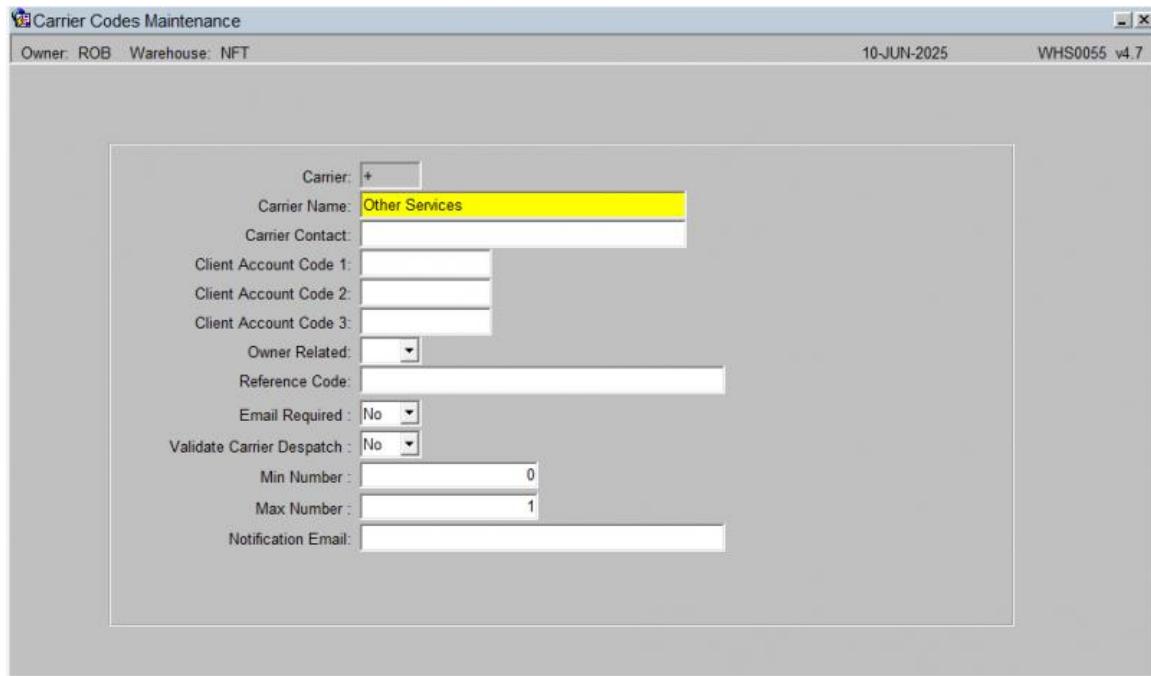
Ensure that carrier codes setup on MetaPack are maintained in the WMS, though not required for Sales Order validation it can be used for reporting and enquiry purposes.

Generally, carrier codes for own fleet and for any other carriers (e.g. DHL Express) will need to be created.

The carrier codes are created at Company level.

12 WHS4010 Customer Types Maintenance
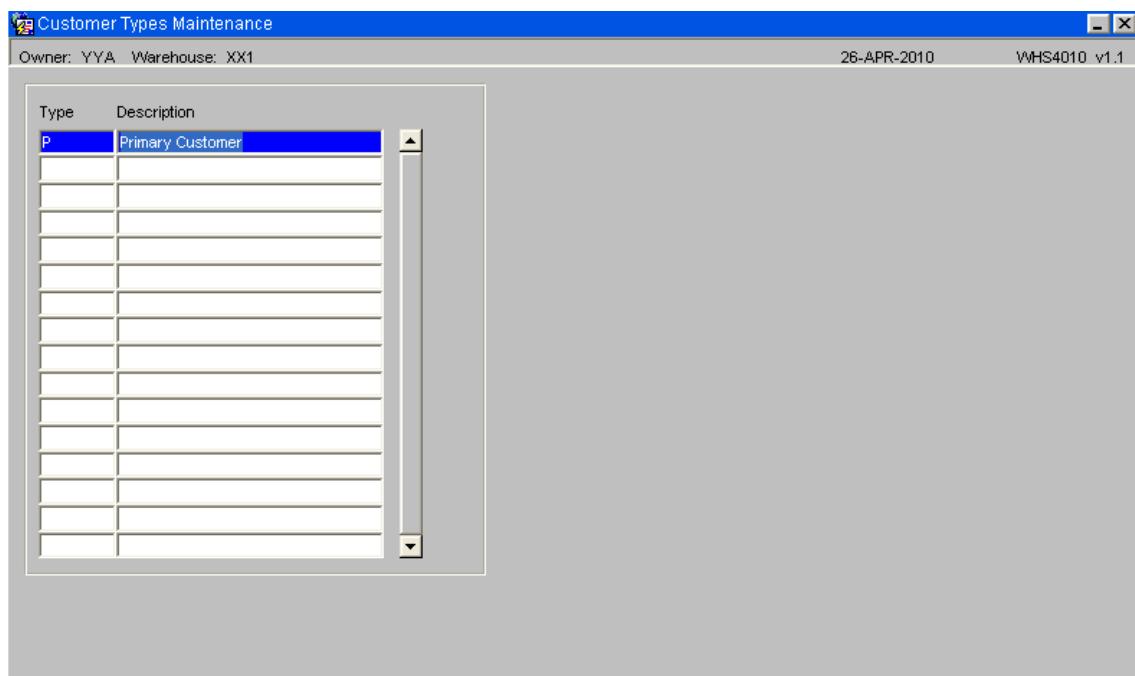
Field Name	Description	Options	Generic Value
Type **	The type of customer being delivered to	2 character free text field	Defined by the client
Description	The description of the customer type	30 character free text field or left blank	Defined by the client

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13 WHS7090 SOP Invoice Charges Maintenance

This is the SOP Invoice Charges Maintenance screen.

Here you can find, amend or add invoice charges.

You can enter the following:

- *Code*
- *Description*
- *Type* - select from the drop-down list, values:
    - *Case Quantity*
    - *Fixed Cost (Line Level)*
    - *Kilograms of Gross Weight*
    - *Invoice Value*
    - *Kilograms of Net Weight*
    - *Fixed Cost (Order Level)*
    - *Pallet*
    - *Unit Quantity*
    - *Cubic Metre Volume*
    - *Catch weight*
- *Start Date*
- *End Date*
- *Charge Rate*
- *Change*
- *Account Code 1*
- *Account Code 2*
- *Product Type*

You can delete an invoice charge using the **Delete** button provided.

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14 WHSORA035 Customer Wizard
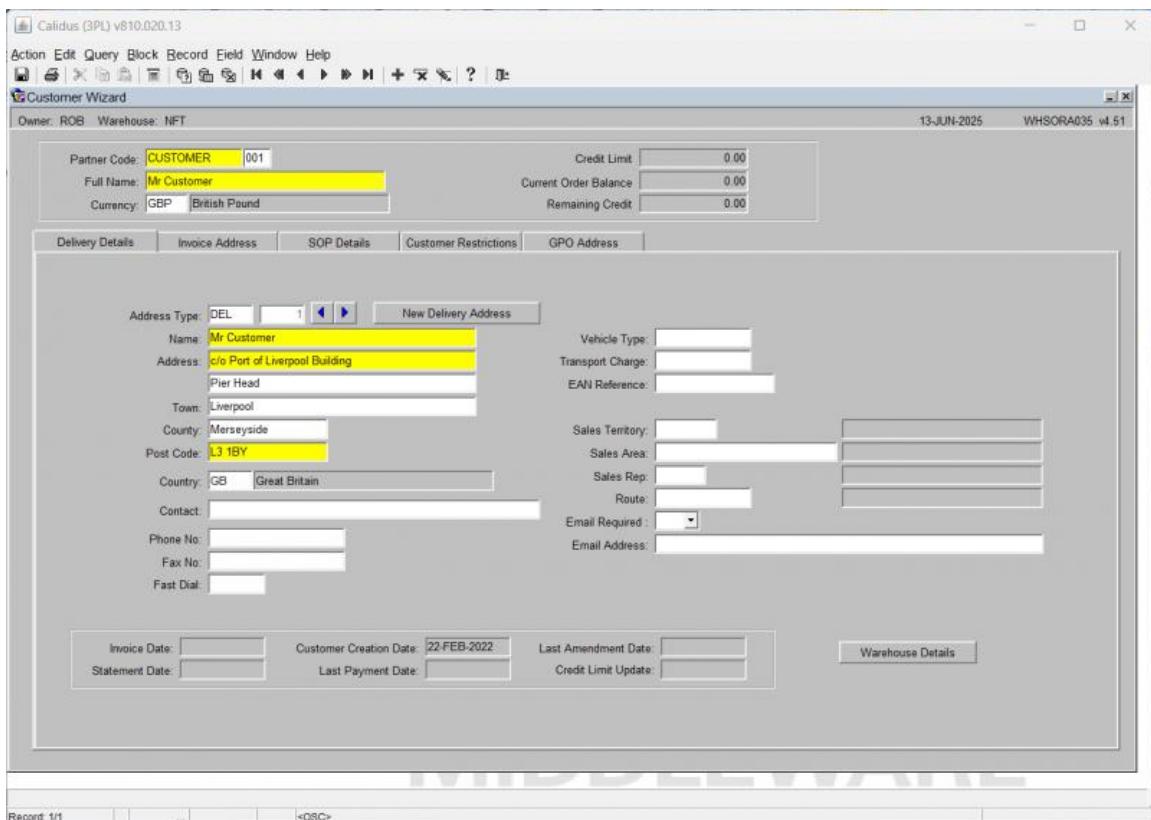
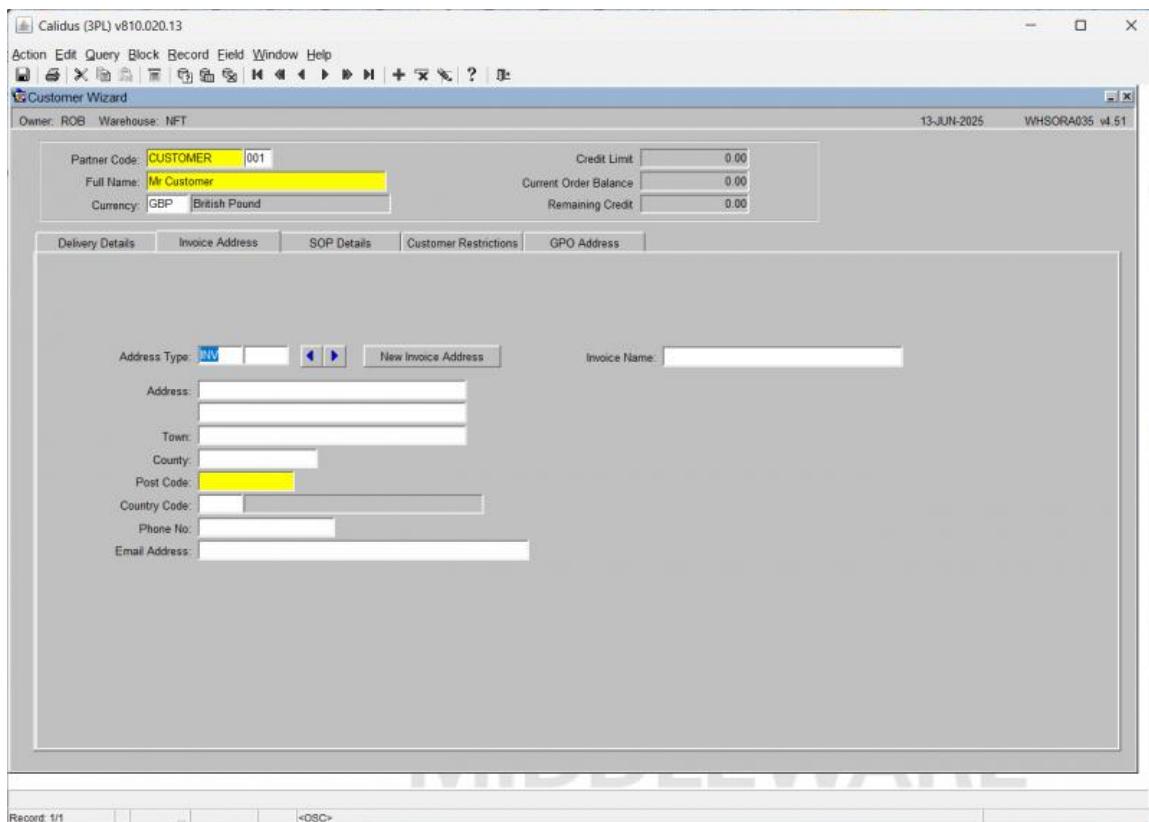| Field Name	Description	Options	Generic Value
Partner Code **	Customer code and sub code (Sub code must always be ?001?)	10 character free text field	Defined by the client
Full Name **	Full name of the customer	35 character free text field	Defined by the client
Currency **	The currency code for the customer is to be invoiced in	Must have been created in currency codes maintenance - LOV available	Defined by the client
Address Type **	The default address type for this customer and the address number	DEL - you can have multiple addresses for one customer	DEL
Name **	The customer?s name	35 character free text field	Defined by the client
Address **	The first two lines of the customer?s address	2 x 35 character free text field (note, 2nd line can be left blank)	Defined by the client
Town **	The town the customer resides in	35 character free text field	Defined by the client
Post Code **	The post code/zip code for the customer	10 character free text field	Defined by the client
County	The county /state for the customer	15 character free text field or left blank	Defined by the client
Country	The country code for the customer	Must have been created in Country codes maintenance or left blank - LOV available	Defined by the client
Phone No	The telephone number for the customer	15 character free text field or left blank	Defined by the client
EAN Reference	Client specific EAN number for this customer	13 character free text field or left blank	Defined by the client
Transport Charge	The amount to be charged to the customer for transport	10 digit numeric field	Defined by the client
Invoice Date	The date the customer was last invoiced	Display only	N/A
Customer	The date the customer code was created	Display only	N/A

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Field Name	Description	Options	Generic Value
Creation Date			
Last Amendment Date	The date details of the customer code were changed	Display only	N/A
Statement Date	The last statement date for the customer	Display only	N/A
Last Payment Date	The date the customer last paid an invoice	Display only	N/A
Buttons			
New Delivery Address	Enables the user to add a new address for the customer	n/a	n/a
Warehouse Details	Enables the user to enter warehouse specific details for the customer (not migrated)	n/a	n/a

14.1 Customer Wizard - Invoice Address (WHSORA035)

Field Name	Description	Options	Generic Value
*Address Type **	The default address type for this customer and the address number	INV - you can have multiple addresses for one customer	INV
*Address **	The first two lines of the customer?s invoice address	2 x 35 character free text field (note, 2nd line can be left blank)	Defined by the client
*Town **	The town of the invoice address	35 character free text field	Defined by the client
*Post Code **	The post code/zip code for the invoice address	10 character free text field	Defined by the client
County	The county /state of the invoice address	15 character free text field or left blank	Defined by the client
Country Code	The country code of the invoice address	Must have been created in Country codes maintenance or left blank - LOV available	Defined by the client
Phone No	The telephone number of the invoice address	15 character free text field or left blank	Defined by the client
Buttons			

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Field Name	Description	Options	Generic Value
New Invoice Address	Enables the user to add an additional invoice address for the customer	n/a	n/a

14.1.1 Customer Wizard - SOP Details (WHSORA035)
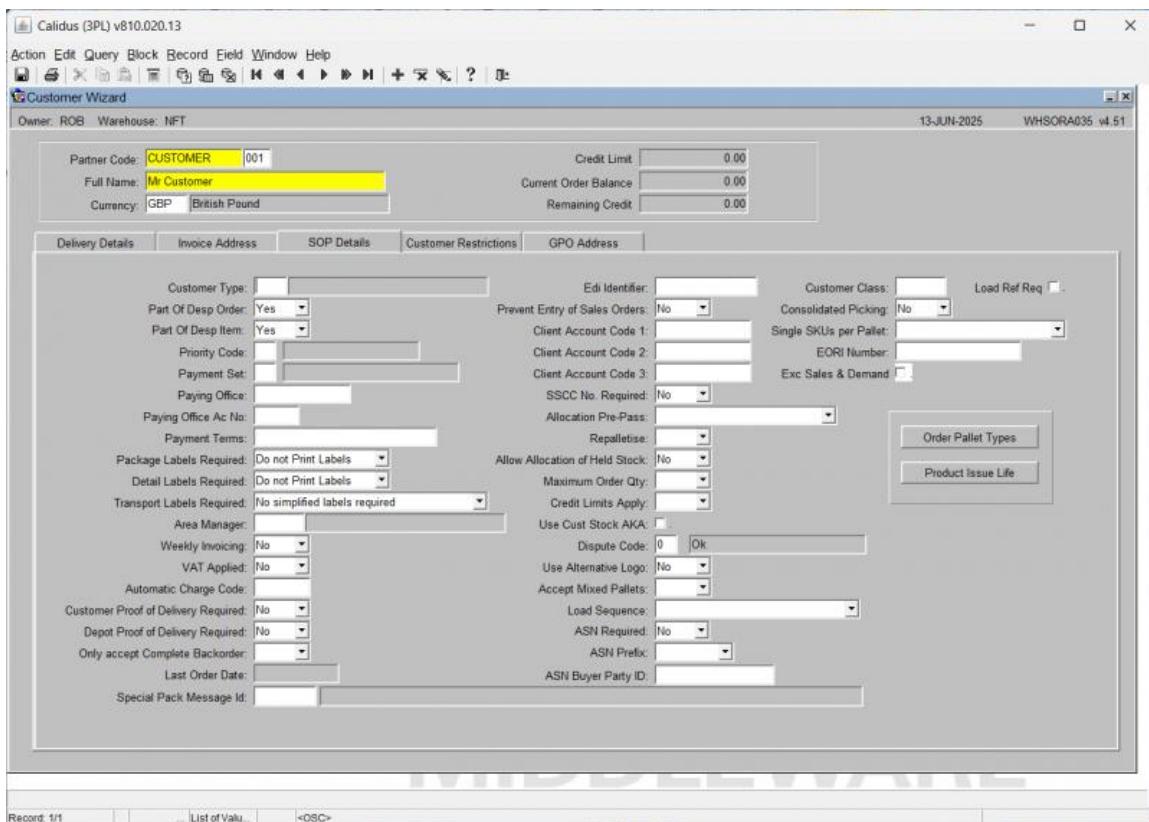
Field Name	Description	Options	Generic Value
Customer Type	The customer type for this customer	Must have been created in customer types maintenance	Defined by the client
Part of Desp Order	Determines whether an order can be despatched if the whole order is not fulfilled (not migrated)	Y or N	Defined by the client
Part of Desp Item	Determines whether an order can be despatched if the whole product quantity is not fulfilled (not migrated)	Y or N	Defined by the client
Priority Code	The priority code for the customer	Must have been created in priority codes maintenance - LOV available	Defined by the client
Payment Set	The group code for the customer under which the invoice will be paid (not migrated)	1 character free text field or left blank	Defined by the client
Paying Office	The office name where the invoice will be paid from (not migrated)	10 character free text field or left blank	Defined by the client
Paying Office Ac No.	The account number for the invoicing paying office	3 character free text field or left blank	Defined by the client
Package Labels Req	Does this customer require packing labels	Do Not Print Labels	Defined by the client
		Print At All Levels	
		Print Labels	
Detail Labels Req	Are packing labels required at detail level? (By stock code)	Do Not Print Labels	Defined by the client
		Print At All Levels	
		Print Labels	
	Are transport labels required	No Simplified Labels Required	

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Field Name	Description	Options	Generic Value
Transport Labels Req			Defined by the client
		Yes, Produce Simplified Labels	
Area Manager	The name of the area manager for this customer	4 character free text field or left blank	Defined by the client
Special Pack Msg Id	The id code for a message that is to be produced at packing	6 character free text field or left blank	Defined by the client
Weekly Invoicing	Does the customer require invoicing? (not migrated)	Y or N	Defined by the client
Vat Applied	Is V.A.T to be applied to the customer?s invoices? (not migrated)	Y or N	Defined by the client
Automatic Charge Code	If an automatic charge is to be applied to the invoice, what is the code for this charge	5 character free text field or left blank	Defined by the client
Customer POD Req	Does the customer require a POD	Y or N	Defined by the client
Depot POD Required	Does the customer require an additional depot POD (not migrated)	Y or N	Defined by the client
Only Accept Complete Back Order	If backordering is used, will the customer only receive orders that completely fulfilled (not migrated)	Y or N	Defined by the client
EDI Identifier	The code that will be used to identify this customer on EDI flows (not migrated)	11 character free text field or left blank	Defined by the client
Prevent Ordering	If set to ?Y?, orders will not be able to be raised against this customer	Y or N	Defined by the client
Client Account Code 1	An account number for the customer which will be produced on outbound documentation	10 character free text field or left blank	Defined by the client
Client Account Code 2	An additional account number for the customer which will be produced on outbound documentation	10 character free text field or left blank	Defined by the client
SSCC No. Required	Are SSCC numbers to be used for this customer	Y or N	Defined by the client
Last Order Date	The date an order was last raised for this customer	Display only	N/A
Repalletise	Do orders need to be repalletised for this customer	Y or N	Defined by the client

14.1.2 Customer Wizard - Customer Restrictions (WHSORA035)

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Field Name	Description	Options	Generic Value
Picking Note Text 1-6	Text entered here will be produced on the picking list	6 x 40 character free text fields or left blank	Defined by the client
Despatch Note Text 1-10	Text entered here will be produced on the delivery note	10 x 40 character free text fields or left blank	Defined by the client

14.1.3 Warehouse

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Field Name	Description	Options	Generic Value
Fast Dial			
Region Code			
Out of Rotation Flag		No, Yes	Yes
Salesman			
Sales Territory			
Sales Area			
Contact			
Post Code/Region Flag			
Delivery Mode		Direct, Trunk	Direct
Despatch Code			
Direct Route			
Trunk Route Code			

14.1.4 Tariff/Charges

Field Name	Description	Options	Generic Value
Tariff Zone			
Carrier Code			

14.1.5 Handling Charges

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Field Name	Description	Options	Generic Value
Product Code			
Handling Charge			

14.1.6 Vehicle Restrictions

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Field Name	Description	Options	Generic Value
Vehicle Type			
Restriction Text			

14.1.7 Picking/Delivery

Field Name	Description	Options	Generic Value
Owner	The owner. Display only		
Reference	Any reference		
Picking Instructions	if entered will appear on the pick note for that customer.		
Delivery Instructions	if entered will appear on the despatch note for that customer.		

💡 **Note:** Not all pick note and despatch note formats will display instructions.

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