

# **Creating an Owner**

Aptean Ltd  
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# 1 Creating an Owner

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## 1.1 Owner Code Creation

Owner or client codes are generally created during the original implementation of the system, but there may be a requirement for a new owner code to be created as the business changes. There are two methods of creating a new owner code, the first is to create a record from new but the user must have a good understanding of both the operational processes and of the WMS settings (refer to the Assist wiki page for a detailed explanation of each field). Or alternatively there is the option to copy the parameters of an existing owner code.

The screenshot shows the 'Owner Maintenance' window. At the top, there's a menu bar with 'Action', 'Edit', 'Query', 'Block', 'Record', 'Field', 'Window', and 'Help'. Below the menu is a toolbar with icons for file operations and navigation. The window title is 'Owner Maintenance'. The main area shows the 'Company: JP1' and 'Department: 0000' at the top right. The 'Owner' field is set to 'XXA 001' with a description 'Standard Client (3pl)'. Below this is a tabbed interface with tabs for 'Main', 'General', 'Sales Order', 'Goods Rec'd', 'SOP C/H', 'EDI', 'EDI Inbou...', 'EDI Out...', 'Charging', 'Def Bul...', 'Format', 'Owner R...', and 'Owner UOM'. The 'Main' tab is active, showing fields for 'Owner Group' (XXA 001), 'Supplier' (PL1 X-001 001), 'Customer' (SL1 X-001 001), 'Address 1' (908 Winding Road), 'Address 2', 'Town' (High Town), 'County' (Lancashire), 'Country' (GB Great Britain), 'Post Code' (L45 C54), 'Tel', 'Fax', 'Gr By Po' (No), 'VAT No' (GB-1234567-890), and 'Owner Email Addr'. There is an 'Enable Users' button next to the 'Owner Group' field.

Fig: Owner Maintenance displaying an existing Owner Code

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## 1.2 Copying an existing Owner Code

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1- Open the form Copy Owner (STS1005) It is possible to find the form in the main menu using the standard search facility in the left hand tool bar, click on the magnify glass.

2- The form will open in entry mode



Fig: Copy Owner Screen

&lt;br\&gt;

### 1.3 Entering Owner Details

All fields marked as yellow are mandatory all others are optional. With the cursor in the Owner Code field, call the LOV, by either using the keyboard ?Ctrl & L? or the LOV icon in the toolbar (6th Icon from the left) then select the existing Owner code that you wish to copy. The owner code should be similar to the one that you creating.

#### Details to be entered -

**New Owner** - Enter the new owner code, and the sub code of ?001?.

**Name** - Enter the name of the new owner

**Address** - If known enter the address details, as they will be displayed on any relevant documentation. They can also be entered at a later date.

**Options** - Unless there is a set of specific parameters and settings that don?t require copying from the original owner, then leave all boxes as ticked.

**Confirm** - if selected will create a new owner code with the parameters selected



Action Edit Query Block Record Field Window Help

Copy Owner

Company: JP1 Department: 0000 14-OCT-2010 STS1005 v4.3

Owner From: **XXA** **001** Name: Standard Client (3pl)

Options:

- ☒ Owner Level Warehouse Configuration
- ☒ Owner Level Warehouse Reason Codes
- ☒ Owner Level Product Classification
- ☒ Pack Set up
- ☒ Unit of Measure Set up
- ☒ Unit of Sale Set up
- ☒ SOP Invoice details
- Client Invoicing :
  - ☒ -Charge Codes
  - ☒ -Invoice Cycle
  - ☒ -Rent Cycle
- Printing Formats :
  - ☒ -Labels
  - ☒ -Reports
- ☒ Owner Rules
- ☒ Enable Access for All Users

New Owner: **D01** **001**

Name: **Joint Holdings and Suppliers**

Address: 34 Short Road

Town: Aintree

County: Bedfordshire

Postcode: A34 43GH

Country: **GB** Great Britain

Telephone:

Fax:

Confirm Clear Screen

Warnings:

Fig: Copy Owner screen with parameters entered and ready to create a new owner code

Upon completion of the owner copy any relevant warning messages will be displayed as below, in this instance these warning can be ignored.

Action Edit Query Block Record Field Window Help

Copy Owner

Company: JP1 Department: 0000 14-OCT-2010 STS1005 v4.3

Owner From: **XXA** **001** Name: Standard Client (3pl)

Options:

- ☒ Owner Level Warehouse Configuration
- ☒ Owner Level Warehouse Reason Codes
- ☒ Owner Level Product Classification
- ☒ Pack Set up
- ☒ Unit of Measure Set up
- ☒ Unit of Sale Set up
- ☒ SOP Invoice details
- Client Invoicing :
  - ☒ -Charge Codes
  - ☒ -Invoice Cycle
  - ☒ -Rent Cycle
- Printing Formats :
  - ☒ -Labels
  - ☒ -Reports
- ☒ Owner Rules
- ☒ Enable Access for All Users

New Owner: **D01** **001**

Name: **Joint Holdings and Suppliers**

Address: 34 Short Road

Town: Aintree

County: Bedfordshire

Postcode: A34 43GH

Country: **GB** Great Britain

Telephone:

Fax:

Confirm Clear Screen

Warnings:

- 016942-Option Owner Level Warehouse Reason Codes is selected but no relevant data four
- 016958-Option Charge Codes is selected but no relevant data found



Fig: Copy Owner screen displaying warning after creation of the new stock code

It is now possible to find the newly created Owner Code in the owner maintenance screen, using the Change Owner screen (HYF0091) highlight and select your newly created owner.

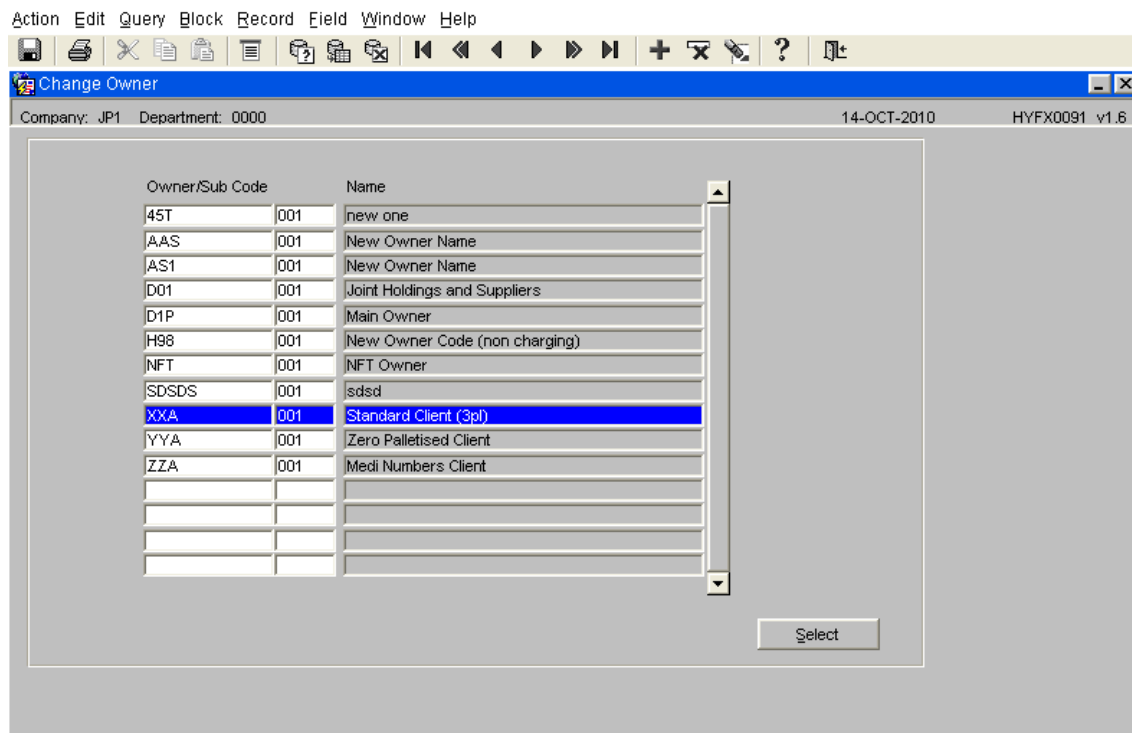


Fig: Change Owner screen

The last task to complete is to update three fields and then the owner is ready to be used -

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1- Owner Group - indicates whether the owner is part of a group, should always set the value to be the same as the new owner code.

2- Supplier - create a new supplier and then update the supplier code (see Supplier Creation guide)

3- Customer - create a new customer and then update the customer code (see Customer Creation guide)

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Action Edit Query Block Record Field Window Help  
 Owner Maintenance  
 Company: JP1 Department: 0000 05-NOV-2010 STS1000 v4.47

Owner: XXXA 001 Standard Client (3pl)

Main General Sales Order Goods Rec'd SOP C/H EDI EDI Inbou... EDI Out... Charging Def Bul... Format Owner R... Owner UOM

Owner Group: XXXA 001 Enable Users

Supplier: PL1 X-001 001

Customer: SL1 X-001 001

Address 1: 908 Winding Road

Address 2:

Town: High Town

County: Lancashire

Country: GB Great Britain

Post Code: L45 C54

Tel:

Fax:

Gr By Po: No

VAT No: GB-1234567-890

Owner Email Addr:

Fig: Owner code Maintenance



## 2 Document History

Version	Date	Status	Reason	Initials
Version 1	05/11/2010	Released		LBW

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