

SOS0050

Aptean Ltd
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1.1 Full Address Tab.....1

1.1 Full Address Tab

- 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

1.1.1 Settings Tab

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

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

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.

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

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.

1.1.1.1 Delivery Instructions Tab

Customer Address Maintenance

Company: JP1 Department: 0000 15-MAR-2011 SOS0050

Full Address Settings Delivery Instructions Warehouse Search List Selection Criteria

Cust Code	Post Code
BAW	BAW 111
COV	CV1 444
DL_SA1	CH43 324
D_ALTON	AL3 9RT
D_COV	CV1 333
D_MORETON	CH46 6AF
D_OXTON	CH42 9QWV
D_PRENTON	CH43 9TL
H_ARR	CH43 9XX
H_BIR	BR11 3ER
H_CLAT	CH64 1TT
H_LEEDS	LE9 1JJ

Picking Text 1

Picking Text 2

Picking Text 3

Picking Text 4

Picking Text 5

Picking Text 6

Despatch Text 1

Despatch Text 2

Despatch Text 3

Despatch Text 4

Despatch Text 5

Despatch Text 6

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.

1.1.1.2 Warehouse Search List Tab



[illegible]

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.

1.1.1.3 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.



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:

Address Number:

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.

