WHSORA035 Customer Wizard

Aptean Ltd
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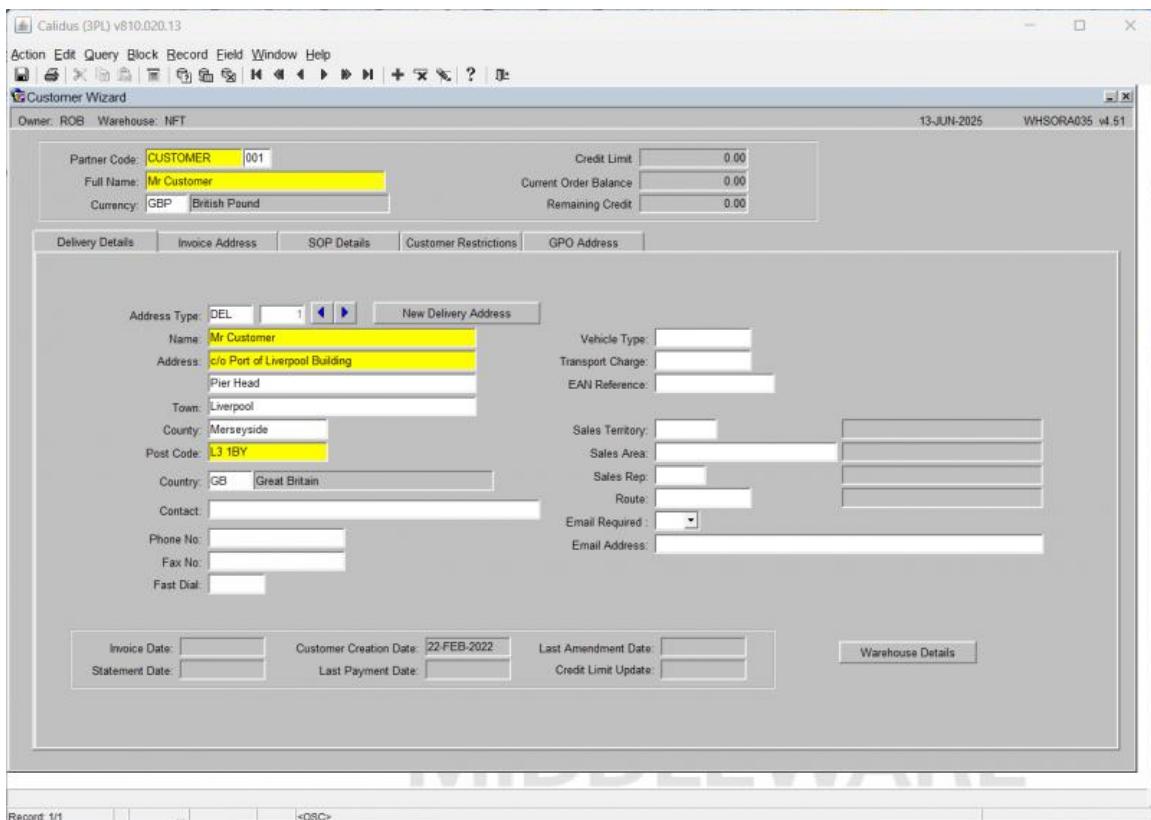
Field Name	Description	Options	Generic Value
Partner Code **	Customer code and sub code (Sub code must always be ?001?)	10 character free text field	Defined by the client
Full Name **	Full name of the customer	35 character free text field	Defined by the client
Currency **	The currency code for the customer 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

## 1.1 Customer Wizard - Invoice Address (WHSORA035)
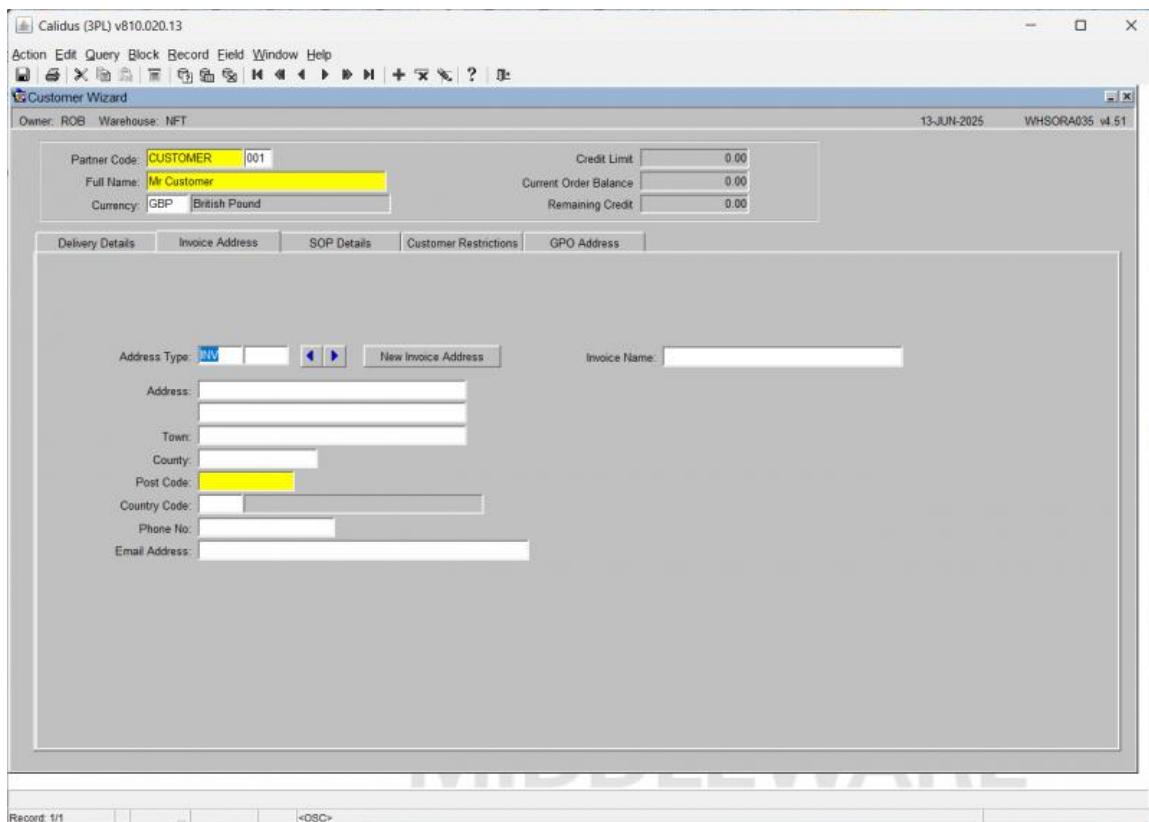
Field Name	Description	Options	Generic Value
Address Type **	The default address type for this customer and the address number	INV - you can have multiple addresses for one customer	INV
Address **	The first two lines of the customer?s invoice address	2 x 35 character free text field (note, 2nd line can 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			

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

1.1.1 Customer Wizard - SOP Details (WHSORA035)
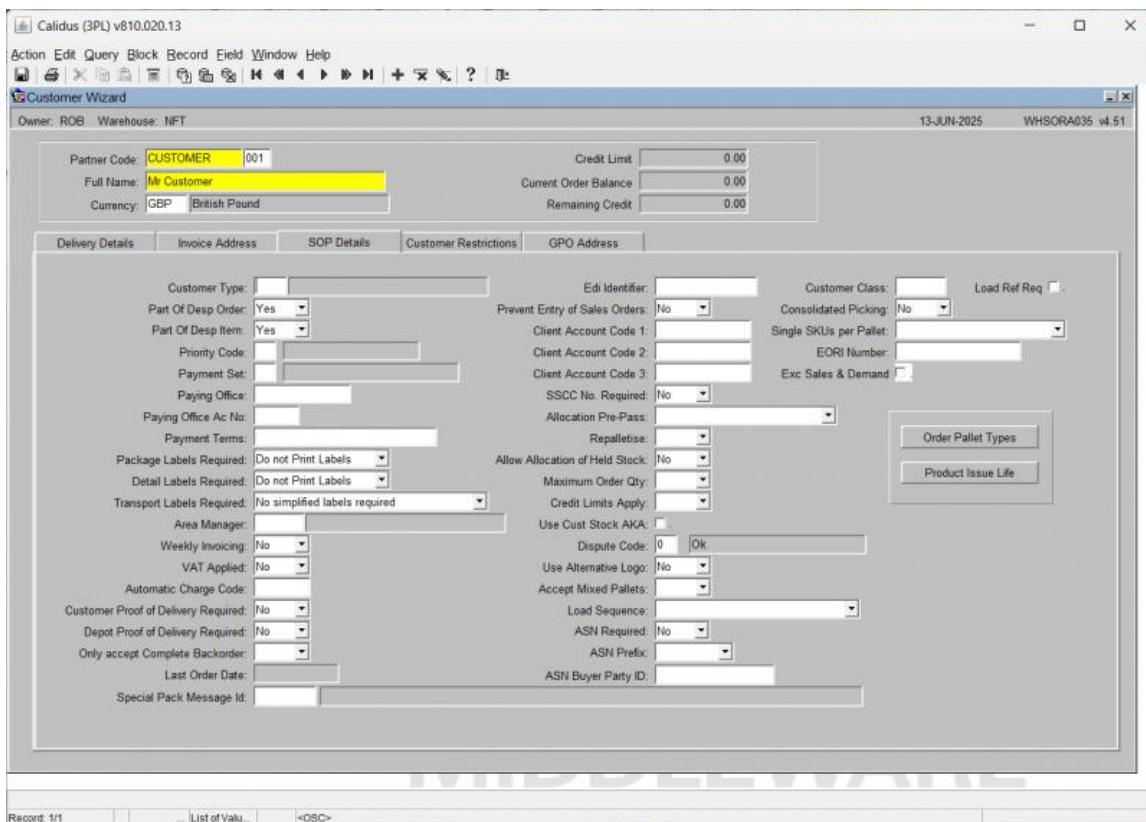
Field Name	Description	Options	Generic Value
Customer Type	The customer type for this customer	Must have been created in customer types maintenance	Defined by the client
Part of Desp Order	Determines whether an order can be despatched if the whole order is not fulfilled (not migrated)	Y or N	Defined 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	

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

1.1.2 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

1.1.3 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			

1.1.4 Tariff/Charges

Field Name	Description	Options	Generic Value
Tariff Zone			
Carrier Code			

1.1.5 Handling Charges

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Field Name	Description	Options	Generic Value
Product Code			
Handling Charge			

1.1.6 Vehicle Restrictions

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Field Name	Description	Options	Generic Value
Vehicle Type			
Restriction Text			

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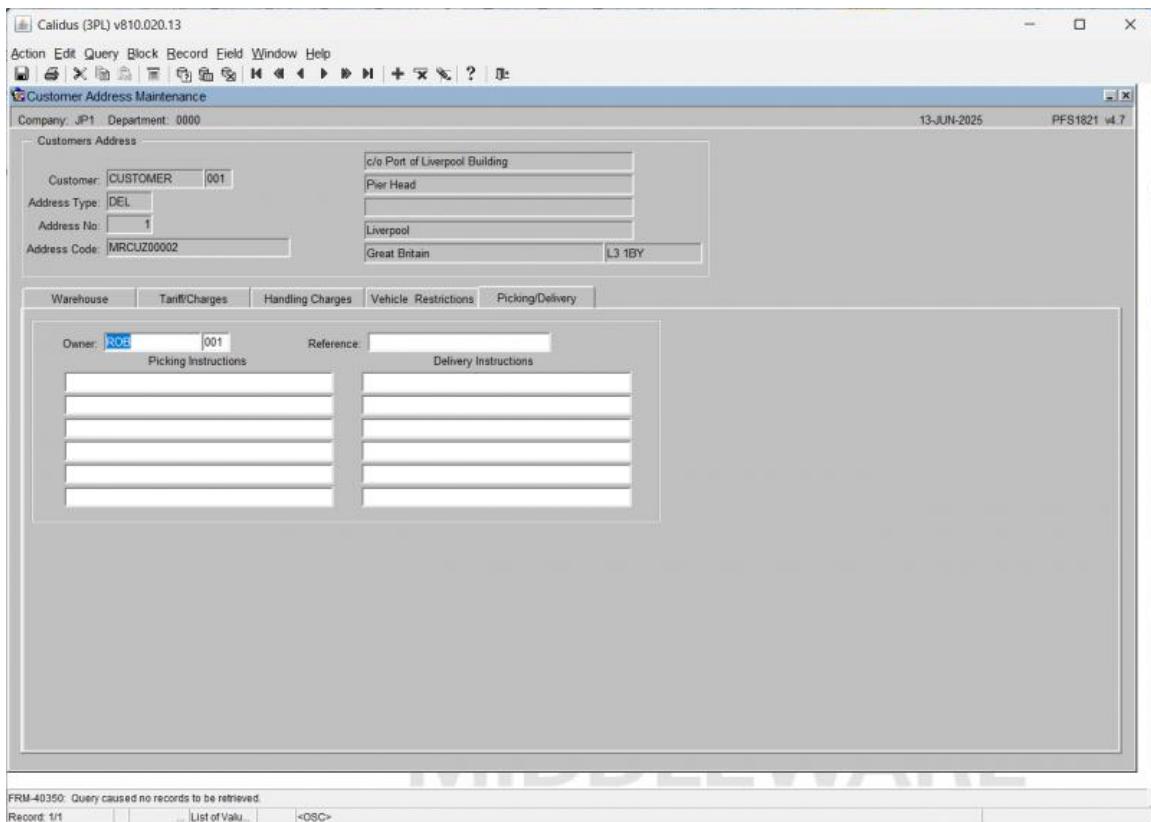
Field Name	Description	Options	Generic Value
Owner	The owner. Display only		
Reference	Any reference		
Picking Instructions	if entered will appear on the pick note for that customer.		
Delivery Instructions	if entered will appear on the despatch note for that customer.		

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

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