

WHSORA035 Customer Wizard

Aptean Ltd
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1.1 Customer Wizard - Invoice Address (WHSORA035).....2

1 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



Field Name	Description	Options	Generic Value
<i>Creation Date</i>			
<i>Last Amendment Date</i>	The date details of the customer code were changed	Display only	N/A
<i>Statement Date</i>	The last statement date for the customer	Display only	N/A
<i>Last Payment Date</i>	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
<i>Address Type</i> **	The default address type for this customer and the address number	INV - you can have multiple addresses for one customer	INV
<i>Address</i> **	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
<i>Town</i> **	The town of the invoice address	35 character free text field	Defined by the client
<i>Post Code</i> **	The post code/zip code for the invoice address	10 character free text field	Defined by the client
<i>County</i>	The county /state of the invoice address	15 character free text field or left blank	Defined by the client
<i>Country Code</i>	The country code of the invoice address	Must have been created in Country codes maintenance or left blank - LOV available	Defined by the client
<i>Phone No</i>	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
<i>Transport Labels Req</i>			Defined by the client
		Yes, Produce Simplified Labels	
<i>Area Manager</i>	The name of the area manager for this customer	4 character free text field or left blank	Defined by the client
<i>Special Pack Msg Id</i>	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
<i>Weekly Invoicing</i>	Does the customer require invoicing? (not migrated)	Y or N	Defined by the client
<i>Vat Applied</i>	Is V.A.T to be applied to the customer's invoices? (not migrated)	Y or N	Defined by the client
<i>Automatic Charge Code</i>	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
<i>Customer POD Req</i>	Does the customer require a POD	Y or N	Defined by the client
<i>Depot POD Required</i>	Does the customer require an additional depot POD (not migrated)	Y or N	Defined by the client
<i>Only Accept Complete Back Order</i>	If backordering is used, will the customer only receive orders that completely fulfilled (not migrated)	Y or N	Defined by the client
<i>EDI Identifier</i>	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
<i>Prevent Ordering</i>	If set to ?Y?, orders will not be able to be raised against this customer	Y or N	Defined by the client
<i>Client Account Code 1</i>	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
<i>Client Account Code 2</i>	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
<i>SSCC No. Required</i>	Are SSCC numbers to be used for this customer	Y or N	Defined by the client
<i>Last Order Date</i>	The date an order was last raised for this customer	Display only	N/A
<i>Repalletise</i>	Do orders need to be repalletised for this customer	Y or N	Defined by the client

1.1.2 Customer Wizard - Customer Restrictions (WHSORA035)



Calidus (3PL) v810.020.13

Action Edit Query Block Record Field Window Help

Customer Wizard

Owner: ROB Warehouse: NFT 13-JUN-2025 WHSORA035 v4.51

Partner Code: CUSTOMER 001 Credit Limit: 0.00

Full Name: Mr Customer Current Order Balance: 0.00

Currency: GBP British Pound Remaining Credit: 0.00

Delivery Details Invoice Address SOP Details Customer Restrictions GPO Address

Picking Note Text 1:

Picking Note Text 2:

Picking Note Text 3:

Picking Note Text 4:

Picking Note Text 5:

Picking Note Text 6:

Despatch Note Text 1:

Despatch Note Text 2:

Despatch Note Text 3:

Despatch Note Text 4:

Despatch Note Text 5:

Despatch Note Text 6:

Despatch Note Text 7:

Despatch Note Text 8:

Despatch Note Text 9:

Despatch Note Text 10:

Despatch Note Text 11:

Despatch Note Text 12:

Record: 1/1 ... List of Valu... -OSC>

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

Calidus (3PL) v810.020.13

Action Edit Query Block Record Field Window Help

Customer Address Maintenance

Company: JP1 Department: 0000 13-JUN-2025 PFS1821 v4.7

Customers Address

Customer: CUSTOMER 001 c/o Port of Liverpool Building

Address Type: DEL Pier Head

Address No: 1 Liverpool

Address Code: MRCUZ0002 Great Britain L3 1BY

Warehouse Tariff/Charges Handling Charges Vehicle Restrictions Picking/Delivery

Fast Dial:

Region Code:

Out Of Rotation Flag:

Salesman:

Sales Territory:

Sales Area:

Contact:

Post Code/Region Flag:

Delivery Mode: Direct

Despatch Code:

Direct Route:

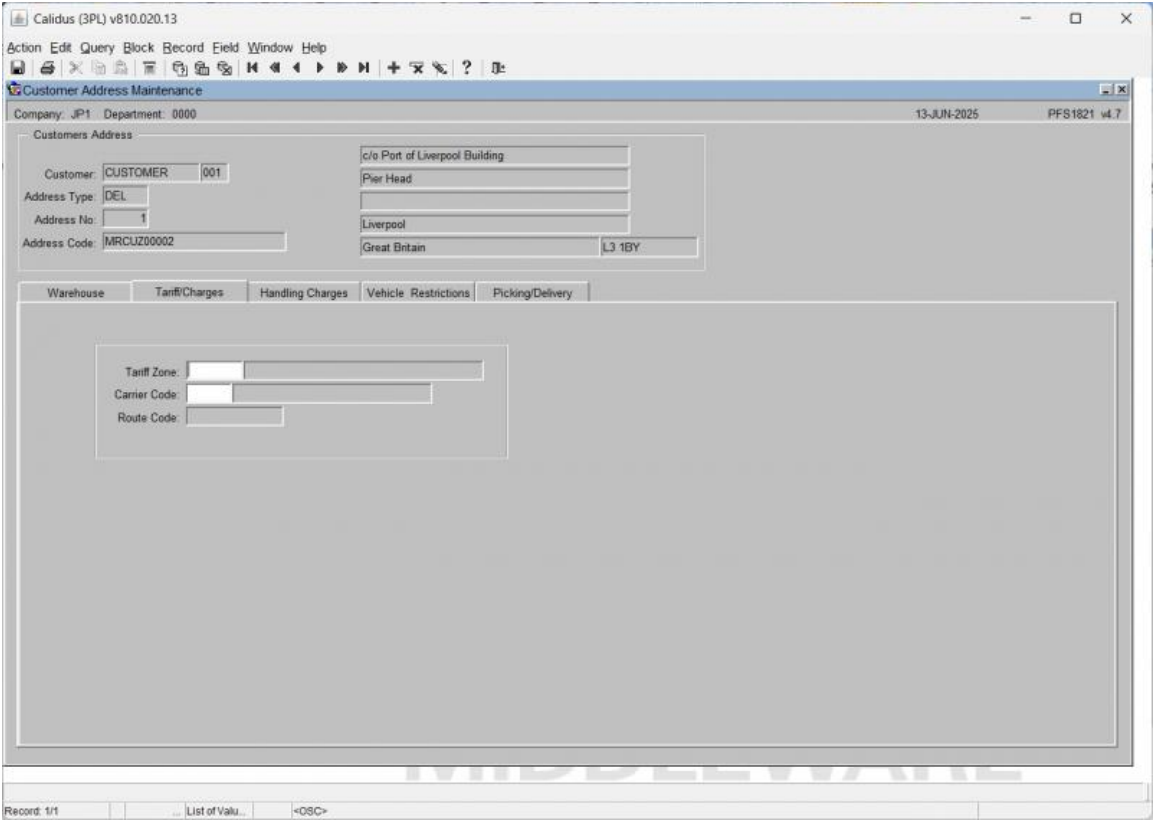
Trunk Route Code:

Record: 1/1 ... -OSC>



Field Name	Description	Options	Generic Value
Fast Dial			
Region Code			
Out of Rotation Flag			
Salesman			
Sales Territory			
Sales Area			
Contact			
Post Code/Region Flag			
Delivery Mode			
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



Calidus (3PL) v810.020.13

Action Edit Query Block Record Field Window Help

Customer Address Maintenance

Company: JP1 Department: 0000 13-JUN-2025 PFS1821 v4.7

Customers Address

Customer: CUSTOMER 001

Address Type: DEL

Address No: 1

Address Code: MRCUZ00002

c/o Port of Liverpool Building

Pier Head

Liverpool

Great Britain L3 1BY

Warehouse Tariff/Charges Handling Charges Vehicle Restrictions Picking/Delivery

Product Class	Handling Charge	Description

FRM-40350: Query caused no records to be retrieved.

Record: 1/1 ... List of Valu... <OSC>

Field Name	Description	Options	Generic Value
Product Code			
Handling Charge			

1.1.6 Vehicle Restrictions

Calidus (3PL) v810.020.13

Action Edit Query Block Record Field Window Help

Customer Address Maintenance

Company: JP1 Department: 0000 13-JUN-2025 PFS1821 v4.7

Customers Address

Customer: CUSTOMER 001

Address Type: DEL

Address No: 1

Address Code: MRCUZ00002

c/o Port of Liverpool Building

Pier Head

Liverpool

Great Britain L3 1BY

Warehouse Tariff/Charges Handling Charges Vehicle Restrictions Picking/Delivery

Vehicle Type and Restriction Text

FRM-40350: Query caused no records to be retrieved.

Record: 1/1 ... List of Valu... <OSC>



Calidus (3PL) v810.020.13

Action Edit Query Block Record Field Window Help

Customer Address Maintenance

Company: JP1 Department: 0000 13-JUN-2025 PFS1821 v4.7

Customers Address

Customer: CUSTOMER 001

Address Type: DEL

Address No: 1

Address Code: MRCUZ00002

c/o Port of Liverpool Building

Pier Head

Liverpool

Great Britain L3 1BY

Warehouse Tariff/Charges Handling Charges Vehicle Restrictions Picking/Delivery

Owner: RDE 001 Reference:

Picking Instructions

Delivery Instructions

FRM-40350: Query caused no records to be retrieved.

Record: 1/1 List of Valu... <OSC>

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