Setting Up or Creating Locations for BILL TO & SHIP TO Customers

Summary   Managers want to track customers that are related by being part of a chain or group of stores or Ship To locations that have a Headquarters or Bill To.

Requirements   Basic database and knowledge of File Transfer Combine

Module   Sales Entry

Situation

You have set up a company that has numerous shipping locations and one billing address. Or you have set up a company with many locations and have customer codes already established for each one. Now you want to go back and have one address as a bill to address with the others as shipping locations.

For Example: You have four customer files for Northeastern, all with different addresses. They have been entered as follows:

CUSTOMER CODE	CUSTOMER NAME
NE0001	Northeastern – Golden Ring
NE0002	Northeastern – Elkton
NE0003	Northeastern – Eldersburg
NE0004	Northeastern – Bel Air

Once you determine which will be the BILL TO account (in this case Northeastern – HeadQuarters), you will have to set up a new record for that account and then transfer all others to new customer codes, with a unique location code.

Solution

1.   Make sure all sessions have been posted

2.   To set up the BILL TO account

　　　A.   If you are setting up the records for the first time, set up the BILL TO (i.e. use NORTHE for Northeastern – HeadQuarters and use NORHTE_XX for the SHIP TO addresses where XX is a 2 character code you define for each location) and then setup each of the SHIP TO customers.

B.   For our example, Northeastern – Golden Ring is currently the BILL TO account but we will set up a new summary headqauerters that will not track sales using NORTHE for customer code.

C.   Go to the Veiwers, select **CUSTOMER MAINTENANCE then ADD.**

D.   Setup the BILL TO account as follows:

|	
CODE FIELD	**Type Customer Code (i.e.** NORTHE**).**
CUSTOMER FIELD	**Type Customer Name (i.e. Northeastern HQ)**
Other Fields	**Type information as desired.**

3.   You have to transfer all history from the SHIP TO customers to the new Location customers. We will transfer NE0001 to the new NORHTE B1 account in the following steps. Refer to the Help section for File Tansfers and Combine for more detailed information on the transfer process.

A.   Go to   **EDIT>FILE TRANSFER/COMBINE**

B.   Select   **MFG/CST/SMN TRANSFER PHASE 1**

C.   Type in the following information as follows (refer to following screen):

SELECT RECORDS WITH:
MFG   **<enter>**
CST   Type the current Customer Code (i.e. NORTHE)
SMN   **<enter>**

TRANSFER TO:
MFG   **<enter>**
CST   Type the new Customer Code (i.e. NORTHE) Loc. (B1)
**SMN**   **<enter>**
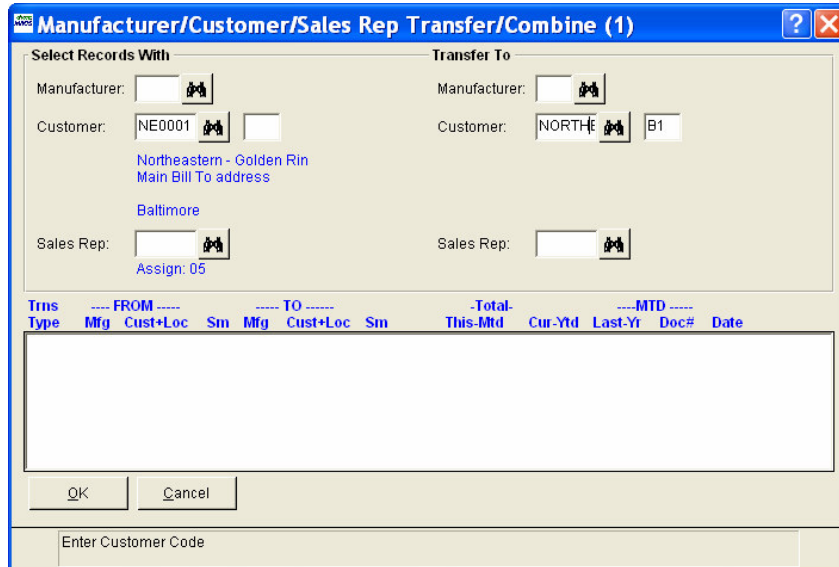
D.   If all the information is correct then type **Y <enter>**

E.   Answer the prompts as appropriate.

4.   You have to assign new customer and location codes to the remaining accounts (the SHIP TO addresses) and repeat the transfer proceedure for each one.

        Note: Do not use the letter S as part of the Location Code as it is reserve for a program feature and problems might arise.

5.   If you already have a Bill To or Headquarters set up and just want to add a location for all the Ship To, then just select the Bill To or Headquarters and press the ADD LOCATIONS button.
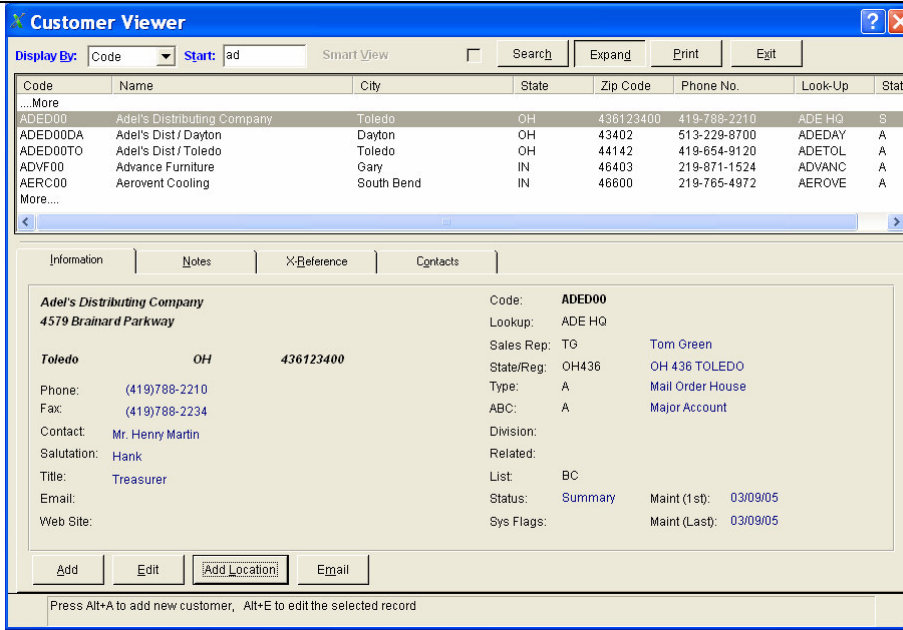
F. This will bring up the Customer Matainance screen with main Billl To/Headquarters code and you can add in the new locations two character code.
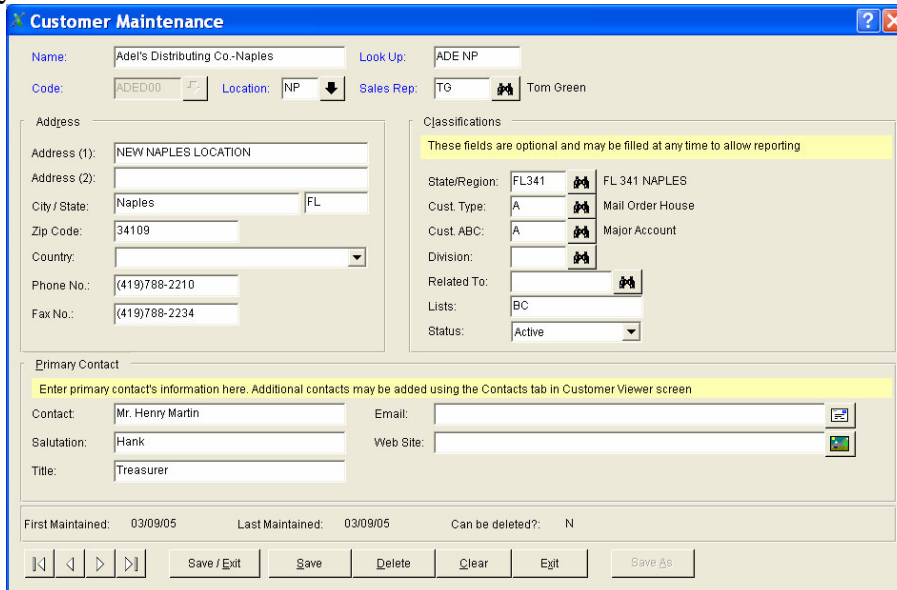
4.   Then adjust the address and other information and save.

5.   Press the SAVE {BUTTON]