

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

<u>Summary</u>	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:

E FIELD	ype Customer Code ((i.e. NORTHE).	
E FIELD	ype Customer Code ((i.e. NORTHE).	

CUSTOMER FIELD Type Customer Name (i.e. Northeastern HQ)

Other Fields

Type information as desired.

X Customer	Maintenance	? 🗙			
Name:	Northeastern - Headquarters Look Up:	NORTHE			
Code:	NORH00 Location: Sales Rep:	SB MA Steve Brown			
Add <u>r</u> ess —		Jassifications			
Address (1):	Main Bill To Address	These fields are optional and may be filled at any time to allow reporting			
Address (2):		State/Region: #			
City / State:	Baltimore MD	Cust. Type:			
Zip Code:	20900	Cust ABC:			
Country:	USA	Division:			
Phone No.:	(000)000-0000	Related To:			
Fax No.:	(000)000-0000	Lists:			
		Status: Active			
Primary Conta	ict -				
Enter primary	contact's information here. Additional contacts may be added	using the Contacts tab in Customer Viewer screen			
Contact:	Email:				
Salutation:	Web Site:				
Title:					
First Maintained	First Maintained: 00/00/00 Last Maintained: 00/00/00 Can be deleted?: N				
	I J DI Save / Exit Save Delete Clear Exit Save As				

- 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:

<enter></enter>
Type the current Customer Code (i.e. NORTHE)
<enter></enter>

TRANSFER TO:

MFG	<enter></enter>
CST	Type the new Customer Code (i.e. NORTHE) Loc. (B1)
SMN	<enter></enter>

🕮 Manufac	turer/Customer/Sales Rep T	ransfer/Combine (1)	? 🗙	
Select Record	s With	— Transfer To		
Manufacturer:	(#1)	Manufacturer: 🌈 🏘		
Customer:	NE0001 M	Customer: NORTHE		
	Northeastern - Golden Rin Main Bill To address			
	Baltimore			
Sales Rep:	Assign: 05	Sales Rep:		
Trns FR Type Mfg (OM TO Cust+Loc Sm Mfg Cust+Loc Sm	-TotalMTD This-Mtd Cur-Ytd Last-Yr Doc# Date		
<u></u> K	Cancel			
Enter Customer Code				

- 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.



X Customer Viewer						? 🗙
Display By: Code 💌 Start: ad	Smart <u>V</u> iew	C Searc <u>h</u>	Expan <u>d</u>	Print Exit		
Code Name	City	State	Zip Cod	e Phone No.	Look-Up	Stati
More						
ADED00 Adel's Distributing Com	pany Toledo	OH	4361234	419-788-2210	ADE HQ	S
ADEDU0DA Aders Dist/ Dayton ADEDU0TO Adel's Dist / Toledo	Toledo	OH	43402	513-229-8700 419-654-9120	ADEDAT	A
ADVF00 Advance Furniture	Gary	IN	46403	219-871-1524	ADVANC	A
AERC00 Aerovent Cooling	South Bend	IN	46600	219-765-4972	AEROVE	A
More						
<]						>
Information Notes	X-Beference Contacts	;]				
Adel's Distributing Company		Code:	ADED00			
4579 Brainard Parkway		Lookup:	ADE HQ			
		Soloo Bon	TO	Tom Green		
Toledo OH	436123400	Ctoto/Dog:	04426			
Dhama: (410)799 2210		Type:	A	Mail Order House		
Finite. (419)700-2210		APC:	Δ.	Major Account		
(419)/88-2234		ADC.	~	major Account		
Contact: Mr. Henry Martin		Division:				
Salutation: Hank		Related:				
Title: Treasurer		List:	BC			
Email:		Status:	Summary	Maint (1 st): 03/09/05		
Web Site:		Sys Flags:		Maint (Last): 03/09/05		
Add Edit Add Loc	ation E <u>m</u> ail					
Press Alt+A to add new customer, Alt+E to edit the selected record						

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.

X Customer	r Maintenance		? 🗙
Name:	Adel's Distributing CoNaples	p: ADE NP	
Code:	ADED00 🧐 Location: NP 🖊 Sales F	Rep: TG	Ma Tom Green
Add <u>r</u> ess —		Classifications	15
Address (1):	NEW NAPLES LOCATION	These fields a	are optional and may be filled at any time to allow reporting
Address (2):		State/Region:	n: FL341 # FL 341 NAPLES
City / State:	Naples FL	Cust. Type:	A Mail Order House
Zip Code:	34109	Cust. ABC:	A Major Account
Country:	•	Division:	<i>i</i> *4
Phone No.:	(419)788-2210	Related To:	<u>ina</u>
Fax No.:	(419)788-2234	Lists:	BC
		Status:	Active
Primary Conta	act		
Enter primary	contact's information here. Additional contacts may be a	added using the Cor	ontacts tab in Customer Viewer screen
Contact:	Mr. Henry Martin Ema	ail:	E
Salutation:	Hank Web	Site:	
Title:	Treasurer		
First Maintained: 03/09/05 Last Maintained: 03/09/05 Can be deleted?: N			
Id J D Save / Exit Save Delete Clear Exit Save As			

- 4. Then adjust the address and other information and save.
- 5. Press the SAVE {BUTTON]