

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:

NE0001Northeastern – Golden RingNE0002Northeastern – ElktonNE0003Northeastern – EldersburgNE0004Northeastern – Bel Air	CUSTOMER CODE	CUSTOMER NAME
NEUUU4 Noluicasiciii – Del Ali	NE0002 NE0003	Northeastern – Elkton 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).
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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 —		Classifications
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	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	act	
Enter primary	contact's information here. Additional contacts may be added	using the Contacts tab in Customer Viewer screen
Contact:	Email:	E
Salutation:	Web Site:	
Title:		
First Maintained	: 00/00/00 Last Maintained: 00/00/00	Can be deleted?: N
	Delete Save / Exit Save	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:

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

TRANSFER TO:

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

🕮 Manufact	turer/Customer/Sales Rep T	ransfer/Combine (1)	? 🗙
Select Record	s With	Transfer To	
Manufacturer:	(M)	Manufacturer: 🌈 🏘	
Customer:	NE0001 #4	Customer: NORTHE	
	Northeastern - Golden Rin Main Bill To address		
	Baltimore		
Sales Rep:	Assign: 05	Sales Rep:	
	COM TO Cust+Loc Sm Mfg Cust+Loc Sm	-TotalMTD This-Mtd Cur-Ytd Last-Yr Doc# Date	
<u></u> K	Cancel		
Enter Cus	tomer 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.



splay By: Co	ode 💌 Start: ad	Smart <u>V</u> iew	Search	Expan <u>d</u>	Print Exit		
ode	Name	City	State	Zip Cod	e Phone No.	Look-Up	St
.More							23
DED00	Adel's Distributing Company	Toledo	ОН	4361234		ADE HQ	S
DED00DA DED00TO	Adel's Dist / Dayton Adel's Dist / Toledo	Dayton Toledo	он он	43402 44142	513-229-8700 419-654-9120	ADEDAY ADETOL	A A
DVF00	Aders Dist/Toledo Advance Furniture	Garv	IN	44142	219-871-1524	ADETUL	A
ERCOO	Aerovent Cooling	South Bend	IN	46600	219-765-4972	AEROVE	Â
ore							
Information	Notes	X- <u>R</u> eference Contacts)				
Adel's Dist	ributing Company		Code:	ADED00			
	ard Parkway		Lookup:	ADE HQ			
			Sales Rep:	TG	Tom Green		
Toledo	он	436123400		OH436	OH 436 TOLEDO		
			State/Reg:		Mail Order House		
Phone:	(419)788-2210		Type:	A			
Fax:	(419)788-2234		ABC:	A	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		
. 700 0118.			oyo nugo.				
	Edit Add Location	Email					

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	Maintenance						? 🗙
Name:	Adel's Distributing CoNaples	Jp:	ADE NP	-			
Code:	ADED00 5 Location: NP Sales	Rep:	TG 🏘	Tom Gre	een		
Add <u>r</u> ess —			Classifications				
Address (1):	NEW NAPLES LOCATION		These fields an	e optional ar	nd m	ay be filled at any time to allow reporting	
Address (2):			State/Region:	FL341	24	FL 341 NAPLES	
City / State:	Naples FL		Cust. Type:	A	纳	Mail Order House	
Zip Code:	34109		Cust. ABC:	A	纳	Major Account	
Country:	•		Division:		纳		
Phone No.:	(419)788-2210		Related To:			24	
Fax No.:	(419)788-2234		Lists:	BC			
			Status:	Active			
Primary Conta	act						
Enter primary	contact's information here. Additional contacts may be	adde	d using the Cont	acts tab in C	usto	mer Viewer screen	
Contact:	Mr. Henry Martin Em	ail:				E	
Salutation:	Hank We	b Site					
Title:	Treasurer						
,							
First Maintained: 03/09/05 Last Maintained: 03/09/05 Can be deleted?: N							
	Save / Exit Save	lete	Clear	Exit		Save As	

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