

Getting Started with Entity Maintenance

Release 8.7.6

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Table Of Contents

Entity Maintenance Overview	1
Setup Requirements for Customer and Vendor Maintenance.....	2
Customer Control Maintenance Records	2
Customer and Vendor Authorization Keys.....	5
Setup Requirements for Contact Maintenance.....	6
Control Maintenance Records.....	6
Authorization Key.....	6
Setup Requirements for Branch and Territory Maintenance	7
Control Maintenance Records.....	7
Authorization Keys	7
Setup Requirements for Company Branches	8

Entity Maintenance Overview

Each customer, vendor, and branch must have its own record for pricing, reporting, and product information.

You can set up a variety of information in your customer and vendor records, including:

- Cross-references between the customer or vendor's product numbers and the system-generated part numbers.
- A list of contact numbers within the customer or vendor's company, such as those of purchasing agents, sales representatives, and accountants.
- Activity triggers that tell the system to send automatic email confirmations to customers when orders are shipped, or fax notifications to vendors when ship dates are missed.
- A way to determine which customers can order from which of your branches, and which of your branches can order from which vendors.
- The ability to receive or ship consigned inventory.

Each branch record contains information, such as:

- The customers and vendors that order from or sell to the branch.
- An assigned remit-to branch if a branch does not maintain its own finances.
- The credit card types that can be used.
- The method used to transport goods to and from the branch.
- The process used to verify checks.

Setup Requirements for Customer and Vendor Maintenance

Following are the control maintenance records and authorization keys used for Customer and Vendor Maintenance.

Only a system administrator is authorized to set control maintenance records and authorization keys.

This topic contains the following sections:

- Customer and vendor control maintenance records.
- Customer and vendor authorization keys.

Customer Control Maintenance Records

The following control maintenance records relate to Customer Maintenance:

ACCT (Accounting)

Set the following control maintenance records:

- A/P Over/Short Maximum Parameters
- Auto C/R Default Customer If Not Found
- Cash Over/Short Maximum Parameters
- Credit Card Default Reference Number
- Credit Card Level III Summary Line Item
- Default Auth Method for New Credit Cards
- Include Service Charges In Service Charge Calculation
- Maximum Collection Days Date
- Minimum Check Distribution Amount
- Valid ACH Formats
- Valid Cash Sources
- Valid Customer Statement Cycles
- Valid Invoice Select Codes

DLOT (Detail Lot Tracking)

- Valid Detail Lot Product Quality Ranks
- Valid Detail Lot QC Inspection Levels

EMAIL (E-mail)

- Corporate Customer
- Default E-mail Print Styles
- Valid E-mail Preference
- Valid E-mail Types

GENRL (General)

Set the following control maintenance records:

- Activity Trigger Subroutine Overrides
- Customer Classification Sort List
- Valid Customer Price Classes
- Vendor Classification Sort List

INVM (Inventory Management)

- Assign Demand Forecast To Price/Ship Branch Or By Zip Code

MAINT CUST (Customer Maintenance)

- Customer Maintenance Authorization Levels
- Customer Maintenance Authorization Levels For New Customers BT/ST
- Default Customer Price Class
- Default Customer Salesperson
- New Customer Maintenance Template
- Prompt To Copy Tax Information From Bill-Tos to All Ship-Tos
- User Defined Customer Notes
- Valid Customer Invoice Status Codes
- Valid Customer Points Programs
- Valid Customer Select Codes
- Valid Customer Types
- Valid Sale Categories

MAINT PROD (Product Maintenance)

- Valid Product Certification Codes
- Valid Product Zones

MAINT (Vendor Maintenance)

Set the following control maintenance records:

- Disable Home Branch Check In Vendor Maintenance
- User Defined Vendor Notes
- Valid Vendor Types

POE (Purchase Order Entry)

Set the following control maintenance records:

- Capitalize Tax On Purchase Orders

- Default B/O Days For Purchase Orders
- Include Directs In Vendor Target Check When Printing a P/O
- Vendor Freight Terms
- Valid Vendor ASL Types

SFA (Sales Force Automation)

- SFA Administrator

SOE (Sales Order Entry)

Set the following control maintenance records:

- Allow Multiple Products To Be Associated With One Customer Part #
- Allow Sending Credit Card Level 3 Data
- Apply Extra Handling For Shipping To First Gen Only
- Display Customers/Vendors Who Are Inactive At A Branch
- Display Products Within A Customer's Product Zones
- Duplicate Customer P/O Number Check
- Duplicate Order Check
- Enable Auto Routing On Creation Of Sales Order
- Exclude From Ship-To/Ship-From Selection If Excluded From Index
- Invoice Print Copies = 0, Q Status Invoices To Invoice Preview Queue
- Minimum Variance Before Last Price Reduction
- New SOE Customer Template
- Number Of Digits Of Accuracy For Product Weight
- Order Status Print Status Defaults
- Pass-Along Discount Holdback Percent
- Percent Of Order To Fill Before Automatically Shipping
- Prompt For Required Date In Sales Order Entry
- Use Last Price/Cost Logic
- Validate Name In 'Ordered By' Field Against Customer Contact
- Valid Product Matrix Types

TOE (Transfer Order Entry)

Set the following control maintenance record:

- Default Vendor Consignment on Transfers

WIP (Work Order Processing)

Set the following control maintenance record:

- Valid Vendor Work Order Process Codes

Customer and Vendor Authorization Keys

Set the following authorization keys:

- COGS.VIEW
- CONVERT.PROSPECT
- CREDIT.CARD.ACCT
- CREDIT.CARD.REQD.OVR
- CUST.CREDIT.EDIT
- CUST.BR.AUTH.ONETIME
- CUST.BR.AUTH.OVRD
- CUST.CERTIFY.EDIT
- CUST.DEMAND.BR.OVRD
- CUST.POINTS
- CUST.PRICING.EDIT
- CUST.TAX.VIEW
- CUSTOMER.MAINT
- CUSTOMER.MAINT.LEVEL
- ENTITY.PN.EDIT
- ENTITY.TRIGGER
- FREIGHT.TARGET.OVERRIDE
- INVALID.VEN.TYPES
- POE.ASL.RELEASE
- PRD.ZONE
- SLSMN.CUSTOMER.MAINT
- SOE.CREDIT.RELEASE
- VALID.VEN.TYPES
- VEN.BR.AUTH.ONETIME
- VEN.BR.AUTH.OVRD
- VENDOR.MAINT
- VENDOR.MAINT.LEVEL

Setup Requirements for Contact Maintenance

Following are the control maintenance records and authorization keys used for Contact Maintenance. Only a system administrator is authorized to set control maintenance records and authorization keys.

Control Maintenance Records

Set the following control maintenance records:

- Contact Classification Sort List
- Validate Name In 'Ordered By' Field Against Customer Contact
- Valid Phone Codes
- Valid Salutations
- Valid SFA Contact Classifications

Authorization Key

Set the following authorization key:

- CONTACT.MAINT

Setup Requirements for Branch and Territory Maintenance

Following are the control maintenance records and authorization keys used for Branch and Territory Maintenance.

Only a system administrator is authorized to set control maintenance records and authorization keys.

Control Maintenance Records

- Check Verification: Required Information
- Display Active Primary Index Products First In Product Search
- RF Pick Selection Sort
- Valid Cost Center Types
- Valid Phone Codes

Authorization Keys

- BRANCH.MAINT
- CREDIT.CARD.SETUP
- RF.LOAD.OVRD
- TERRITORY.MAINT

Setup Requirements for Company Branches

Creating a branch in the system involves several system program settings. You must set up branches as entities to track sales and expenses, and to use the branch in transfer orders. Generally, you create branches representing different physical locations, but you can also create a fictitious branch, such as *Corporate*, to maintain and track expenses that are not applied to inventory or pricing branches.

Complete the following to set up a branch:

- Set up control maintenance records and authorization keys for Branch and Territory Maintenance.
- Create a branch record and associate it with a customer record, so the branch activities can be tracked and you can use the branch for transfer orders. If this is a non-stocking branch and you will never order from this branch, activate No Order Entry in customer credit control parameters.

Alternatively, you can specify a class for your transfer entities to accomplish the same purpose. For example, assign all branches a class of BRCH, and create a Class/All matrix cell.

- For each branch customer record for which you anticipate creating transfer orders, set up Customer/Group/All sell matrix cells so there is no gross profit percent calculated on transfer orders.
- Define territory authorization levels for users in User Maintenance. Determine a user's authority based on their assigned branches and how they need to use the system's territories.
- Set up customer and vendor access to branches with which your customers and vendors will do business.
- Create territories.
- Organize your branches into territories.