

CMT Requirement Document

[OKI: Customer Merge Tool]

Software Division

Evolution

Version: 1.0

2-Dec-2015

486 & 487, Udyog Vihar Phase-III

**Gurgaon- 122016, India**

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1. Introduction

This document describes the process and steps of the application and their rules which are using in this application. This document serves the how the different Pages are involved in the project. The prime intention of this analysis is to create the understanding about the business implementation of the Merge tool application. Like merge one customer group to another customer group with few validation rules and their respective source tables as well as finding out impacts/effects in the application and its related tables.

* 1. Objective

To develop the business understanding and low level implementation of the Mergetool as well as changes impact in the project due to different tables and their relationships.

* 1. Scope

This document is intended to provide detail information about the different customers with their customer group’s tables used to merge one customer group to another customer group table with validation message rules.

1. MergedCustomerList Requirement
   1. Tools Page

* Rename the Existing Tools Page in Application to MergedCustomerList.
* Add a new Column in DimCustomerGroup in Screen and DimCustomerGroup. Column name is CRMCustomerID. This Column will be editable from the Screen. The User will update the column based on the Match of the Customer from BI System and CRM System. This CRMCustomerID will be populated from UI itself or ETL process that will match the data from CRM and BI bases on CustomerGroupVATNum.
* All Customers from CRM with there CRMCustomerID will be populated into CRM Interface Database by CRM. During loading the data in BI, update the CRMCustomerID and CustomerGroupNAme1 in BI under DimCustomerGroup using **ETL** where there is match of VAT Numbers.
* If there is no match of the VAT numbers then user in CRM will not get the actual achievements from BI and thus the user has to go to CMT to update the CRMCustomerID.
  1. Edit Functionality Flow

1. In the MergedCustomerList Page, there is an update image button “Edit Customer Group Name” for each Customer.
2. When user click on this image button “Edit Customer Group Name”, it will open an “Edit Customer Group” popup with following Fields
   1. Name:
   2. VAT Num:
   3. CRMCustomerID:
3. Edit the CustomerGroupName1, CustomerGroupVATNum or CRMCustomerID in DimCustomerGroup table. Rules to Update are given below.
4. With the Save button user can save the changes or cancel the process with Cancel button.
5. Change into this table would also need to update EDMX into this CMT Project.
   1. CRMCustomerID
      1. Rule 1

* Update CRMCustomerID in CMT
  + Is new CRMCustomerID there in CRM Intermediate database
    - No - Pop up a message that it’s not there and do not allow to update. Message **“Customer is not present in CRM”**.
    - Yes- Is New CRMCustomerID already been assigned to some other CustomerGroupID in DimCustomerGroup.
      * No - then update the CRMCustomerID
      * Yes - Popup message “Do you want to Merge this Customer with already existing Customer with same CRM Id” and if user says yes then merge this CustomerGroup with already existing CustomerGroup and assign all its customers in DimCustomer to the merged Customer else do not change the CRMCustomerID. This will be consistent what we will do with the VATn update
    1. Rule 2
* You can not merge 2 customer in DimCustomerGroup with different CRMCustomerID
  + 1. Rule 3
* No 2 customers will have same CRMCustomerID in DimCustomerGroup
  + 1. Rule 4
* Customer in DimCustomerGroup with Not Null CRMCustomerID will always lead the records while merging 2 CustomerGroups
  + 1. Rule 5
* If 2 customers in DimCustomerGroup has CRMCustomerID null and we merge them then the rule to merge remains same as earlier based on VAT and Country.
  1. CustomerGroupVATNum Update
     1. Rule 1
* Update CustomerGroupVATNum only when it is blank or NULL in DimCustomerGroup
  + 1. Rule 2
* If the CustomerGroupVATNum already Exit, allow user to change the CustomerGroupVATNum. If the CustomerGroupVATNum already exist in DimCustomerGroup then show popup message “Do you want to Merge this Customer with already existing Customer with same VAT” and if user says yes then merge this CustomerGroup with already existing CustomerGroup and assign all its customers in DimCustomer to the merged Customer else do not change the CustomerGroupVATNum. If the CustomerGroupVATNum do not already exist then update .
  + 1. Rule 2
* When Updating the VAT number, apply the rules to save it as in the current system, that is to say, only alphanumeric characters, (so remove the rest) and the country prefix must be present, that is to say, the first two digits must be in the country table ISO ALPHA-2 code.

|  |  |
| --- | --- |
| **Country or Area Name** | **ISO ALPHA-2 Code** |
| Afghanistan | AF |
| Aland Islands | AX |
| Albania | AL |
| Algeria | DZ |
| American Samoa | AS |
| Andorra | AD |
| Angola | AO |
| Anguilla | AI |
| Antarctica | AQ |
| Antigua and Barbuda | AG |

* + 1. Rule

When updating the vat number, we only want to save alphanumerical digits. (This is new rules as per David mail)

* + 1. Rule

When merging two different customers by entering the same CRMCustomerId in a new record, the merge cannot be done if the VATnumbers are different, or the country is different (same rules than merging manually). A null Vat number is not considered as a different vat number.

* 1. CustomerGroupName1 Name Update
     1. Rule 1
* If CRMCustomerID is NULL then it means there is no link between CRM and BI.
  + 1. Rule 2
* Change CustomerGroupName1 from x to y only when CRMCustomerID is NULL. If CRMCustomerID is populated, then the Name should be grayed out and could not be edited.
  + 1. Rule 3
* Later if the CRMCustomerID is populated using ETL then what ever is the name in CRM will be updated in DimCustomerGroup from ETL and it will be grayed out next time for edit.
  1. Update History and ETL Impact
* While updating DimCustomerGroup record “UpdatedBy”, “UpdatedDate” and “IsUpdated” will be populated by Who Updated, When Updated and Flag to indicate that it has been updated from CMT.
* ETL flow will check if the IsUpdated Column is populated or not. If it is populated then there will be no change from the ETL Process on this record.
  1. Log of Changes
* Create a new log table to manage logs the update history for DimCustomerGroup. Columns of the table as below:-

1. CustomerGroupLog ID
2. CustomerGroupName1
3. CustomerGroupVATNum
4. CRMCustomerID
5. UpdatedBy
6. UpdatedDate

* This Functionality can be created using CDC in SQL Server and then there will be no need to create a log table.
  1. Other Scenarios:-
* When two people make changes to the same record, the update from the earlier one will be lost

1. ReportedCustomerList Requirement
   1. New Page ReportedCustomerList

Create a new page ReportedCustomerList. In ReportedCustomerList Page, show all the details of the customer.

* This Page will have the following Columns in the Grid.

1. ID – CustomerId from DimCustomer
2. Key - CustomerKey from the DimCustomer
3. Name - CustomerName1 from DimCustomer
4. VAT Number - CustomerVATNum from DimCustomer
5. Distributor Name - DistributorName from DimDistributor joining Customer and Distributor using DistributorId
6. Address -
7. Postal Code -
8. City -
9. Country -

* This Page will have the Search Functionality similar to CustomerGroupList Page
* This Page will have Edit functionality for Each Customer
  1. ~~CustomerName1 Update~~
* ~~There is no rule to validate so go and change it. This requirement is out~~
  1. CustomerVATNum Update
* If the user changes CustomerVATNum from x to y and y is already in DimCustomerGroup, popup message “**This records will be Merged with Already existing CustomerVATNum**” if user says yes then and take CustomerGroupId of y from DimCustomerGroup and update in this record CustomerGroupID and CustomerVATNum else Create a new record in DimCustomerGroup with details from this records and assign its CustomerGroupId to this record. If user says no do not update CustomerVATNumber.
* If the new CustomerVATNum do not exist in DimCustomerGroup, update the DimCustomer VAT and Insert a new record in the new record in DimCustomerGroup and link both using CustomerGroupid
* When a user changes a CustomerVATNum to ZY12345678 and Customer County is XY, then do not change the CustomerVATNumDimCustomer. Pop up message should be there that the Country is not matching the VAT.
  1. Update History and ETL Impact
* While updating DimCustomerGroup record “UpdatedBy”, “UpdatedDate” and “IsUpdated” will be populated by Who Updated, When Updated and Flag to indicate that it has been updated from CMT.
* ETL flow will check if the IsUpdated Column is populated or not. If it is populated then there will be no change from the ETL Process on this record.
  1. Log of Changes
* Create a new log table to manage logs the update history for DimCustomerGroup. Columns of the table as below:-

1. CustomerLog ID
2. CustomerGroupVATNum
3. UpdatedBy
4. UpdatedDate

* This Functionality can be created using CDC in SQL Server and then there will be no need to create a log table.
  1. Other Scenarios:-

When two people make changes to the same record, the update from the earlier one will be lost

1. Future Plan
   1. Unchecked or Checked Customer
   2. Country Update

* If the country is not Valid - Throw message
* If the country is Valid - update the country name

1. Question/Answer

**\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\***

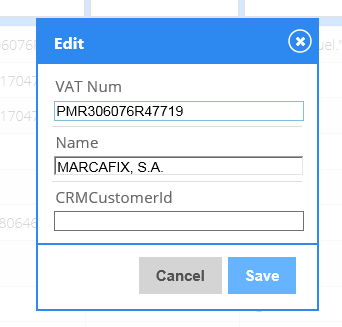
**CMT Pop up Message Review**

**Group CustomerList**

**Updating the VAT number**

**Issue 133**: When the VAT number is populated. Message shown: “Vat Num can not update with exist Vat Num”

**Change request: Grey Out the VAT number. Lock it, not allowing any user changes.**



clicking on the symbol, please use for all the information symbols an icon like this or similar.

**Message: “If you want to change the VAT number for a customer, you can do this in the Reported Customer list”**

**Issue 134**: When trying to merge two customers with two different VAT codes, message is shown: “Country OR VAT Num is different”

**Change request: The pop up needs to be changed. “Two customers from different countries cannot be merged. If one Countries is wrong can be updated in the Reported Customer List view” (To discus with Amit, how to update a country)**

**Issue 136**: **When the changing the VAT number of a customer. If the prefix of the Vat code is not correct for a country. Message is shown:** “The code is not valid because it is for a different country”

**Change request: The pop up needs to be changed. “The VAT number prefix is not correct for the chosen country. The Country of the customer and the prefix must match”**

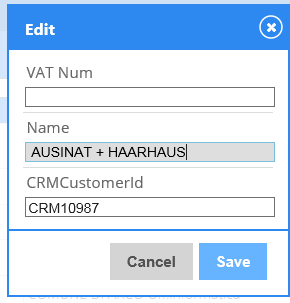
**Issue 137:** When changing the VAT code of a customer, if the Vat code contains any non-alphanumeric digits. Message is shown: “Vat Num character should be alphanumeric”

**Change request: The pop up needs to be changed. “Vat Num must contain only alphanumeric characters. All non-alphanumeric digits ( - / ~ ) have been removed”**

**Updating the Customer Name**

1. When the CRM Custoemr Id is populated

**Change request: Grey Out the Customer name (Don’t even let the users click on it). Lock it, not allowing any user changes.**



when clicking on the symbol, please use for all the information symbols an icon like this or similar**.** 

**Message: “As the customer has a CRM number and is linked to the CRM system, if you want to change the customer name, please do this in the CRM system”**

**Updating the CRM customer ID.**

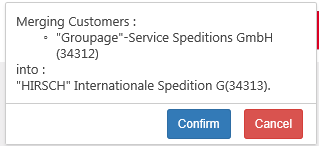
1. When trying to change the customer iD, when the CRM Customer Id exists in the Customer table in CRM, Currently no message is shown

**Change request: needs a pop up notice. Should say “You are about to link customer in BI <Customer Name in BI>with the customer name in CRM <Customer name in CRM in the intermediate database>…..”” Confirm or cancel**

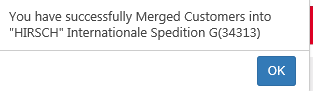
1. When trying to add a CRM Customer Id which already exists in a Customer Group. The current message shown:

“Do you want to Merge this Customer with already existing Customer with same CRM Id?”

**Change request: The pop up needs to be changed. “You are about to add the same CRM Customer Id used by another customer. Therefore the customers will be merged.” (Include this text as the beginning of the following pop up)**



Then if confirm, show the same pop up after merging customers



1. When trying to add a CRM Customer Id, which does not exist in a Customer Group, the current message shown:

“Customer is not present in CRM”

**Change request: Amend pop up – “The CRM Customer ID you entered is not listed in CRM. Please review number in the CRM system”**

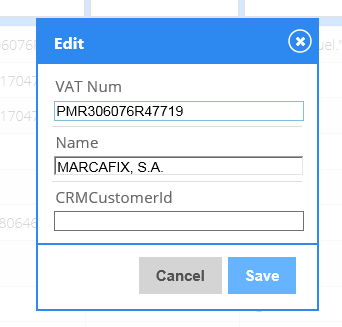
**Reported CustomerList**

**Updating the VAT number**

1. When the VAT number is populated. Message shown:

“Vat Num can not update with exist Vat Num”

**Change request: Grey Out the VAT number. Lock it, not allowing any user changes.**



clicking on the symbol, please use for all the information symbols an icon like this or similar.

**Message: “If you want to change the VAT number for a customer, you can do this in the Reported Customer list”**

1. When trying to merge two customers with two different VAT codes, message is shown:

“Country OR VAT Num is different”

**Change request: The pop up needs to be changed. “Two customers with different VAT numbers cannot be merged. If one VAT number is wrong can be updated in the Reported Customer List view”**

1. When trying to merge two customers from two different countries, message is shown:

“Country OR VAT Num is different”

**Change request: The pop up needs to be changed. “Two customers from different countries cannot be merged. If one Countries is wrong can be updated in the Reported Customer List view” (To discus with Amit, how to update a country)**

1. **When the changing the VAT number of a customer. If the prefix of the Vat code is not correct for a country. Message is shown:**

“The code is not valid because it is for a different country”

**Change request: The pop up needs to be changed. “The VAT number prefix is not correct for the chosen country. The Country of the customer and the prefix must match”**

1. When changing the VAT code of a customer, if the Vat code contains any non-alphanumeric digits. Message is shown:

“Vat Num character should be alphanumeric”

**Change request: The pop up needs to be changed. “Vat Num must contain only alphanumeric characters. All non-alphanumeric digits ( - / ~ ) have been removed”**

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*CMT Bug Tracker Tickets Details \*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

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**CMT ticket list as per Issue Tracker**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Unique ID** | **Authors Initials** | **Description** | **Type** | **Date of Test/Raised** | **Remarks** |
| 098 | DDLH | The customer with the VATn NL803543177B01 and customer Name Alpha International BV is tin BI but not toin the CMT | Defect | 16-12-2015 |  |
| 100 | PG | Performance issue - taking over 5 mins for one customer merge |  | 17-12-2015 |  |
| 101 | PG | user having problem of clicking dropdown icon to see customer detail, which is automatically checking/selecting the file. She is using int. explorer 9 - possible cause? **UPDATE - The records are selected when we click anywhere other than the icon to see the customer under the group. Is it possible to change this just to selct them when we click on the sellect botton.** | Defect | 17-12-2015 |  |
| 102 | PG | when user is merging records, system hangs for 5 mins and then shows conflicting "success" and "error " messages | Defect | 17-12-2015 |  |
| 107 | PG | cannot search for distributor using "&" in the name. Facilility cannot use/recognise "&" in the search field. Example GB distributor "J & R Courier" | Defect | 11-01-2016 |  |
| 113 | PG | **Need function to Roll back for merging. Currently if you merge something wrongly, then there is no chance to get back to the initial point. Need new function button to undo incorrect merges/changes** | Requirement | 02-02-2016 |  |
| 114 | PG | **A check button needs to be added, to highlight the records that haven't been checked and confirmed. This will allow the users to review only new records on a weekly basis.** | Requirement | 02-02-2016 |  |
| 115 | PG | **Country of the customer function. If we cannot update the reported country, when it is wrong we are going to be unable to merge these customers.** | Requirement | 02-02-2016 |  |
| 116 | PG | **Add the Customer Group Id in the Reported Customer list** | Requirement | 02-02-2016 |  |
| 117 | PG | **Change colour for the Merged customer list and Reported customer list icon at top of page** | Enhancement | 11-02-2016 |  |
| 118 | PG | After merging two customer records to one VAT code, you cannot afterwards see the VAT code listed in the header line customer information. Have to use the drill down detail icon to see single VAT code | Requirement | 11-02-2016 |  |
| 119 | PG | **Add sort option to Country column in MergedCustomer List. This is the only cloumn we cannot sort by** | Enhancement | 11-02-2016 |  |
| 120 | PG | **Ability to use more than one column sort at a time. For example VAT code and also Country at same time. Currently only one useable at a time** | Enhancement | 11-02-2016 |  |
| 121 | PG | **In the tool - where are the files with Distributor Name UNKNOWN from? How is that possible? Please, can you check whether this is the info coming from customer master in SAP. If so, then please change Unkown by OKI SAP** | Requirement | 11-02-2016 |  |
| 122 | PG | Add a postcode search filter | Enhancement | 11-02-2016 |  |
| 123 | PG | Need standard message for adding CRM number to customer record. If we try to add a CRM number to a customer record that has a VAT number, the error message is "CRMcustID is already assigned to different VatNum or country". BUT if you add a CRM code to a customer record that has no VAT number, the error message is different - "do you wan to merge this customer with already existing custom er with same CRM ID?". Needs same message for both | Enhancement | 11-02-2016 |  |
| 124 | PG | Incorrect spelling of DIFFERENT in all error messages. Spelled as "diffrent" | Enhancement | 11-02-2016 |  |
| 125 | PG | If a user tries to add VAT code for a customer in a different country, the error message currently says only "Vat code is not valid". The message needs to say the code is not valid because it is for a different country | Requirement | 11-02-2016 |  |
| 126 | PG | If there is one customer with two Vat codes listed. One is wrong, the other is correct. If try to merge the incorrect record into the correct record, them the error message is "Vat code cannot update with existing Vat number". BUT if you delete the incorrect Vat code from the customer in the edit function, and then merge, this wil be successful. Is this the correct process? It is more time consuming for users | Requirement | 11-02-2016 |  |
| 127 | PG | The pop up messages when editing a VAT number need to be revised | Requirement | 11-02-2016 |  |
| 130 | DDLH | **The customer list contains again all the customer from SAP, even if they haven't bought anything. Please remove thos customer which haven't bougth anything** | Defect | 12-02-2016 |  |
| 131 | PG | **Widen the edit pop up to update customer name, it is too norrow for customer names** | Defect | 12-02-2016 |  |
| 132 | DDLH | **We update the VAT number and it is left null in the reported customer list. When it belons to a customer group, The tool should remove the customer from the initial customer group, this is OK. But it should create a new customer group as a result of the new action, and this is not happening. The customer just disappears. (It probably get merged to a customer with the VAT number null). It is workin fine when the VATnumber is not updated as null** | Defect | 12-02-2016 |  |
| 133 | PG | **Group CustomerList - When updating the VAT number. Current message - “Vat Num can not update with exist Vat Num”. Change message to “If you want to change the VAT number for a customer, you can do this in the Reported Customer list”** | Defect | 16-02-2016 |  |
| 134 | PG | **Group CustomerList - When updating the VAT number. When trying to merge two customers with two different VAT codes, message is shown - “Country OR VAT Num is different”. Change message to “Two customers with different VAT numbers cannot be merged. If one VAT number is wrong can be updated in the Reported Customer List view”** | Defect | 16-02-2016 |  |
| 135 | PG | **Group CustomerList - When updating the VAT number. When trying to merge two customers from two different countries, message is shown - “Country OR VAT Num is different”. Change message to “Two customers from different countries cannot be merged. If one Countries is wrong can be updated in the Reported Customer List view”** | Defect | 16-02-2016 |  |
| 136 | PG | **Group CustomerList - When updating the VAT number. If the prefix of the Vat code is not correct for a country. Message is shown: “The code is not valid because it is for a different country”. Change message to “The VAT number prefix is not correct for the chosen country. The Country of the customer and the prefix must match”** | Defect | 16-02-2016 |  |
| 137 | PG | **Group CustomerList - When updating the VAT number. When changing the VAT code of a customer, if the Vat code contains any non-alphanumeric digits. Message is shown: “Vat Num character should be alphanumeric”. Change message to . “Vat Num must contain only alphanumeric characters. All non-alphanumeric digits ( for example - / ~ ) have been removed”** | Defect | 16-02-2016 |  |
| 138 | PG | **Group CustomerList - When updating the Customer Name and the CRM Custoemr Id is populated. Grey Out the Customer name (Don’t even let the users click on it). Lock it, not allowing any user changes. Change message to “As the customer has a CRM number and is linked to the CRM system, if you want to change the customer name, please do this in the CRM system”.** | Defect | 16-02-2016 |  |
| 139 | PG | **Group CustomerList - When updating the CRM customer ID. When trying to change the customer iD, when the CRM Customer Id exists in the Customer table in CRM, Currently no message is shown. Needs a pop up notice. Should say “You are about to link customer in BI <Customer Name in BI>with the customer name in CRM <Customer name in CRM in the intermediate database>…..”” Confirm or cancel.** | Defect | 16-02-2016 |  |
| 140 | PG | **Group CustomerList - When updating the CRM customer ID When trying to add a CRM Customer Id which already exists in a Customer Group. The current message shown: “Do you want to Merge this Customer with already existing Customer with same CRM Id?”. Change message to "You are about to add the same CRM Customer Id used by another customer. Therefore the customers will be merged.”** | Defect | 16-02-2016 |  |
| 141 | PG | **Group CustomerList - When updating the CRM customer ID. 3. When trying to add a CRM Customer Id, which does not exist in a Customer Group, the current message shown: “Customer is not present in CRM”. Change message to “The CRM Customer ID you entered is not listed in CRM. Please review number in the CRM system”** | Defect | 16-02-2016 |  |
| 142 | PG | **Reported CustomerList - When updating the VAT number. Current message - “Vat Num can not update with exist Vat Num”. Change message to “If you want to change the VAT number for a customer, you can do this in the Reported Customer list”** | Defect | 16-02-2016 |  |
| 143 | PG | **Reported CustomerList - When updating the VAT number. When trying to merge two customers with two different VAT codes, message is shown - “Country OR VAT Num is different”. Change message to “Two customers with different VAT numbers cannot be merged. If one VAT number is wrong can be updated in the Reported Customer List view”** | Defect | 16-02-2016 |  |
| 144 | PG | **Reported CustomerList - When updating the VAT number. When trying to merge two customers from two different countries, message is shown - “Country OR VAT Num is different”. Change message to “Two customers from different countries cannot be merged. If one Countries is wrong can be updated in the Reported Customer List view”** | Defect | 16-02-2016 |  |
| 145 | PG | **Reported CustomerList - When updating the VAT number. If the prefix of the Vat code is not correct for a country. Message is shown: “The code is not valid because it is for a different country”. Change message to “The VAT number prefix is not correct for the chosen country. The Country of the customer and the prefix must match”** | Defect | 16-02-2016 |  |
| 146 | PG | **Reported CustomerList - When updating the VAT number. When changing the VAT code of a customer, if the Vat code contains any non-alphanumeric digits. Message is shown: “Vat Num character should be alphanumeric”. Change message to . “Vat Num must contain only alphanumeric characters. All non-alphanumeric digits ( for example - / ~ ) have been removed”** | Defect | 16-02-2016 |  |