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CHAPTER 3 – SETUP CUSTOMER, PRODUCT GROUPS, & ITEMS

Setting Up And Maintaining Customers

SYNAPSE is designed to give full support to each customer's needs and requirements. This section covers the various screens available for each customer.

It is important to understand the difference between a customer, a consignee and a supplier in SYNAPSE.

- A Customer is the warehouse's client or the company that owns the merchandise.
- A Consignee is a customer's customer or the person or company receiving the merchandise.
- A Supplier provides goods for a customer.

For example, XXX Industries manufactures and sells picnic tables and they store the merchandise at this facility and ship the merchandise from this facility. XXX Industries is considered a “**customer**”. This facility ships XXX-brand picnic tables to individual AAA Super Stores. Each AAA Super Store is considered a distinct “**consignee**”. XXX Industries also sells table umbrellas but they are manufactured and delivered to this warehouse by ZZZ Company. ZZZ Company would be considered a “**supplier**” for XXX Industries.

Descriptions of specific field definitions can be found in the Concepts Manual under Customer Setup.

Adding and Maintaining Product Groups

Product Group is a layer of data between Customer and Customer / Item. Unlike Customer and Customer / Item which are required, Product Group is optional.

Each Product Group is unique to a customer and is associated with that customer's ID. Product Groups are made up of items similar in characteristics. For example, a product group of Electronic Equipment would consist of TV's and stereos and a product group of Technical Literature would consist of brochures and books.

The Product Group maintenance screens are accessed from Setup / Customer / Product Group Maintenance menu. When an item is added, it will inherit data defaults from the Product Group the item is associated with. This creates a layer of data between Customer and Item. In the same way the Item can inherit its' defaults from Customer, the system now looks to Product Group before looking to Customer. If a Product Group is not defined for an item, the system will default to the Customer values where the default value is indicated.

An entry needs to be added to the ProductGroup validation table to aid in some lookup and reporting functions.

Descriptions of specific field definitions can be found in the Concepts Manual under Customer Setup as they are the same as the Customer.

Adding and Maintaining Items

Each item/product is unique to a customer and is associated with a customer ID. Each item must have a unique item identifier. Once an item is added, it cannot be deleted except through a purge.

Descriptions of specific field definitions can be found in the Concepts Manual under Item Setup.

Customer, rates and unit of measure must be set up first before adding an item.

Descriptions of specific field definitions can be found in the Concepts Manual under Item Setup.

Suggested Order of Setup for New Customers and Items

1. Add Customer
2. Add billing rate group for customer (Add the rate group even if there are no rates)
3. Set the default customer rate group on the Setup/Customer/Billing/Rates tab.
4. Add product groups (optional).
5. Add any new units of measure and units of storage needed for items.
6. Add items.