# Fresa Technologies

## Neutral IT Solution Provider

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# GUIDELINES FOR
# CUSTOMER CODE CREATION

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Prepared By : **FRESA TECHNOLOGIES**

*Proprietary & Confidential*

# FRESA TECHNOLOGIES

## About Fresa Technologies

Fresa Technologies Pvt Ltd is an independent, neutral and professional software company that provides IT and IT enabled services with focus on providing solutions only to Freight forwarding and shipping industries. Fresa Technologies also focus on developing cost effective and efficient Freight Forwarding Software Applications with a user friendly interface and back office solutions. We also focuses on infrastructure and hardware support such as developing & maintaining websites and Mail Services. Our team comprises of highly skilled individuals, who are experienced architects in designing & developing Freight forwarding & logistics software for over 15 years. We are domain experts and specialize in providing customized, user friendly and cost effective solutions. We focus on enhancing user experience and satisfaction for a sustainable relationship.

# GUIDELINES FOR CUSTOMER CODE CREATION

1. The Company name must end with business entity type i.e. Pvt. Ltd, LLC etc. This business entity types varies based on countries.

2. Modifications in the Customer details can be done using the Customer Master.

3. Full style of address is mandatory for the Customer Code creation. Please check with the user to provide complete address before creation.

4. Check whether the Company Name and Address details are related to the same country. Sometimes, the user might provide the Company Name related to one country and Address related to another country, which must be avoided.

5. In Customer Name tab, the Company Name must not be along with c/o. It must be provided separately in the Address details tab.

6. Dots should be avoided and must be removed, if provided by the user.

7. To create a Customer with multiple branches, the unique company name must be entered followed by the branch details. For ex: UTL Logistics Pvt ltd. (Chennai), UTL Logistics Pvt ltd. (Mumbai).

8. City Name is must to approve the Customer. In case, if the city name is not given, request the user to check and confirm.

9. Country Validation can be done based on the PO Box. In case, of Germany we can validate it by using the city name.

10. If the Customer name is in full format (not in short form like Pvt LTD) we must not use any special characters like (. , : ;)

11. If the Customer name is provided as an individual name, then prefix Mr./Mrs./Miss/Dr is not allowed, it can be suffixed.

12. In case of Customer name is a company name, then prefix M/S is not allowed.

13. If the Customer name is given in an abbreviated form or in a short form, we must be careful while approving. For ex. First case – Eon Logistics Corporation Limited. Second case – ELCL. In this case, if both are same with the same address then we should not approve for the same Customer, twice.

14. In Phone Number field, minimum of 7 digits must be provided. This may vary from Country to Country.

15. If the Customer name ends with Co Ltd, it must be end in an orderly manner, such as Co. Ltd.

16. Sometimes the user will enter the city name as three-digit code which is not allowed. Ex: "Pvt. Ltd. CCU", it must be entered as "Pvt. Ltd. (Kolkata)"

17. In the Address tab, Company Name should not be entered.

18. While validating the Customer we must filter it to the maximum level by trying it in various ways. Check with the first name of the Customer. Next with the second name of the Customer. Then with the address of the Customer. In the case of a Customer name like V.S.A. Trading, we must check as explained below: -

    - *Step 1*: V%S%A% Trading
    - *Step 2*: V%S%A% along with country
    - *Step 3*: %Trading%

19. While validating we must prioritize the work. For Instance: Preference must be given to certain Country and Air Freight based on the time difference and urgency.

20. The business entity types vary based on countries such as,

    - **UAE** - LLC.
    - **Australia**, **New-Zealand** – Pty.
    - **Malaysia** – Sdb. Bhd.
    - **USA**, **Philippines** – INC.
    - **Singapore** – PTE. LTD.

    PVT. LTD. In
    - **India**
    - **Bangladesh**
    - **China**
    - **Pakistan**
    - **Sri-Lanka**

21. If the User comes with the request with the spelling mistake, please ask the User to correct and then create the code.