

Zone Groups

The purpose of Zone Groups view is to manage company's partners' locations (e.g. vendors, customer, and employees) into zones. By managing partners's delivery locations into certain zones or districts, it allows users to quickly sort their order to cash transactions documents according to the defined areas and take actions on these more efficiently, i.e. manage processing time / delivery management.

Below actions are available under **"Zone Groups"**:

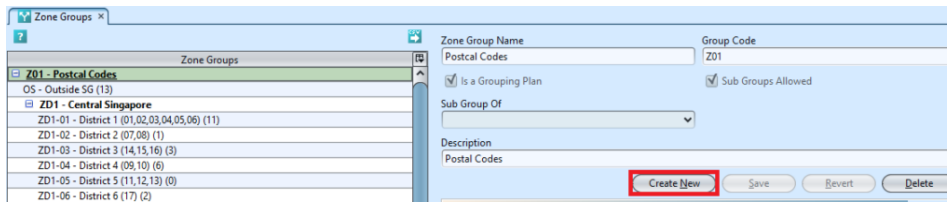


Create new group; update, delete, view and search for details.

Field Name	Description	Mandatory Information
Zone Group Name	Name of the zone group	Y
Group Code	Custom code for the group	Y
Is a grouping plan	Tick the checkbox if it is a grouping plan	N
Subs groups allowed	Tick the checkbox if it allows subs group	N
Sub Group of	Select the main/parent zone group	N
Description	Description	N

Create New Group

1. Click **“Create New”** button at the right side of screen

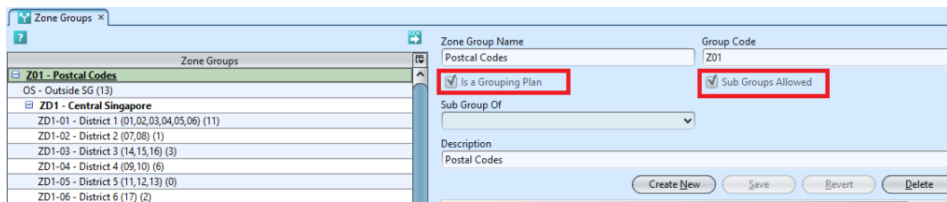


The screenshot shows the 'Zone Groups' form. On the left is a tree view of existing groups. On the right are input fields for 'Zone Group Name', 'Group Code', 'Postal Codes', 'Is a Grouping Plan', 'Sub Groups Allowed', 'Sub Group Of', and 'Description'. The 'Create New' button at the bottom right is highlighted with a red box.

2. Fill up zone group's information

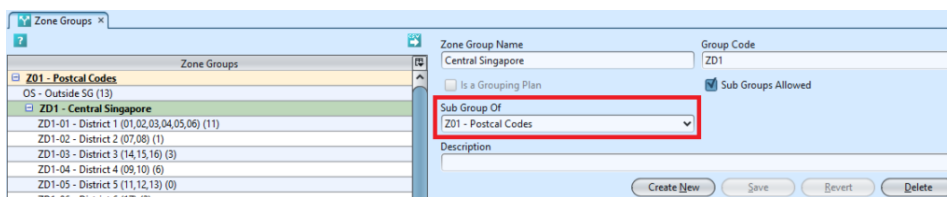
3. Tick on **“Is a Grouping Plan”** box if it is a master group plan. The **“Sub Groups Allowed”** box will be automatically ticked to allow creation of sub groups under the group

4. Tick on **“Sub Groups Allowed”** box to allow creation of sub groups under the group



The screenshot shows the 'Zone Groups' form. The 'Is a Grouping Plan' and 'Sub Groups Allowed' checkboxes are both checked and highlighted with red boxes.

5. Choose a (parent) group from **“Sub Group Of”** drop-down list to assign the group under the selected (parent) group



The screenshot shows the 'Zone Groups' form. The 'Sub Group Of' dropdown menu is open, showing 'ZD1 - Postal Codes' as the selected option, which is highlighted with a red box.

6. Click **“Save”** button at the bottom of screen to save

Assigned Zone Groups

1. Click the **“Unassigned Partners Locations”** at the

Move To Zone Group

Move To Zone Group
i Assign selected partners to another Zone Group.

Please choose a Zone Group to which selected partners will be assigned to.

Zone Group: ZD1-02 - District 2 (07,08)

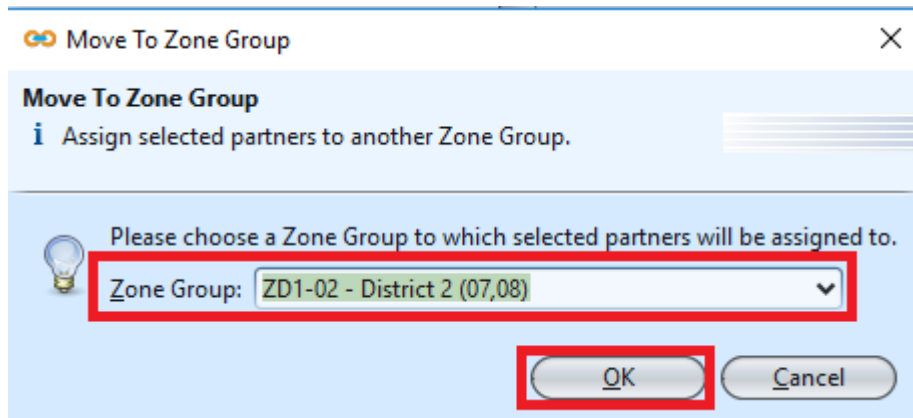
OK Cancel

Update Group Details

1. Click on a group to be updated, it will bring up the selected group details on the right side of the screen
2. Right click on assigned partner in **"Assigned Partners Locations"** table at the bottom right of screen, and select **"Move to Zone Group"** to reassign it to another group. It will pop up a window with list of available zone groups to choose from

Assigned Partner Locations : (15)			
Partner # ▲	Partner Name	Location Name	Postal Code
4110.011/CA001	Cash S	HQ	001234
4110.011/WA001	Watson	Consignment - Raffles Place (S102)	000100
4110.011/WA001	Watsons - HQ (Consignment)	Old Tower (Do not Use)	123
4110.011/WA001	Watsons - HQ (Consignment)	Orchard Tower (no store)	0000
4110.011/WA011	Watsons - HQ - Proper	Old Tower (Do not Use)	123
6004/DBS	DBS Financing	-	--
6004/HP-OL001	H.P. Creditor - Orix Leasing	.	.
6100.01/SF002	Star Freight (SGD)	SG	-
EM01	Christina	Singapore	XXXXX
EM010	Doris Lau	SG	40000
EM02	Chris Wirianto	Singapore	xxxxxxx
EM03	Jessica	Singapore	xxxxxx
EM04	Noe Saglio	.	xxxxxx
EM13	Mandy Starr	test	test
EP07	Jessica	123 Orchard Road	904812

Search:
1 / 15



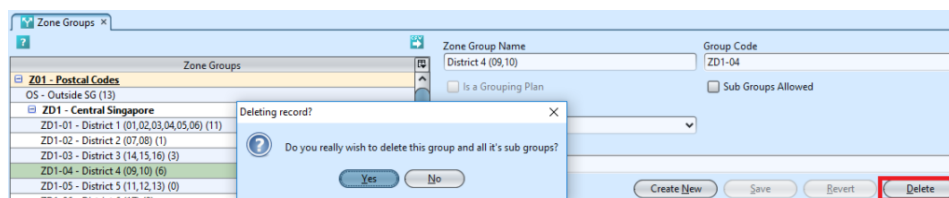
3. Click **“Save”** button at the bottom of the screen when done with the updates

Delete Group

1. Click on a group to be deleted, it will bring up the selected group on the right side of the screen

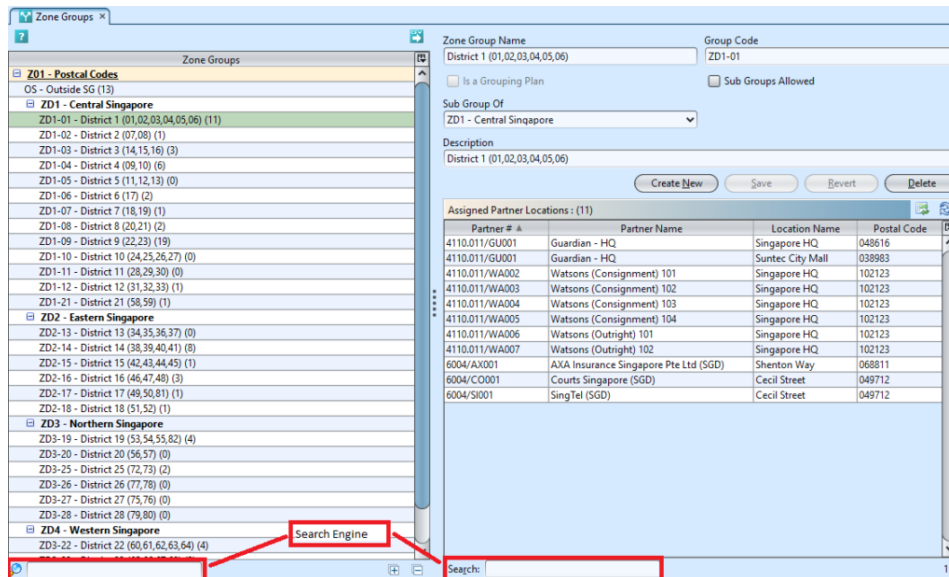
2. Click on **“Delete”** button at the right side of screen

3. Click on **“Yes”** button on the pop-up window to confirm group deletion




View and Search for Group Details

1. Enter search parameter to filter the result, i.e. type in the group name in the search textfield box at the bottom of the screen.



2. Click on a group to view, it will bring up the selected group details on the right side of the screen

3. Click  button on top of screen to export the zone groups as CSV file