

## Customer and Delivery Location Selection Status

### Overview

This document describes how you can hide customer and delivery location selection from the shipment entry page, i.e. how to make the customer or delivery location available in the selection box on the entry page.

In some cases, you would like to remove some customers or delivery locations from the selection box because they are no longer in use or invalid. Since we need to maintain data integrity, you need to keep them in the database. Therefore, you can change the customer / delivery location status in order to make them appear in the selection list or not.

### A/ Customer

In customer database (menu-> operation master tables -> account database), edit your desired customer profile, in customer details page, change the status.

Value	Result
ACTIVE	This customer appears in selection box
INACTIVE or LOCKED	This customer will not be available in the selection box

DEMO AMERICAN TRUCKING (ON SERVER2)  
Trucking Management System  
id: brian

Dashboard System Master Tables Operation Master

save cancel

Account ID: 57145  
Company Name: ABC Company Inc  
Address:   
State Zip/Postal: CA - CALIFORNIA  
City: EL MONTE  
Primary Email:   
Additional Information:   
Portal Control: WEB ACCESS ON, diego90, testing

Status: ACTIVE  
Contact Person:   
Country:   
Credit Limit/Term: 0 ONE MONTH  
Phone:   
Alert ! This customer is having over due amount \$724.00

Account Type:  AGENT,  CONSIGNEE,  OVERSEA PARTY,  VENDOR,  ALLWAYS,  DRIVER,  PROSPECT,  BROKER,  FORWARDER,  SHIPPER,  CARRIER,  MISC.,  THIRD PARTY,  COLOA,  NOTIF,  TRUCK

Noted that status column is shown in Account Database dashboard, see below.

Account Database

search string here... Q search

Account ID	Company Name	Type	Address	Phone	Contact Person	Status	Last Modified	Action
57145	ABC Company Inc	Vendor	.EL MONTE,US			YES	4/4/2022 1:09:35 PM by brian	
57149	AD & K Limited	Broker,Forwarder,Vendor	11 e watson center road,CARSON,US	..		NO	10/19/2023 10:08:27 AM by brian	
57148	America First Shipping	Trucking Company	400 e via mondo,RANCHO DOMINGUEZ,US			YES	7/16/2020 11:39:59 AM by brian	
57143	DEMO Company Ltd	Carrier	1111 w 17th st,LONG BEACH,US			YES	12/16/2019 6:30:55 PM by brian	
57176	FBA-11>HONGCHANG	Forwarder	11738 San Marino St.,RANCHO CUCAMONGA,US			YES	4/25/2023 2:20:47 PM by demo11	
57174	FBA-12>QIU	Forwarder	605 W Victoria St.,COMPTON,US			YES	4/25/2023 1:53:30 PM by demo11	
57190	FBA-120>BDZ	Forwarder	5011 Brooks St,MONTCLAIR,US			YES	4/25/2023 4:34:43 PM by demo11	
57169	FBA-122>SINO	Forwarder	851 E Watson Center Rd.,CARSON,US			YES	4/25/2023 1:45:56 PM by demo11	
57191	FBA-125>MZ FASHION	Forwarder	12345 RUSH ST.,EL MONTE,US	626-999-9985		YES	8/10/2023 12:55:30 PM by brian	
57171	FBA-133>ANJOEE	Forwarder	9640 KLINGERMANN ST.,EL MONTE,US			YES	4/25/2023 1:47:34 PM by demo11	
57184	FBA-143>STARCO	Forwarder	18350 SAN JOSE AVE.,CITY OF INDUSTRY,US			NO	10/19/2023 10:08:33 AM by brian	
57175	FBA-150>L&Z	Forwarder	10528 PIONEER BLVD,SANTA FE SPRING,US			YES	4/25/2023 1:55:11 PM by demo11	

## B/ Delivery Location

We can also setup delivery locations do be available in selection box or not.

Edit your desired delivery location in customer profile page (customer details page -> click "Delivery Location" tab-> click your desired location).

Account ID	<input type="text" value="57123"/>	Status	<input type="text" value="ACTIVE"/>
Company Name	<input type="text" value="K &amp; K Shipping inc"/>	Contact Person	<input type="text"/>
Address	<input type="text" value="15 farquhar ave"/>	Country	<input type="text" value="United States"/>
State/Zip/Postal	<input type="text" value="CA - CALIFORNIA"/> <input type="text" value="90720"/>	Credit Limit/Term	<input type="text" value="0"/> <input type="text" value="ONE MONTH"/>
City	<input type="text" value="ALHAMBRA"/> <small>** To add new city, please select "add new city..." at the bottom of the list.</small>	Phone	<input type="text"/>
Primary Email	<input type="text" value="diana.vidal@testing.com"/>		
Additional Information	<input type="text"/>		
Portal Control	<input type="text" value="WEB ACCESS ON"/> <input type="text" value="kkshipping"/> <input type="text" value="testing"/>		

Alert ! This customer is having over due amount \$10,026.63

Account Type	Delivery Locations	Email List	Notes	Quotation	Portal Logs				
<input type="button" value="new"/>	<input type="button" value="refresh"/>								
ID	USR Key	Delivery Location	Location Address	City	Open Hours	Delivery Hours	Rate	Active	Action
278	XXX	ADDRESS 21	DFJDLFAFJ	CALABASAS		03:00 to 08:00	\$0.00	NO	<input type="button" value="edit"/> <input type="button" value="delete"/>
273	X01	BRIAN TESTING	ROAD ONE STREET	CALABASAS		-----	\$0.00	NO	<input type="button" value="edit"/> <input type="button" value="delete"/>
149		DEMO Delivery Location - 149	1551 S LILAC AVE	BLOOMINGTON		-----	\$550.00	NO	<input type="button" value="edit"/> <input type="button" value="delete"/>
251		DEMO Delivery Location - 251	19914 S VIA BARON	RANCHO DOMINGUEZ	22:00 to 23:00	-----	\$300.00	YES	<input type="button" value="edit"/> <input type="button" value="delete"/>
252		DEMO Delivery Location - 252	22351 S WILMINGTON	WILMINGTON	9:00-17:00	-----	\$115.00	YES	<input type="button" value="edit"/> <input type="button" value="delete"/>
258		DEMO Delivery Location - 258 (new name)	11500 LOS NIETOS RD	SANTA FE SPRINGS		-----	\$535.00	YES	<input type="button" value="edit"/> <input type="button" value="delete"/>
262	X04	DEMO Delivery Location - 262	3350 1/2 WARNER AVE	IRVINE		-----	\$420.00	YES	<input type="button" value="edit"/> <input type="button" value="delete"/>
263		DEMO Delivery Location - 263	2850 E EL PRESIDIO ST	SHENZHEN	07:00-17:00	-----	\$300.00	NO	<input type="button" value="edit"/> <input type="button" value="delete"/>
265		DEMO Delivery Location - 265	280 trade st	SAN MARCOS		-----	\$750.00	YES	<input type="button" value="edit"/> <input type="button" value="delete"/>

In delivery location details page, change "Active Flag" value as follow:

Value	Result
YES	This delivery location appears in selection box
NO	This delivery location will not be available in the selection box

Contact Person

**Delivery Address**

DELIVERY ADDRESS FOR K & K Shipping inc

Delivery Location Name:

Address Line 1:

Address Line 2:

Address City:

State/ Zip:

Phone:

Contact Person:

Contact Email:

Delivery Hours:  :  TO  :

Open Hours:

Rate (\$):  (For invoice)

User Defined Key:  (For shipment batch import)

Active Flag:  \* Set to NO to hide this delivery address from the selection box \*