

- | Step   | Comments |
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| <ol style="list-style-type: none"> <li>1. From the Main form, select the Administration tab, then click Trading Partners.</li> <li>2. To add a new trading partner, click on the first empty row at the bottom of the data grid and enter the details of the trading partner as described in the table below:</li> </ol> |          |

Field	Description and options	Comments and shortcuts
Trading Partner (required)	The name of the trading partner that you send pallets to or receive pallets from	This must be unique.
Code (recommended)	Your own internal code for the trading partner. Used to identify the trading partner when importing movements from a warehouse or transport management system or a 'slave' location in 2ic Pallets	Automatically generated by default.
Type (select)	There are 4 types of trading partner: Location, 3rd Party, Supplier and Black Hole. As 3rd Party is the most commonly used option, this is selected by default	Location – Your site, depot or warehouse 3rd Party – Your customer with whom you are exchanging pallets Supplier – A pallet hirer or owner Black Hole – Lost or gained equipment
Email	The trading partner's email address	
Notify	If ticked, movement notifications will be sent to the specified email address	
Internal TP	Used to specify an optional internal location trading partner that is always to be associated with a 3rd Party trading partner that you are adding. Used as the other trading partner when importing a supplier bill	This is important for exchange customers as the cost of exchanges is allocated to the location specified.
Primary TP	Used when the trading partner you are adding is an Alias, or trading name, for a trading partner who already exists on the system	
Active	If ticked, this indicates that the trading partner you are adding is current	
Notes	Any additional information for this trading partner	

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| <ol style="list-style-type: none"> <li>3. Close this form, then from the Main form, select the Administration tab and click TP Accounts.</li> <li>4. Click on the Single Record View checkbox at the top of the screen. Specify details of the trading partner account as described in the table on the following page:</li> </ol> | <p>You can edit records directly in the multiple record view, but in this form it may be easier in Single Record View.</p> |
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## Procedure 6 Adding Trading Partners (continued)

Field	Description and options	Comments and shortcuts
3rd Party (select)	Select the trading partner you created previously from the drop down list	You can also start to type in the name of the trading partner until the correct name displays.
Supplier (select)	The supplier who the account is with.	A 3rd Party may have accounts with more than one supplier.
Account No.	An optional account number for the 3rd party	The same account number may be used for multiple trading partners, but you will receive a warning when you enter subsequent accounts.  'Exchange only' customers will not typically have an account number.
Redeem Exchanges	Tick this box if you would like to redeem exchanges	Sets the Redeem XN and Redeem XF fields when keying records in the Movements form.
Redeem Same	Tick this box if redeeming and you would like to redeem exchanges on against other exchanges on or exchanges off against other exchanges off	
Days Added	Tick this box if the 3rd Party uses CHEP Australia's EDO system	
Complete	Sets the 'Complete' field when keying movements	This box is ticked by default but you may turn it off in the following cases: <ul style="list-style-type: none"> <li>Pre-raised transfers where a retail distribution centre requires a printed docket to accompany each delivery, but they raise their own docket and use your docket number in the Reference field</li> <li>Exchanges where empty pallets may be collected and returned.</li> </ul>
Override Export Status	Tick this box if the trading partner is treated differently from the standard export setting for this supplier so that the new settings are defined by the Allow Transfer On and Allow Transfer Off boxes	For 'CPC' accounts, this determines settings in the Export Data form for the Export Ons and Export Offs fields. Overriding and not exporting either ons or offs will exclude the 3rd Party when using the 'Create CPC Batches' function. For other supplier accounts, overriding determines how the Export box is set when keying movements.
Allow Exchange/ Credit Limit	Specifies whether exchanges are allowed and gives you the option of nominating a maximum number of exchange pallets in possession of the other party	
Allow Transfer On/ TN Delay Type	Specifies whether transfers on to the trading partner are allowed and gives you the option of choosing a type/length of delay	
Allow Transfer Off/ TN Delay Type	Specifies whether transfers off the trading partner are allowed and gives you the option of choosing a type/length of delay	