Customer Preference

Customer Preference is used to record the unique ‘preferences’ of the Customer such as unique product identifications, customer specific clauses, customer specific charges or opening balances of products with the Customer.

How to Create a New Customer Preference?

In order to create a NEW Customer Preference the user must go to
CRM >> Customer Preference.
This opens up the Customer Preference Detail page.

Explanations of the various fields in the Customer Preference Detail page:

Customer:

User must ‘tag’ a Customer in the field labeled Customer. This is the Customer whose preferences are going to be recorded.
This is a mandatory field and the Customer Preference entry cannot be saved without entering this field.

Payment Terms

The default payment terms for a particular Customer can be tagged in the field labeled Payment Terms. In order to do this, the user must click on the small icon beside the field to open up a list of pre-configured Payment Terms. The user must select the appropriate Payment Term and click Ok to finalize the tagging.
An example of Payment Terms could be ’90 Days from the Date of Invoice’.
The list of pre-configured Payment Terms is created from the Configuration >>> Configuration Center.
For a more detailed guide on how to create the list of Payment Terms please refer to the related help.

Delivery Terms

The default delivery terms for a particular Customer can be tagged in the field labeled Delivery Terms. In order to do this, the user must click on the small icon beside the field to open up a list of pre-configured Delivery Terms. The user must select the appropriate Delivery Term and click Ok to finalize the tagging.
An example of Delivery Terms could be ’Ex - Works’.
The list of pre-configured Delivery Terms is created from the Configuration >>> Configuration Center.
For a more detailed guide on how to create the list of Delivery Terms please refer to the related help.

Inspection Clause

The customer when buying goods may have certain terms for inspecting the goods sent to them at their premises.
This information can be recorded in the field Inspection Clause. This is a free text field meaning whatever the user types in this field will be reflected in the documents as well.

Rejection Clause

The customer when buying goods may have certain terms for rejecting the materials.
This information can be recorded in the field Rejection Clause. This is a free text field meaning whatever the user types in this field will be reflected in the documents as well.

Product

Users have the option to link Customers to Products from the Customer Preferences. This enables the user to get a list of all the products, a particular Customer buys vis-a-vis they will also be able to get a list of all the Customers for a particular Product.
To do this the User must click on the ‘Add’ button on the Product tab in the child section. This will open up a window with all the available Products. User must select the required product and click ok to finalize the selection.
Once the product appears on the screen users can click on ‘Save’ to save the Customer Preference or they can specify more details mentioned below:

Alternate No.
The Alternate No. field is useful if the Customer identifies the Product through an alternate Product No. other than the one specified in the Product Master.

Alternate Description
The Alternate Description field is useful if the Customer identifies an alternate Product Description other than the one which is specified in the Product Master.

Lead Time (Days)
This field can be used to capture the default lead required to cater to this Customer.

Allocated Quantity.
This field is useful when the user wants to limit the quantity of the Packaging product issued to the Customer.
For an example, during sales Crates are issued to the Customer along with goods sold which are supposed to be returned later on by the Customer. If the user puts 100 units as the limit for Packaging Crates for this particular Customer, the system will not allow more than 100 units of Crates to be issued at any point of time. Only when the Customer has returned some of the Crates back through ‘Return Packaging’, will they be able to take more Crates.

Package Open Bal.
This field lets the users specify an opening balance of packaging products that is present with the Customer. This works parallel with the Allocated Quantity field therefore the Opening Balance can never exceed the Allocated Quantity.

Open Bal. Date
Users can select the Opening Balance date for the opening balance quantity they have specified in the previous field.