

## Customer

On the *Customer* screen, you can enter information about your customers. A customer's address and contact information, appropriate tax rates, credit limit, territory, FOB information, and customer class can be established via this screen. The customer class determines the currency and various accounts of a customer.

**Go To: Sales → Sales Master Data → Customer.**

A customer can be put on hold by setting his status to *Hold* on this screen. This means:

- No new sales orders or quotations can be created for that customer.
- No shipments can be processed for that customer.



Customer information cannot be deleted if it is used in the sales contract, price matrix, or sales order. Attempting such an action would cause the following error message to be displayed: 'Cannot delete this key. Reference Exists.'



**Prerequisite:** Most other Sales Master Data should be defined first.

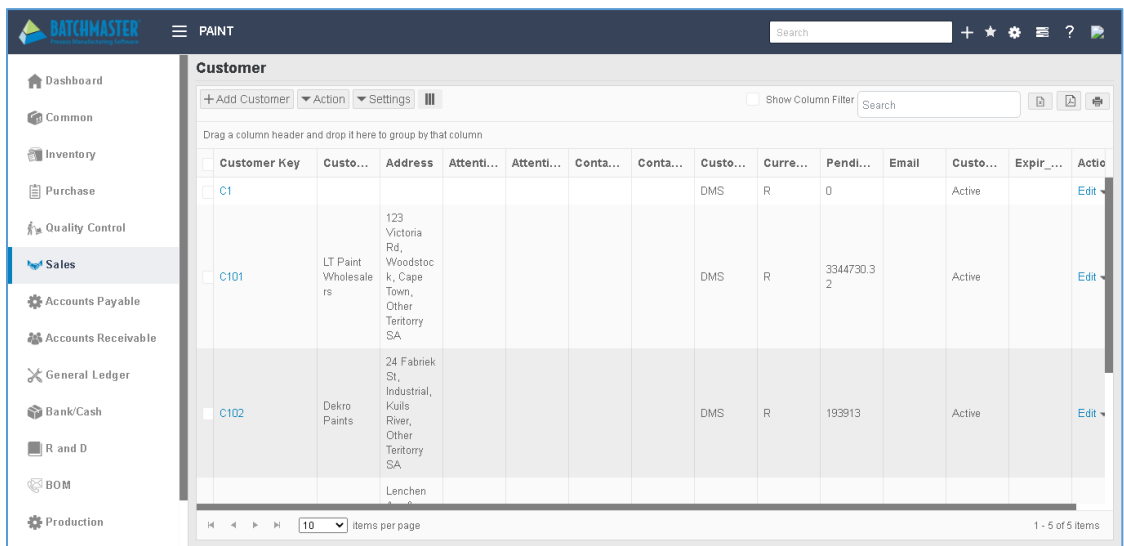
## Customer – Dashboard

You can manage and create customers from this dashboard. By default, the system displays all the existing customers maintained for your business/company. You can click on any of the customer records to view its details.

Customer Key	Customer...	Attentio...	Contact ...	Contact ...	Customer...	Currenc...	Pending ...	Email	Customer...	Expir_Date	Action
C1					DMS	R	0		Active		Edit
C101	LT Paint Wholesalers				DMS	R	3344730.32		Active		Edit
C102	Dekro Paints				DMS	R	193913		Active		Edit
C103	WARRIOR PAINTS AND VERWE				INRFR	INR	704399.59		Active	10/05/19	Edit
C104	ILEX RIORDAN & CO				DMS	R	0		Active	10/05/19	Edit

The *Customer* dashboard contains many elements that occupy 100% of the browser window. Resizing the window would resize the elements to fit. The elements can be rearranged, i.e., docked, resized, grouped, and stacked. The header and the side panel can't be rearranged.

After you select all the columns of the customer dashboard, the middle grid displays the selected columns.



The screenshot shows the BatchMaster Customer dashboard. On the left is a sidebar with navigation links: Dashboard, Common, Inventory, Purchase, Quality Control, Sales (highlighted), Accounts Payable, Accounts Receivable, General Ledger, Bank/Cash, R and D, BOM, and Production. The main area is titled 'Customer' and contains a table of customer records. The table has columns: Customer Key, Custo..., Address, Attenti..., Attenti..., Conta..., Conta..., Custo..., Curre..., Pendi..., Email, Custo..., Expir..., and Action. There are three visible rows of data. The first row is for customer C1. The second row is for customer C101, with address 'LT Paint Wholesale rs' and phone number '3344730.3 2'. The third row is for customer C102, with address '24 Fabriek St, Industrial, Kuils River, Other Territory SA' and phone number '193913'. Each row has an 'Edit' button in the Action column. At the bottom of the table, there is a pagination bar showing '10' items per page and '1 - 5 of 5 items'.

Customer Key	Custo...	Address	Attenti...	Attenti...	Conta...	Conta...	Custo...	Curre...	Pendi...	Email	Custo...	Expir...	Action
C1		123 Victoria Rd, Woodstock, Cape Town, Other Territory SA					DMS	R	0		Active		Edit
C101	LT Paint Wholesale rs						DMS	R	3344730.3 2		Active		Edit
C102	Dekro Paints	24 Fabriek St, Industrial, Kuils River, Other Territory SA					DMS	R	193913		Active		Edit

The *Customer* dashboard provides a clear vision of the created customers in a read-only mode. You can view the customers as per the number of pages provided per page.

Using the Action button from the dashboard you can make a customer on Hold or Active.

## Customer Screen – Add Mode

To add a new Customer to your BatchMaster database, click on the *Add Customer* button. The system displays the *Customer Master* form where you can enter the customer-related details on various tabs.

**Customer Master**

Customer Information | Transaction Defaults | Process Information

Customer Key: [Field] Status: Active

Customer Name: LT Paint Wholesalers

Address 1: 123 Victoria Rd, City: Cape Town,  
 Address 2: Woodstock, State: Other Territory  
 Address 3: [Field] Zip Code: [Field]

Country: SA Country Name: South Africa  
 Language: EN Language Description: ENGLISH

Attention: [Field] Contact Details: [Button]  
 Attention Ph. No.: [Field] Contact Person: [Field]

[Add] [Copy] [Save] [Delete] [Search] [Close]

## Customer Information Tab

Use this tab to maintain customer-related contact details.

**Customer Master**

Customer Information | Transaction Defaults | Process Information

Customer Key: [Field] Status: Active

Customer Name: LT Paint Wholesalers

Address 1: 123 Victoria Rd, City: Cape Town,  
 Address 2: Woodstock, State: Other Territory  
 Address 3: [Field] Zip Code: [Field]

Country: SA Country Name: South Africa  
 Language: EN Language Description: ENGLISH

Attention: [Field] Contact Details: [Button]  
 Attention Ph. No.: [Field] Contact Person: [Field]

[Add] [Copy] [Save] [Delete] [Search] [Close]

**Customer Key:** Enter the unique identification code for a customer. This information may be used at various screens in BatchMaster. Even the selection criteria for generating reports recognize this ID. This field can hold a maximum of 15 alphanumeric characters. It is a mandatory field and shouldn't be duplicated. This field is non-editable in edit mode.

**Customer Name:** This is the name or description of the above-defined Customer key. This is an optional field. The length of this field is according to Finance Integration, which can hold a maximum of 50 alphanumeric characters.

**Customer Status:** Customers are assigned statuses to reflect the stage they have reached in their processing. The status can be set as one of:

- **Active:** A Customer having Active status is available for all purposes, whatsoever, in the BatchMaster Enterprise.
- **Hold:** When a customer is put on hold:
  - No new Sales Orders or Quotations can be created for that customer.
  - No shipments can be processed for that customer.

**Address 1:** This is Line-1 of the Customer's address. The length of this field is according to Finance Integration, which can hold a maximum of 50 alphanumeric characters.

**Address 2:** This is Line-2 of the Customer's address. The length of this field is according to Finance Integration, which can hold a maximum of 50 alphanumeric characters.

**Address 3:** This is Line-3 of the Customer's address. The length of this field is according to Finance Integration, which can hold a maximum of 50 alphanumeric characters.

**City:** This is the city of the Customer. The length of this field is according to Finance Integration, which can hold a maximum of 30 characters.

**State:** This is the state, province, or region of the customer. The length of this field is according to Finance Integration, which can hold a maximum of 30 characters.

**Zip:** This is the postal zip code of the Customer. The length of this field is according to Finance Integration, which can hold a maximum of 11 numeric characters.

**Country:** This is the Country of the Customer. Use this field to select a country using the *Country Lookup* next to the *Country* field.

**Country Name:** This is the name of the country to which the customer belongs.

**Language:** Use this field to select the language in which the customer communicates using the *Language Lookup* next to the *Language* field.

**Language Description:** This is the description associated with the language.

**Attention:** This is the name of the individual or department to whose attention invoices, statements, and correspondence may be addressed. The length of this field is according to the Finance Integration, which can hold a maximum of 50 alphanumeric characters.

**Attention Ph. No.:** This is the above-defined individual's phone number. The length of this field is according to the Finance Integration, which can hold a maximum of 15 numeric characters.

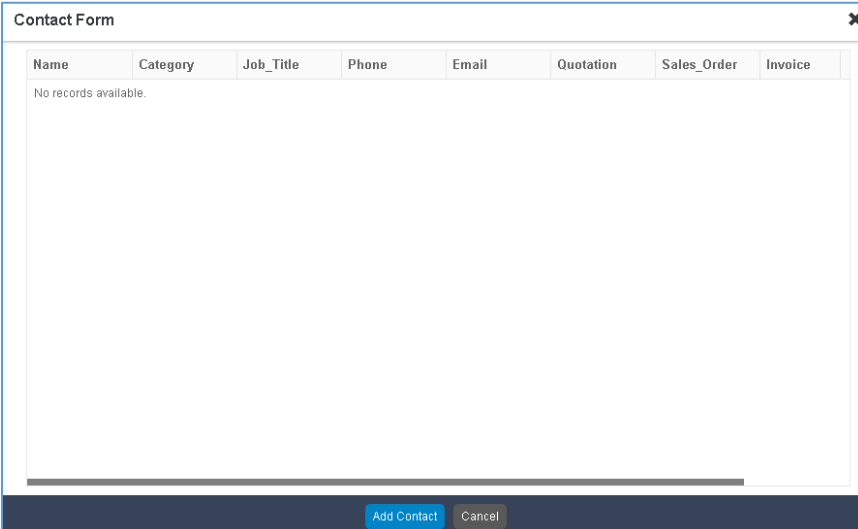
**Contact Person:** This field refers to the name of the contact person. The length of this field is according to the Finance Integration, which can hold a maximum of 50 alphanumeric characters.

**Contact Ph.No.:** This is the Phone No of the contact person. The length of this field is according to the Finance Integration, which can hold a maximum of 15 numeric characters.

**Telex No.:** This is the telex number of the customer. The length of this field is according to the Finance Integration, which can hold a maximum of 15 numeric characters.

**URL:** The URL of the customer's company website can be maintained here. The maximum length of this field is 100 characters.

**Contact Details Button:** Clicking this button displays *Contact Form* screen where you can view the existing customer contact details. You can add a new customer's contact details by clicking on the *Add Contact* button available on the *Contact Form* screen. Once saved the customer contact details, you can click on the *Contact Details* button to view the customer's contact details.



The screenshot shows a window titled "Contact Form" with a close button (X) in the top right corner. Inside the window is a table with the following columns: Name, Category, Job\_Title, Phone, Email, Quotation, Sales\_Order, and Invoice. The table is currently empty, and the text "No records available." is displayed below the table header. At the bottom of the window, there are two buttons: "Add Contact" (in blue) and "Cancel" (in grey).

**Contact Form Screen Fields:**

**Name:** This field refers to the name of the contact person. This key is the unique key to identify the contact person.

**Category:** This field refers the category, which the contact person belongs to as Primary secondary etc.

**Job\_Title:** This field is used to refer to job designation of the Contact Person.

**Phone:** This is the Phone No of the Contact Person.

**Email:** This is the Electronic Mail Identification of the Contact Person.

**Quotation:** Displays the email ID used for quotation.

**Sales\_Order:** Displays the email ID used for Sales Order.

**Invoice:** Displays the email ID used for Invoice.

**Cancel:** Clicking this button will exit the contact details window.

**Add Contact:** Clicking this button displays *View Contact* window from where you can maintain the complete details required to make contact with the customer. Distinct fields displaying on *View Contact* window are:

The 'View Contact' window is a form for managing contact details. It includes the following sections and fields:

- Header:** 'View Contact' title with a close button (X).
- Basic Information:**
  - Full Name (text input)
  - Job Title (text input)
  - Email (text input)
  - Cont. Category (dropdown menu, currently 'None')
  - Colleague (text input)
  - Quotation (checkbox), Sales Order (checkbox), Invoice (checkbox)
- Phone Numbers:**
  - Office (dropdown menu, currently 'Office'), (text input)
  - Mobile (dropdown menu, currently 'Mobile'), (text input)
  - Home (dropdown menu, currently 'Home'), (text input)
  - Other (dropdown menu, currently 'Other'), (text input)
- Physical Address:**
  - Address # 1 (text input), Address # 2 (text input)
  - City (text input), State (text input)
  - Zip (text input), Code (text input, currently 'Afghanistan')
  - Region (dropdown menu), Country (dropdown menu)
- Anniversary and Birthday:**
  - Anniversary (text input, placeholder 'month/day/year', calendar icon)
  - Birthday (text input, placeholder 'month/day/year', calendar icon)
- Opt-out Options:**
  - Postal Opt-out (checkbox)
  - Email Opt-out (checkbox)
- Footer:** 'Save and New' (button), 'Save and Close' (button), 'Cancel' (button)

### View Contact Screen Fields:

Full Name	<input type="text" value="MrRichard"/>	Cont. Category	<input type="text" value="Key"/>
Job Title	<input type="text" value="Manager"/>	Colleague	<input type="text"/>
Email	<input type="text" value="de@il.com"/>	<input type="checkbox"/> Quotation <input type="checkbox"/> Sales Order <input checked="" type="checkbox"/> Invoice	

**Full Name:** Use this field to specify the full name of the customer.

**Job Title:** Use this field to specify the job title of the customer.

**Email:** Use this field to specify the customer's contact email.

**Cont.Category:** Select one of the option from the following options:

- **None**
- **Key: Key Person**
- **Primary**
- **Secondary**
- **Consultant**
- **X-Employee**
- **Delete**

**Colleague:** Use this field to specify the customer's colleague name.

**Quotation Checkbox:** Mark this checkbox if the customer's contact is related to the quotation.

**Sales Order Checkbox:** Mark this checkbox if the customer's contact is related to the sales.

**Invoice Checkbox:** Mark this checkbox if the customer's contact is related to the invoice.

**Phone Numbers:** You can change the contact category by clicking on the arrow adjacent to all the field labels under the *Phone Number* section. Select one of the option from the following:

- **Primary:** Select this option to specify the customer's primary contact.
- **Office 2:** Select this option to specify the customer's primary contact.

- **Direct:** Select this option to specify the customer's direct contact number.
- **Mobile:** Select this option to specify the customer's contact mobile number.
- **Mobile2:** Select this option to specify the customer's alternative mobile number.
- **Home:** Select this option to specify the customer's contact home number.
- **Home2:** Select this option to specify the customer's alternative home number.
- **Fax:** Select this option to specify the customer's contact fax number.
- **Assistant:** Select this option to specify the customer's assistant contact number.
- **Other:** Select this option to specify other customer's contact.

A dropdown menu with a blue header 'Office' and a downward arrow. The menu is open, showing a list of options: Primary, Office, Office 2, Direct, Mobile, Mobile 2, Home, Home 2, Fax, Assistant, and Other. The 'Office' option is highlighted in blue.

A form titled 'Phone Numbers' with four rows. Each row has a dropdown menu on the left and a text input field on the right. The rows are: Office (07312360709), Mobile (9826859874), Home (07312465126), and Other (07316259867). All dropdown menus are set to their respective labels.

**Office:** This is the office contact number of the customer.

**Mobile:** This is the mobile contact number of the customer.

**Home:** This is the home contact number of the customer.

**Other:** This is the office contact number of the customer.

### Physical Address Section:

A form titled 'Physical Address' with two columns. The left column contains: Address #1 (2451), City (Indore), Zip (652450), Region (Africa), Anniversary (7/1/2020), and Postal Opt-out (checked). The right column contains: Address #2 (Sector D West Wing), State (MP), Code (91), Country (India), Birthday (1/1/1980), and Email Opt-out (checked). All text inputs are filled with sample data, and the Region and Country dropdowns are set to 'Africa' and 'India' respectively.

**Address #1:** The street address of the customer is entered here.



**Address#2:** The street address of the customer is entered here.

**City:** This field specifies the city in which the customer is located.

**State:** This field specifies the state in which the customer is located.

**Zip:** This field specifies the zip code of the customer location.

**Code:** This field specifies the country code in which the customer is located. This is a read-only field.

**Region:** Select the applicable region for the customer's address.

**Country:** This field specifies the country in which the customer is located.

**Anniversary:** Use this field to specify the anniversary date of the customer.

**Birthday:** Use this field to specify the birthday date of the customer.

**Postal Opt-out Checkbox:** Mark this checkbox if the customer opt the postal mode of communication.

**Email Opt-out Checkbox:** Mark this checkbox if the customer opt the email mode of communication.

**Save and New Button:** Click this button to save the contact details and to reopen the screen in insert mode to enter new data.

**Save and Close Button:** Click this button to close the screen and save the contact details.

**Cancel Button:** Click this button to close the screen without saving the contact details.

**Contact Person:** This field refers to the name of the contact person. This key is the unique key to identify the contact person. The length of this field is according to the Finance Integration, which can hold a maximum of 50 alphanumeric characters.

**Fax Number:** This is the fax number of the customer. The length of this field is according to the Finance Integration, which can hold a maximum of 15 characters.

**Cont. Email:** The E-mail address for the exchange of emails with the customer can be maintained here. Data in this field can be obtained from the Contact details window. Mentioning the email id is

mandatory in case you want to receive emails regarding the created Sales Order / Invoice. The maximum length of this field is 100 characters.

For this, you need to maintain the data on the *Email Layout Master* Screen and Mail Settings under the *User Settings* screen.

## Transaction Defaults Tab

Use this tab to maintain accounts related to transactions.

Customer Information		Transaction Defaults		Process Information	
Customer Class Key	DMS	Class Description	Domestic		
Terms Key	20D	Terms Description	20 DAYS		
Tax Rate Key	AR15%	Tax Rate Description	AR 15%		
FOB Key	01	FOB Description	Jaipur		
Ship Via Key	001	Ship Via Description	ROADWAYS		
Territory Key	NORTH	Territory Description	NORTH		
Sales Person Key	SP03	Sales Person Description	SALESPERSON 03		
Comment Key	HWC	Comments Description	Handle with care		
Customer Tax ID		Corporate ID.No.			
Customer Country		Group Description			
Customer Group Key					

Buttons: Add, Copy, Save, Delete, Search, Close

**Customer Class Key:** This is the Customer classification key pertaining to the customer. This customer class key determines the currency and various accounts applicable to the customer. It is a mandatory field. Specifying the Customer Class Key here will automatically default the same on Quotation/ Sales Requisition or Sales order created for this customer.

**Class Description:** This field displays the description as associated with the Customer Class Key. This is a read-only field.

**Terms Key:** This is the Terms Key denoting the payment terms provided to the customer. On specifying the Terms key here, it will automatically default the same on Quotation/ Sales Requisition or Sales order created for this customer.

**Terms Description:** This field displays the description associated with the Terms Key. This is a read-only field.

**Tax Rate Key:** Based on the customer location, taxes applicable vary. Thus this field is used to denote the Tax Rate Key applicable to the customer. Specifying the tax rate key here will automatically default the same on Quotation/ Sales Requisition or Sales order created for this customer.

**Tax Rate Description:** This field displays the description associated with the Terms Key. This is a read-only field.

**FOB Key:** This is the Free On Board Key applicable to the Customer. It indicates the point at which ownership of goods passes to the buyer. Specifying the FOB key here will automatically default the same on Quotation/ Sales Requisition or Sales order created for this customer.

**FOB Description:** This field displays the description associated with the FOB Key. This is a read-only field.

**Ship Via Key:** This field specifies the mode of transportation going to be used for delivering the goods and is applicable to the selected customer. Specifying the Ship Via key here will automatically default the same on Quotation/ Sales Requisition or Sales order created for this customer.

**Ship Via Description:** This field displays the description associated with the Ship Via Key Key. This is a read-only field.

**Territory Key:** This is the Territory Key denoting a specific region or group of customers for which a salesperson has direct responsibility. Specifying the Territory Key here will automatically default the same on Quotation/ Sales Requisition or Sales order created for this customer.

**Territory Description:** This field displays the description associated with the Territory Key. This is a read-only field.

**Sales Person Key:** It shows the Salesperson Key that uniquely identifies the person employed to represent the business activities. Specifying the Salesperson Key here will automatically default the same on Quotation/Sales Requisition or Sales order created for this prospect customer.

**Sales Person Description:** This field displays the description associated with the Sales Person Key. This is a read-only field.

**Comment Key:** This is the Comment Key denoting a particular remark applicable to the customer during sales. Specifying the Comment Key here will automatically default the same on Quotation/ Sales Requisition or Sales order created for this prospective customer.

**Comment Description:** This field displays the description associated with the Comment Key. This is a read-only field.

**Customer Tax ID:** This is the Tax identification key applicable to the customer during sales. The length of this field is according to the Finance Integration, which can hold a maximum of 30 alphanumeric characters.

**Corporate ID. No.:** Specify the Company's CIN No or code. It is a 21 digit alphanumeric code issued to every company incorporated in India. It is unique and used to track the company on various levels. The corporate identity number has its own meaning, which is translatable and helps you to find the basic information of the company. The maximum length of this field is 30 alphanumeric characters.

**Customer Country:** This is the country applicable to the customer. The length of this field is according to the Finance Integration, which can hold a maximum of 2 characters.

**Customer Group Key:** This is the Customer Group Key for this customer.

**Group Description:** This field displays the description associated with the Customer Group Key. This is a read-only field.

**Location Key:** This is the default location for the customer. When a Customer is inserted on a sales order, this key defaults on Tab-2 of the sales order.

**Location Description:** This field displays the description associated with the Location Key. This is a read-only field.

**Freight Key:** This field specifies the freight key that classifies frequently used freights for the customer. Specified freight key defaults on the sales orders created for the particular customer.

**Price List Key:** Through this key, the user can attach a price list containing the different or single items to be sold. Attaching a Price List and associating the same customer on the *Sales Order Entry* screen would fetch the Item's List price from the Price List if, the same item is taken on the Line items tab and the preference is given to the *Customer/Price List* option at the *Price Search Order* screen.

**Price List Description:** This field displays the description associated with the Price List Key. This is a read-only field.

**Contract Location:** This field is used to specify the customer location where finished goods produced in contract manufacturing need to be posted. When a manufacturer posts inventory from the Maintain Shipment screen, the inventory is posted to this location.

**Location Description:** This field displays the description associated with the Contact Location. This is a read-only field.

## Process Information Tab

Use this tab to maintain customer's credit card details and other relevant information.

The screenshot shows a software interface with three tabs: 'Customer Information', 'Transaction Defaults', and 'Process Information'. The 'Process Information' tab is active. It contains several input fields and checkboxes. On the left, there are fields for 'Resale Number' (P09), 'Credit Card Number' (6525451487456598), 'Credit Limit' (999,999,999,999.00), 'Pending Invoice' (3344730.32), 'Dues from Customer' (61124.326), 'Vendor Key' (V102), and 'Remit To Key' (R08). On the right, there are fields for 'Credit Card Type', 'Expiration Date' (MM/dd/yy), 'Currency' (R), 'Non Taxable' (checked), 'Vendor Name' (Protea Chemicals), and 'Company Name'. At the bottom, there are checkboxes for 'Required Freight' and 'Require Approval for Sales Requisition', a 'Freight Order Total Limit' field (0.00), and a 'Freight Order Total Limit' field (1,000,000,000,000.00). An 'Age Brackets' dropdown is also present. At the bottom of the form, there are buttons for 'Add', 'Copy', 'Save', 'Delete', 'Search', and 'Close'.

**Resale Number:** This is the resale number applicable to the customer or distributor who is free from paying state sales tax. The length of this field will be according to finance integration, and the maximum permissible length of this field is 20 alphanumeric characters.

**Credit Card Number:** This is the Credit Card Number used by the customer. In order to ensure PCI compliance, the entered field value is in an encrypted format so that no user can see the entered value. The length of this field will be according to finance integration, and the maximum permissible length of this field is 20 alphanumeric characters.

**Credit Card Type:** This is the Credit Card type being used by the customer for the payment process. This field is for information only. The length of this field is according to finance integration, and the maximum permissible length of this field is 5 characters.

**Expiration Date:** This is the Credit Card Expiration Date applicable to the customer. Use this field to enter the credit card expiration date in mm/dd/yyyy format or using the date picker next to the *Expiration Date* field.

**Credit Limit:** This is the maximum amount of credit that a company will extend to the customer. This is a numeric field having a maximum permissible length of 100+ numeric characters.

**Pending Invoice:** This is the sum of the SO totals from all those sales orders (for this customer) that have not been processed via the Transfer to Invoice screen. While performing Invoice reversal transaction, the field value gets increased. This is a read-only field.

**Currency:** This is a read-only field denoting the currency in which the customer deals. It defaults from the *Customer Class* screen.

**Dues From Customer:** In the case of a finance-interfaced BatchMaster Enterprise Company, this value is taken as the sum of the amounts associated with the various age brackets of this customer in the finance package. In the case of a BatchMaster Enterprise Company that is not finance-interfaced, this amount is zero. This is a read-only field.

**Non Taxable:** If this checkbox is checked, then the order associated with this customer does not contain any taxable amount.

**Vendor Key:** If the customer is also a vendor to the company, then this is the associated vendor key. Use this field to specify the vendor key using the *Vendor Lookup* provided next to the field.

**Vendor Name:** This is the name associated with the vendor key. This is a read-only field.


**Remit To Key:** This is the Remit To key associated with this customer specifying the address used to remit payments from the customer. Use this field to specify the Remit To key using the *Remit To Lookup* provided next to the field.

**Company Name:** This is the name of the company associated with the customer. This is a read-only field.

**Required Freight:** If this checkbox is checked, the system reminds the user to enter freight on a sales order when the order is saved with zero freight.

**Freight Order Total Limit:** The two text boxes corresponding to this field get enabled only when the required freight checkbox is checked. Users can maintain the lower and upper Freight Order limit here.

**Require Approval for Sales Requisition:** The checkbox corresponding to this field, if checked, then the sales requisition for this customer will be saved only after associating an approval group. Moreover, it can be transferred to a sales order after completion of the approval process.

**Age Brackets Section:** Click on the  arrow icon adjacent to the *Age Brackets* label to open the *Age Brackets* section.

Age Brackets ^		
Age Brackets	Description	Amount
0-30	0-30 Days	0.00
30-60	30-60 Days	0.00
60-90	60-90 Days	0.00
>90	90 Days and Above	-117201.58
	Total	-117201.58

**Age Brackets:** This value is fetched from the finance database.

**Description:** This value is fetched from the finance database.

**Amount:** This value is fetched from the finance database.

## ACCPAC Information Tab

This tab appears only if the BatchMaster Enterprise Company is interfaced with ACCPAC.

**Rate Type:** This is the Rate type associated with the Conversion Rate defined at ACCPAC. Rate Type must be entered here if this Customer uses a foreign currency. The lookup here displays the Rate Types maintained at ACCPAC. This is a mandatory field if the Customer uses a foreign currency.

**Billing Cycle:** This is the Billing cycle associated with the billing routine of this Customer. The lookup here displays the Billing Cycles maintained at ACCPAC. This is a mandatory field.

**Interest Profile:** This is the Interest Profile, associated with this Customer, which determines the chargeable interest rates and related factors for this customer. The user must ensure that the Interest Profile selected here includes a profile for the currency of this Customer. This is a mandatory field.

## Creating a Customer

1. Click on the *Add Customer* button to open a new blank record.

The screenshot shows the 'Customer Master' form with the following fields and values:

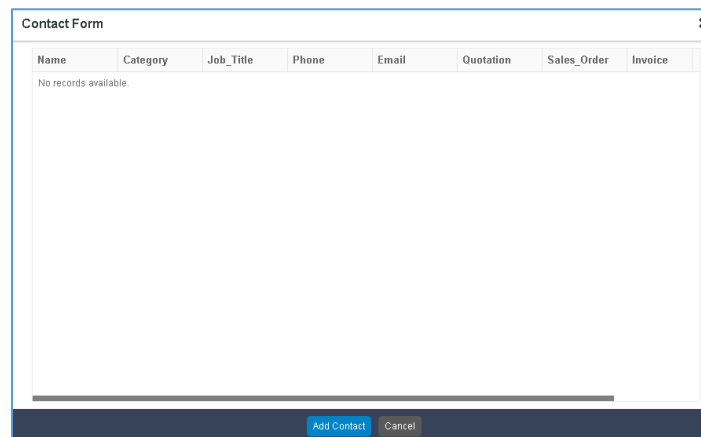
- Customer Key:** C001
- Customer Name:** Start Enterprises
- Status:** Active (dropdown menu)
- Address 1:** 63 West Wing
- Address 2:** MI Road
- Address 3:** CA
- City:** CA
- State:** Ohio
- Zip Code:** 9962585
- Country:** USA (lookup field)
- Country Name:** United State of America
- Language:** ENG (lookup field)
- Language Description:** English
- Attention:** Mr Kin
- Attention Ph. No.:** 6598754815
- Contact Person:** (empty field)

At the bottom of the form, there are buttons: Add, Copy, Save, Delete, Search, and Close.

2. Enter a unique identification key for the customer in the *Customer Key* field.
3. Enter the complete name of the customer in the *Customer Name* field.
4. Set a status for the customer using the dropdown next to the *Status* field. A customer with *Active* status is available for all purposes. When the status is *Hold*, it is not possible to create a quotation or sales order for the customer, nor can shipment orders be processed.
5. Enter the complete address details of the customer in the *Address Line 1*, *Address Line 2*, *Address Line 3*, *City*, *State*, *Zip Code* fields.
6. Specify the customer's country in the *Country* field using the lookup next to the field.
7. Specify the language in which the customer communicates in the *Language* field using the lookup next to the field.
8. In the *Attention* field, specify the name of an individual or department to whose attention invoices, statements, and correspondence may be addressed.
9. Use the *Attention Ph.No.* field to specify the contact number of the individual or department listed in the *Attention* field.



10. In the *Contact Person* field, enter the name of the person (i.e., the buyer or purchasing agent) who you will contact for delivery purposes.
11. Enter the contact person's phone number in the *Cont. Ph. Number* field.
12. Specify the fax and telex numbers of the contact person in the *Fax Number* and *Telex No.* fields, respectively.
13. Enter the email ID of the contact person in the *Cont. Email ID* field. Mentioning the email id is mandatory in case you want to receive emails regarding the created Sales Order / Invoice.  
  
For this, you need to maintain data on the Email Layout Master screen and *Mail Settings* under the *User Settings* screen.
14. Enter an applicable URL in the *URL* field.
15. Clicking *Contact Details* button displays the *Contact Form* screen where you can view the existing customer's contact details.



The screenshot shows a window titled "Contact Form" with a close button (X) in the top right corner. Inside the window, there is a table with the following columns: Name, Category, Job\_Title, Phone, Email, Quotation, Sales\_Order, and Invoice. The table is currently empty, and the text "No records available." is displayed below the column headers. At the bottom of the window, there are two buttons: "Add Contact" (highlighted in blue) and "Cancel" (in a grey box).

16. You can add a new customer's contact details by clicking on the *Add Contact* button available at bottom of the *Contact Form* screen.

**View Contact** [X]

Full Name [ ] Cont. Category [None v]  
 Job Title [ ] Colleague [ ]  
 Email [ ] ☐ Quotation ☐ Sales Order ☐ Invoice

Phone Numbers  
 Office [ ] Mobile [ ]  
 Home [ ] Other [ ]

Physical Address  
 Address # 1 [ ] Address # 2 [ ]  
 City [ ] State [ ]  
 Zip [ ] Code [Afghanistan]   
 Region [ ] Country [ ]

Anniversary [month/day/year] [ ] Birthday [month/day/year] [ ]  
 Postal Opt-out ☐ Email Opt-out ☐

[Save and New] [Save and Close] [Cancel]

17. Switch to the *Transaction Defaults* tab.

Customer Information [X] **Transaction Defaults** [X] Process Information [X]

<a href="#">Customer Class Key</a> *	DMS	Class Description	Domestic
<a href="#">Terms Key</a>	20D	Terms Description	20 DAYS
<a href="#">Tax Rate Key</a>	AR15%	Tax Rate Description	AR 15%
<a href="#">FOB Key</a>	01	FOB Description	Jaipur
<a href="#">Ship Via Key</a>	001	Ship Via Description	ROADWAYS
<a href="#">Territory Key</a>	NORTH	Territory Description	NORTH
<a href="#">Sales Person Key</a>	SP02	Sales Person Description	SALESPERSON 02
<a href="#">Comment Key</a>	HWC	Comments Description	Handle with care

Customer Tax ID [ ] Corporate ID.No. [ ]  
 Customer Country [ ]  
[Customer Group Key](#) [ ] Group Description [ ]

[Add] [Copy] [Save] [Delete] [Search] [Close]

18. Select the customer class key that determines the currency and various accounts applicable to the customer using the lookup next to the *Customer Class Key* field.

19. Choose the payment terms provided to the customer using the lookup next to the *Terms Key* field.

20. Enter the tax applicable for the customer in the *Tax Rate Key* field.


21. Select the FOB key applicable to the customer in the *FOB Key* field. This indicates the point at which ownership of goods passes to the buyer.

22. Specify the mode of transportation to be used to deliver goods to this customer in the *Ship Via Key* field.

23. Use the lookup next to the *Territory Key* field to enter the specific region or group of customers for which a salesperson is directly responsible.
24. Specify the person employed to represent your business activities in the *Salesperson Key* field.
25. Enter any note or remark applicable to this customer during sales in the *Comment Key* field.
26. Enter the tax identification key applicable to the customer during sales in the *Customer Tax ID* field.
27. Enter the Corporate Identity Number applicable to the Customer in the *Corporate ID.No.* field.
28. Specify the country applicable to the customer in the *Customer Country* field.
29. Choose the applicable customer group for the customer using the lookup next to the *Customer Group Key* field.
30. Enter the default location of the customer in the *Location Key* field.
31. Specify the frequently used freight method for the customer in the *Freight Key* field.
32. Attach any applicable price list comprising the single or distinct items to be sold to this customer using the *Price List Key*.
33. Specify the contract location using the *Contract Location* field.
34. Switch to the *Process Information* tab.

Customer Information		Transaction Defaults		Process Information	
Resale Number	RNumber3	Credit Card Type	VISA		
Credit Card Number	**** * 6731	Expiration Date	11/14/2020		
Credit Limit	0.00	Currency	INR		
Pending Invoice	1877.01	Non Taxable	<input checked="" type="checkbox"/>		
Dues from Customer	-117201.576	Vendor Name	Global Suppliers		
Vendor Key	2345	Company Name	ABCD		
Remit To Key	AAAA				
Required Freight	<input checked="" type="checkbox"/>	Freight Order Total Limit	1,212.00	234,234,243.00	
Require Approval for Sales Requisition	<input checked="" type="checkbox"/>				
Age Brackets ▼					

35. If the customer or distributor does not have to pay state sales tax, enter the applicable resale number in the *Resale Number* field.
36. Specify the credit card type being used by the customer for the payment process in the *Credit Card Type* field if it is permissible to record this in your jurisdiction.

37. Specify the credit card number used by the customer in the *Credit Card Number* field. The entered number will be in an encrypted format so as to ensure PCI compliance.
38. Enter the expiration date of the customer's credit card in the *Expiration Date* field.
39. Specify the maximum amount of credit that your company will extend to the customer in the *Credit Limit* field.
40. If orders associated with this customer do not contain any taxable amount, select the *Non-Taxable* checkbox.
41. If the customer is also a vendor of the company, associate the vendor using the lookup next to the *Vendor Key* field.
42. Specify the company used to remit customer payments in the *Remit To Key* field.
43. When you need the system to remind you to enter freight on a sales order when the order is saved with zero freight, select the *Required Freight* checkbox.
44. Enter the upper and lower limits of the freight order in the *Freight Order Total Limit* field. This field is enabled when you select the *Required Freight* checkbox.
45. Specify the upper and lower freight order limit in the *Freight Order Total Limit*. This field is enabled when you check the *Required Freight* checkbox.
46. Select the *Require Approval for Sales Requisition* checkbox if you need to implement the approval process for sales requisitions for this customer.
47. To view the age brackets, click on the  arrow icon adjacent to the *Age Brackets* label to open the *Age Brackets* section.

Age Brackets ^		
Age Brackets	Description	Amount
0-30	0-30 Days	0.00
30-60	30-60 Days	0.00
60-90	60-90 Days	0.00
>90	90 Days and Above	-117201.58
	Total	-117201.58

48. Click the *Save* button to save the record.