

Milestone 5: Customers

Activity 1: Customers Creation:

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New Customer

Customer Type ☒ Business ☐ Individual

Primary Contact

Company Name

Customer Display Name*

Customer Email

Customer Phone

Other Details | Address | Contact Persons | Custom Fields | Reporting Tags | Remarks

GST Treatment*

GSTIN / UIN* [Get Taxpayer details](#)

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PAN

Place Of Supply*

Tax Preference* ☒ Taxable ☐ Tax Exempt

Currency

Opening Balance

Payment Terms

Enable Portal? ☐ Allow portal access for this customer

Portal Language

[Add more details](#)

Customer Owner: Assign a user as the customer owner to provide access only to the data of this customer. [Learn More](#)