Customer Master

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Customer Master

In Vin eRetail, the Customer Master module is pivotal for systems dealing with orders and returns, placing customers at the forefront. Each customer is identified by a unique customer code in the system for which the transactions related to any order, or returns can be done. There can be different ways through which the customers can be created in the system.

Following are the steps to create a customer in eRetail Web portal.

1. User to navigate to Master module and click on Customer Master.
2. User to click on Add New for adding new customer to the screen.
3. User to enter details related to the customer that he wishes to create in the system.
4. User to click on Save and the entries will be reflected on the Customer Master screen.

Additionally, the customers can be created by the APIs directly where the order details are pulled from the external systems and the corresponding customers are created in the system. These customers are also visible in the Customer Master module against a unique customer code.

Navigation: Masters > Trading Partners > Customer Master

Fields	Description
Customer Code	System generated unique code provided to each customer and once saved, it is un-editable
Customer Name	This is the name given to a particular customer
Ext Customer code	This is the external customer code for any customer
Type	This is the type of customer created by the user. Ex – B2B, B2C or any other type. This is configurable and can be created as per the requirements.
Status	This is the status of a customer, Active or Inactive.
Primary Contact	This is the primary contact number of the customer
Primary Email	This is the primary email address for the customer
Created date	This is the date on which the customer is created in the system

Action Buttons:

Fields	Description
Customer Code	System generated unique code provided to each customer and once saved, it is un-editable
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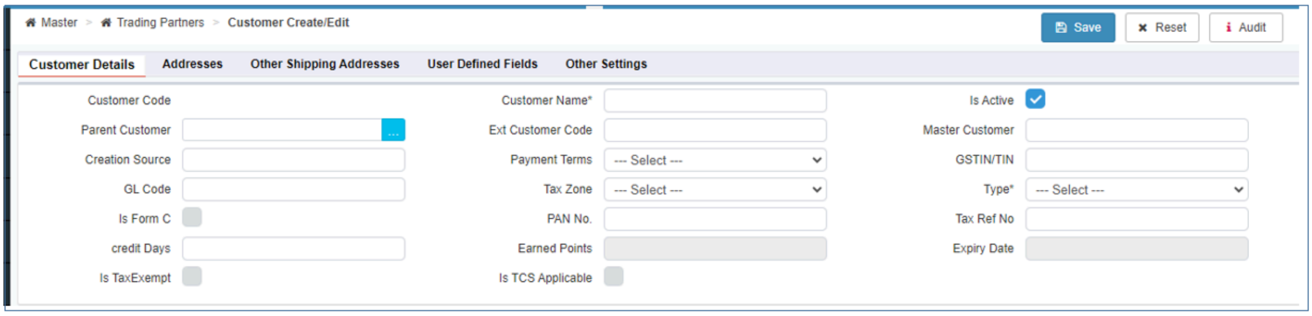
Status	This is the status of a customer, Active or Inactive.
Primary Contact	This is the primary contact number of the customer
Primary Email	This is the primary email address for the customer
Created date	This is the date on which the customer is created in the system

Following are the tabs in which the details for the customer are captured:

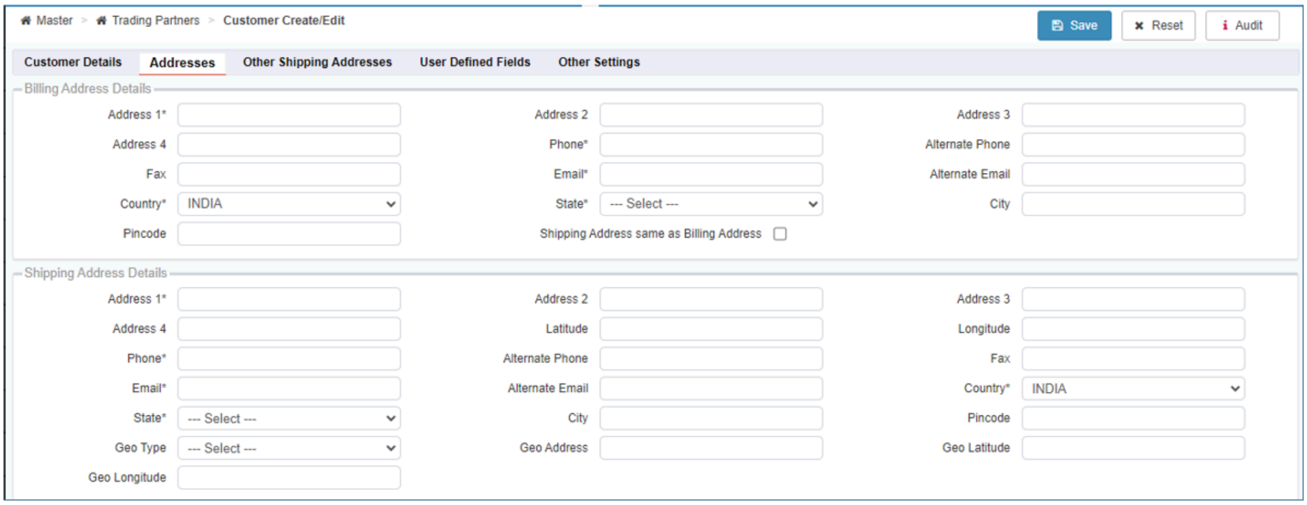


1. Customer Details: This tab captures all the details for a particular customer where some of the fields are mandatory and non-mandatory.

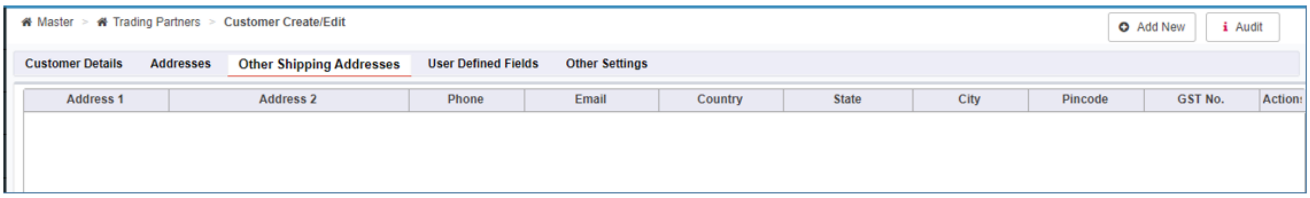
- **Customer Code**: Customer Code is the unique code provided by the system and this helps in differentiation two or more records. Once the customer is saved in the system, the field becomes un-editable.
- **Customer Name***: This is the name of the customer and if this name is similar to any other customer, the unique customer will be identified on the basis of the customer code.
- **Is Active**: This is the check if the customer is Active or Inactive.
- **Parent Customer**: This is the Primary customer who can have multiple customers within itself. For example, for any customer dealing in Wholesale goods, this customer can have multiple retail customers linked to him. This handling is possible in the system and the user can create the retail customer in the system and link it to this wholesale Parent customer through this functionality.
- **Ext Customer Code:** This is the external Customer Code and is given to the customer who get synced from a different platform.
- **Creation Source**: This captures the source of customer creation, and the user can type in the box.
- **Payment Terms**: This is an option for the payment settlement days for any customer.

- **GSTIN/TIN**: This is the GST Identification Number for the customer created in the system.
- **GL Code**: This is the General Ledger code and is used to keep track of the financial transactions.
- **Tax Zone**: State/City/Country where the tax is applicable for the customer becomes the Tax Zone.
- **Type***: This is the type of customer created in the database by the user. The list of the type of customers can be selected from the dropdown.
- **Is Form C**: This is the check box for a customer to which Form C is applicable.
- **PAN No**: PAN Number is used for financial recordings of a customer.
- **Tax Ref No**: This is the reference number for Tax filing purposes apart from the GSTIN/TIN.
- **Credit days**: These are the number of credit days applicable for that customer.
- **Earned points**: This is the number of points earned on different channels for the customer and is auto filled.
- **Expiry date**: This is the expiry date for the points earned by the customer and is also auto filled.
- **Is Tax Exempt**: This check is applicable for the Tax-Exempt customer. For this customer, no tax is applicable for that customer and once the user enables this for a customer, the user will have an option to select the Economic Zone for which this Tax-Exempt condition is applicable.
- **Is TCS Applicable**: This is used to capture if Tax Collected at Source is applicable for the customer and if the box is checked by the user, a new tab to capture the Tax Percentage will open. This Tax Percentage will capture the applicable tax percentage for the customer created in the system.

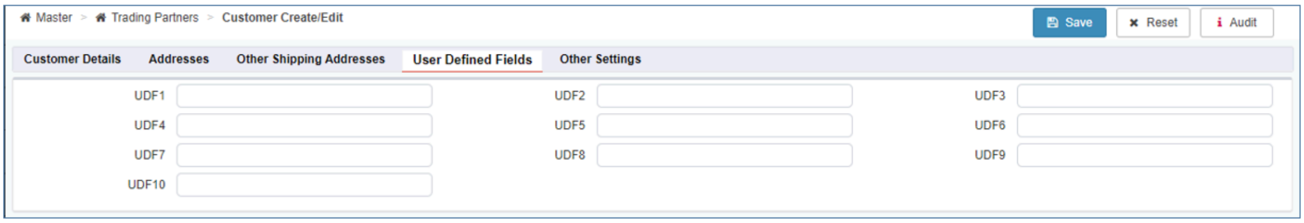
2. Addresses: This section captures the addresses of a particular customer and has different sections for Billing Address Details and Shipping Address Details. All the fields in this section are self-explanatory.



3. Other Shipping Addresses: This section enables the user to add additional shipping addresses for a particular customer apart from the primary billing and shipping address specified in the above section. The user can click on (Add new) on this module to add the shipping addresses. Fields in the section are self-explanatory.



4. User Defined Fields: This section captures the custom fields that are created by the user for any customer in case of any extra information is required.



5. Other Settings: This section captures the additional settings for a customer. It includes below fields :

- **Invoice Report**: The user can choose the type of Invoice report. The details of the type of reports are enabled from the database.
- **Total Shelf Life:** No. of days of Total shelf like for SKU(s) as agreed by the user and the customer.
- **Shelf Life on Picking**: No. of days of Shelf Life on Picking for SKU(s) as agreed by the user and the customer