

Milestone 5: Customers:

Activity 1: Customers Creation:

The screenshot shows the 'New Customer' form in the Books application. The form is divided into several sections: 'Customer Type' (Business/Individual), 'Primary Contact' (Salutation, First Name, Last Name, Company Name), 'Customer Display Name', 'Customer Email', 'Customer Phone' (Work Phone, Mobile), 'Other Details' (Address, Contact Persons, Custom Fields, Reporting Tags, Remarks), 'GST Treatment' (Select a GST treatment), 'PAN', 'Place Of Supply', 'Tax Preference' (Taxable/Tax Exempt), 'Currency' (INR-Indian Rupee), 'Opening Balance' (INR), 'Payment Terms' (Due on Receipt), 'Enable Portal', 'Portal Language' (English), and 'Add more details'. At the bottom, there is a 'Customer Owner' section with a 'Learn More' link and 'Save' and 'Cancel' buttons.

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New Customer

Customer Type ☒ Business ☐ Individual

Primary Contact

Customer Display Name

Customer Email

Customer Phone

Other Details Address Contact Persons Custom Fields Reporting Tags Remarks

GST Treatment*
Select a GST treatment

PAN

Place Of Supply*

Tax Preference*
☒ Taxable ☐ Tax Exempt

Currency
INR-Indian Rupee

Opening Balance
INR

Payment Terms
Due on Receipt

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](#)

Save Cancel

Activity 2: Review the Customers List:

The screenshot shows the 'Active Customers' list in the Books application. The table has columns for NAME, COMPANY, EMAIL, WORK PHONE, PLACE OF SUPPLY, RECEIVABLE, and UNPAID CBE. There are 6 rows of customer data.

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Active Customers [+ New](#)

NAME	COMPANY	EMAIL	WORK PHONE	PLACE OF SUPPLY	RECEIVABLE	UNPAID CBE
<input checked="" type="checkbox"/> Mr. Suresh Kumar Iyer	Suresh Sweets			Tamil Nadu	₹1,05,000.00	₹1,05,000.00
<input checked="" type="checkbox"/> Ms. Priya Ranganathan	Priya Sweets			Telangana	₹42,000.00	₹0.00
<input checked="" type="checkbox"/> Ms. Kavitha Rajendran	Kavitha Sweets			Tamil Nadu	₹0.00	₹0.00
<input checked="" type="checkbox"/> Mr. Karthik Krishnan	Karthik Sweets			Tamil Nadu	₹33,600.00	₹0.00
<input checked="" type="checkbox"/> Mr. Aravindan M	Aravindan Sweets			Tamil Nadu	₹0.00	₹0.00