

Milestone 5: Customers

Activity 1: Customers Creation:

The below are the list of customers:

1. Knowledge Foundation Pvt Ltd (GST Registered).
 2. Growmore Careers (Non GST).
- Firstly, to create Customers Accounts: Go to SALES>CUSTOMERS>CREATE NEW CUSTOMER
 - In Customer Type for GST registered customer select Business and for unregistered person select Individual and give the required fields and click on Save.

New Customer

Customer Type: ☒ Business ☐ Individual

Primary Contact: Knowledge Point:

Company Name:

Customer ID: Name:

Customer Email:

Customer Phone:

Other Details

Business Type: ☒ Registered Business ☐ Unregistered Business

Registration Number: GSTIN:

Business Legal Name:

Business Type Name:

PAN:

Place of Origin: Tax Rate:

Tax Type: ☒ Taxable ☐ Non Taxable

Company: Indian Number:

Opening Balance:

Payment Terms:

Credit Period:

Period:

Activity 2: Review the Customers List

Activity 2: Review the Customers List

The screenshot displays the 'Active Customers' dashboard in the 'Books' application. The dashboard features a table with the following columns: Name, Location, Status, Phone, Place of Supply, Wholesale Price, Wholesale Margin, and GST Treatment. Two customers are listed:

Name	Location	Status	Phone	Place of Supply	Wholesale Price	Wholesale Margin	GST Treatment
Sovereign Books	Sovereign Books			Taxi Hubs	₹100	₹50	Integrated Business
Knowledge Foundation Pvt Ltd	Knowledge Foundation Pvt Ltd			Taxi Hubs	₹100	₹50	Registered Business - Regular

The dashboard includes a sidebar with navigation options: Home, Sales, Billing, and a top bar with a search bar and user profile. The 'Sovereign Books' customer is highlighted in blue, and the 'Knowledge Foundation Pvt Ltd' customer is also highlighted in blue.

Customer Details

Business Legal Name
ABC COMPANY

Business Trade Name
ABC COMPANY

VAT ID
AAAAA000000000

Place Of Registry
TIN - Tax ID No.

Tax Registration
☒ Taxable ☐ Tax Exempt

Currency
USD - United States

Opening Balance
0.00

Payment Terms
Due on Receipt

Enable Portal?
☒ Allow portal access for this customer

Portal Language
English

Customer Status
Active

Customer Email
info@abc.com

Customer Phone
1234567890

Customer Address
123 Main St, Suite 100, New York, NY 10001, USA

Customer Website
http://www.abc.com

Customer Notes
Customer created by system on 10/10/2018. All rights reserved.

Milestone 6: Sales

Activity 1: Sales Order Creation

EduConnect Learning Center received below Sales Order from the mentioned Customer:

- 10/04/2023 Knowledge Foundation –For Competative Coaching for their 200 no's of Students- paid through bank on 15/04/2023

To Create Sales Order from navigation panel go to Sales>Sales Order> Creat New and fill the necessary fields>Save>Mark as Confirmed

New Sales Order

Customer Details

Customer Name: Knowledge Foundation Pvt. Ltd.
Customer Address: 30, Main, Suburban, Mumbai
Customer Email: kfc@kfc.com
Customer Phone: 98765 43210
Customer Type: Regular Customer
Customer Category: Regular Customer
Customer Status: Active

Product Details

Product Name: Competative Coaching
Product Code: 10000000000000000000
Product Price: 115.00
Product Unit: Per Student

Line Items

Line Item	Product Name	Quantity	Price	Total
1	Competative Coaching	200	115.00	23,00,000.00
2	GST	1	1.00	1.00
Total (₹)				23,80,000.00

Save and Send **Cancel**