

CUSTOMER MANAGEMENT

Listed on the Figure 1 are Suppliers created in the Accounting System. These customers are used in Sales Modules, Accounting Entry Modules, and as Filter to reports.

Figure 1

Customers						
+ New Customer		Print		Export		Search : <input type="text"/>
	Customer Name	Contact Person	Address	Contact No	Action	
	N/A					
	Various Customers					
	Everest Industries	Cristina Applegate	Angeles City	045 874 5980		
	Western Sports Industries	Wendy Mae Lindt	Manila, Philippines	045 965 2510		
	Taylor Sporting Goods	Grace Warner	Manila, Philippines	045 985 2510		
	Valley Clyde Industries	Brooke Stacy	Angeles, Pampanga	045 958 1200		
Showing 1 to 6 of 6 entries						
< Previous		1	Next >			

Use **Search Field** to search for the information from inside the table. Click the **Trash Button** to delete, **Pencil Button** to edit. Click the **Print Button** to print the supplier Master File (*Figure 2*), and Export Button to save the Master File to an Excel File (*Figure 3*).

Figure 2

jdev **JDEV OFFICE SOLUTIONS INC.**
 4776 Montang Ave., Service Rd, Diamond Subd., Balibago, Angeles City
 (045) 900-3988 / 0955-283-3018
 jdevtechsolution@gmail.com

Customer Masterfile

Customer Name	Contact Person	Contact No	Address	Email Address	TIN
N/A					
Various Customers					
Everest Industries	Cristina Applegate	045 874 5980	Angeles City	account@everest.com.ph	
Western Sports Industries	Wendy Mae Lindt	045 965 2510	Manila, Philippines	accounting@westernsports.net	
Taylor Sporting Goods	Grace Warner	045 985 2510	Manila, Philippines	marketing@taylorsports.com	
Valley Clyde Industries	Brooke Stacy	045 958 1200	Angeles, Pampanga	accounting@valleyclyde.net	

Figure 3

	A	B	C	D	E	F
1	JDEV OFFICE SOLUTIONS INC.					
2	4776 Montang Ave., Service Rd, Diamond Subd., Balibago, Angeles City					
3	(045) 900-3988 / 0955-283-3018					
4	jdevtechsolution@gmail.com					
5						
6	Customer Masterfile					
7						
8						
9	Customer Name	Contact Name	Contact No	Address	Email Address	TIN
10	N/A					
11	Various Customers					
12	Everest Industries	Cristina Applegate	045 874 5980	Angeles City	account@everest.com.ph	
13	Western Sports Industries	Wendy Mae Lindt	045 965 2510	Manila, Philippines	accounting@westernsports.net	
14	Taylor Sporting Goods	Grace Warner	045 985 2510	Manila, Philippines	marketing@taylorsports.com	
15	Valley Clyde Industries	Brooke Stacy	045 958 1200	Angeles, Pampanga	accounting@valleyclyde.net	
16						

Clicking the + Button will open the Information, Invoices, and Payments from the Customer. **Information Tab** (Figure 4) shows the Information of the Customer with the photo if uploaded, the latest transaction made, and the *open*, and *partially received* Sales Orders. The **Customer Invoice Tab** (Figure 5) are Sales Invoices made, together with their amounts and payment statuses. The **Payment Details Tab** (Figure 6) lists all the payments made by the customers.

Figure 4

Valley Clyde Industries Brooke Stacy Angeles, Pampanga 045 958 1200

Information Customer Invoice Payment Details

Address : Angeles, Pampanga
 Email : accounting@valleyclyde.net
 Landline : 045 958 1200
 Added : System Administrator
 Date : 07/26/2019 03:43:09 PM

Your last payment : 07/29/2019
 Reference : REC02
 Amount : 10,175.00

List of Sales Order of Valley Clyde Industries (Open and partially received)

SO #	Order Date	Remarks	Status	SO Amount
SO-20181217-1	2018-12-17	Order from Customer	Open	2,750.00
SO-20190730-2	2019-07-30	Sales Order of Customer	Open	8,250.00

Showing 1 to 2 of 2 entries

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Figure 5

Valley Clyde Industries Brooke Stacy Angeles, Pampanga 045 958 1200

Information **Customer Invoice** Payment Details

List of Sales Invoice of Valley Clyde Industries

Invoice	Date	Amount	Remarks
SAL-INV-20190322-11	2019-03-22	8,675.00	paid
SAL-INV-20190726-12	2019-07-26	3,000.00	paid
Total Amount		11,675.00	

Figure 6

Valley Clyde Industries Brooke Stacy Angeles, Pampanga 045 958 1200

Information Customer Invoice **Payment Details**

List of Payments of Valley Clyde Industries

OR No	Date Paid	Invoice Paid	Check Number
REC01	2019-07-29	2,000.00	
REC02	2019-07-29	10,175.00	
Total Paid Amount		12,175.00	

Click the **New Customer Button** to create. Fill the form (*Figure 7*) and select the Customer Type, then click the **Save Button** to save. The *Customer Type* is used in creating Invoices from the *Sales Modules*, the unit price will depend on what type the customer is.

Figure 7

Customer Information

* Customer Name :

Valley Clyde Industries

Contact Person :

Brooke Stacy

* Address :

Angeles, Pampanga

Email Address :

accounting@valleyclyde.net

Contact No :

045 958 1200

TIN :

TIN

Customer Type :

None

None


Wholesaler

Dealer

Distributor

Reseller

Customer's Photo



BROWSE PHOTO

REMOVE

SAVE

CANCEL