

TABLE OF CONTENTS

INTRODUCTION.....	2
PAGES AND PAGE LINKS.....	2
MANAGE CUSTOMER.....	2
Adding Customer.....	3
Searching Customer.....	9
Editing Customer's.....	12
Viewing Customer Details.....	17
Viewing Customer Documents Details.....	19
Disabling Customer's.....	22
Enabling Customer.....	25
Import Customer.....	27
Importing Customer Documents.....	29

Introduction

- Vbooks provides Customer management capabilities.
- The Organization Super User / Management / Accountant has the privilege to manage Customers accounts.
- Once the account is created for the customer, the users can interact to customers through
- VBooks resources according to the permissions allocated.
- The Organization Super User / Management / Accountant can create a new customer, modify the details of existing customer accounts and delete customer in the specific organization respectively.
- Besides the Super User, Management / Accountant Users have the privileges to create the Customer and Sales Executive has be privilege to create a Customer and which need to be approved by the Management / Accountant.

Pages and Page links

- Manage Customers
 - Add Customer
 - Upload Customer Documents
 - Search Customer
 - Import Customer

Manage Customer

- Manage Customer is a place where we add / modify / disable / search Customer available in the organization respectively.

Adding Customer

Place to add Customer to the system.

Adding a Customer is a 3 step process(including preview).

Description of Fields Available.

Step 1: Basic Info

Step to add Basic Information of the Customer.

S. No	Field Header	Description	Accepted Values
1	Business Name	Name of the Business of the Customer	Alphanumeric
2	Invoice Name	Invoice Name desired on all the transactions.	Alphanumeric
3	Customer Name	Name of the Customer(Business Contact Person)	Alphanumeric
4	Gender	Gender of the Customer	Selection (Default M)
5	Contact Number	Contact Number of the Customer	Numbers, Space, Hyphen(-) and Curly Braces(()).
6	Email Address	Email Id of the Customer.	Alphanumeric, with '@' and period(.) EX: test@org.com
7	Credit Limit	Credit limit for the Customer	Numeric
8	Credit Overdue Days	Overdue days a Customer can carry forward the Credit	Numeric

Step 2: Additional Info

Step to Provide the Additional Information of the Customer like Address and so on.

S. No	Field Header	Description	Accepted Values
1	Direct Line (Optional)	Number of the Customer respectively.	Numbers, Space, Hyphen(-) and Curly Braces(()).
2	Alternative Contact No (Optional)	Alternate Contact Number of the Customer respectively.	Numbers, Space, Hyphen(-) and Curly Braces(()).
3	Address 1	Address 1 of Customer respectively.	Alphabets, Numbers, Special Characters
4	Address 2	Address 2 of Customer respectively.	Alphabets, Numbers, Special Characters
5	Locality	Locality of Customer respectively.	Alphabets, Numbers, Special Characters
6	Landmark	Landmark of Customer respectively.	Alphabets, Numbers, Special Characters
7	Region	Region of Customer respectively.	Alphabets, Numbers
8	State	State of Customer respectively.	Alphabets, Numbers, Special Characters
9	City	City of Customer respectively.	Alphabets, Numbers, Special Characters
10	Zipcode	Zipcode of customer respectively.	Numbers

Step 3: Preview

Preview Page to view all the details provided in Step 1 and 2.

Example

To add a Customer Hypercity Wines to the System.

1. Login as Organization Super User / Management / Accountant User
2. Drive to Customers Module --> Manage Customers Page --> Add Customer Page link

Add Customer	Upload Customer Documents	Search Customer	Import Customer	
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Basic Info
Additional Info
Preview

Business Name

Customer Name

Gender ☒ Male ☐ Female

Credit Limit

Invoice Name

Contact Number

Email Address

Credit Overdue Days

Next
Clear
Cancel

3. Provide the following details in Basic Info Step
- a) Business Name: Hypercity Wines
 - b) Invoice Name: Hypercity Wines
 - c) Customer Name: K Sam
 - d) Contact Number: 9188988988
 - e) Credit Limit: 100,000.00
 - f) Credit Overdue Days: 90

Add Customer	Upload Customer Documents	Search Customer	Import Customer
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Basic Info
Additional Info
Preview

Business Name	<input type="text" value="Hypercity Wines"/>	<input checked="" type="checkbox"/>	Invoice Name	<input type="text" value="Hypercity Wines"/>
Customer Name	<input type="text" value="K Sam"/>	Contact Number	<input type="text" value="9188988988"/>	
Gender	<input checked="" type="radio"/> Male <input type="radio"/> Female	Email Address	<input type="text"/>	
Credit Limit	<input type="text" value="100,000.00"/>	Credit Overdue Days	<input type="text" value="90"/>	

4. Click on Next for Additional Info Page.

Add Customer	Upload Customer Documents	Search Customer	Import Customer
---------------------	----------------------------------	------------------------	------------------------

Basic Info
Additional Info
Preview

Direct Line	<input type="text"/>	Alternate Contact Number	<input type="text"/>
Address 1	<input type="text"/>	Region	<input type="text"/>
Address 2	<input type="text"/>	State	<input type="text"/>
Locality	<input type="text"/>	City	<input type="text"/>
Landmark	<input type="text"/>	Zipcode	<input type="text"/>

5. Enter the following details

a) Locality : Madhapur

b) Region : South

Add Customer	Upload Customer Documents	Search Customer	Import Customer
<div> <div>Basic Info</div> <div>Additional Info</div> <div>Preview</div> </div>			
Direct Line	<input type="text"/>	Alternate Contact Number	<input type="text"/>
Address 1	<input type="text"/>	Region	<input type="text" value="South"/>
Address 2	<input type="text"/>	State	<input type="text"/>
Locality	<input type="text" value="Madhapur"/>	City	<input type="text"/>
Landmark	<input type="text"/>	Zipcode	<input type="text"/>
<div> <div>Prev</div> <div>Next</div> <div>Clear</div> <div>Cancel</div> </div>			

6. Click on Next to review the details in preview.

Add Customer	Upload Customer Documents	Search Customer	Import Customer
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Basic Info
 Additional Info
 Preview

Business Name	Hypercity Wines	Invoice Name	Hypercity Wines
Customer Name	K Sam	Gender	Male

Contact Number	9188988988	Locality	Madhapur
Email		LandMark	
Direct Line		Region	South
Alternate Mobile No		City	
Address1		State	
Address2		ZipCode	

Credit Limit (UGX)	100,000.00	Credit Overdue Days	90
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Prev
 Save
 Cancel

- Click on save to save the details to the system
- A Message Saved Successfully will be displayed on save of Customer.

Add Customer	Upload Customer Documents	Search Customer	Import Customer
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Saved Successfully.

Searching Customer

Place to search Customer's available in the system.

Field Description

S. No	Field Header	Description	Accepted Values
1	Full Name	Full Name of the Customer	Alphabets

2	Business Name	Business Name / Shop Name	Alphabets
3	Invoice Name	Invoice Name of the Customer	Alphabets
4	Locality	Locality of the Business	Alphabets

























Add Customer	Upload Customer Documents	Search Customer	Import Customer	
Full Name	<input type="text"/>	Invoice Name	<input type="text"/>	
Business Name	<input type="text"/>	Locality	<input type="text"/>	
		Search	Clear	

Example

To search the customer available in the system

1. Login as Management / Accountant User
2. Drive to Customers Module --> Manage Customers Page --> Search Customer Page link





Add Customer	Upload Customer Documents	Search Customer	Import Customer
Full Name	<input type="text"/>	Invoice Name	<input type="text"/>
Business Name	<input type="text"/>	Locality	<input type="text"/>
Search		Clear	

BN A Contact Number 9885365841	Cust A Locality Madhapur	   
BN AA Contact Number 9885365867	Cust AA Locality Nacharam	   
BN AAS Contact Number 9885366561	Cust AAS Locality Jalapalli	   
BN AAT Contact Number 9885366562	Cust AAT Locality Jalapalli	   
BN AAU Contact Number 9885366563	Cust AAU Locality Jalapalli	   
BN AAV Contact Number 9885366564	Cust AAV Locality Jalapalli	   

3. Enter the following Details in Search Criteria.
 - a) Business Name: Hypercity
4. Click on Search to get the record.

Add Customer	Upload Customer Documents	Search Customer	Import Customer	
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Full Name	<input type="text"/>	Invoice Name	<input type="text"/>
Business Name	<input type="text" value="Hypercity"/>	Locality	<input type="text"/>

Hypercity Wines	K Sam	   
Contact Number 9889889889	Locality Madhapur	

Editing Customer's
























Customer details can be modified by clicking the edit icon available in the search Customer.

On clicking the edit button a 3 step page opens with all the details filled up with provided details while creating a Customer.

Example

To edit the details of Business Hypercity Wines to change Contact Number to 9889889889.





1. Login as Management / Accountant User
2. Drive to Customers Module --> Manage Customers Page --> Search Customer Page link

Add Customer	Upload Customer Documents	Search Customer	Import Customer
Full Name	<input type="text"/>	Invoice Name	<input type="text"/>
Business Name	<input type="text"/>	Locality	<input type="text"/>
Search		Clear	
BN A Contact Number 9885365841	Cust A Locality Madhapur	   	
BN AA Contact Number 9885365867	Cust AA Locality Nacharam	   	
BN AAS Contact Number 9885366561	Cust AAS Locality Jalapalli	   	
BN AAT Contact Number 9885366562	Cust AAT Locality Jalapalli	   	
BN AAU Contact Number 9885366563	Cust AAU Locality Jalapalli	   	
BN AAV Contact Number 9885366564	Cust AAV Locality Jalapalli	   	

3. Enter the following Details in Search Criteria.

a) Business Name: Hypercity

4. Click on Search to get the record.

Add Customer	Upload Customer Documents	Search Customer	Import Customer
Full Name	<input type="text"/>	Invoice Name	<input type="text"/>
Business Name	Hypercity	Locality	<input type="text"/>
Search		Clear	
Hypercity Wines Contact Number 9889889889	K Sam Locality Madhapur	   	

5. Click on edit icon of the record Hypercity Wines.

Add Customer	Upload Customer Documents	Search Customer	Import Customer
<div> <div>Basic Info</div> <div>Additional Info</div> <div>Preview</div> </div>			
Business Name <input type="text" value="Hypercity Wines"/>		Invoice Name <input type="text" value="Hypercity Wines"/>	
Customer Name <input type="text" value="K Sam"/>		Contact Number <input type="text" value="9188988988"/>	
Gender <input checked="" type="radio"/> Male <input type="radio"/> Female		Email Address <input type="text"/>	
Credit Limit <input type="text" value="100000.0"/>		Credit Overdue Days <input type="text" value="90"/>	
<div> <div>Next</div> <div>Clear</div> <div>Cancel</div> </div>			

6. Change the following details in Basic Info Page.

a) Contact Number: 9889889889

Add Customer	Upload Customer Documents	Search Customer	Import Customer
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Basic Info	Additional Info	Preview
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Business Name	<input type="text" value="Hypercity Wines"/>	Invoice Name	<input type="text" value="Hypercity Wines"/>
Customer Name	<input type="text" value="K Sam"/>	Contact Number	<input type="text" value="9889889889"/>
Gender	<input checked="" type="radio"/> Male <input type="radio"/> Female	Email Address	<input type="text"/>
Credit Limit	<input type="text" value="100,000.00"/>	Credit Overdue Days	<input type="text" value="90"/>

7. Click on Next for Additional Info Page.

Add Customer	Upload Customer Documents	Search Customer	Import Customer
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Basic Info	Additional Info	Preview
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Direct Line	<input type="text"/>	Alternate Contact Number	<input type="text"/>
Address 1	<input type="text"/>	Region	<input type="text" value="South"/>
Address 2	<input type="text"/>	State	<input type="text"/>
Locality	<input type="text" value="Madhapur"/>	City	<input type="text"/>
Landmark	<input type="text"/>	Zipcode	<input type="text"/>

8. Click on Next for Preview page to review all the changes details.

Add Customer	Upload Customer Documents	Search Customer	Import Customer
--------------	---------------------------	-----------------	-----------------

Basic Info	Additional Info	Preview
------------	-----------------	---------

Business Name	Hypercity Wines	Invoice Name	Hypercity Wines
Customer Name	K Sam	Gender	Male

Contact Number	9889889889	Locality	Madhapur
Email		LandMark	
Direct Line		Region	South
Alternate Mobile No		City	
Address1		State	
Address2		ZipCode	

Credit Limit (UGX)	100,000.00	Credit Overdue Days	90
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Previous
Update
Cancel

9. Click on Update to Update the Details to the System.

10. A Message Updated Successfully will be displayed on Update to the system.

Add Customer	Upload Customer Documents	Search Customer	Import Customer
--------------	---------------------------	-----------------	-----------------

Updated Successfully.

























Viewing Customer Details

A Place to view details of a Customer available in the system.
Customer Details can be Viewed by clicking the View icon available in the search page.

Example

To view the details of Business Hypercity Wines available in the system.





1. Login as Management / Accountant User
2. Drive to Customers Module --> Manage Customers Page --> Search Customer Page link

Add Customer	Upload Customer Documents	Search Customer	Import Customer
Full Name	<input type="text"/>	Invoice Name	<input type="text"/>
Business Name	<input type="text"/>	Locality	<input type="text"/>
Search		Clear	
BN A Contact Number 9885365841	Cust A Locality Madhapur	   	
BN AA Contact Number 9885365867	Cust AA Locality Nacharam	   	
BN AAS Contact Number 9885366561	Cust AAS Locality Jalapalli	   	
BN AAT Contact Number 9885366562	Cust AAT Locality Jalapalli	   	
BN AAU Contact Number 9885366563	Cust AAU Locality Jalapalli	   	
BN AAV Contact Number 9885366564	Cust AAV Locality Jalapalli	   	

3. Enter the following Details in Search Criteria.

a) Business Name: Hypercity

4. Click on Search to get the record.

Add Customer	Upload Customer Documents	Search Customer	Import Customer
Full Name	<input type="text"/>	Invoice Name	<input type="text"/>
Business Name	Hypercity	Locality	<input type="text"/>
Search		Clear	
Hypercity Wines Contact Number 9889889889	K Sam Locality Madhapur	   	

5. Click on View icon of the record Hypercity Wines.
6. A pop-up with details of Hypercity Wines will open.

Customer Details			
Business Name	Hypercity Wines	Invoice Name	Hypercity Wines
Customer Name	K Sam	Gender	Male
Contact Number	9889889889	Locality	Madhapur
Email		LandMark	
Direct Line		Region	South
Alternate Mobile No		City	
Address1		State	
Address2		ZipCode	
Credit Limit (UGX)	100000.0	Credit Overdue Days	90

Close

7. Click on Close the pop-up.

Viewing Customer Documents Details

A Place to View / Delete Documents of a Customer available in the system.
 Customer Documents Details can be Viewed by clicking the View Document's icon available in the search page.

Example





To view the available Documents of Business Hypercity Wines available in the

system.







1. Login as Management / Accountant User
2. Drive to Customers Module --> Manage Customers Page --> Search Customer Page link

Add Customer	Upload Customer Documents	Search Customer	Import Customer
Full Name <input style="width: 150px;" type="text"/>	Invoice Name <input style="width: 150px;" type="text"/>		
Business Name <input style="width: 150px;" type="text"/>	Locality <input style="width: 150px;" type="text"/>		
<input style="margin: 0 10px;" type="button" value="Search"/> <input style="margin: 0 10px;" type="button" value="Clear"/>			
BN A Contact Number 9885365841	Cust A Locality Madhapur		
BN AA Contact Number 9885365867	Cust AA Locality Nacharam		
BN AAS Contact Number 9885366561	Cust AAS Locality Jalapalli		
BN AAT Contact Number 9885366562	Cust AAT Locality Jalapalli		
BN AAU Contact Number 9885366563	Cust AAU Locality Jalapalli		
BN AAV Contact Number 9885366564	Cust AAV Locality Jalapalli		

3. Enter the following Details in Search Criteria.
 - a) Business Name: Hypercity
4. Click on Search to get the record.

Add Customer	Upload Customer Documents	Search Customer	Import Customer
Full Name	<input type="text"/>	Invoice Name	<input type="text"/>
Business Name	<input type="text" value="Hypercity"/>	Locality	<input type="text"/>
Search		Clear	
Hypercity Wines Contact Number 9889889889		K Sam Locality Madhapur	
		   	

- Click on View Document's icon of the record Hypercity Wines.
- A pop-up with Document details of Hypercity Wines will open.

Customer View Documents		
S.No	File Name	
1	Passport.pdf	 
2	PAN_Card.pdf	 
3	Cheque1.pdf	 

Close

- Click on Download Icon to download the Document
- Click on Delete Icon to Delete the Document.

Disabling Customer's

A Place to disable a Customer available in the system.
Customer can be disabled by clicking the disable icon available in the search page.

Example

To Disable the Customer Hypercity Wines from the system

1. Login as Management / Accountant User
2. Drive to Customers Module --> Manage Customers Page --> Search Customer Page link

























Add Customer	Upload Customer Documents	Search Customer	Import Customer	
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Full Name

Business Name




Invoice Name

Locality

BN A Contact Number 9885365841	Cust A Locality Madhapur	   
BN AA Contact Number 9885365867	Cust AA Locality Nacharam	   
BN AAS Contact Number 9885366561	Cust AAS Locality Jalapalli	   
BN AAT Contact Number 9885366562	Cust AAT Locality Jalapalli	   
BN AAU Contact Number 9885366563	Cust AAU Locality Jalapalli	   
BN AAV Contact Number 9885366564	Cust AAV Locality Jalapalli	   

3. Enter the following Details in Search Criteria.
 - a) Business Name: Hypercity
4. Click on Search to get the record.

- 24

Add Customer	Upload Customer Documents	Search Customer	Import Customer
Full Name	<input type="text"/>	Invoice Name	<input type="text"/>
Business Name	<input type="text" value="Hypercity"/>	Locality	<input type="text"/>
Search		Clear	
Hypercity Wines		K Sam	  
Contact Number 9889889889		Locality Madhapur	

Disabled Customer will not have an option to Edit.

























Enabling Customer

A Place to Enable a Customer available in the system.
 Customer can be Enabled by clicking the Enable icon available in the search page.

Example

To Enable the Customer Hypercity Wines from the system




1. Login as Management / Accountant User
2. Drive to Customers Module --> Manage Customers Page --> Search Customer Page link

Add Customer	Upload Customer Documents	Search Customer	Import Customer
Full Name	<input type="text"/>	Invoice Name	<input type="text"/>
Business Name	<input type="text"/>	Locality	<input type="text"/>
Search		Clear	
BN A Contact Number 9885365841	Cust A Locality Madhapur	   	
BN AA Contact Number 9885365867	Cust AA Locality Nacharam	   	
BN AAS Contact Number 9885366561	Cust AAS Locality Jalapalli	   	
BN AAT Contact Number 9885366562	Cust AAT Locality Jalapalli	   	
BN AAU Contact Number 9885366563	Cust AAU Locality Jalapalli	   	
BN AAV Contact Number 9885366564	Cust AAV Locality Jalapalli	   	

3. Enter the following Details in Search Criteria.

a) Business Name: Hypercity

4. Click on Search to get the record.

Add Customer	Upload Customer Documents	Search Customer	Import Customer
Full Name	<input type="text"/>	Invoice Name	<input type="text"/>
Business Name	Hypercity	Locality	<input type="text"/>
Search		Clear	
Hypercity Wines Contact Number 9889889889	K Sam Locality Madhapur	  	

5. Click on Enable icon.
6. A conformation pop-up opens with Yes or No Option.

Customer Enable Disable

Are You Sure Want To Enable This Customer ?

7. Click on Yes to Enable the Customer.
8. Enabled Costume's record will be shown normally.

Add Customer	Upload Customer Documents	Search Customer	Import Customer
Full Name <input style="width: 150px;" type="text"/>	Invoice Name <input style="width: 150px;" type="text"/>	Business Name <input style="width: 150px;" type="text" value="Hypercity"/>	
Locality <input style="width: 150px;" type="text"/>		<input type="button" value="Search"/> <input type="button" value="Clear"/>	
Hypercity Wines Contact Number 9889889889		K Sam Locality Madhapur	


Import Customer

A Place to add bulk data to the system by defining the data in a predefined template.

Authenticated user need to select the template with data filled and need to click the Upload button to save all the records to the System.

Screen Design

Add Customer	Upload Customer Documents	Search Customer	Import Customer	
--------------	---------------------------	-----------------	-----------------	--



Choose file: No file chosen

1. Drive to Customers Module --> Manage Customers Page --> Import Customer Page link
2. Click on "Choose File" and Browse to the respective Customer Import Template.
3. Click on Upload to save all the records available in the file to the system.

Importing Customer Documents

A Place to add the Documents of the Customer to the System.

Authenticated user need to select the Document and need to click the Upload button to save the Document to the System.

Screen Design

Add Customer	Upload Customer Documents	Search Customer	Import Customer	
<div>Business Name <input type="text"/></div> <div>Choose file: <div>Choose File No file chosen</div></div> <div><div>Upload</div></div>				

1. Drive to Customers Module --> Manage Customers Page --> Upload Customer Documents Page link
2. Select the Business Name for whom the Document's need to be uploaded.
3. Click on "Choose File" and Browse to the Customer Document.
4. Click on Upload to save the Document to the system.