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#### Introduction

- Ubooks 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
- UBooks 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<br>Name       | Name of the Customer(Business Contact Person)        | Alphanumeric  |
| 4     | Gender                 | Gender of the Customer                               | Selection (Default M)                                 |
| 5     | Contact<br>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<br>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<br>(Optional)               | Number of the Customer respectively.                   | Numbers, Space, Hyphen(-) and Curly Braces(()). |
| 2     | Alternative<br>Contact No<br>(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<br>Characters       |
| 5     | Locality                                | Locality of Customer respectively.                     | Alphabets, Numbers, Special<br>Characters       |
| 6     | Landmark                                | Landmark of Customer respectively.                     | Alphabets, Numbers, Special<br>Characters       |
| 7     | Region                                  | Region of Customer respectively.                       | Alphabets, Numbers                              |
| 8     | State                                   | State of Customer respectively.                        | Alphabets, Numbers, Special<br>Characters       |
| 9     | City                                    | City of Customer respectively.                         | Alphabets, Numbers, Special<br>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 Up | oload Customer Documents   Search Customer   Import Customer |  |
|-----------------|--|--|
| Basic Info      | Additional Info Preview                                      |  |
| Business Name   | Invoice Name   |  |
| Customer Name   | Contact Number   |  |
| Gender          | Email Address  Male Female                                   |  |
| Credit Limit    | 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

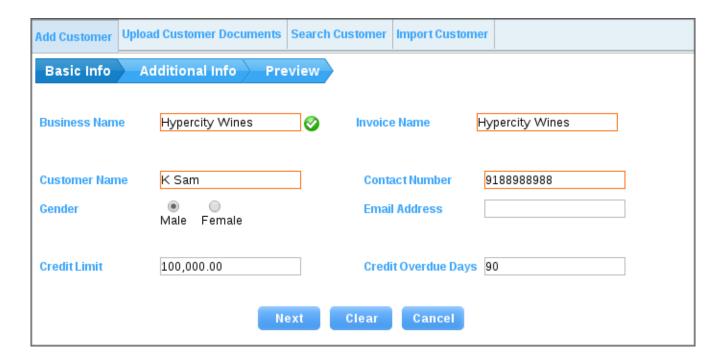
c) Customer Name: K Sam

d) Contact Number: 9188988988

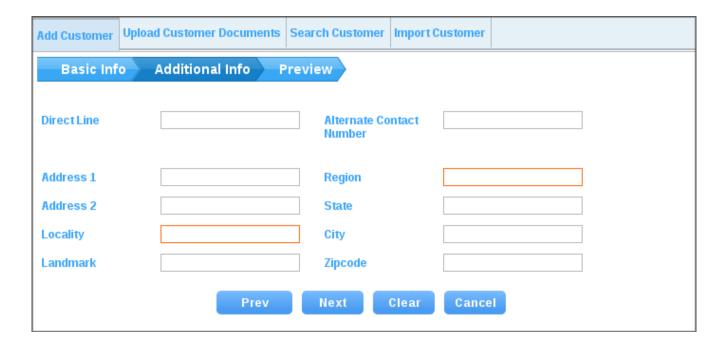
e) Credit Limit: 100,000.00

f) Credit Overdue Days: 90





4. Click on Next for Additional Info Page.

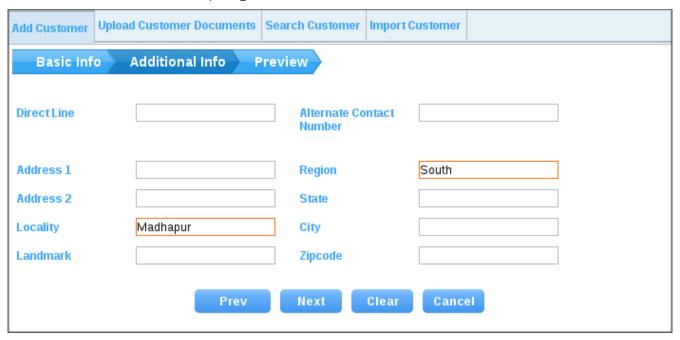


5. Enter the following details



a) Locality: Madhapur

b) Region: South

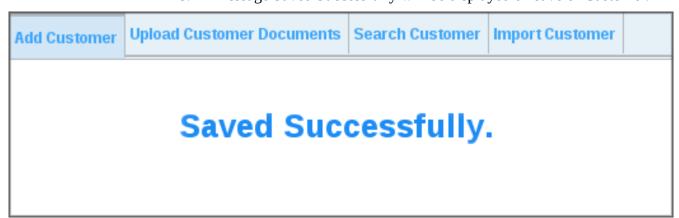


6. Click on Next to review the details in preview.





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





# **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 |



## **Example**

To search the customer available in the system

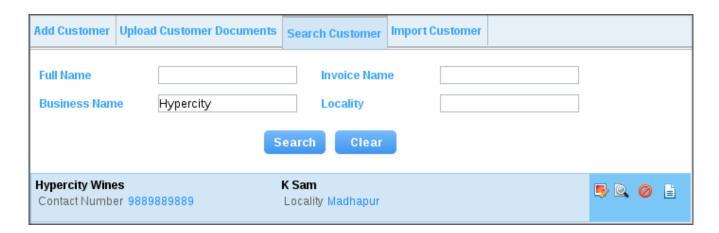
- 1. Login as Management / Accountant User
- 2. Drive to Customers Module --> Manage Customers Page --> Search Customer Page link



| Add Customer   Upload Customer Docu | ıments Search Customer Import Customer |                       |
|-------------------------------------|--|-----------------------|
| Full Name  Business Name            | Invoice Name  Locality                 |                       |
| Dusiness name                       |  |                       |
|                                     | Search Clear                           |                       |
| BN A<br>Contact Number 9885365841   | Cust A<br>Locality Madhapur            | <b>□ □ ⊘ □</b>        |
| BN AA<br>Contact Number 9885365867  | Cust AA<br>Locality Nacharam           | <b>₽ 2 0 1</b>        |
| BN AAS<br>Contact Number 9885366561 | Cust AAS<br>Locality Jalapalli         | <b>₽ 2 0 1</b>        |
| BN AAT<br>Contact Number 9885366562 | Cust AAT<br>Locality Jalapalli         | <b>₽ 2 0 1</b>        |
| BN AAU<br>Contact Number 9885366563 | Cust AAU<br>Locality Jalapalli         | <b>₽</b> ❷ <b>Ø i</b> |
| BN AAV<br>Contact Number 9885366564 | Cust AAV<br>Locality Jalapalli         | <b>₽ 2 0 1</b>        |
|                                     |  |                       |

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





#### **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**

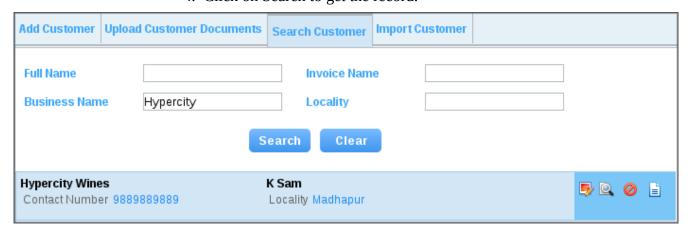
To edit the details of Business Hypercity Wines to change Contact Number to 988989898.

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



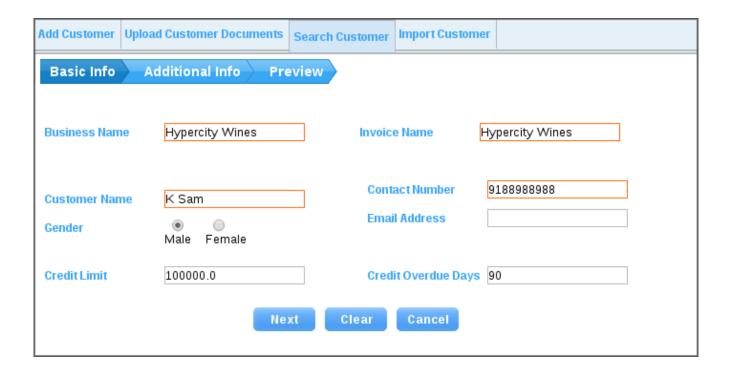
| Add Customer   Upload Customer Docum | ents Search Customer Import Customer |                       |
|--------------------------------------|--------------------------------------|-----------------------|
| Full Name  Business Name             | Invoice Name  Locality  Search Clear |                       |
| BN A<br>Contact Number 9885365841    | Cust A<br>Locality Madhapur          |                       |
| BN AA<br>Contact Number 9885365867   | Cust AA<br>Locality Nacharam         | <b>5 Q 0 E</b>        |
| BN AAS<br>Contact Number 9885366561  | Cust AAS<br>Locality Jalapalli       | <b>₽</b> ❷ Ø 🖹        |
| BN AAT<br>Contact Number 9885366562  | Cust AAT<br>Locality Jalapalli       | <b>₽</b> ❷ Ø <b>i</b> |
| BN AAU<br>Contact Number 9885366563  | Cust AAU<br>Locality Jalapalli       | <b>₽</b> ❷ Ø <b>i</b> |
| BN AAV<br>Contact Number 9885366564  | Cust AAV<br>Locality Jalapalli       | <b>5 Q 0 E</b>        |
|                                      |                                      |                       |

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



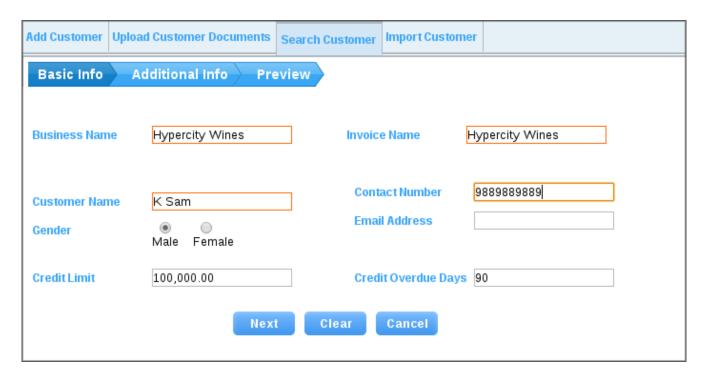


5. Click on edit icon of the record Hypercity Wines.

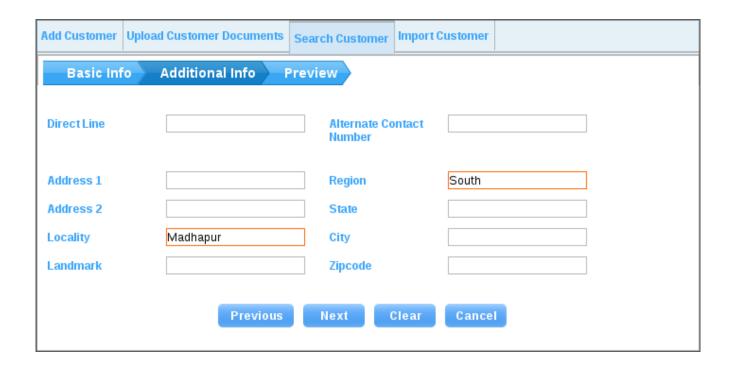


- 6. Change the following details in Basic Info Page.
  - a) Contact Number: 9889889889



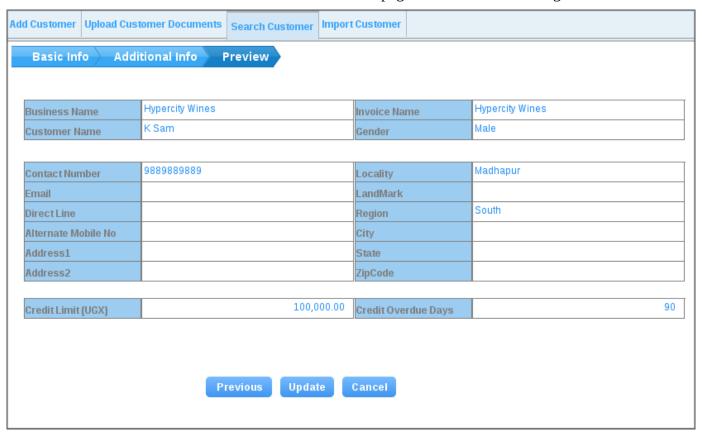


7. Click on Next for Additional Info Page.

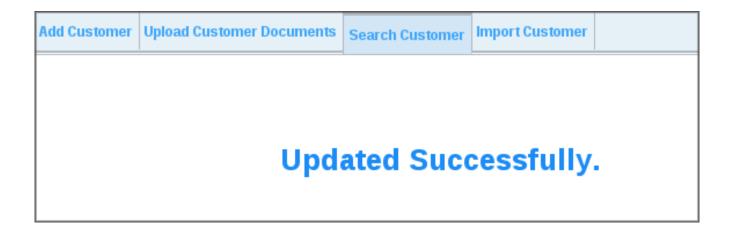




8. Click on Next for Preview page to review all the changes details.



- 9. Click on Update to Update the Details to the System.
- 10. A Message Updated Successfully will be displayed on Update to the system.





#### **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**

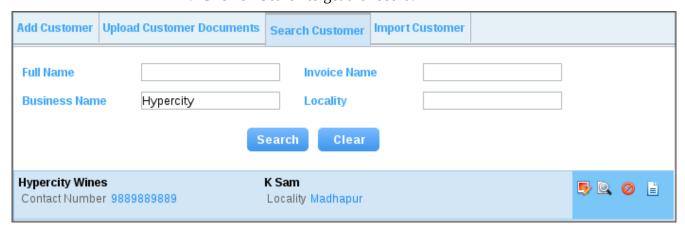
To view the details of Business Hypercity Wines available in the system.

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



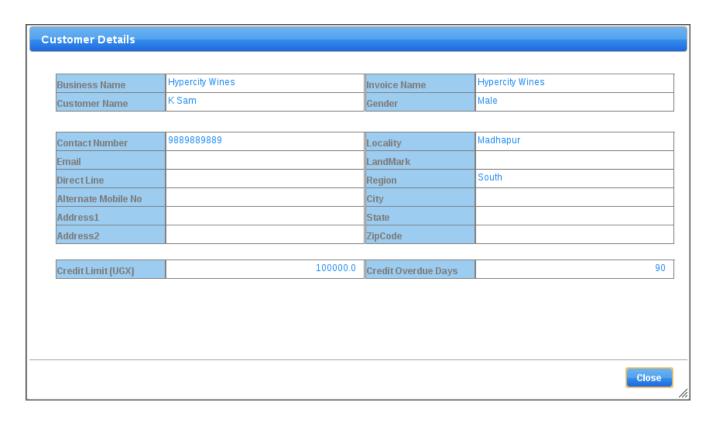
| Add Customer Upload Customer Docum  | ents Search Customer Import Customer |                |
|-------------------------------------|--------------------------------------|----------------|
| Full Name  Business Name            | Invoice Name  Locality               |                |
| Business mans                       | Search Clear                         |                |
|                                     | Journal Great                        |                |
| BN A<br>Contact Number 9885365841   | Cust A<br>Locality Madhapur          | <b>₽ 2 0 1</b> |
| BN AA<br>Contact Number 9885365867  | Cust AA<br>Locality Nacharam         | <b>₽ ② Ø </b>  |
| BN AAS<br>Contact Number 9885366561 | Cust AAS<br>Locality Jalapalli       | <b>₽ Q Ø </b>  |
| BN AAT<br>Contact Number 9885366562 | Cust AAT<br>Locality Jalapalli       | <b>₽ 2 0 1</b> |
| BN AAU<br>Contact Number 9885366563 | Cust AAU<br>Locality Jalapalli       | <b>₽ 2 0 1</b> |
| BN AAV<br>Contact Number 9885366564 | Cust AAV<br>Locality Jalapalli       | <b>5</b> Q Ø E |
|                                     |                                      | _              |

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





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



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.

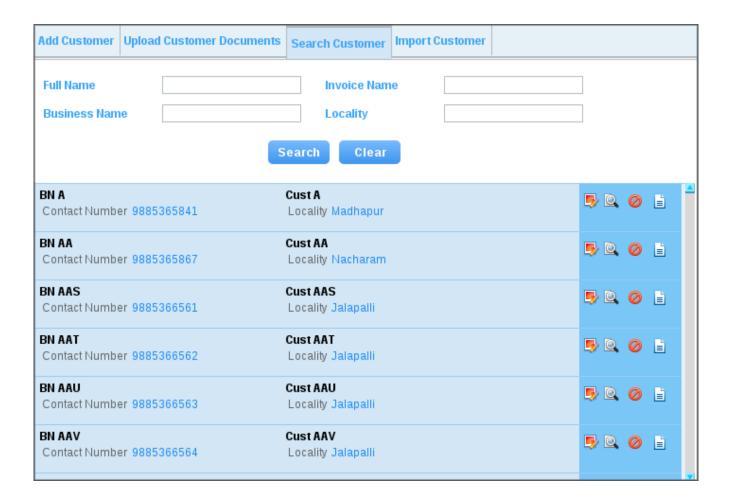
#### **Example**

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



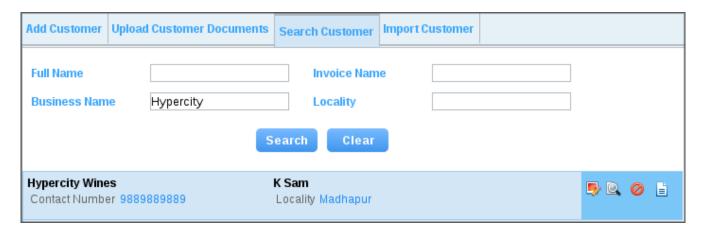
#### system.

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

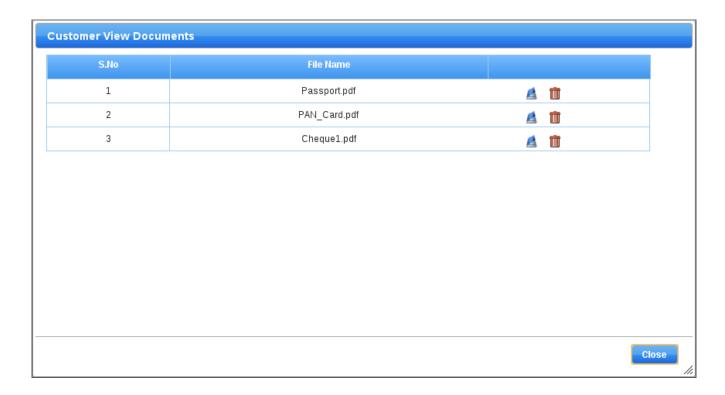


- 3. Enter the following Details in Search Criteria.
  - a) Business Name: Hypercity
- 4. Click on Search to get the record.





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



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



## **Disabling Customer's**

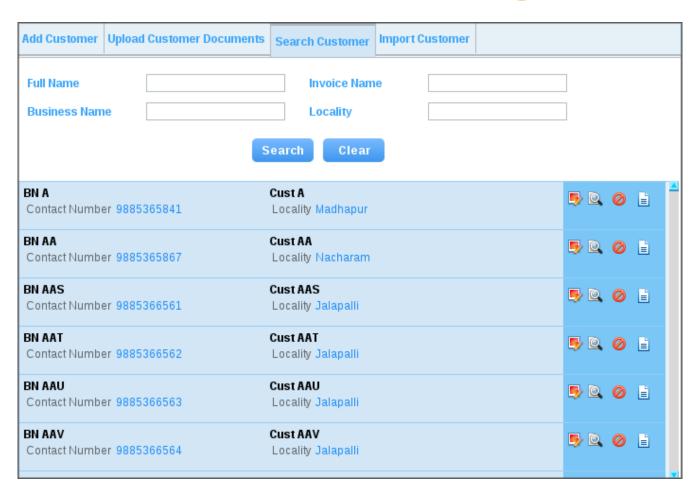
A Place to disable a Customer available in the system. Customer can be disables by clicking the disable icon available in the search page.

#### **Example**

To Disable the Customer Hypercity Wines from the system

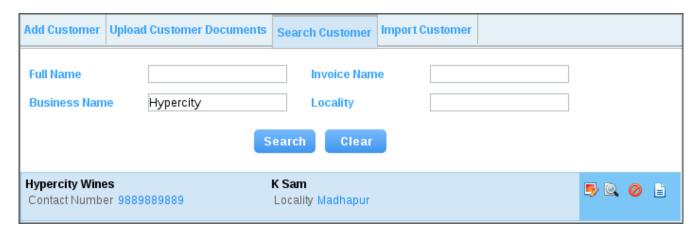
- 1. Login as Management / Accountant User
- 2. Drive to Customers Module --> Manage Customers Page --> Search Customer Page link



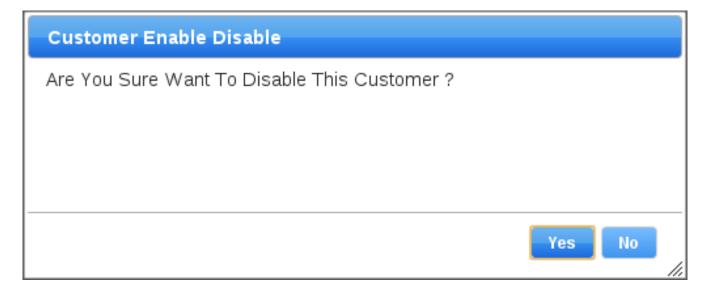


- 3. Enter the following Details in Search Criteria.
  - a) Business Name: Hypercity
- 4. Click on Search to get the record.



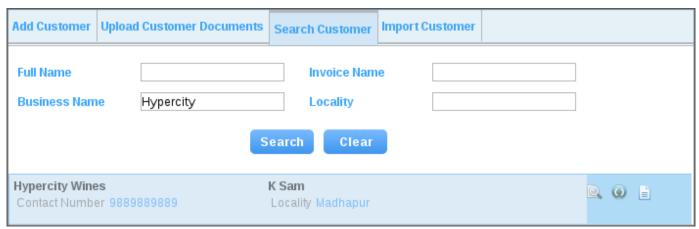


- 5. Click on Disable icon.
- 6. A conformation pop-up opens with Yes or No Option.



- 7. Click on Yes to Disable the Customer.
- 8. Disabled Costume record will be faded.





Disabled Customer will not have an option to Edit.

#### **Enabling Customer**

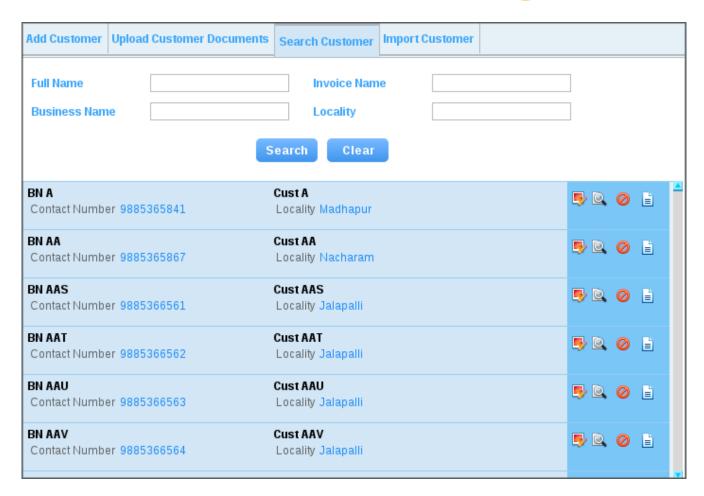
A Place to Enable a Customer available in the system. Customer can be Enabled by clicking the Enable icon available in the search page.

#### **Example**

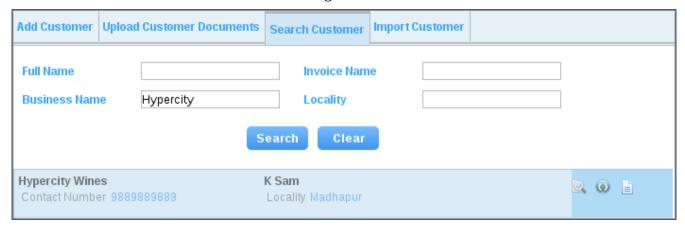
To Enable the Customer Hypercity Wines from the system

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





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

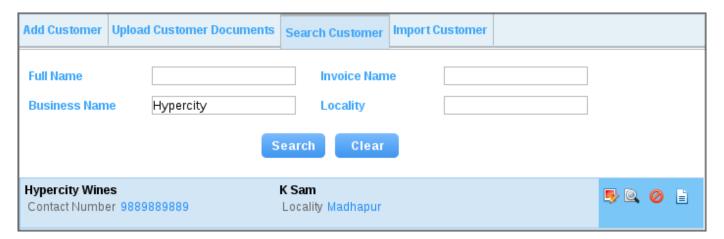




- 5. Click on Enable icon.
- 6. A conformation pop-up opens with Yes or No Option.



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



### **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**



- 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.

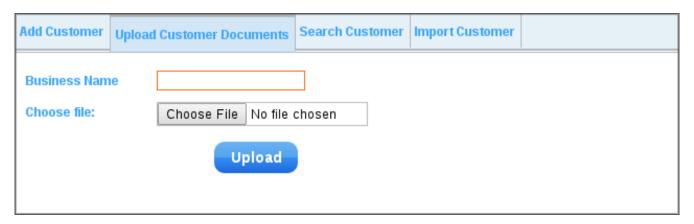


#### **Importing Customer Documents**

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**



- 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.