

Tab

- Customer
- Contact (User)
- Interest Area
- BP Access
- Location
- Bank Account
- Shipping Accounts
- Customer Accounting
- Tax Information

Customer

Home (75) Summary Customer: 10000014 Macho i... x

Customer

Client: Konnect Demo

Search Key: 10000014

Group: Customers

Name: Macho industry

Name 2:

Reference No:

Rating:

Credit Status: No Credit Check

Credit Limit: 0.00

Description:

☒ Active

URL:

Logo:

Business: Sundry Debtors

Partner Type:

☒ Customer

☐ Sales Representative

Sales Rep:

Agent:

Area:

Open Balance: 0.00

Classification or Importance

Tax Details

Tax ID:

Tax ID Type:

Tax Payer: TCS 0.1

☐ S/O Tax exempt

☐ is Ecommerce operator

Contact (User) Activity (User) Interest Area BP Access Activity Location Bank Account Shipping Accounts Customer Accounting Tax Information

2 Records

Client	Name	Description	Comments	Action
Konnect Demo	Ravi kumar	Customer		

Critical Fields

1. Search Key : Used to maintain the Customer code and unique id number.(Use characters and numbers)
2. Group : We can give the customer group name from the Business Partner group master window. (Do not change the Group after the transactions)
3. Name : We can give the Customer name.(Ex : Customer 1)

Critical & onetime setup fields

Non-Critical Fields

1. Representative/Agent : Used to select the Agent name .
2. Payment Term : We can select payment term from the payment term master.
3. Payment Rule : This is used to select the payment type.(Ex : Cash ,Check , On Credit)
4. Price List : We can select the Price list type from the price list master.(Ex :Sales)
5. Delivery Rule : We can select the delivery rule from the list.(After Receipt , Availability, Manual)
6. Delivery Via : We can select the Delivery Type from the list .(Pick Up ,Shipper, Delivery)
7. Business partner Type :Used to select the Business partner type

Zoom condition's

1. We can find the transactions by using this Customer.(EX :Quotation, Sales Order, customer po, Customer return, etc)

Customization

Contact (User)

KONNECT ANALYTICS customer

Prasanth P@Kconnect Demo-*/Kconnect Demo Admin

Feedback | Profile | Preference | Change Role | Log Out

Home (7) | Summary | Customer: Customer - 01 AB... x

Customer > Contact (User)

Record saved

Client: Kconnect Demo Organization: *

Customer Name: ABB India Ltd.

Name: Customer 1

Description:

Comments:

Email Address: customer1@gamil.com Password: *****

Greeting: Partner Location:

Title: Birthday: 06/04/2020

Phone: 8989483894 2nd Phone:

Fax: Notification Type: Email

Position: Full BP Access: ☒

EMail Verify: Verification Info:

Active: Last Contact:

Critical Fields

1. Name : We should maintain the contact user name for that Customer. (Ex : Customer 1)

Critical & onetime setup fields

Non-Critical Fields

1. Email Address : It is used to maintain the Email Id for this user.(Ex : customer1@gmail.com)
2. Email User Password : This is used to maintain the Password for the mail ID.
3. Partner Location : Used to maintain the Partner location. (To create location refer location Master)
4. Supervisor : This field is used to maintain the supervisor of the particular Customer. (Refer master window)

5. Phone : Used to maintain the user contact Number.

Zoom condition's

1. We can check the transactions by using this contact user.(Ex : Sales Order,Invoices,.)

Validation

1. Save : Used to Save the Record.
2. Delete : Used To Delete the Saved Records.

Interest Area

Home (56) Summary **Customer: 10000013 Tech eq... x**

Customer > Contact (User) > Interest Area▼

Data requested

Client Konnect Demo Organization *

User/Contact Arun

Interest Area Marketing

☒ Active

Subscribe Date 18/08/2023 Opt-out Date

Critical Field :

1. Subscribe Date : This field is used to maintain the user Subscription starting Date
2. Opt-Out Date : It is used to maintain the date of Un subscription Date

Critical and One Time SetUp :

1. Interest Area : It is used to select the Interested area from the master window.

BP Access

The screenshot displays the BP Access web application interface. At the top, there is a navigation bar with tabs for 'Home (56)', 'Summary', and 'Customer: 10000013 Tech eq...'. Below the navigation bar is a toolbar with various icons for file management and navigation. The main content area shows a breadcrumb trail: 'Customer > Contact (User) > BP Access'. Below this, the text 'Data requested' is visible. The form contains several fields: 'Client' with the value 'Konnect Demo', 'Organization' with a single asterisk '*', 'User/Contact' with the value 'Arun', and a checked 'Active' checkbox. The 'Access Type' dropdown menu is open, showing three options: 'Assets, Download' (highlighted in orange), 'Business Documents', and 'Requests'.

Home (56) Summary Customer: 10000013 Tech eq... x

Customer > Contact (User) > BP Access

Data requested

Client Konnect Demo Organization *

User/Contact Arun

☒ Active

Access Type Assets, Download

Assets, Download
Business Documents
Requests

Critical Field :

1. Access Type : It is used to select the access type for the user. These Types are available like Assets,Download,Business Documents,Requests.

Location

The screenshot shows the KONECT ANALYTICS interface for managing customer locations. The form is titled "Customer: Customer - 01 AB..." and indicates a "Record saved" status. The form fields are organized into sections: Client (Konekt Demo), Customer Name (ABB India Ltd.), Name (with a dropdown menu open showing Country: India, State: TamilNadu, City: Coimbatore), Address (with fields for Address 1: Door no 34, Address 2: BSS colony, Address 3: Coimbatore, Address 4:), Phone, Fax, Sales Region, Customer Address ID, GST (with fields for GST Registration Type, GST Number, GST Registration Date, and GST Contact Phone), and Organization (with fields for 2nd Phone: 8329489327, ISDN, Invoice Address checkbox, and Remit-To Address checkbox). The form also includes a "Map" button and a "Get Lat/Long" button.

Critical Fields

1. Name : This Field is used maintain the location Name.(Ex : Location 1)

Critical & onetime setup fields

Non-Critical Fields

1. Country : We can select the country name from the list.(Ex : India)
2. State : We can select the state name from the list .(Ex : Tamil Nadu)
3. City : We can select the city name from the list.(Ex : Coimbatore)
4. Address Fields : Used to maintain the address of the location.
5. Postal Code : Used to give postal number.
6. Invoice Address Check Box : If we select the check box this location is used as an invoice location.
7. Ship Address Check Box : If we select the check box this location is used as a shipping

location.

8. GST Registration Type: We can Select the GST Registration Type (Regular, consumer, Etc..)
9. GST Registration date: To enter the Registration date
10. GST Legal Name: To enter the gst legal name
11. GST Number: To enter the GST number (Ex:22AAAAA0000A1Z5)
12. GST contact phone: To enter the gst contact phone number
13. GST Contact Person: To enter the GST Contact Person details
14. GST contact Person Email: To enter the gst contact person Email

Zoom condition's

1. We can zoom and check the transactions by using this partner locations.(Ex : Invoice,..)

Validation

1. Save : Used to save the record.
2. Delete : Used to delete the existing record .

Bank Account

KONNECT ANALYTICS customer [Search] [User Icon]

Prasanth P@Konnect Demo.*Konnect Demo Admin

Feedback | Profile | Preference | Change Role | Log Out

Home (7) | Summary | Customer: Customer - 01 AB... ✕

Favourites [Dropdown] [Add]

Recent Items [Dropdown] [Add]

Customer > Bank Account

Record saved

Bank Accounts

Client: Konnect Demo Organization: *

Customer Name: ABB India Ltd.

User/Contact: Customer 1

☒ Active

Bank: State Bank_-1

Account No: 828491284912r2

Account Usage: Both

Bank Account Type: Cash

IBAN:

Reference

Account Name: Deposit Account

Account Street:

Account City: Coimbatore

Account Zip/Postal:

Account State: Tamilnadu

Account Country:

Driver License:

Social Security No:

Account EMail:

Address verified: Match

Zip verified:

Customer Payment Profile ID:

Payment Processor:

Critical Fields

1. Bank : We should select the bank name from the bank master.(Ex : State Bank)
2. Account Name : We should mention the Account Name .

Critical & onetime setup fields

Non-Critical Fields

1. User/Contact : We select the user contact name from the contact user tab.(Ex : Customer 1)
2. Account No : Used to maintain the Bank Account Number.
3. Bank Account Type : Used to select the Account type like Card,Cash,Checking,Current Account,Fixed Deposit ,OD,Recurring Deposit Account,Salary Account, Savings.
4. Account Usage : Used to maintain the usage like Direct Debit,Direct Deposit,Both,None.

Zoom condition's

Validation

Shipping Accounts

The screenshot shows the Konnect Analytics web application interface. The top navigation bar includes the logo, a search bar, and user information. The left sidebar contains 'Favourites' and 'Recent Items' sections. The main content area displays the 'Shipping Accounts' form for a customer named 'ABB India Ltd.'. The form includes fields for Client, Organization, Customer Name, Shipper Account Number, Duties Shipper Account, Partner Location, and Shipping Processor. A 'Record saved' message is visible at the top of the form area.

Record saved

Client	Konnect Demo	Organization	*
Customer Name	ABB India Ltd.		
<input checked="" type="checkbox"/> Active			
Shipper Account Number	8987 9482 8945 2942	Shipper Meter	
Duties Shipper Account			
Partner Location	Location 1		
Shipping Processor	Konnect Ship		

Critical Fields

Critical & onetime setup fields

Non-Critical Fields

1. Shipper Account Number : We can give the shipper account number.
2. Partner Location : We can select the shipping location.(Refer location Master)
3. Shipping Processor : We can select the shipping processors.(Refer shipping processor Master Window)

Zoom condition's

Validation

Customer Accounting

The screenshot shows the 'Customer Accounting' form in the Konnect Analytics application. The interface includes a top navigation bar with the 'KONNECT ANALYTICS' logo, a search bar, and user information. A left sidebar contains 'Favourites' and 'Recent Items' sections. The main content area displays the following fields:

Client	Konnect Demo	Organization	*
Customer Name	ABB India Ltd.		
Accounting Schema	Konnect Demo UN/35 Indian Rupee		
	<input checked="" type="checkbox"/> Active		
Customer Receivables	*-112100000-____		
Customer Prepayment	*-112100000-____		

In this tab we can see the Accounting information, This is a read only window.

Tax Information

The screenshot shows a software interface with a top navigation bar containing 'Home (71)', 'Summary', and a tab for 'Customer: 10000013 Tech eq...'. Below the navigation bar is a toolbar with various icons. The main content area is titled 'Customer > Tax Information' and shows 'Data requeried'. The form contains the following fields:

Client	Konnect Demo	Organization	Manufacturing Discrete
Customer Name	Tech equipment	Pan Number	ABCTY1234D
Tin Number			

At the bottom, there is a checkbox labeled 'Active' which is checked.

Critical Fields :

- 1.Pan Number: We can give the Pan Number
- 2.Tin Number: We can give the Tin Number

Critical & onetime setup fields :

Non-Critical Fields :

Zoom condition's :

Validation :