

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** Area Sales Order (#1)
 Contact (#2)
 Sales Order (#1)
 User (#2)

Search Key: **10000014** Group: **Customers** Manufacturing Discrete Logo: ☐

Name: **Macho industry** Business: **Sundry Debtors**
 Partner Type: ☒ Customer
☐ Sales Representative

Reference No: Rating: Sales Rep: ☐ Group: ☐

Credit Status: **No Credit Check** Credit Limit: **0.00** Classification or Importance: ☐ Agent: ☐

Description: ☐ Area: ☐

☒ Active Open Balance: **0.00**

URL: ☐

Tax Details

Tax ID: Tax ID Type: ☐ \$0 Tax exempt

Tax Payer: **TCS 0.1** ☐ 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	Acti
Konnect Demo	Ravi kumar	Customer		<input checked="" type="checkbox"/>

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

The screenshot shows a web application interface with a top navigation bar containing tabs for 'Home (56)', 'Summary', and 'Customer: 10000013 Tech eq...'. Below the navigation bar is a toolbar with various icons. The main content area displays the breadcrumb 'Customer > Contact (User) > Interest Area' and a 'Data requested' section. The form contains the following fields:

- Client**: Konnect Demo
- Organization**: *
- User/Contact**: Arun
- Interest Area**: Marketing
- Active**: ☒
- Subscribe Date**: 18/08/2023
- Opt-out Date**: (empty)

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 search. The main content area shows a breadcrumb trail: 'Customer > Contact (User) > BP Access'. Below this, the text 'Data requested' is visible. The search filters are as follows:

- Client:** Konnect Demo
- Organization:** *
- User/Contact:** Arun
- Active:** ☒
- Access Type:** A dropdown menu is open, showing three options: 'Assets, Download' (highlighted in orange), 'Business Documents', and '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

KONECT ANALYTICS customer

Prasanth P@Kconnect Demo.*Kconnect Demo Admin

Feedback | Profile | Preference | Change Role | Log Out

Home (7) Summary Customer: Customer - 01 AB... *

Favourites Recent Items

Customer > Location

Record saved

Client: Kconnect Demo Organization: *

Customer Name: ABB India Ltd.

Name: Country: India State: TamilNadu City: Coimbatore

Address: Address 1: Door no 34 Address 2: BSS colony Address 3: Coimbatore Address 4:

Phone: 2nd Phone: 8329489327

Fax: ISDN:

Sales Region: Invoice Address: ☒ Remit-To Address: ☐

Customer Address ID: GST: GST Registration Type: GST Registration Date: GST Contact Phone:

GST Number:

Map Get Lat/Long

✓ ✗

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

Prasanth P@Konnect Demo.*Konnect Demo Admin

Feedback | Profile | Preference | Change Role | Log Out

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

Favourites Recent Items

Customer > Bank Account

Record saved

Bank Accounts

Client Konnect Demo Organization *

Customer Name ABB India Ltd.

User/Contact Customer 1

☒ Active Account Usage Both

Bank State Bank_-1 Bank Account Type Cash

Account No 828491284912r2 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 'Shipping Accounts' form in the Konnect Analytics application. The interface includes a top navigation bar with the 'KONNECT ANALYTICS' logo, a search bar, and user information (Prasanth P@Konnect Demo, Konnect Demo Admin). Below the navigation bar, there are tabs for 'Home (7)', 'Summary', 'Customer: Customer - 01 AB...', and 'Shipping Processor: Konnect...'. The left sidebar contains 'Favourites' and 'Recent Items' sections. The main form area displays the following fields:

- Client:** Konnect Demo
- Organization:** *
- Customer Name:** ABB India Ltd.
- Active:** ☒
- Shipper Account Number:** 8987 9482 8945 2942
- Shipper Meter:**
- Duties Shipper Account:**
- Partner Location:** Location 1
- Shipping Processor:** Konnect Ship

A 'Record saved' message is visible at the top of the form area.

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

Home (71) Summary Customer: 10000013 Tech eq... x

Customer > Tax Information 1/1

Data requiered

Client* Konnect Demo Organization* Manufacturing Discrete

Customer Name Tech equipment Pan Number ABCTY1234D

Tin Number

☒ Active

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 :