

# Tab

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# Customer

Customer

Client: Konnect Demo

Search Key: 10000014

Name: Macho industry

Reference No: [ ] Rating: [ ]

Credit Status: No Credit Check Credit Limit: 0.00

Description: [ ]

Active

URL: [ ]

Group: Manufacturing Discrete

Business Partner Type: Sundry Debtors

Open Balance: 0.00

Tax Details

Tax ID: [ ] Tax ID Type: [ ]

Tax Payer: TCS 0.1

Classification or Importance

Client	Name	Description	Comments	Acti
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)

The screenshot displays the 'Contact (User)' form in the Konnect Analytics application. The form is for a customer named 'ABB India Ltd.' and includes the following fields:

- Client: Konnect Demo
- Organization: \*
- Customer Name: ABB India Ltd.
- Name: Customer 1
- Description: (empty)
- Comments: (empty)
- E-Mail Address: customer1@gamil.com
- Password: (masked with dots)
- Greeting: (dropdown menu)
- Partner Location: (dropdown menu)
- Title: (empty)
- Birthday: 06/04/2020
- 2nd Phone: (empty)
- Phone: 8989483894
- Notification Type: Email
- Fax: (empty)
- Position: (dropdown menu)
- Full BP Access:
- EMail Verify: (empty)
- Verification Info: (empty)
- Active:
- Last Contact: (empty)

## 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

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

Customer > Contact (User) > BP Access

Data requeried

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 displays the 'Location' form in the Konnect Analytics application. The form is for a customer named 'ABB India Ltd.' and is currently in edit mode. A modal window is open for the 'Name' field, showing a dropdown for 'Country' (India), a dropdown for 'State' (TamilNadu), and a dropdown for 'City' (Coimbatore). Below these are input fields for 'Address 1' (Door no 34), 'Address 2' (BSS colony), 'Address 3' (Coimbatore), 'Address 4', 'Postal Code' (638 092), 'Latitude', and 'Longitude'. There are 'Map' and 'Get Lat/Long' buttons at the bottom of the modal. The main form also includes fields for 'Client' (Konnect Demo), 'Organization', 'Customer Name', 'Phone', 'Fax', 'Sales Region', 'Customer Address ID', 'GST Registration Type', 'GST Number', '2nd Phone' (8329489327), 'ISDN', 'Invoice Address' (checked), and 'Remit-To Address' (unchecked).

## 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

The screenshot shows the 'Bank Account' form in the Konnect Analytics application. The form is titled 'Bank Account' and is part of a 'Customer' record. The form contains the following fields:

- Client: Konnect Demo
- Organization: \*
- Customer Name: ABB India Ltd.
- User/Contact: Customer 1
- Active:
- Bank: State Bank\_-1
- Account No: 828491284912r2
- IBAN:
- Account Name: Deposit Account
- Account Street:
- Account City: Coimbatore
- Account Zip/Postal:
- Account State: Taminadu
- 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 interface for managing Shipping Accounts. The top navigation bar includes the Konnect Analytics logo, a search bar, and user information (Prasanth P@Konnect Demo, Konnect Demo Admin). The main content area displays a form for a Shipping Account. The form is titled 'Shipping Accounts' and shows a record for 'ABB India Ltd.' with 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

## 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 form is read-only and displays the following information:

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 requested

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 :