

Customer

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Introduction

Introduction

1. Customer Window is used to create the customer name and customer details.

Tab

Tab

Customer

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

Customer

Client Konnect Demo

Search Key 10000014

Name Macho industry

Reference No

Credit Status No Credit Check

Description

URL

Group Customers

Manufacturing Discrete

Logo

Business Sundry Debtors

Partner Type

Sales Rep

/Agent

Area

Open Balance 0.00

Area Sales Order (#1)

Contact (#2)

Sales Order (#1)

User (#2)

Classification or Importance

Tax Detail

Tax ID

Tax ID Type

Tax Payer TCS 0.1

\$0 Tax exempt

isEcommerce 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		

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

Tab

Contact (User)

The screenshot shows the 'Contact (User)' form in the Konnect Analytics application. The form is titled 'Customer: Customer - 01 AB...' and shows a 'Record saved' status. The form contains various fields for user information, including Client, Organization, Customer Name, Name, Description, Comments, Email Address, Password, Greeting, Partner Location, Title, Birthday, Phone, 2nd Phone, Fax, Notification Type, Position, EMail Verify, and Last Contact. The form is organized into two main columns with a sidebar on the left for navigation.

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.

Tab

Interest Area

The screenshot shows a software interface with a top navigation bar containing tabs: '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 requeried' section. The form contains the following fields:

- Client**: Text input with value 'Konnect Demo'.
- Organization**: Text input with value '*'.
- User/Contact**: Text input with value 'Arun'.
- Interest Area**: Text input with value 'Marketing'.
- Active**: A checked checkbox.
- Subscribe Date**: Text input with value '18/08/2023' and a calendar icon.
- Opt-out Date**: Text input with a calendar icon.

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.

Tab

BP Access

The screenshot displays the BP Access web application interface. At the top, there is a navigation bar with tabs: '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 the breadcrumb trail, the text 'Data requested' is visible. The form contains several fields: 'Client' with the value 'Konnect Demo', 'Organization' with the value '*', 'User/Contact' with the value 'Arun', and a checkbox labeled 'Active' which is checked. The 'Access Type' field is a dropdown menu with the value 'Assets, Download' selected. The 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.

Tab

Location

The screenshot displays the 'KONECT ANALYTICS' interface for managing customer locations. The main form is titled 'Customer: Customer - 01 AB...'. It includes a sidebar with 'Favourites' and 'Recent Items' sections. The form fields are organized into sections: 'Client' (Konnekt Demo), 'Customer Name' (ABB India Ltd.), 'Name' (with a modal window for Country, State, City, and Address fields), 'Address' (with fields for Address 1, 2, 3, 4, Postal Code, Latitude, and Longitude), 'Phone' (2nd Phone: 8329489327), 'Fax', 'ISDN', 'Invoice Address' (checked), 'Remit-To Address' (unchecked), 'GST Registration Date', 'GST Contact Phone', and 'GST Number'. The modal window for 'Name' is currently open, showing a dropdown for 'Country' (India), 'State' (TamilNadu), and 'City' (Coimbatore), along with text 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 has a 'Record saved' message at the top left.

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 .

Tab

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: ☒

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

Tab

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 is a sidebar with 'Favourites' and 'Recent Items' sections. The main content area displays the 'Shipping Accounts' form for 'Customer: Customer - 01 AB...'. The form fields are as follows:

Field	Value
Client	Konnect Demo
Organization	*
Customer Name	ABB India Ltd.
Active	<input checked="" type="checkbox"/>
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

Tab

Customer Accounting

The screenshot shows the 'Customer Accounting' form in the Konnect Analytics application. The interface includes a top navigation bar with the 'customer' search bar and user information (Prasanth P@Konnect Demo, Konnect Demo Admin). 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.

Tab

Tax Information

The screenshot shows a software interface with a top navigation bar containing 'Home (71)', 'Summary', and a selected tab '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 requested'. 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 :

Validations

Validation

Save

1.System will check the all mandatory fields

Delete

1.System will delete the order and its history details