

Customer

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Introduction

Introduction

Introduction

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

Tab

Tab

Customer

The screenshot displays the SAP Customer Master form for a customer named 'Macho industry'. The form includes the following fields and options:

- Client:** Konnect Demo
- Search Key:** 10000014
- Name:** Macho industry
- Group:** Customers
- Business Partner Type:** Sundry Debtors
- Credit Status:** No Credit Check
- Credit Limit:** 0.00
- Description:** (Empty)
- Active:**
- URL:** (Empty)
- Tax ID:** (Empty)
- Tax ID Type:** (Empty)
- Tax Payer:** TCS 0.1
- is SO Tax exempt:**
- is Ecommerce operator:**

The form also features a navigation bar with tabs for Contact (User), Activity (User), Interest Area, BP Access, Activity, Location, Bank Account, Shipping Accounts, Customer Accounting, and Tax Information. Below the form, a table shows 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 contains the following fields:

- Client:** Konnect Demo
- Organization:** *
- Customer Name:** ABB India Ltd.
- Name:** Customer 1
- Description:**
- Comments:**
- E-Mail 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:**
- E-Mail 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.

Tab

Interest Area

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

Customer > Contact (User) > Interest Area

Data requeried

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.

Tab

BP Access

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 'Location' setup form in the Konnect Analytics application. The form is for a customer named 'ABB India Ltd.' and is currently in edit mode. The 'Name' field is highlighted with a red border. The form includes the following fields and values:

- Client: Konnect Demo
- Organization: [Dropdown]
- Customer Name: ABB India Ltd.
- Name: [Text Field]
- Country: India
- State: TamilNadu
- City: Coimbatore
- Address 1: Door no 34
- Address 2: BSS colony
- Address 3: Coimbatore
- Address 4: [Text Field]
- Postal Code: 638 092
- Latitude: [Text Field]
- Longitude: [Text Field]
- 2nd Phone: 8329489327
- ISDN: [Text Field]
- Invoice Address:
- Remit-To Address:
- GST Registration Date: [Calendar Icon]
- GST Contact Phone: [Text Field]

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... x

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

Tab

Shipping Accounts

The screenshot displays the 'Shipping Accounts' form in the Konnect Analytics application. The form is titled 'Record saved' and contains the following fields:

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

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 a web application interface for 'Customer Accounting'. The top navigation bar includes the 'KONNECT ANALYTICS' logo, a search bar with 'customer' entered, and user information: 'Prasanth P@Konnect Demo.*|Konnect Demo Admin'. Navigation links for 'Feedback', 'Profile', 'Preference', 'Change Role', and 'Log Out' are present. 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

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

Customer > Tax Information 1/1

Data requeried

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 :

Validations

Validation

Save

1. System will check the all mandatory fields

Delete

1. System will delete the order and its history details