

Costumer Master

Costumer

- a person or company that customarily or habitually engages in transactions.
- sometimes known as a client, buyer, or purchaser.

Sample image for costumer page

The screenshot shows the 'Customer Master' form with the following fields and sections:

- Customer Number:** CUS- (with search icon)
- Short Name:** (with search icon)
- Name:** (with search icon)
- Address 1:** (with search icon)
- Address 2:** (with search icon)
- City:** (with search icon)
- State/Province:** (with search icon)
- Zip/Postal Code:** (with search icon)
- Country:** Philippines (dropdown)
- Salutation:** [Select] (dropdown)
- First Name:** (with search icon)
- Middle Name:** (with search icon)
- Last name:** (with search icon)
- Title:** (with search icon)
- Email:** (with search icon)
- Phone:** (with search icon)
- Phone-Mobile:** (with search icon)
- Fax:** (with search icon)
- URL:** (with search icon)
- Id:** (with search icon)
- Tax Number:** (with search icon)
- Control Account-AR:** [Select] (dropdown)
- Customer Group:** [Select] (dropdown)
- Customer Type:** AD HOC (dropdown)
- Price Group:** [Select] (dropdown)
- SIC Code:** [Select] (dropdown)
- Tax Scope:** [Select] (dropdown)
- Industry Segment:** [Select] (dropdown)
- Discount %:** 0.00
- Agent:** (with search icon)
- Commission %:** 0.00
- Billing Address:** (with search icon)
- Customer Status:**
 - ☐ Held
 - ☐ Legal
 - ☒ Open
- Credit Limit:** 1,000,000,000.00
- Credit Available:** 0.00
- Credit Rating:** [Select] (dropdown)
- Credit Terms:** 0
- Date of Credit Application:** [Unknown] (with search icon)
- Date Approved:** [Unknown] (with search icon)
- Expiration Date:** [Unknown] (with search icon)
- Date Incorporated:** [Unknown] (with search icon)
- Date of Credit Evaluation:** [Unknown] (with search icon)
- Date of Financial Statements:** [Unknown] (with search icon)
- Payment Instructions:** (with search icon)
- Avg Payment Days:** 0
- Remarks:** (with search icon)
- License:** (with search icon)
- Backorder Type:** None (dropdown)
- Payment Method:** [Select] (dropdown)
- Points OB:** 0.00

Mandatory Field

- **Country** - This is the country where the certain costumer operate his/her business.
- **Phone Number** - contact Number
- **E-mail**
- **Control Account-AR** - This is mainly use for GL interface
- **Customer Group** - Your own company grouping of costumers.
 - Example:
 - Regular Sales
 - Consignment
 - Outright Sales
 - Ex-Deal
 - Trade Creditor
- **Tax Scope**

- In here you categorize your costumer according to what tax obligation they belong.
- Tax Scope provides vision in tax.
- Example:
 - Foreign Costumer
 - local Costumer

Steps in Creating Costumer File

1. Fill in self-explanatory fields.

Terms	Definition
Costumer Number	Automatically assigned by the system.
Short Name	Abbreviation
Name	Full name of the costumer
Address 1	Name of the Bldg/ Lot Number & Street Name/Number
Address 2	Barangay
City	City of the customer
State/Province	
Zip/Postal	
Country	Country of the costumer
Salutation	
First Name	Name of the Contact Person
Middle Name	
Last Name	
Title	Designation of the Contact Person
E-mail	
Phone	Landline Number
Phone-Mobile	Hand Phone number
Fax	
URL	
Id	
Tax Number	
Control Account-AR	Use for GL interface

1. Click **Add** -

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