

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
Customer Group	Classification of Costumer defined by the company
Costumer Type	
Price Group	
SIC Code	
Tax Scope	
Industry Segment	
Discount %	
Agent	
Commission	
Billing Address	
Costumer Status	
Credit Limit	
Credit Available	

Terms	Definition
Credit Rating	
Credit Terms	
Date of Credit Application	
Date of Credit Evaluation	
Date of Financial Statements	
Payment Instructions	
Avg Payment	
Remarks	

1. Click **Add** -

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