

# 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- [dropdown]
- Short Name:** [text field]
- Name:** [text field]
- Address 1:** [text field]
- Address 2:** [text field]
- City:** [text field]
- State/Province:** [text field]
- Zip/Postal Code:** [text field]
- Country:** Philippines [dropdown]
- Salutation:** [Select]
- First Name:** [text field]
- Middle Name:** [text field]
- Last name:** [text field]
- Title:** [text field]
- Email:** [text field]
- Phone:** [text field]
- Phone-Mobile:** [text field]
- Fax:** [text field]
- URL:** [text field]
- Id:** [text field]
- Tax Number:** [text field]
- Control Account-AR:** [Select]
- Customer Group:** [Select]
- Customer Type:** AD HOC [dropdown]
- Price Group:** [Select]
- SIC Code:** [Select]
- Tax Scope:** [Select]
- Industry Segment:** [Select]
- Discount %:** 0.00
- Agent:** [text field]
- Commission %:** 0.00
- Billing Address:** [text field]
- Customer Status:**
  - ☐ Held
  - ☐ Legal
  - ☒ Open
- Credit Limit:** 1,000,000,000.00
- Credit Available:** 0.00
- Credit Rating:** [Select]
- Credit Terms:** 0
- Date of Credit Application:** [Unknown]
- Date Approved:** [Unknown]
- Expiration Date:** [Unknown]
- Date Incorporated:** [Unknown]
- Date of Credit Evaluation:** [Unknown]
- Date of Financial Statements:** [Unknown]
- Payment Instructions:** [text area]
- Avg Payment Days:** 0
- Remarks:** [text area]
- License:** [text field]
- Backorder Type:** None [dropdown]
- Payment Method:** [Select]
- 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 or a substitute for the proper name of a Customer
Name	Full name of the costumer
Address 1	Name of the Bldg/ Lot Number & Street Name/Number
Address 2	Barangay/ Town
City	City of the customer
State/Province	An administrative division or unit of a country.
Zip/Postal	A code of letters and digits used as part of a postal address to aid the sorting of mail.
<b>Country</b>	Country of the costumer
Salutation	A polite expression of greeting or goodwill( such as Miss,Mr.,Madam, etc.)
First Name	Name of the Contact Person
Middle Name	
Last Name	
Title	Designation of the Contact Person
E-mail	A system for sending and receiving messages electronically over a computer network.
Phone	Landline Number
Phone-Mobile	Hand Phone number
Fax	Fax Number. A fax (short for facsimile and sometimes called telecopying) is the telephonic transmission of scanned-in printed material (text or images), usually to a telephone number associated with a printer or other output device.
URL	It is the global address of documents and other resources on the World Wide Web.
Id	
Tax Number	
<b>Control Account-AR</b>	Use for GL interface
Customer Group	Classification of Costumer's by group defined by the company
Costumer Type	Classification of Costumer's by type defined by the company
Price Group	Classification of Costumer's by price category defined by the company
SIC Code	
Tax Scope	

Terms	Definition
Industry Segment	A distinct component of a business, such as a product line or a category of products. The term is also used to describe a grouping of similar types of businesses, such as fast-food restaurants or athletic equipment manufacturers.
Discount %	Refers to the condition of the price of a bond that is lower than par, or face value exclusively for this Costumer.
Agent	A person that has express (oral or written) or implied authority to act for Costumer so as to bring the Costumer into contractual relationships with the Company. A person who have been given the official job of selling something
Commission	an amount of money paid
Billing Address	
Costumer Status	
Credit Limit	Refers to the maximum amount of credit a company extends to a client
Credit Available	Available credit is the difference between the amount of the credit line or limit, and the amount that has already been used.
Credit Rating	An assessment of the creditworthiness of a borrower in general terms or with respect to a particular debt or financial obligation.
Credit Terms	Credit terms or terms of credit is the agreement between a seller and buyer that lists the timing and amount of payments the buyer will make in the future.
Date of Credit Application	
Date of Credit Evaluation	
Date of Financial Statements	
Payment Instructions	
Avg Payment	
Remarks	

2. Click **\*\*Add\*\***

3. Costumer added.

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