Customer Entry

Module Guide: Customer Entry

Module Location

Sales > Customer > Customer Entry

Module Objective

The **Customer Entry** module serves as the center for managing customer **master data**. This is where all new customer data is registered, and existing customer data can be viewed and managed. The accuracy of the data in this module is crucial as it will be used throughout all other modules related to customers (Accounts Receivable, CRM, etc.).

1. Main View (Customer/MOU List)

The main page of this module displays a list of all customers or MOUs (Memorandum of Understanding) that have been recorded in the system.

View Explanation & Filters

This page is for viewing and managing all customer master data.

- **Filters**: You can search for specific data by **MOU Number**, **Goods/Services Category**, **Status**, or a **Start Date** and **End Date** range.

- **Customer List**: The table below will display all data that matches the filters. The columns include important information such as **MOU Number**, **Customer Name**, **Territory**, **Credit Limit**, and **Document Status**.

Button Functions

- **New**: The primary button to create or input new customer data.

- **Print**: To print the details of selected customer data.

- **Change Status**: To change the status of selected customer data (e.g., from prospect to active).

2. Steps to Input a New Customer

Step 1: System Configuration Prerequisite (Important!)

Before you can input a new customer, the system requires a **Document Type** setting. If you click **New** and see the message **"You haven't set CustomerEntry as Document Type yet!"**, it means this configuration has not been done.

Action: Please contact the **MIS (Management Information System) department** to perform this setup first.

Step 2: Create a New Customer

After the configuration in Step 1 is complete, click the **New** button on the Main View to open the customer registration form.

Step 3: Fill in Customer Details

On the form that appears (not shown in the image), fill in all the necessary customer master data. Based on the existing columns, this data will include:

- **General information**: Customer Name, Address, Territory, etc.
- **Sales information**: Products of interest, Sales target.
- **Financial information**: Bank Guarantee, Credit Limit.

Step 4: Save the Data

Click the "Save" or "Confirm" button to save the new customer data into the system. The new data will then appear in the Main View.

Tips & Important Notes

- This module is the **single source of master data** for all customers. Ensure the data input here (especially name, address, and Tax ID Number/NPWP) is correct and accurate.
- The **Credit Limit** column will be an important reference for the system to control sales transactions so they do not exceed the granted credit ceiling.
- The **Change Status** button is likely used to manage the customer lifecycle within the system.

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