

Customer

Module Guide: Customer

Module Location

Sales > Customer > Customer

Module Objective

The **Customer** module is the master data hub for all of the company's customers. This is where you can create new customer data, view, edit, and manage their complete information, ranging from address and contact details to tax information and sales terms. Accurate data in this module is crucial for the smooth operation of the entire sales, delivery, and billing process.

1. Main View (Customer List)

The main page of this module displays a list of all customers registered in the system.

No.	Customer Code	Customer Name	Address	City	Phone	Fax	Currency	Status	Sales Person
1.	012917	A. Karim, Bp-palembang	Palembang	Palembang	0812-7880-9477		IDR	✓	M. Qoirlu Anwar
2.	012450	A. Munavar Bp-Balikpapan	Balikpapan	Balikpapan	08155289823		IDR	✓	Mochamad Atiz
3.	12028	Abadi Sejahtera, UD-Pemalang	Desa Bayatan RT 01 RW 03 Purvosari Kec. Comal Kabupaten Pemalang	Pemalang	081125050109		IDR	✓	M. Qoirlu Anwar
4.	012901	Abdul Malik, Habibi, Bp-Gresik	Jl Raya Bamba KM 19 Driyorejo Gresik	Gresik	081333603098		IDR	✓	Mochamad Atiz
5.	UMSC000115	Achmad Handiyansyah	Dusun GempolKaledongcangkring Prambon	Sidoarjo	089515617276		IDR	✓	Mochamad Atiz
6.	012772	Adhitya Any Utama, RT (TF)-Bogor	Jalan Gerdu Raya No39 RT 003 RW 001 Kel Margasjaya Kec. Bogor Barat Kota Bogor	Bogor	081296535796		IDR	✓	M. Qoirlu Anwar
7.	012761	Afdal Jaya Karsa, Cv-Makassar	Jl Poros Kostred Karangan No 51Makassar	Makassar	085399211693		IDR	✓	M. Qoirlu Anwar
8.	012987	Agung Jaya, Cv-Serang	Bumi Agung Permai II D 23 No 07 Kelurahan Kaligandu Kecamatan Serang Kota Serang	Kota Serang	087810081978		IDR	✓	Mochamad Atiz
9.	012799	AK, Tk (TF)-Banjarasin / Rundini ex DBDL	Jl RK Ilir No555 Banjarasin	Banjarasin	082142844437		IDR	✓	M. Qoirlu Anwar
10.	012970	Alamjaya Wirasantosa, Pt-Air Molek	Jl Raya Medan Tanjung Morawa KM 135 No 54 Bangun Sari Tanjung Morawa Kabupaten Deli Serdang	Indragiri Hulu	085359288798		IDR	✓	Mochamad Atiz
11.	012979	Alamjaya Wirasantosa, Pt-Banda Aceh	Jl Raya Medan Tanjung Morawa KM 135 No 54 Bangun Sari Tanjung Morawa Kabupaten Deli Serdang	Banda Aceh	085359288798		IDR	✓	Mochamad Atiz
12.	012938	Alamjaya Wirasantosa, Pt-Baturaja	Jl Raya Medan Tanjung Morawa KM 135 No 54 Bangun Sari Tanjung Morawa Kabupaten Deli Serdang	Baturaja	085359288798		IDR	✓	Mochamad Atiz
13.	012960	Alamjaya Wirasantosa, Pt-Bengkulu	Jl Raya Medan Tanjung Morawa KM 135 No 54 Bangun Sari Tanjung Morawa Kabupaten Deli Serdang	Bengkulu	085359288798		IDR	✓	Mochamad Atiz
14.	012981	Alamjaya Wirasantosa, Pt-Bireun	Jl Raya Medan Tanjung Morawa KM 135 No 54 Bangun Sari Tanjung Morawa Kabupaten Deli Serdang	Bireun	085359288798		IDR	✓	Mochamad Atiz
15.	012985	Alamjaya Wirasantosa, Pt-Blangpidie	Jl Raya Medan Tanjung Morawa KM 135 No 54 Bangun Sari Tanjung Morawa Kabupaten Deli Serdang	Blangpidie	085359288798		IDR	✓	Mochamad Atiz
16.	012976	Alamjaya Wirasantosa, Pt-Bukittinggi	Jl Raya Medan Tanjung Morawa KM 135 No 54 Bangun Sari Tanjung Morawa Kabupaten Deli Serdang	Bukittinggi	085359288798		IDR	✓	Mochamad Atiz
17.	012994	Alamjaya Wirasantosa, Pt-Bungo	Jl Raya Medan Tanjung Morawa KM 135 No 54 Bangun Sari Tanjung Morawa Kabupaten Deli Serdang	Bungo	085359288798		IDR	✓	Mochamad Atiz
18.	012971	Alamjaya Wirasantosa, Pt-Dumai	Jl Raya Medan Tanjung Morawa KM 135 No 54 Bangun Sari Tanjung Morawa Kabupaten Deli Serdang	Dumai	085359288798		IDR	✓	Mochamad Atiz
19.	012993	Alamjaya Wirasantosa, Pt-Jambi	Jl Raya Medan Tanjung Morawa KM 135 No 54 Bangun Sari Tanjung Morawa Kabupaten Deli Serdang	Jambi	085359288798		IDR	✓	Mochamad Atiz
20.	012980	Alamjaya Wirasantosa, Pt-Langka	Jl Raya Medan Tanjung Morawa KM 135 No 54 Bangun Sari Tanjung Morawa Kabupaten Deli Serdang	Langka	085359288798		IDR	✓	Mochamad Atiz

View Explanation & Filters

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

- **Filters:** You can search for a specific customer using the search bar at the top or filter the list by **Item Category** and **Status**.
- **Customer List:** The table below displays a summary of each customer, with columns such as **Customer Code**, **Customer Name**, **Address**, **City**, **Phone**, and the responsible **Sales Person**.

Button Functions

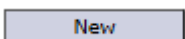
- **New:** The primary button to create new customer data.
- **Delete:** To delete selected customer data.
- **Print:** To print the details of selected customer data.
- **Export To MS Excel:** To download the customer list into an Excel format.
- **Change Status:** To change the status of a selected customer (e.g., from active to inactive).

2. Steps to Manage Customer Data

The following is the complete workflow for registering a new customer.

Step 1: Create a New Customer

From the Main View, click the **New** button to open the **New Customer** form.



Step 2: Fill in Main Customer Details

Fill in all the relevant information on the form that appears. Fields marked with (*) are mandatory.

- **General Information:** Fill in the **Customer Code** (if not automatic), **Name** (Customer Name), and select the appropriate **Customer Category**.

Customer Code * UMSCCxxxxx

Name *

Customer Category

- **Tax & Bank Information:** Complete important data such as **Tax File Number**, **NPWP** (Tax ID Number), **Bank Account**, and **Account Name**.

Tax File Number

Document NPWP No file chosen

Bank Account

Account Name

- **Contact Information:** Enter the **Email Address**, **Website**, **Address**, **City**, and **Phone**.

Email Address

Website

Address *

- **Sales Information:** Set terms such as **Default Price Group** and **Allowed Tolerance Difference**.

Default Price Group *

Allowed Tolerance Difference *

Step 3: Add a Contact Person

Every customer company has a contact person. To add them:

1. While filling out the new customer form, click the **Add Contact** button at the bottom to open the **Add Contact** form.

First Name *	<input type="text"/>
Middle Name	<input type="text"/>
Last Name	<input type="text"/>
Job Title *	<input type="text"/>

2. Fill in the contact person's details such as **First Name**, **Last Name**, **Job Title**, and **Email Address**.

Email Address *	<input type="text"/>
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3. **Important:** Check the **Billing PIC** (Person In Charge) box if this person is responsible for billing matters.

BillingPIC *	<input type="checkbox"/> Yes
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4. Click **Save** to save the contact and return to the main customer form.

<input type="button" value="Save"/>

Step 4: Save the Customer Data

After all the data on the main customer form and for the contact person has been filled in, click the 'Save' or 'Confirm' button at the bottom of the main form to register the new customer into the system.

Tips & Important Notes

- Ensure you fill in the **Customer Category** correctly as this will affect the default accounting settings for that customer.
- Filling in the contact person data, especially marking the **Billing PIC**, will greatly simplify the communication and collection process for the AR team.

- The **Change Status** button on the main page is used to change a customer's status, for example, from 'Potential' to 'Active' or vice versa.

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