Product Training
Customers

Where "Lean" principles are considered common sense and are implemented with a passion!

winman
ADVANCED ERP SYSTEMS

Customers

Customers are used for sales orders, invoices, credits and RMA's. The customer master stores bill to and ship to information.

Customers

General Tab

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Customer – First field is a 6 digit customer number that will increment by 1 for each new customer. The second field is the branch. A customer can have multiple branches which can be used as ship to addresses.

Note: It is good practice to use the automatically generated sequential number as the customer number. Using an intelligent number that reflect the customer name are problematic with today's mergers and acquisitions that lead to company name changes.

SYSTEM SETTING:
The default length of a Customer number is 6 characters. This can be amended to be as many 10 characters. Use the Customer system setting **Customer Identifier Length.** Enable the profile and use the number of characters for the customer number as the value.

SYSTEM SETTING:
The default prefix of a Customer number is C. The prefix can be amended to be any character. Use the Customer system setting **Customer Identifier Prefix.** Enable the profile and use the character(s) required for the prefix as the value.

SYSTEM SETTING:
The default length of a Customer branch is 4 characters. This can be amended to be changed but the max is 4 characters. Use the Customer system setting **Customer Branch Length.** Enable the profile and use the number of characters for the customer branch as the value.

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General Tab

- **Name –** The name of the customer

- **Address –** Address of the customer

- **City –** The city of the customer

- **State –** The state that the customer is found in. State's are in the table and must be maintained in the States program.

- **Postcode –** Enter the zip code of the customer. For quick entry of City and State, enter the postcode and select the icon next to the zip code field.

- **Country –** Enter the country of the customer

- **Phone number –** The main customer phone number (Individual phone numbers can be assigned to a contact)

- **Fax –** The main customer fax number (Individual fax numbers can be assigned to a contact)

- **Email –** The main customer email address. (Individual email numbers can be assigned to a contact)

- **Web Site –** The customer's web site

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Financial Tab

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Financial Tab

- ❏ **Billing Address –** The branch that will be the Bill to for the customer. Each customer must have a billing address as all invoices generated will be assigned to the Bill to customer record.

    Note: It is good practice to have all branches of 0000 represent the Billing address.

- ❏ **Currency –** The currency that the customer is trading in.

- ❏ **Bank –** A default bank for the customer used as reference only.

- ❏ **Credit Terms –** Used as a default for sales orders and sales invoices to calculate invoice due dates.

- ❏ **Credit Limit –** The credit limit of the customer. If credit checking is activated, all customer activity will be measured against the credit limit and a warning will be provided. If a user has admin security in the program where the credit check is performed, they can override the warning. If the user doesn't have security, they cannot continue.

- ❏ **Settlement terms –** The default early pay discount for the customer.

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Financial Tab

- ❏ **Discount** – The default discount code that will be applied to all sales orders and sales invoices for the customer. The customer discount code would be overridden by a discount code in products if one exists. If a customer pricing classification exists, this will override both customer and product discount. All discounts will be overridden by any discount found in the customer cross reference.

- ❏ **Price List** – The default price list for the customer. A product will lookup the price on the price list, and if no price list entry exists for the part, the standard price in products will be used.

- ❏ **Tax Number** – The tax number for the customer used for reference only.

- ❏ **Tax Code** – The default tax code used for the customer.

- ❏ **Tax code secondary** – The default second tax, if required.

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Accounting Tab

- **Division –** The Accounts Receivable division as well as the default revenue division.

- **Control Account –** The Accounts Receivable account.

- **Free Text Account –** The default free text account that will be used when a free text item is added to a sales order or sales invoice.

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Details Tab
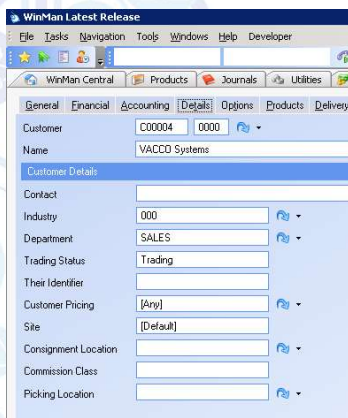
- **Contact –** The default contact for sales orders as well as prints.

- **Industry –** The industry that the customer belongs to. Can be used for reporting.

- **Department –** The department responsible for the customer. This can be a group of WinMan users responsible for the account or it can be a non-commissionable sales rep.

- **Trading Status –** A customer can have 1 of 3 trading statues (trading status can also be amended in the Customer Review program).
    1. **Trading –** Sales and shipments can be completed for the customer.
    2. **Held –** Sales orders may be entered but no shipments can be completed.
    3. **Stop –** Neither sales orders or shipments may be completed.

- **Their Identifier –** The supplier number that the customer uses in their system. For reference only.

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Details Tab

- **Customer Pricing –** The customer pricing ID that will be used. Customer pricing is a way to group customers and products and cross reference them to determine what discount rate is to be applied. This discount will override all over discounts (both customer and product level discounts) with the exception of the customer cross reference discount.

- **Site –** If multi-site is in use a customer is either available to a specific site or all sites. The customer may only have sales orders entered for the sites it is assigned to.

- **Consignment Location –** The location that items on a consignment sales order will be moved to once a shipment is finalised.

- **Commission Class –** The commission class used for the customer. The commission class in customers and the commission group in products help determine what commission rate an item will receive.

- **Picking Location –** A primary location used when inventory is picked for a shipment. Any picking requirements will be picked from the primary location. If additional requirements are needed, standard picking logic will apply. Leave the Picking Location blank if standard picking logic is needed.

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Options Tab
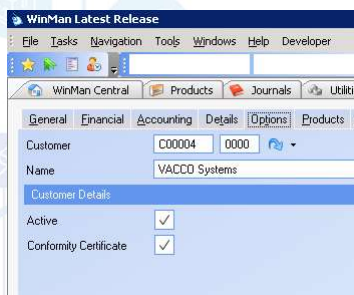
- **Active –** If the customer is active it can be picked for new sales orders or new sales invoices.

- **Conformity Certificate –** If a certificate of conformity is required by the customer. Used for reference only.

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Products Tab

- ❑ All customer cross reference records for the customer are displayed. Additional customer cross reference records can be added by using the action Add Product.
- ❑ Customer cross reference records can be viewed/modified in the customer master or the product master

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Delivery Tab

The default delivery address for the customer

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Contacts and Branches Tab
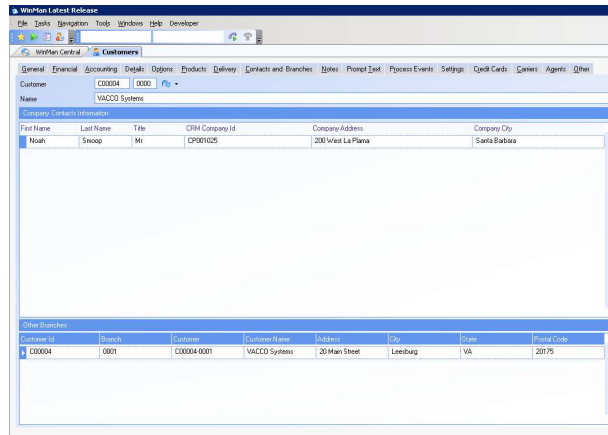
Customers

Contacts and Branches Tab

❑ **Branches**

➢ Additional branches for a customer record can be added using the Add Branch action. Additional branches should be used when a delivery address differs from the Bill To address and will be used multiple times. By using a branch, a ship to address will not have to be re-keyed every time it is required on a sales order. When adding a branch, all the information from the customer record will duplicate and only information that is different needs to change.

❑ **Contacts**

➢ Contacts can be added and stored against a customer record. Each branch will have it's own list of contacts. Contacts can be added by using the action New Contact

➢ Details Tab of adding a contact allows you to track;
   a) Work Phone
   b) Mobile Phone
   c) Home Phone
   d) Fax Number
   e) Work Email
   f) Home Email

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Contacts and Branches Tab

❑ **Additionally on the General Tab the following fields are provided;**
   a) **Job Title** – The contact's job title
   b) **Owner** – The WinMan user who is responsible for the contact
   c) **Lead type** – The type of contact
   d) **Active** – If the contact is active
   e) **CRM Source** – The CRM source of the contact
   f) **CRM Group** – The CRM group of the contact
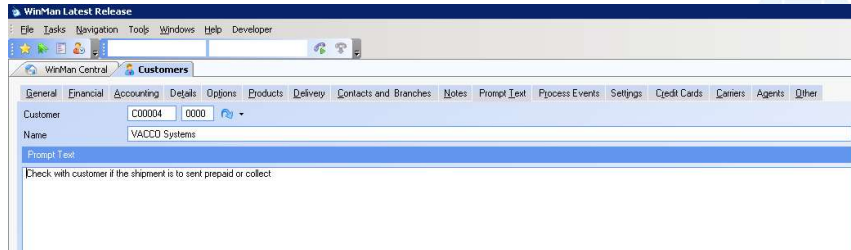   g) **CRM Region** – The CRM region of the contact

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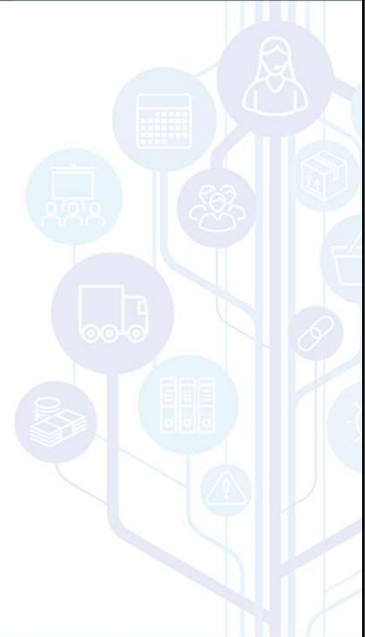
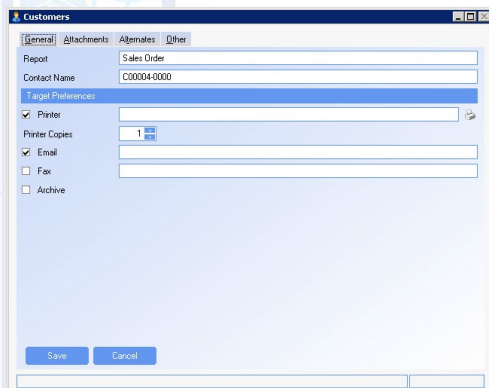# Customers

Notes Tab
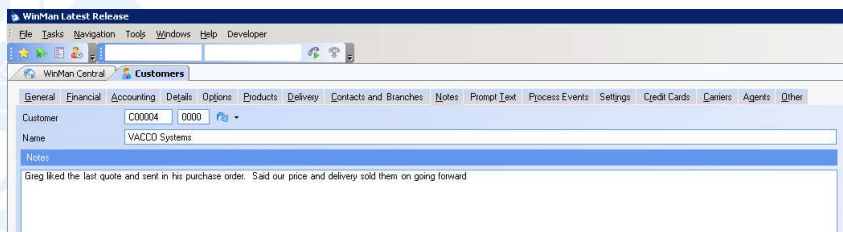
Internal notes about the customer

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Prompt Text Tab

Notes that will prompt Sales Order entry when entering an order for the customer
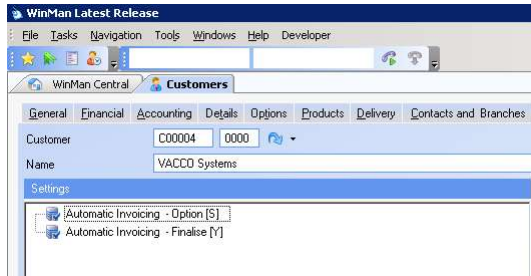

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Process Events Tab

❑ **Report Preferences –** Any sales related print that can be sent to a customer can be set up as a report preference. The report preference stores the preferred method(s) the customer would like to receive the print which include;

    ❑ Fax

    ❑ Email

    ❑ Printed copy which also included the number of copies.

    ❑ Archive which saves a copy of the document as an attachment to the record being printed. For example when the archive option is selected in the sales order program for the sales pro-forma invoice, a pdf of the pro-forma invoice will be attached in the documents panel for the sales order

❑ Fax and email options also allow for a specific email address and specific fax number for the print.
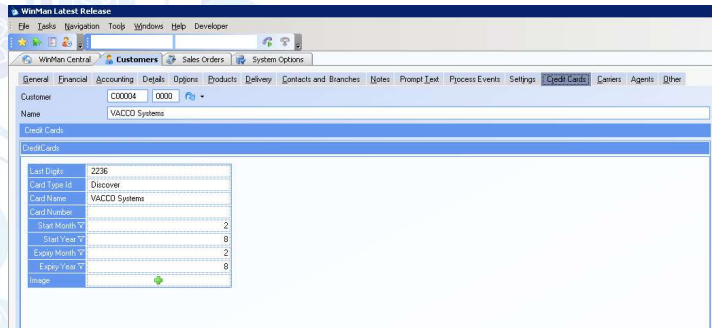
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Settings Tab

☐ **Automatic Invoicing – Options –** Automatic invoicing for a customer can create an invoice based on a (S)hipment, (W)eekly time period, (M)onthly time period, or (N)ever.

☐ **Automatic Invoicing – Finalise –** Automatic invoicing can create a finalised invoice or a temporary invoice. A finalised invoice is created ready to send to the customer and post to the GL. Unfinalised invoices are created if any changes might be required, such as adding freight or changing pricing, and must then be manually finalised.

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Credit Cards Tab

Use the Add Credit Card action to add a credit card to the customer. At order entry an existing credit card may be selected for credit card processing.

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Carriers Tab

The preferred carriers for the customer. Multiple entries can be added for a customer and a single record can be designated as a default for sales order entry. Customer's UPS collect numbers can be stored and will be used in the shipping integration when the freight method is used on a shipment.

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Agents Tab

The commission agents that will receive commission amounts for the customer. Multiple agents may be added in cases where a split commission value is required.