ProjectVIEW ERP

Cost Monitoring Solution

Customers

This section describes how customers are managed in the Accounts Receivables modules of ProjectVIEW

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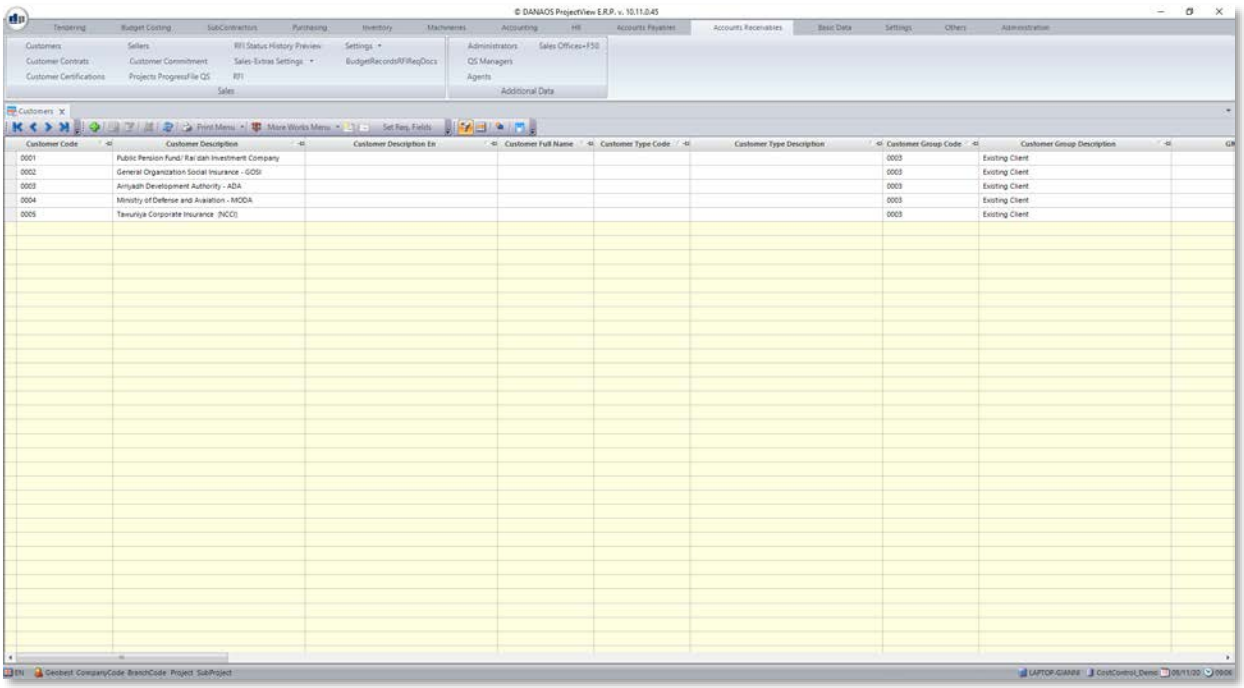
1 Customers

To view a list of the customers, the user must navigate to:

“Accounts Receivables” > *“Sales”* > *“Customers”*

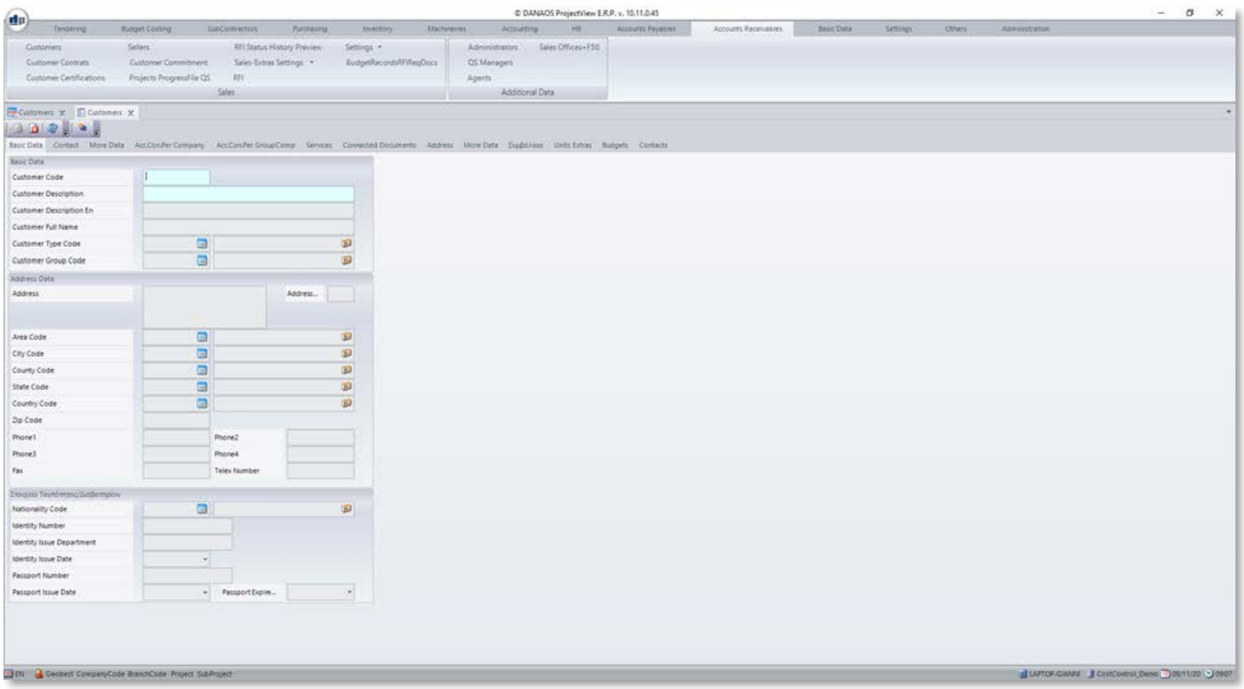


Editing or creating a new item will display the customer form.

1.1 Customer Form

1.1.1 Basic Data

This tab contains the customer’s basic information.



The mandatory fields are:

- ✓ Customer Code
- ✓ Customer Description

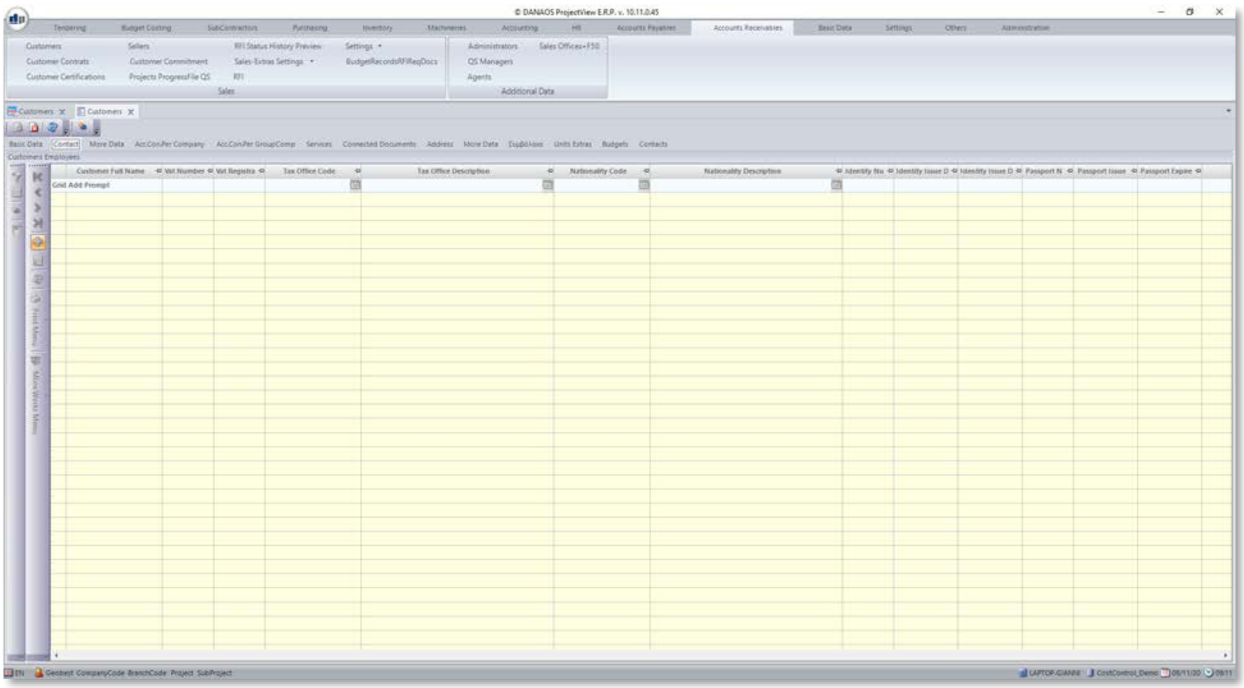
Although not mandatory, the following fields are recommended

- ✓ Customer Type Code
- ✓ Customer Group Code

1.1.2 Contacts

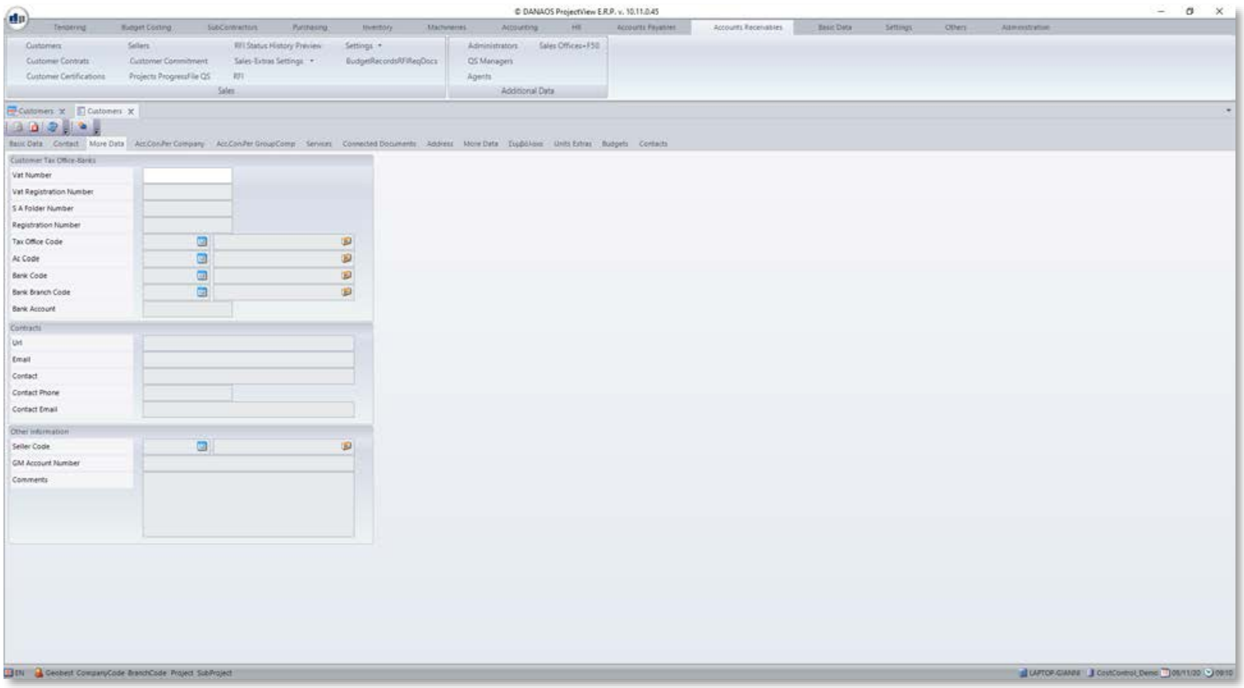
A customer can have multiple contacts or departments, each with an email, phone number etc.

This tab allows for these contacts to be added to the customer.



1.1.3 More Data

This tab contains additional customer information.

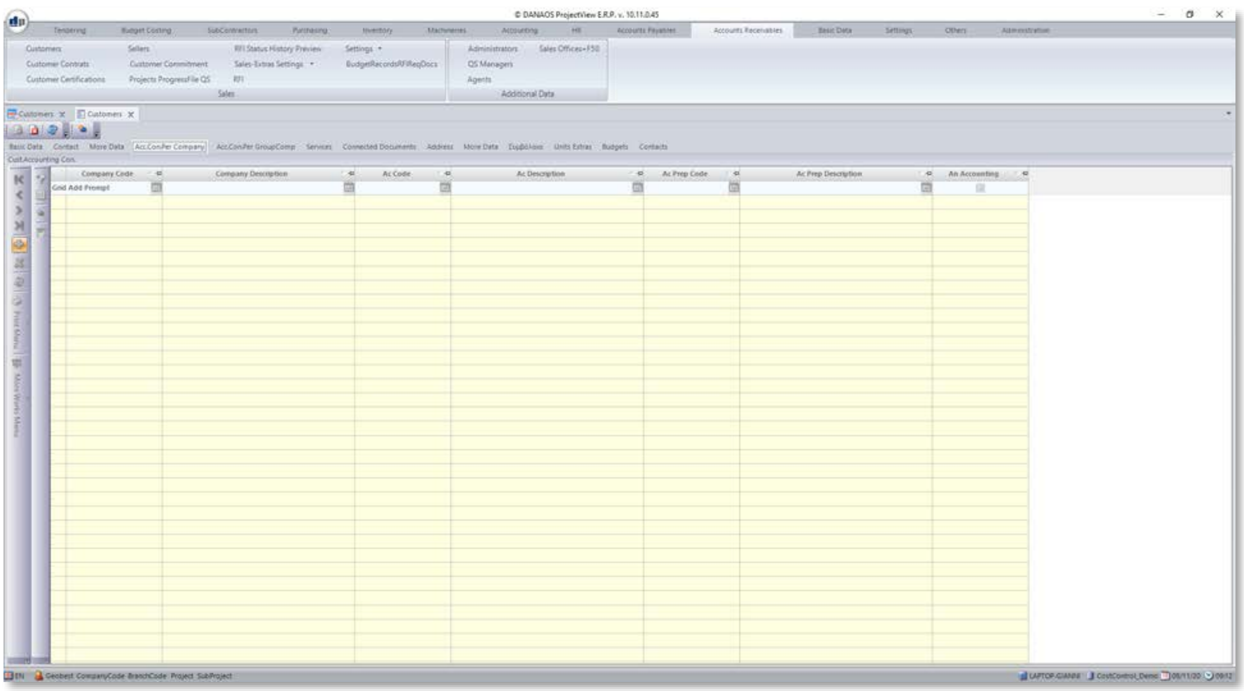


All fields are optional. However, the following are recommended:

- ✓ VAT Number
- ✓ VAT Registration Number
- ✓ Email
- ✓ Ac Code
- ✓ Bank Code
- ✓ Bank Account

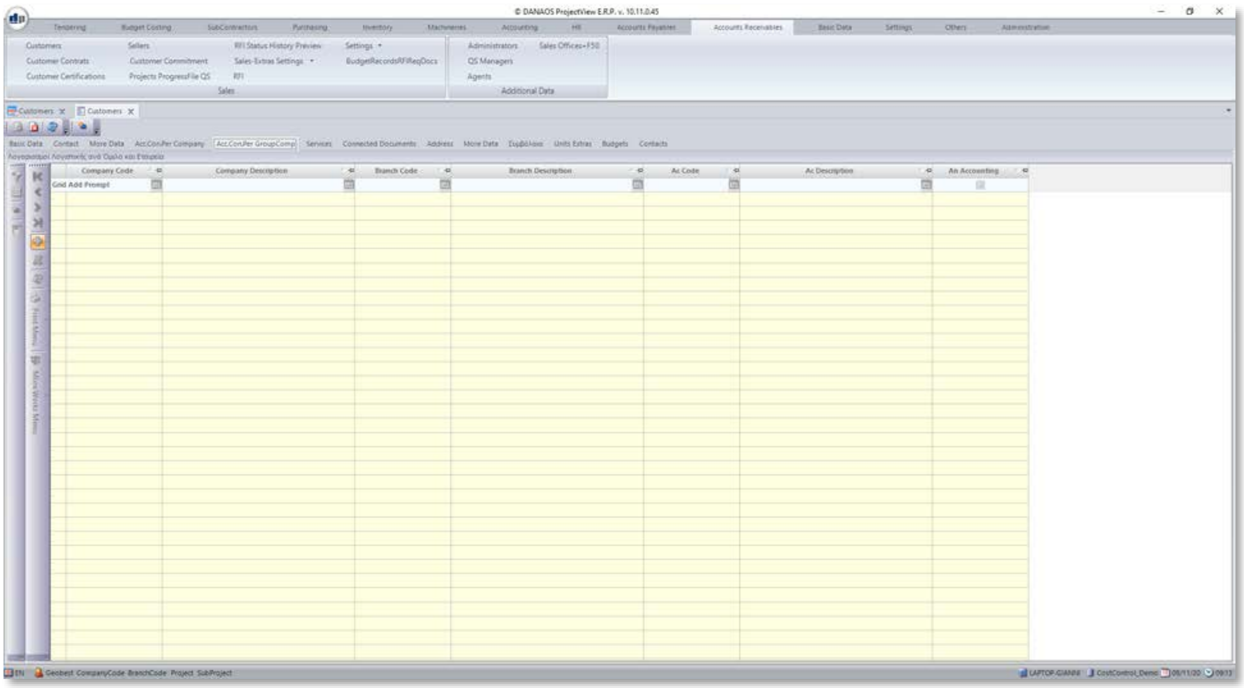
1.1.4 Ac Con Per Company

Some customers can have multiple Accounts. This tab allows the user to add them.



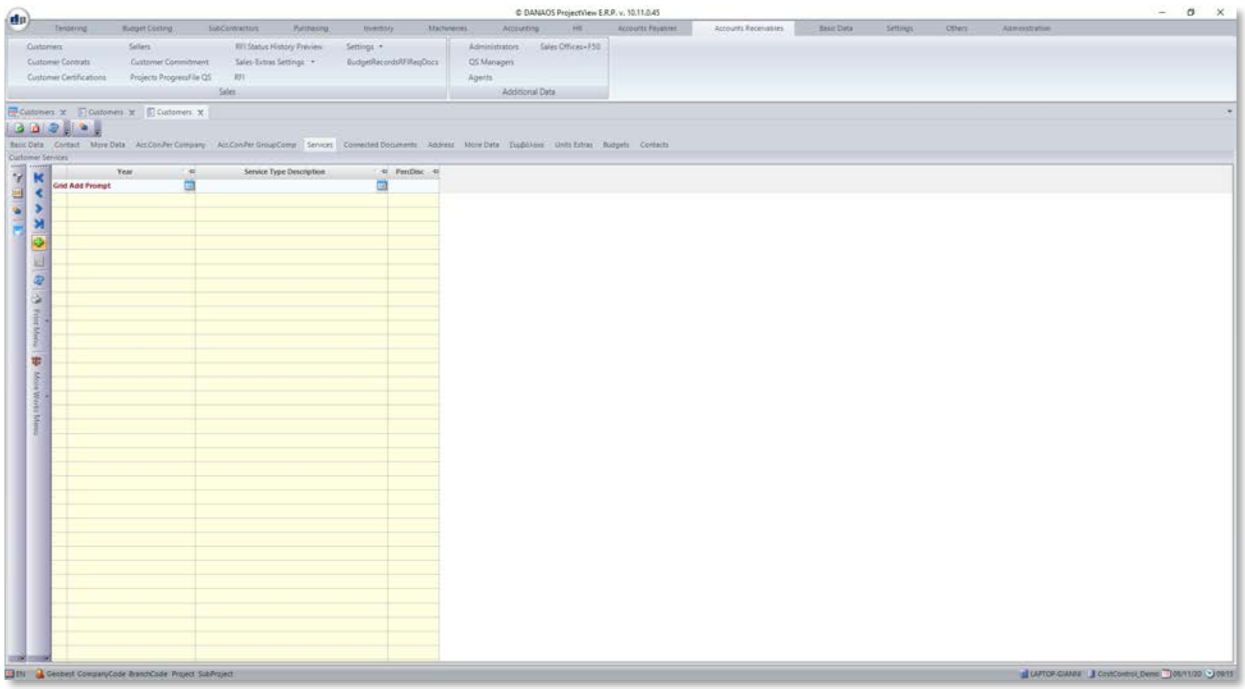
1.1.5 Ac Con Per Group Company

Customers can belong to groups, which in turn can have multiple Accounts. This tab allows the user to add them.



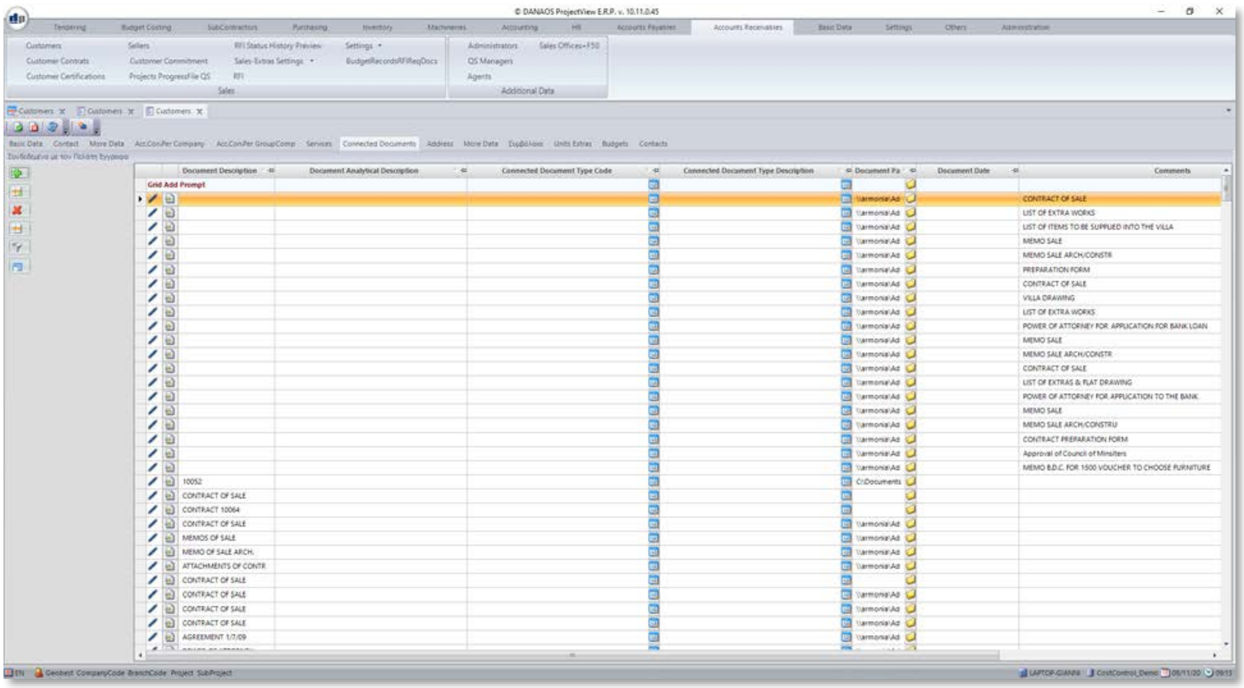
1.1.6 Services

ProjectVIEW uses the package/service system to associate vendors with BOQ lines, items etc. In this tab, the user can associate a number of services with this customer.



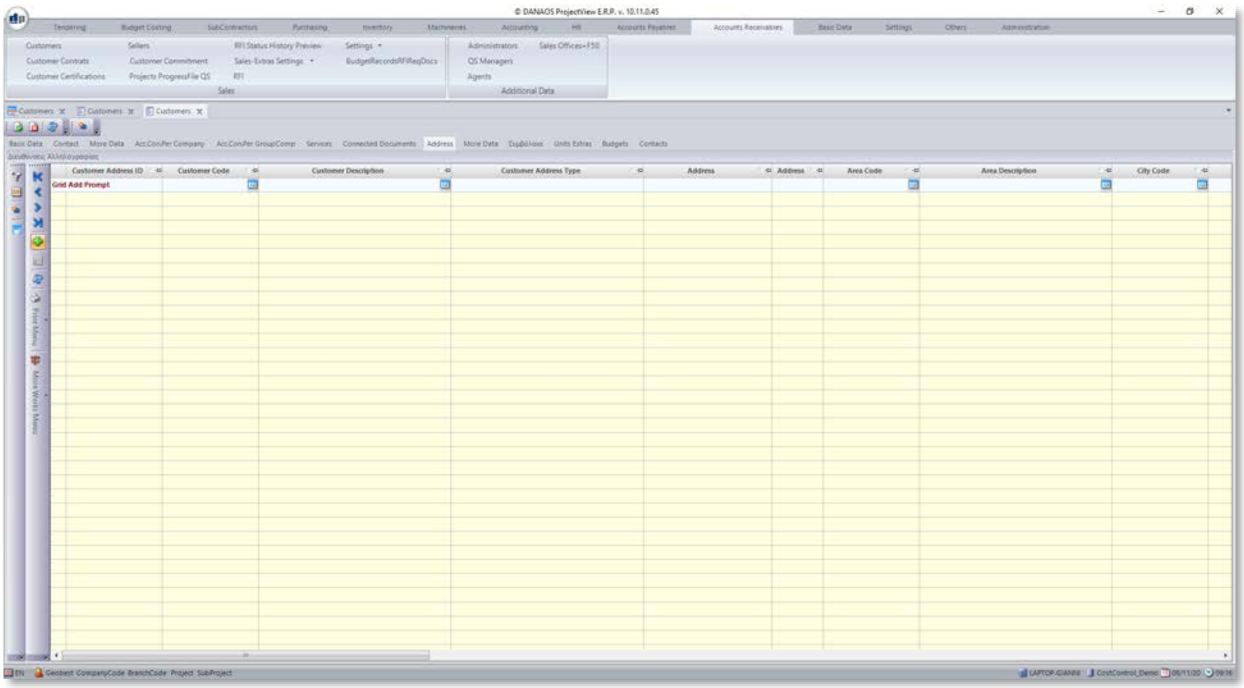
1.1.7 Connected Documents

It is possible to associate a customer with one or more documents (e.g. certificates). This tab allows for these documents to be associated with the customer.



1.1.8 Address

It is possible to assign multiple addresses to a customer. This tab allows for these addresses to be added.

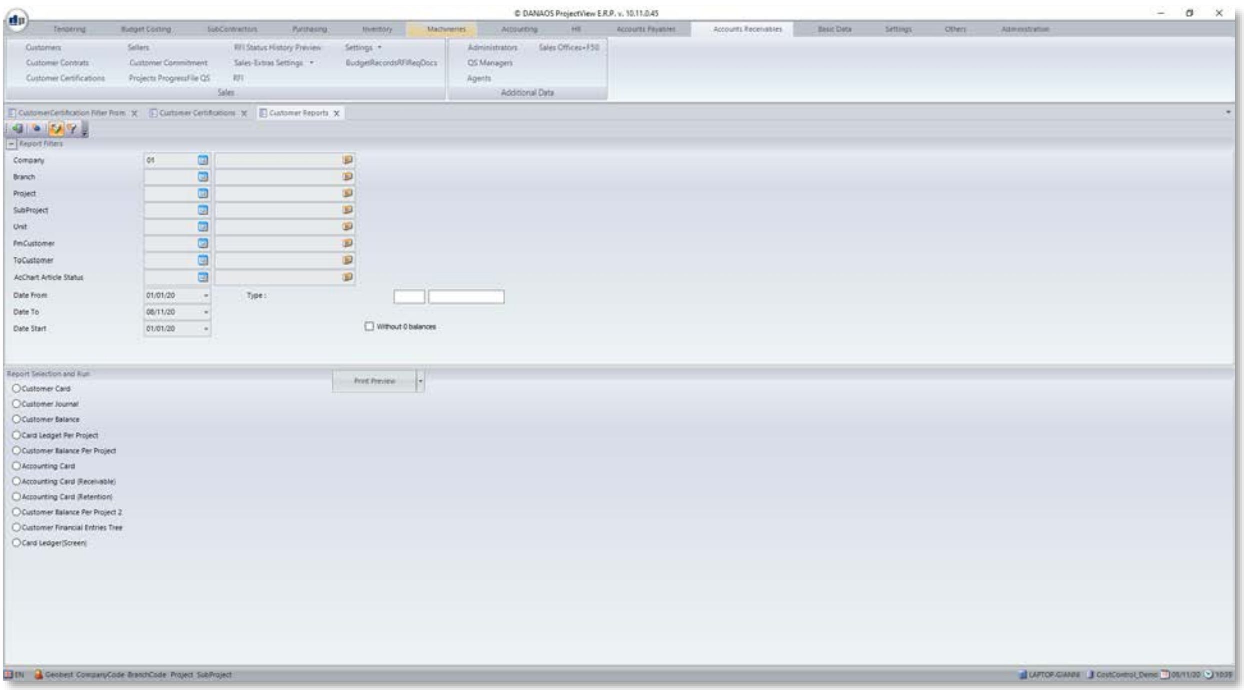


2 Customer Reports

To view all available reports, the user has to navigate to:

“*Accounts Receivables*” > “*Sales*” > “*Sales-Extras Settings*” > “*Customer Reports*”

This will display the following form:



After providing the appropriate parameters the user can select a report and click on the “*Print Preview*” button to view it.

3 Appendix – Customer Settings

There are various fields in the customers, which use predefined codes. These are:

- ✓ Customer Service Types
- ✓ Customer Groups
- ✓ Customer Titles
- ✓ Customer Source
- ✓ Customer Assistant
- ✓ Communication Types
- ✓ Name Titles
- ✓ Inspection Trip Types

To view/add/edit the above, the user has to navigate to:

“*Accounts Receivables*” > “*Sales*” > “*Settings*” > …

and then choose the appropriate item from the list.

In case of any queries or support issues, please contact us:

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