NOOM

Business software

User guide

part 2

Customers and Suppliers

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1. Customers and Suppliers

The **Customers and Suppliers (Customer)** menu is located at the **Folders Panel** under the folder **General Data**.

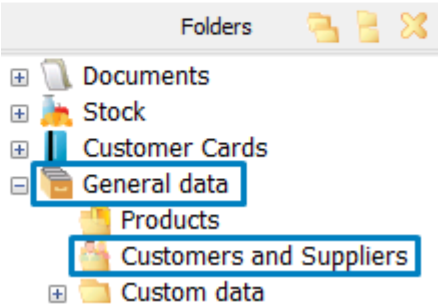


Image 1. Location of the Customers and Suppliers menu

1.1. Overview

The Customer menu consists of several panels and tabs (marked with different colours on Image 2).

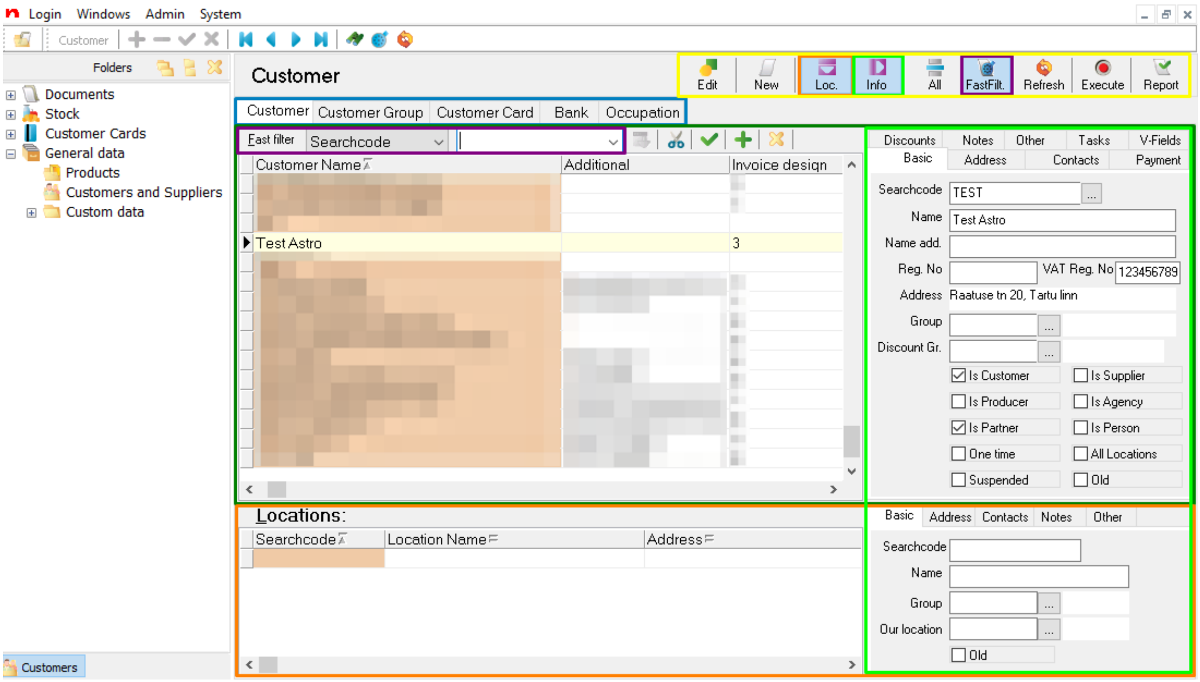


Image 2. Overview of the Customer menu

The main parts of the Customer menu (see Image 2):

- **Customer menu tabs** - for creating and adjusting different parameters that can later be used in different fields;
- **Customer list** - list of all the customers added to NOOM. If the **Customer Information** panel is made visible, then a detailed information is shown about a selected customer;
- **Buttonpanel**.

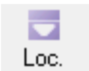
The following panels can be hidden or made visible again by clicking the buttons in the **Buttonpanel**:

- **Customer Information** panel (button **Info**) - a detailed information about a selected customer;
- **Locations** (button **Loc.**) - can be used if a customer has different locations;
- **Fast Filter** (button **FastFilt.**) - a search box for a quick search from the list. The user can choose between many parameters for conducting a search.

The functionalities of all the buttons in the Buttonpanel:

= **F4** - activates/deactivates the editing mode; has to be clicked before making any changes to the data;

= **F5** - for adding a new customer to the table;



- hides/unhides the **Locations** panel;

- hides/unhides the **Customer Information** panel;

- makes all rows visible in the **Customer list** (including the ones marked "Old");

- hides/unhides the **Fast Filter;**

- refreshes the contents of the Customer table from the database server;

- executes predefined scripts (custom made solutions can be used as well);

- opens the reports list.

1.2. Customer table

The **Customer table** includes all the data about the customers and suppliers Your company interacts with.

The column order can be changed by dragging the column headers.

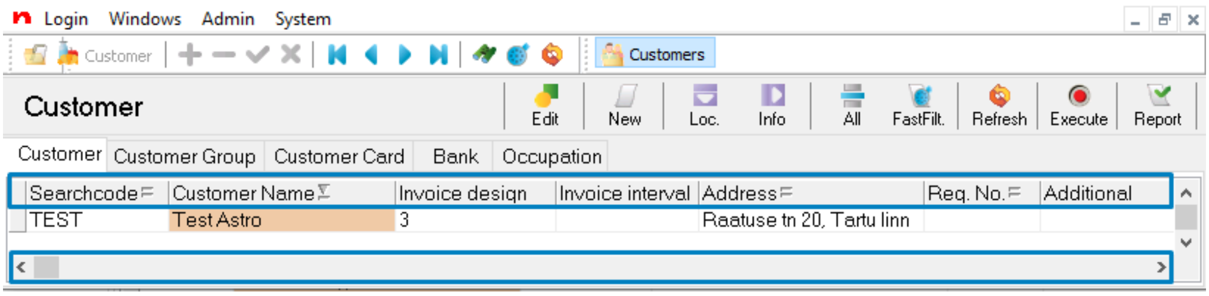


Image 3. Columns in the Customer table

1.2.1. The Owner company

The Owner company is also listed in the Customer table.

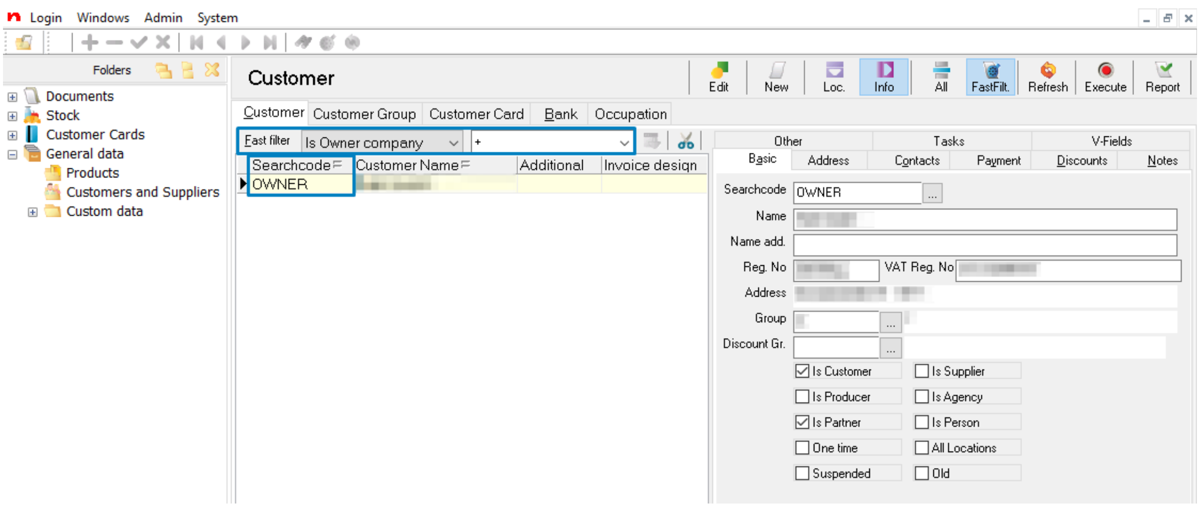


Image 4. The Owner company

In case the owner needs to make any changes to the data of the company, it can be done by opening and editing the Owner company information on the **Customer Information** panel.

Please be sure that the company data are up-to-date and correct. Information from these fields are used on document print forms, invoices, *etc.*

1.2.2. Customer menu tabs

The Customer menu tabs are meant for creating and adjusting different parameters that can later be used in different fields (for example, giving customer group based discounts, *etc*).

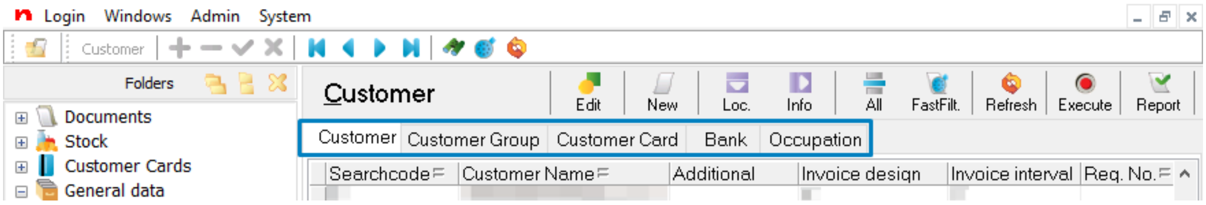


Image 5. Customer menu tabs

1.2.2.1. Customer

The list of all the customers is located on the Customer tab. In order to make any changes to the data of a customer, it can be done by opening and editing the company information on the **Customer Information** panel (button **Info**).

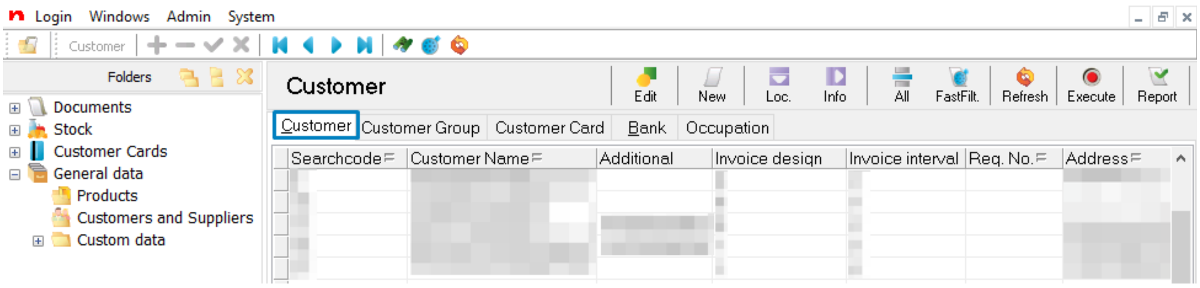


Image 6. Customer menu tabs - Customer

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1.2.2.2. Customer Group

Customer groups can be used to make discounts to the customers by the group.

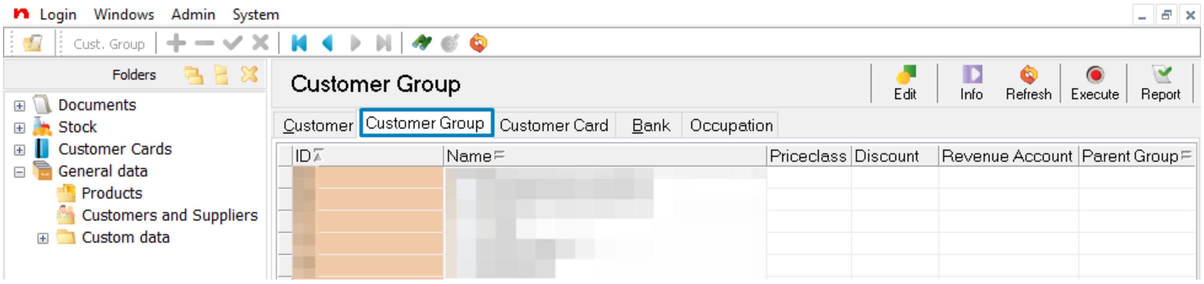

Image 7. Customer menu tabs - Customer Group

In order to add a customer to a customer group, the group has to be defined first on the **Customer Group** tab.

To edit the existing Customer groups, click **Edit**, make the changes on the **Information panel** (button **Info**) and **Save** by clicking ✔ (or F9).

To add a new Customer Group, click **Edit** and ✚ (or F5), then insert the data of the new Customer Group and **Save** by clicking ✔ (or F9).

1.2.2.3. Customer Card

A simple customer card manager.

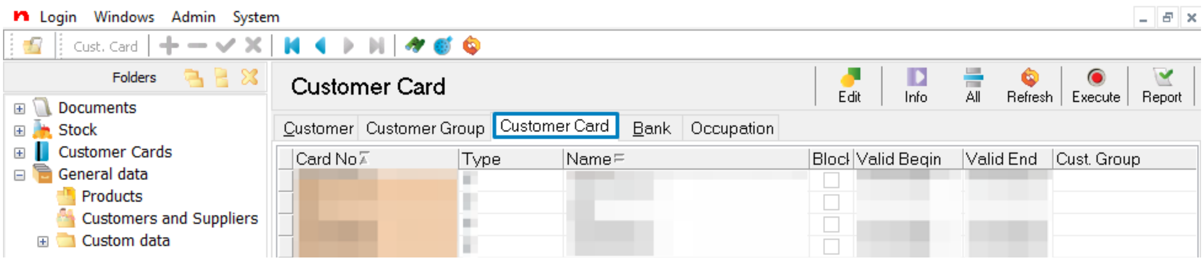

Image 8. Customer menu tabs - Customer Card

<u>If the **Customer Cards module** is activated, please use the module instead of the simple Customer Card manager in the Customer menu tabs.</u>

Image 9. Customer Cards module

1.2.2.4. Bank

In order to link a customer or an account to a certain bank, the bank data have to be inserted first on the Bank tab.

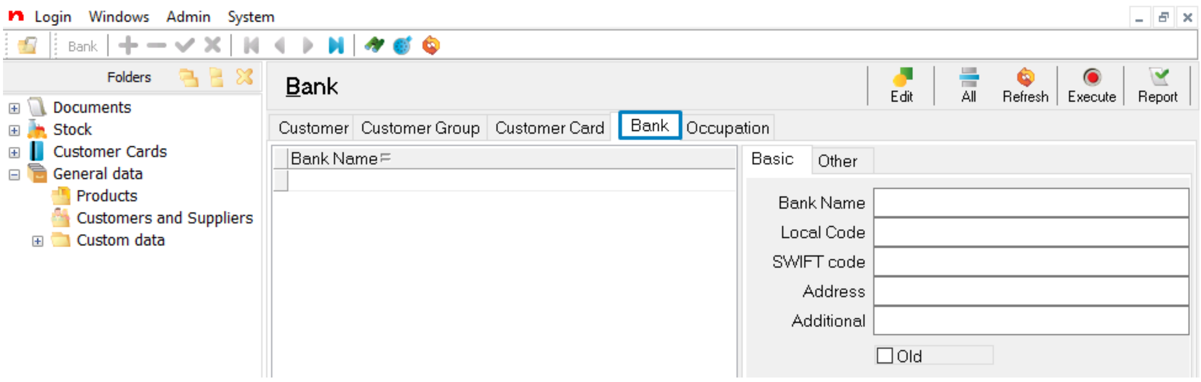

Image 10. Customer menu tabs - Bank

To edit the data of a bank, click **Edit**, make the changes and **Save** by clicking ✔ (or F9).

To add a new bank to the list, click **Edit** and ➕ (or F5), then insert the data of the new bank and **Save** by clicking ✔ (or F9).

1.2.2.5. Occupation

Customer Occupations can be defined on the Occupation tab and later added to the customer contacts.

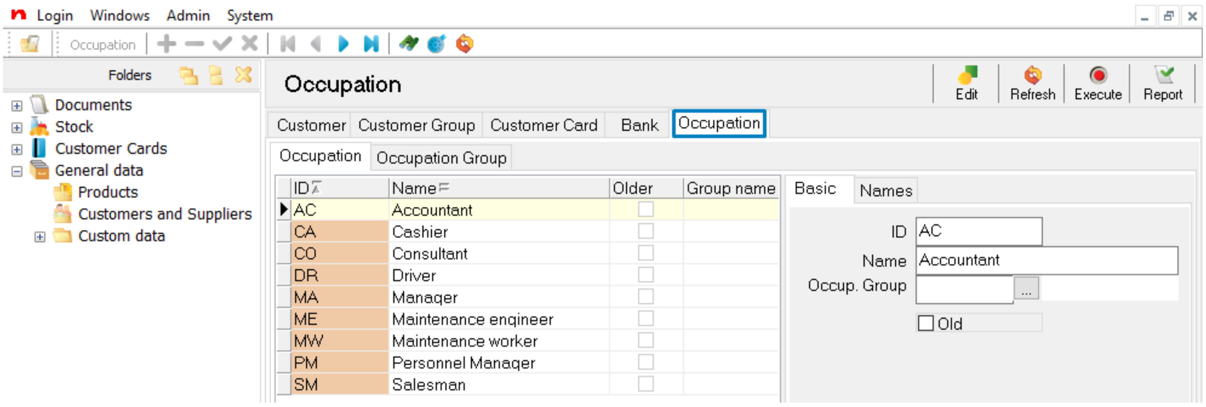

Image 11. Customer menu tabs - Occupation

To edit an occupation, click **Edit**, make the changes and **Save** by clicking (or F9).

To add a new occupation to the list, click **Edit** and (or F5), then insert the information about the occupation and **Save** the changes by clicking (or F9).

1.2.3. Adding a new customer to the table

To add a new customer to the table, click **Edit** and New, then insert the data of the new customer to the tabs of the **Customer Information** panel and click **Save** (F9).

<u>When adding a new customer to the table, please use the button New, not the on the Data Processing Panel.</u>

To edit a customer's data, open the tab **Customer**, click **Edit**, make the changes on the tabs of the **Customer Information** panel (button **Info**) and **Save** by clicking (or F9).

1.2.3.1. Basic

When entering a new customer to the Customer table or editing an existing one, start with the **Basic** tab.

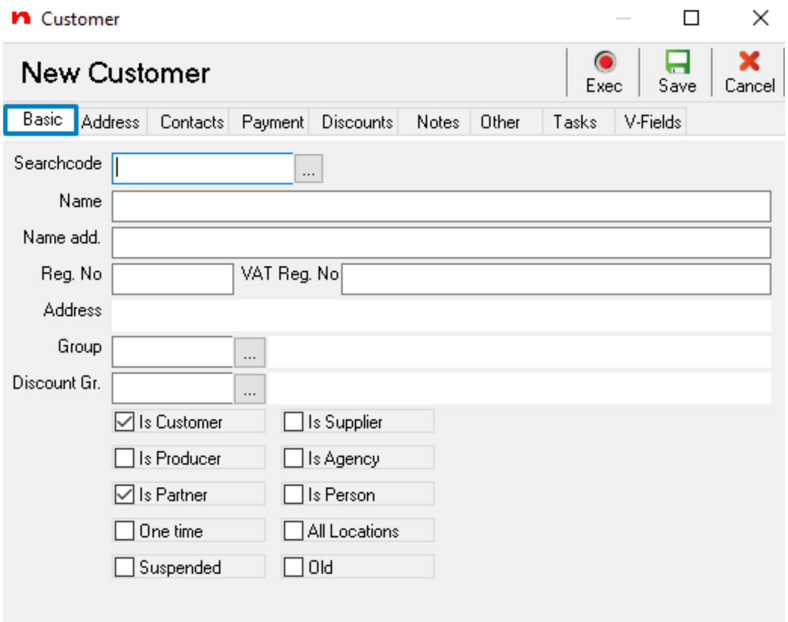

Image 12. Customer - Basic

The most important fields on the Basic tab are the following:

- **Searchcode** - each company in the Customer table has to have a unique searchcode consisting of Latin letters and/or numbers;
- **Name** - name of the company;
- **Reg. No** and **VAT Reg. No**;
- **Address** (can be changed on the Address tab);
- **Group** - for giving discounts or special prices by the group;
- **Is Customer** - has to be ticked in order to use it on invoices.

1.2.3.2. Address

On the **Address** tab, please fill out the address fields of a customer. Information from these fields are used on invoices, print forms, *etc*.

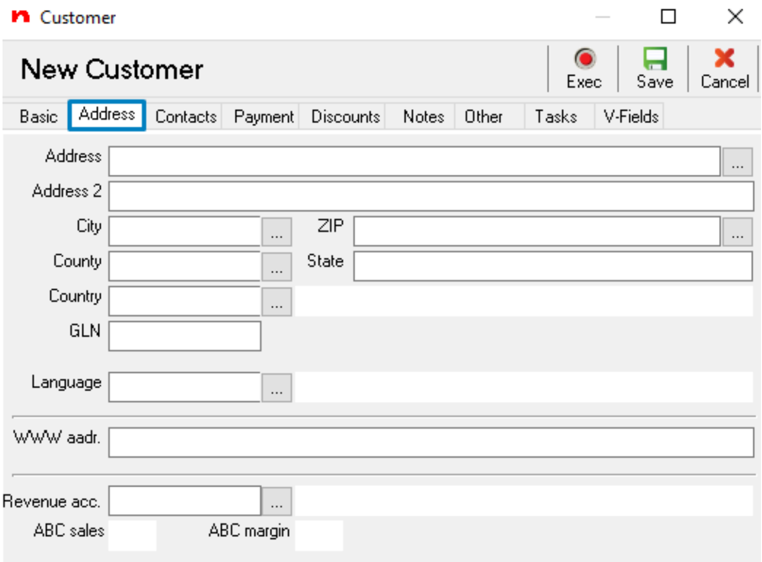

Image 13. Customer - Address

1.2.3.3. Contacts

The **Contacts** tab includes all the data about the contacts of a customer.

The column order can be changed by dragging the column headers.

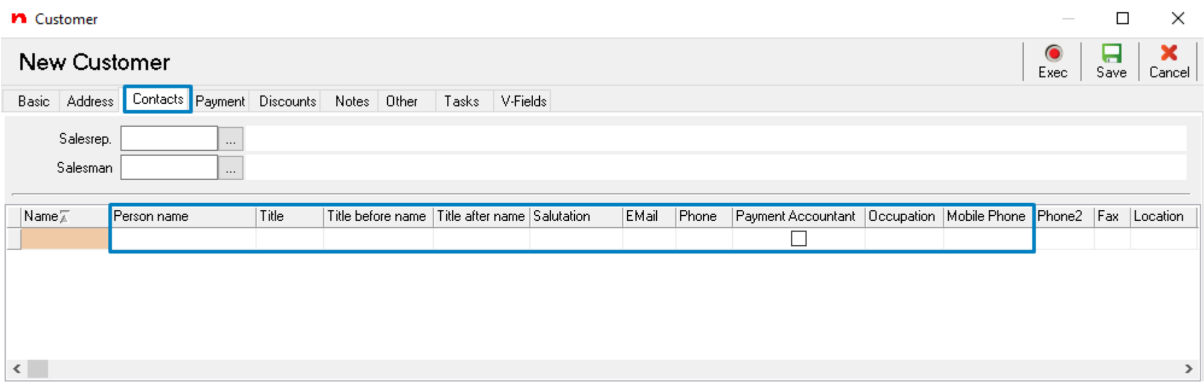

Image 14. Customer - Contacts

Please pay attention to the the following field on the **Contacts** tab:

- **Payment Accountant** - if the field is ticked, then the Summary Invoices will be sent to this person's e-mail address.

1.2.3.4. Payment

All the payment details about a customer can be managed on the **Payment - Basic** tab.

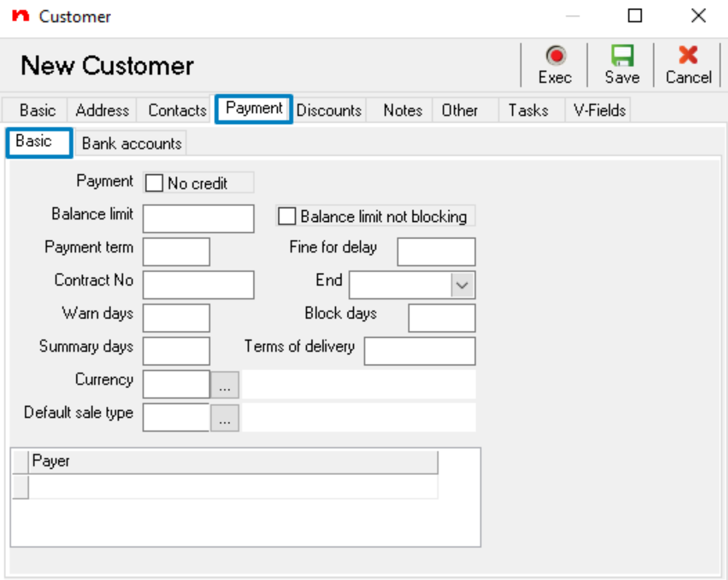

Image 15. Customer - Payment - Basic

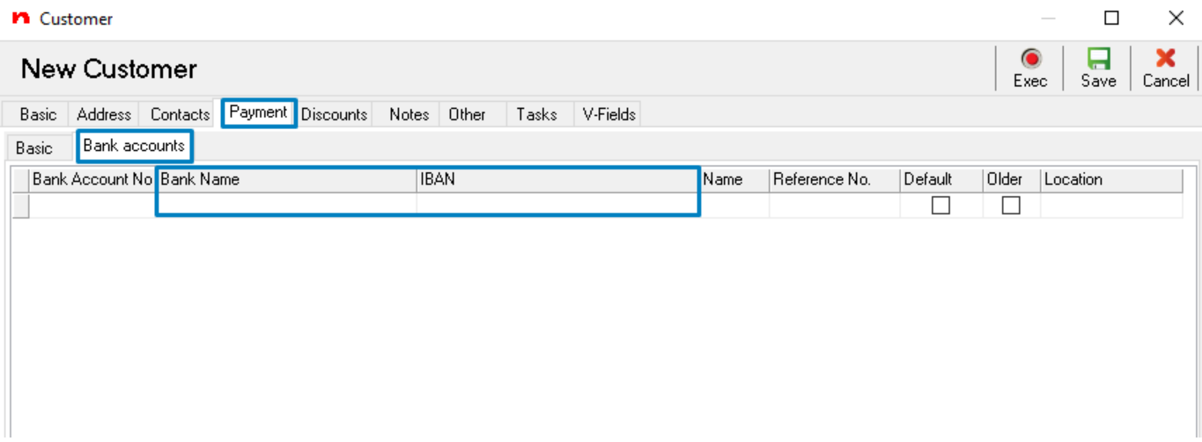

Image 16. Customer - Payment - Bank accounts

Please make sure that the the following fields on the **Payment (Bank accounts)** tab are filled:

- **Bank Name** (to add a new bank, click on the field to make the button for opening the predefined Bank list visible);
- **IBAN**

1.2.3.5. Discounts

Customer's special prices and discounts can be managed on the **Discounts** tab.

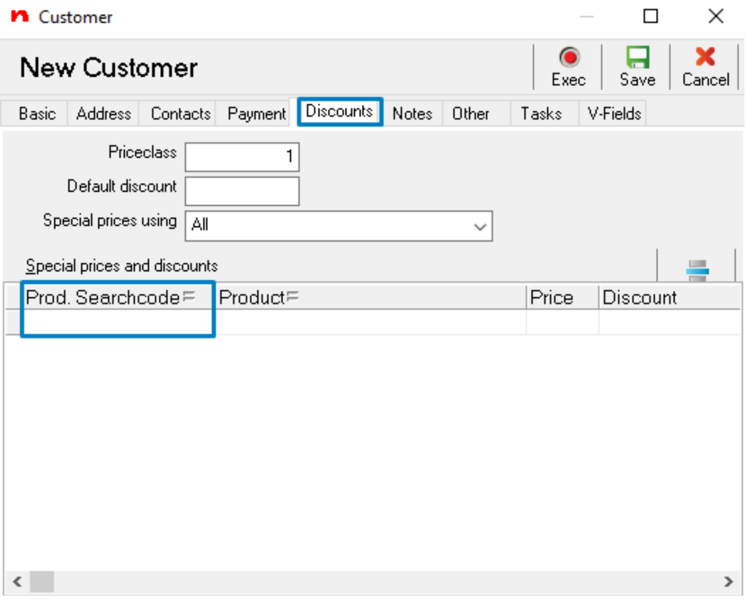

Image 17. Customer - Discounts

To add a discount to a product, click on the field to make the button for opening the Product table visible.

1.2.3.6. Other

On the tab **Other**, additional customer data can be added.

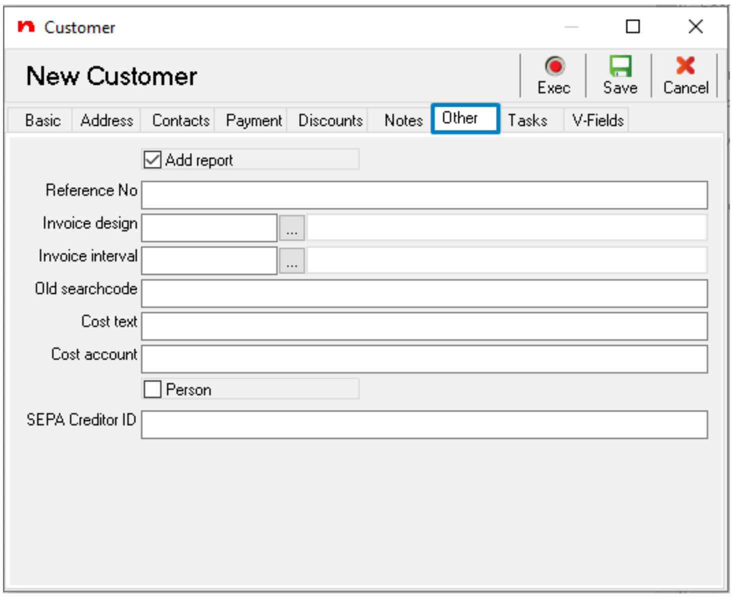

Image 18. Customer - Other

1.2.4. Customer Locations

Many customers have several addresses and departments with different contact persons. In NOOM, they can be managed on the **Locations** panel (button **Loc.**).

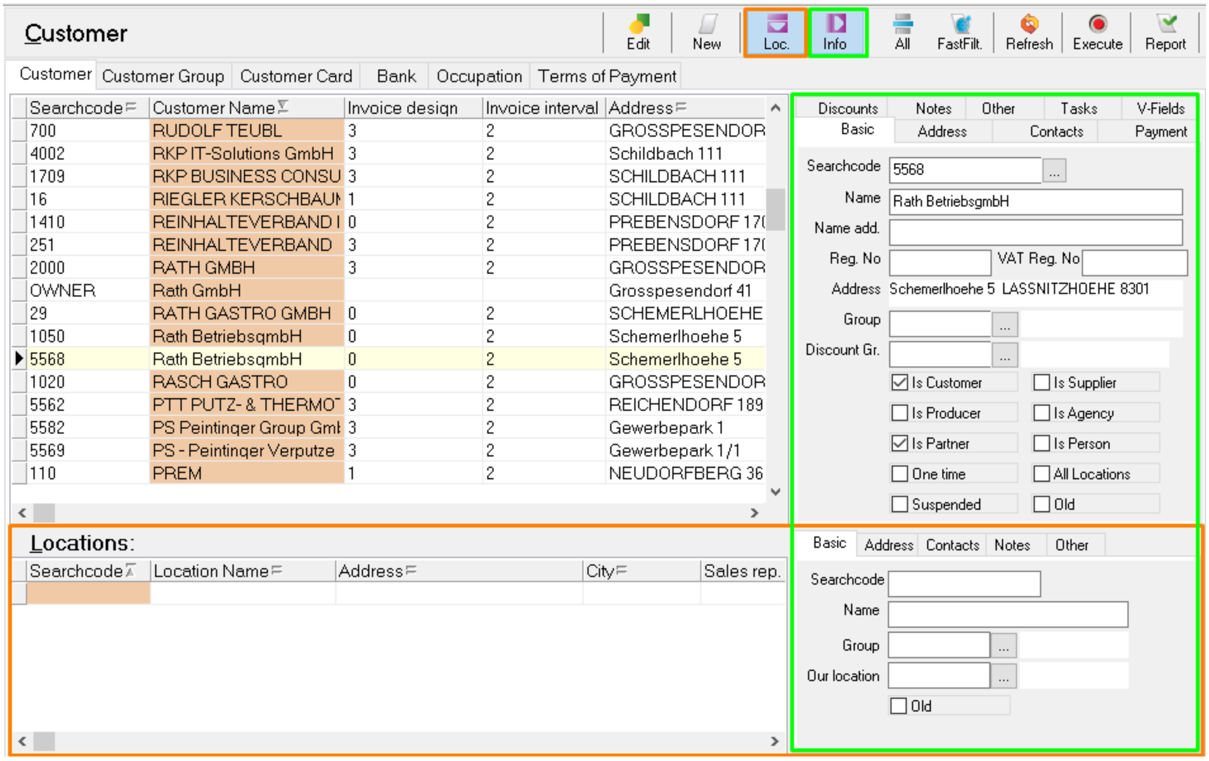

Image 19. Customer Locations

To add a new customer location to the table, click **Edit** and 

(F5), then insert the data of the new location and click **Save** (F9).