



HOW TO ADD A NEW CUSTOMER IN BILLING REGISTER?

BILLING REGISTER

Financial Year 2022-2023
01-04-2022 To 31-03-2023

Change Financial Year

About



- Sales
- Customers
- Purchases
- Suppliers
- Inventory
- Production
- Labels/Stickers
- Accounting
- Statutory Reports
- Marketing
- Administrative Tasks
- Statutory Master Data
- General Settings
- General Master Data
- Organization

Click on Customers menu button

Holidays :

Holiday Name	Date	Refresh
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Check Invalid Records

Events/Reminders

BILLING REGISTER

Financial Year 2022-2023
01-04-2022 To 31-03-2023

Change Financial Year

About



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Click on Customers button

Holidays :

Holiday Name	Date	Refresh
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Check Invalid Records

Events/Reminders

CUSTOMERS

Convert To Lead

Create Sale

Send Message

Customer Name	ID
Chirag Kumar	CK1
	NS1
	SM1

Click here to
Unlock
the form

Basic Information Sub Contacts Events Misc. Opportunities Sales Receipts

Type: Individual ID: CK1 Active:

Customer Name: Chirag Kumar

Photo: Drag File Here

Short Name:

Gender:

Occupation:

Organization:

Designation:

Comments:

Upload

Export

Accounting Ledger CL Set

Default Sale Type

Default Currency: INR

1. Quantity Pricing2. General Discounting

Nominal Discount

3. Specific Discounting (%)

Mailing Addresses:

Location Type Address City State Default Billing Shipping

Communication Details (Phone/Email ID):

Type Contact Number / ID Sub Contact Name Active DND Comments Default Linked With

Customer Groups:

Group Name

Record: 1 of 3 No Filter Search

Search All Start Text End Text

CUSTOMERS

Convert To Lead

Create Sale

Send Message

Customer Name	ID
Chirag Kumar	CK1
Neelam Sahni	NS1
Sapna Modi	SM1

Click here
to Add a new
customer

Basic Information Sub Contacts Events Misc. Opportunities Sales Receipts

Type: Individual ID: CK1 Active:

Customer Name: Chirag Kumar

Photo: Drag File Here

Short Name:

Gender:

Occupation:

Organization:

Designation:

Comments:

Upload

Export

Default Sale Type

Default Currency: INR

1. Quantity Pricing2. General Discounting

Nominal Discount

3. Specific Discounting (%)

Accounting Ledger CL Set

Mailing Addresses:

Location Type Address City State Default Billing Shipping

* Location Type	Address	City	State	Default	Billing	Shipping
*				<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

DELETE

Communication Details (Phone/Email ID):

Type Contact Number / ID Sub Contact Name Active DND Comments Default Linked With

* Type	Contact Number / ID	Sub Contact Name	Active	DND	Comments	Default	Linked With
*			<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	

Customer Groups:

Group Name

* Group Name
*

Record: 1 of 3 No Filter Search

Search All Start Text End Text

CUSTOMERS

Convert To Lead

Create Sale

Send Message

Basic Information Sub Contacts Events Misc. Opportunities Sales Receipts

Type: Individual ID: CK1 Active:

Customer Name: Chirag Kumar

Photo: Drag File Here

Upload

Export

Default Sale Type

Default Currency: INR

1. Quantity Pricing2. General Discounting

Nominal Discount

3. Specific Discounting (%)

Add Customer

ADD CUSTOMER

Customer Name Test Customer

Customer ID TC1

Check Existing

Add

Cancel

Type Customer Name and then click on Add button. Customer ID is assigned automatically by the system.

Mailing Addresses:

^ Location Type

*						
*					<input type="checkbox"/>	<input checked="" type="checkbox"/>

Communication Details (Phone/Email ID) :

*	Type	Contact Number / ID	Sub Contact Name	Active	DND	Comments	Default	Linked With
*				<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	

Customer Groups:

*	Group Name
*	

Record: 1 of 3 No Filter Search

Search All Start Text End Text

CUSTOMERS

Convert To Lead

Create Sale



Customer Name	ID
Chirag Kumar	CK1
Neelam Sahni	NS1
Sanjay Modi	SM1
Test Customer	TC1

The newly created Customer appears here. You can add the details for this customer as per your requirement in the section on the right side.

Basic Information

Sub Contacts Events Misc. Opportunities Sales Receipts

Send Message

Type: Individual ID: TC1 Active:

Customer Name: Test Customer

Photo: Drag File Here

Upload

Export

Default Sale Type

Default Currency: INR

1. Quantity Pricing2. General Discounting

Nominal Discount

3. Specific Discounting (%)

Accounting Ledger CL Set

Mailing Addresses:

Location Type Address City State Default Billing Shipping

DELETE

Communication Details (Phone/Email ID) :

Type Contact Number / ID Sub Contact Name Active DND Comments Default Linked With

Customer Groups:

Group Name

Record: 4 of 4 No Filter Search

Search All Start Text End Text