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2.01.12 Customer

The mask **customer** manages the business contacts. All information about the contact's company, such as name, address and communication possibilities are stored here. For a clear structuring of the business contacts and for a better analysis, information regarding the category, reference, contact type as well as the corresponding branch can be stored for each business contact. In addition, the currency and the charge rate are managed for customers. This data is required when projects are created and for orders and incoming invoices.

The mask consists of the following elements:

General Data

The screenshot shows the 'Kontakt CS Consult Systeme AG' software interface. The top bar includes a title bar with the company name and a menu bar with options like 'Dokument', 'Bearbeiten', 'Ansicht', 'Rückverweise', and 'Aktionen'. Below the menu bar are tabs for 'Stammlist', 'Marketing', 'Vertrieb', 'Adresse & Kommunikation', 'Finanzen', and 'Sonstiges'. The main content area is divided into two sections: 'Basisinformationen' and 'Struktur'.

Basisinformationen

Kürzel: CS Kategorie: Kunde

Firmenname: Consult Systeme AG

alter: Consult GmbH

Firmenname:

gesperrt: ☐ Sperrgrund:

Bemerkung:

Struktur

übergeordneter:

Kontakt

untergeordneter Kontakt

		Firmenname ^	Kategorie	Straße	PLZ	Ort	Debitoren-Nr.	Telefon
☐	1	Consult Beratung GmbH	Kunde - Lieferant	Jahnstarsse 78	80130	München	5609	+4989 7300200
☐	2	Consult Software GmbH	Kunde	Kleine Gasse 34	20012	Hamburg	5611	+4940 67341
☐								

Kontakt CS Consult Systeme AG

Dokument Bearbeiten Ansicht Rückverweise Aktionen

Stammblatt Marketing Vertrieb Adresse & Kommunikation Finanzen Sonstiges

Basisinformationen

Struktur

Ansprechpartner

	Anrede	Titel	Name	Vorname	Abteilung	Funktion	Telefon	Mobil	E-Mail
1	Frau	Dr.	Nahl	Lisa	Geschäftsführung	Geschäftsführung	+4989 7312-100		nahl@consult.de
2	Herr	Dr.-Ing.	Sander	Peter	Geschäftsführung	Assistenz	+4989 7312-120	+49172 344498...	sander@consult...
+							+4989 7300100		

Logo



• Basic Information:

- **Abbreviation:** An abbreviation for the contact can be entered in this field.
- **Category:** In the category field, you can assign defined types of contact (for example, customer, prospect, and so on) in the Collections (see Administration Guide).
- **Company Name and Old Company Name:** These alphanumeric fields describe the current company name and, if applicable, the old company name.
- **Locked, Lock Reason:** This check mark can be set if the customer is no longer to be used as the [sold-to party](#) for a [project](#). The reason for the blockage (insolvency, payment behaviour, ...) can be entered in the next field.
- **Comment:** This field allows you to enter comments about the contact.

• Structure:

- **Parent Contact:** The Parent Contact field characterizes the existence of a parent contact (for example, a holding company) and represents the company structure in projectiles. If the element is not occupied, then the contact itself is a parent contact. This entry is filled automatically when creating subordinate contacts.
- **Subordinate Contact:** This element contains a list of all assigned subordinate contacts. After defining "Subsidiary", these are automatically transferred to the parent contact.

- **Contact Person:** This field identifies the contact person at the customer (see mask [contact person](#)).
- **Logo:** At this point a company logo can be uploaded for this contact.

Marketing (Sample Implementation)

Kontakt CS Consult Systeme AG

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Kriterien & int. Ansprechpartner

Typ: Firma Branche: Software

Erstkontakt: Netzwerkpartner Partner: AB Maschinenbau GmbH

Umsatzklasse: < 10.000.000,00 Gründung: Anzahl: 530 Mitarbeiter

KAM: 006 Damler Katrin Vertretung: 009 Behn Frank

Bekannte Kontakte

Firmenname	Straße	PLZ	Ort	Debitoren-Nr.	Kreditoren-Nr.	Telefon	Web

Kampagnen

Nummer	Bezeichnung	Status	Art	von	bis

- **Criteria & int. Contact Person:**

- **Type:** Hier kann der Kontakttyp gewählt werden.
- **Industry and Foundation:** Here you can enter the branch of the contact and the date of foundation. The industry can be defined in the collections (see administration guide).
- **Initial Contact:** The type of initial contact (internet, campaign, cold calling, partner, ...) can be entered here.
- **Partner:** Sales partners can be entered here.
- **Number of Employees and Revenue (or Revenue Class):** The number of employees and the turnover of the contact can be stored here. These fields can be used as selection criteria (for example, for direct mailings).
- **KAM:** The key account manager can be added here.
- **Representation:** Here you can enter the customer advisors. These employee(s) are responsible for the contact.

- **Known Contacts:** Any contacts can be assigned to the defined contact here.
- **Campaigns:** Here the campaigns concerning this contact are listed.

Sales & Distribution (Sample Implementation)

Kontakt CS Consult Systeme AG

Dokument Bearbeiten Ansicht Rückverweise Aktionen

Stammblatt Marketing Vertrieb Adresse & Kommunikation Finanzen Sonstiges

Opportunities

	Referenz	Vertriebsphase	Potenzial	Handlungsbedarf	Wahrscheinlichkeit	Auftragseingang	Auftragswert	gewichteter Auftragswert
1	BSM#Version 1.0	02 - Erstkontakt	B-Potential	Gering	10,00 %	15.01.2020	7.800,00 EUR	780,00 EUR
2	Projectile#Version 3.2	04 - Präsentation	A-Potential	Signifikant	50,00 %	01.12.2019	65.500,00 EUR	32.750,00 EUR
							73.300,00 E...	33.530,00 EUR
					0,00 %			

Kennzahlen

geschätzter Auftragswert 33.530,00 EUR

Auftragswert 151.014,85 EUR

Rechnungswert 7.273,98 EUR

Meetings

Aktionen

	Aktion	Ansprechpartner	Datum	ToDo	Mitarbeiter	abge
1	129.1-2	Schmidt Peter	21.11.2017 00:00	Terminvereinba...	24 Schaub Peter	☒
2	7.2-4	Schmidt Rainer	01.03.2018 00:00	Anruf	56 Carter Jack	☐
3	7.1-8	Meier Hana	01.03.2018 00:00	Anruf	56 Carter Jack	☐
4	3.1-1	Werner Alfred	01.03.2018 00:00	Anruf	56 Carter Jack	☐

- **Opportunities:** All sales funnels for the customer are listed here.
- **Key Figures:**
 - **Estimated Order Value:** The estimated order value is determined taking into account the order probability.
 - **Order and Invoice Value:** Here the system lists the order value as the sum of all order confirmations and the invoice value as the sum of all completed invoices of all projects of the customer.
- **Meetings:** This field defines and notes meetings that have already been held with the customer.
- **Actions:** This field lists all actions that concern the customer.

Address & Communication

Kontakt CS Consult Systeme AG

Dokument Bearbeiten Ansicht Rückverweise Aktionen

Stammblatt Marketing Vertrieb **Adresse & Kommunikation** Finanzen Sonstiges

Adresse & Kommunikation

Straße

PLZ Ort

Land Sprache

Telefon

Fax

E-Mail

Web

weitere Adressen

	Zusatz Firmenname	Adressart	Straße	PLZ	Ort
☐	1 Consult Systeme AG	Fakuraanschrift	Bahnhofstraße 45	80400	München
☐	2 Consult Systeme AG	Lieferanschrift	Bahnhofstraße 27	80400	München
☐	Consult Systeme AG		Bahnhofstraße 23	80400	München

- **Address & Communication:**

- **Address, Postcode, City and Country:** These fields indicate the complete address of the customer and are required for the expenses during the [offer](#) and [invoice](#) preparation. The countries can be defined and changed in the collections (in the administration menu).
- **Language:** The language field defines the customer language. The languages can be defined and changed in the collections.
- **Phone, Fax:** These fields indicate the customer's availability by phone and fax.
- **e-mail Address, Web:** These fields indicate the customer's e-mail address and URL (Internet address). Clicking on the e-mail address opens the user's default e-mail program with the e-mail address entered and the link to the Web field opens the default browser with the corresponding URL.

- **other Addresses:** Additional addresses of the customer can be entered here. If the billing address/delivery address differs from the company address, this can be noted here. These addresses are managed in the [address](#) mask.

Finances

Kontakt CS Consult Systeme AG

Stammblatt Marketing Vertrieb Adresse & Kommunikation **Finanzen** Sonstiges

Finanzbuchhaltung

Debitoren-Nr. 4500 Kreditoren-Nr.

Rechnungsdaten

USt. MwSt-D-19% USt.-ID

Zahlungsmodalitäten innerhalb 14 Tagen Zahlungsziel 14

Skonto % Rabatt %

Steuer-Nr. eigene Lieferanten-Nr. 230090

Währung EURO ext. Stundensatz EUR

Konteninformationen

Bank

IBAN BIC

Konto BLZ

- **Financial Accounting:**
 - **Customer/Vendor Number:** The customer number (customer) and/or vendor number (vendor) can be stored here for the financial accounting interface.
- **Invoice Data:**
- **Tax on Sales/Purchases:** In this field you enter the tax on sales/purchases as a default value from the selection menu. By default, this field is preset with the tax rate of the country that was assigned in the [configuration](#) mask. The VAT can be defined and changed in the [sales tax](#) mask. This value is used as default for offers and invoices.
- **VAT ID and Tax Number:** The VAT ID and tax number (relevant for invoicing) can be defined here.
- **Payment Terms and Payment Target:** These fields indicate the payment target and the payment terms of the customer.
- **Cash Discount:** In this field you can indicate whether there is a discount if the customer pays immediately.
- **Discount:** A discount can be entered in this field.
- **Own Supplier Number:** Here you can enter the own supplier no. of the defined customer. This number can be used when creating the invoice numbers.
- **Currency:** This field indicates the general customer currency. By default, this currency applies to all projects for this customer. However, it can be overridden by the project currency. Currencies can be defined and changed in the [currency](#) mask.
- **External Hourly Rate:** This field defines the amount usually charged to the customer for one hour of project work. This amount is only relevant for fixed price projects or for outline agreements and can be overwritten by a project-related hourly rate. The project hourly rate is defined in the [project](#) mask; task-related hourly rates can be defined in the [task](#) mask (see also [pricing](#)).
- **Account Information:**
- **Bank Details (Account Number, Bank Code, Name of Bank, IBAN, BIC):** These fields indicate the customer's bank details.

Miscellaneous

Kontakt CS Consult Systeme AG

Dokument Bearbeiten Ansicht Rückverweise Aktionen

Stammblatt Marketing Vertrieb Adresse & Kommunikation Finanzen Sonstiges

Kundenbudgets

Budgetart	Bemerkung	von	bis	Betrag	Ansprechpartner
1 Einmaliges Budget	2345353	01.10.2019	31.12.2019	50.000,00 EUR	Nahl Lisa
2 Einmaliges Budget	Tickets			-10.000,00 EUR	Nahl Lisa
3 Einmaliges Budget	Beratung			-3.000,00 EUR	Nahl Lisa
				37.000,00 EUR	

Lieferantenbewertungen

Nummer	Ansprechpartner	Anlagedatum	Titel	Summe Finanzielle	Summe Terminliche	Summe Inhaltliche
000001		27.10.2019		0	0	0

technische Einstellungen & Details

Zielstatus Änderungsantrag

Bezeichnung

- **Customer Budgets:** Here you can store customer budgets, for example for blanket orders (as in the example above).
- **Supplier Rating:** Here you can store supplier ratings for the contact.
- **Technical Setting & Details:**
 - **Number:** Dies ist eine automatisch generierte Nummer, welche den Kontakt eindeutig im System identifiziert.
 - **Send an e-mail when Ticket Status Changes:** Here you can select whether the customer should be informed by e-mail when the ticket status changes.
 - **E-Mail for ticket status change:** Here you can specify the e-mail to which the notification should be sent.
 - **Target Status Change Request:** Part of the optional ticket system.

Actions

This document class contains the following actions:

- **Customer Description:** With the help of this action all defined employees can be displayed with their address and actions.
- **Create customer-specific Employee Records:** This action can be used to define the customer-related employee records.
- **Display customer-specific Employee Records:** With the help of this action, all defined customer-related employee records are displayed.
- **Create customer-specific Resources:** This action is used to define the resources on a customer basis.
- **Display Resources by Customer:** This action displays all defined customer-specific resources.

- **Create customer-specific Activities:** With the help of this action, price tables for the activities can be defined customer-related (see also [pricing](#)).
- **Display Activities by Customer:** With the help of this action, all defined customer-specific activities can be displayed.
- **Create Ticket from Customer:** This action can be used to create tickets with the corresponding customer description from within the customer.

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