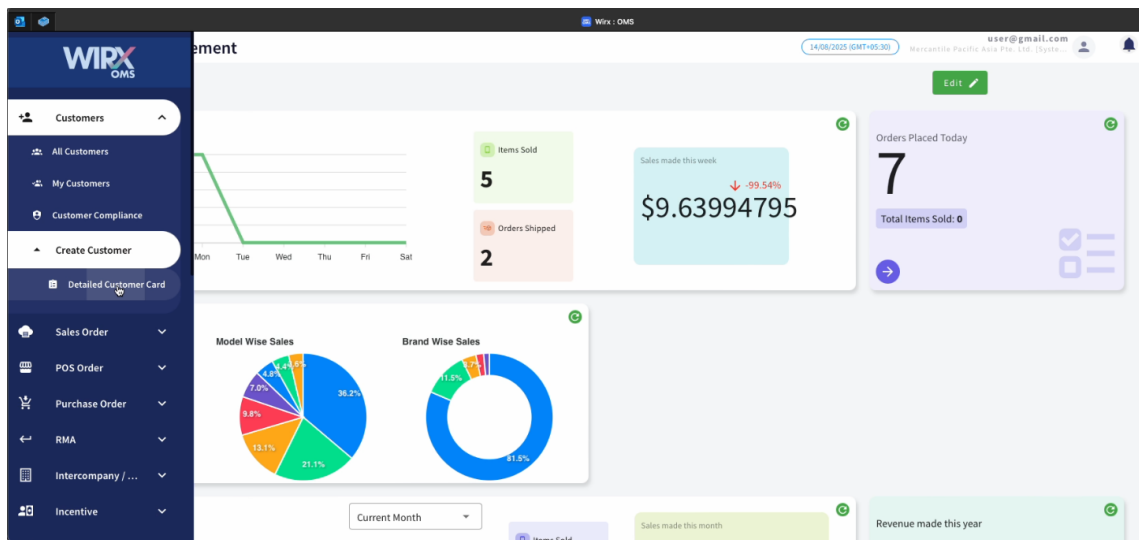


1.1 Create Customer

The **Create Customer** feature in WIRX OMS allows users to add new customers to the system by entering their details through a guided, multi-step form. This process ensures that all relevant customer information is captured for operational, sales, and compliance purposes.

How to Create a Customer.

1.1.1 Steps to Create a Customer



Step 1 – Customer Details

This section collects essential customer information:

- **Sales Person (Required)** – Assign a sales representative responsible for managing the customer.
- **Company Name (Required)** – Enter the legal name of the customer’s company.
- **Mobile Number (Required)** – Include the country code and phone number.
- **Email ID (Required)** – Provide a valid email address for correspondence.
- **Owner’s Name (Required)** – Record the name of the business owner.
- **Type (Required)** – Select the type/category of customer from the dropdown list.

Action: Click **Continue** to proceed to the next step.

WIRX OMS

Customers

14/08/2025 (GMT+05:30) user@gmail.com Mercantile Pacific Asia Pte. Ltd. [System...]

Create Customer

Step 1

Customer Details Billing Address Shipping Address Additional Information

Sales Person: * Company Name: *

User1 John Enterprises

Mobile Number: * Email Id: *

93 1235465778862 Johnwick@gmail.com

Owner's Name: * Type: *

John Wick Company

Continue

Step 2 – Billing Address

This step captures billing-related contact and location information:

- **Contact Person (Required)** – Name of the billing contact.
- **Company (Required)** – Customer company name (can be same as above).
- **Mobile Number (Required)** – Contact’s phone number with country code.
- **Address Line 1 & 2 (Required)** – Complete billing address.
- **Address Line 3 (Optional)** – Additional address details.
- **Postal Code (Optional)** – Postal or ZIP code.
- **Country (Required)** – Select country from dropdown.

Action: Click **Continue** to proceed.

The screenshot shows the 'Create Customer' form in the WIRX OMS system. The form is titled 'Create Customer' and is currently on 'Step 2: Billing Address'. The form is divided into two columns of input fields. The left column contains: 'Contact Person:*' (John Wick), 'Company:*' (John Enterprises), 'Mobile Number:*' (93, 123546577886), and 'Postal Code:'. The right column contains: 'Address Line 1:*' (12, # church road), 'Address Line 2:*' (London), 'Address Line 3:', and 'Country:*' (United Kingdom). At the bottom right of the form, there are 'Back' and 'Continue' buttons.

WIRX OMS Customers 14/08/2025 (GMT+05:30) user@gmail.com Mercantile Pacific Asia Pte. Ltd. [System...]

Create Customer

Customer Details **Step 2 Billing Address** Shipping Address Additional Information

Contact Person:* John Wick Address Line 1:* 12, # church road

Company:* John Enterprises Address Line 2:* London

Mobile Number:* 93 123546577886 Address Line 3:

Postal Code: Country:* United Kingdom

Back Continue

Step 3 – Shipping Address

This step records the customer's shipping address:

- **Use Billing Address** – Checkbox to auto-fill fields with billing details.
- **Contact Person (Required)** – Name of the receiving contact.
- **Company (Required)** – Company name for shipment.
- **Mobile Number (Required)** – Contact number for deliveries.
- **Address Line 1 & 2 (Required)** – Complete shipping address.
- **Address Line 3 (Optional)** – Additional delivery instructions.
- **Postal Code (Optional)** – Postal or ZIP code.
- **Country (Required)** – Select from dropdown.

Action: Click **Continue** to proceed.

The screenshot shows a web application interface for creating a customer. The page title is 'Customers' and the current step is 'Step 3 Shipping Address'. The form is titled 'Create Customer' and has four tabs: 'Customer Details', 'Billing Address', 'Shipping Address' (selected), and 'Additional Information'. A checkbox 'Use Billing Address' is checked. The form contains the following fields:

Field	Value
Contact Person	John Wick
Company	John Enterprises
Mobile Number	93 123546577886
Postal Code	1234243
Address Line 1	12, # church road
Address Line 2	London
Address Line 3	
Country	United Kingdom

Buttons: Back, Continue

Step 4 – Additional Information

This step gathers compliance and supporting documentation:

- **VAT/GST Number** – Customer tax registration number.
- **Remarks** – Any relevant notes about the customer.
- **Tax Certificate** – Upload or attach a file.
- **Business Registration Certificate** – Upload or attach a file.
- **ID Proof (Passport or Driving License)** – Upload or attach a file.

Action: Click **Continue** to proceed.

The screenshot shows the 'Create Customer' form in the WIPX system, specifically Step 4: Additional Information. The form is divided into several sections:

- VAT/GST Number:** A text input field containing the value '1565257581265312'.
- Remarks:** A large text area with the placeholder text 'Remark'.
- Tax Certificate:** A document upload area showing a file named 'Screenshot 2025-08-14 at 11.16.16.png' with a close button (X).
- Business Registration Certificate:** A document upload area showing a file named 'Screenshot 2025-08-14 at 11.16.40.png' with a close button (X).
- ID Proof (Passport or Driving License):** A document upload area showing a file named 'Screenshot 2025-08-14 at 11.16.40.png' with a close button (X).

At the bottom of the form, there is a 'Back' button and a green 'Submit' button. A note at the bottom of the form reads: 'Please either upload two documents or choose not to upload any.'

After the customer is created, the record remains pending approval and is forwarded to Customer Compliance for review and final approval.

Revision #9

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