Code formats (customer/vendor groups)

Field *Code Format* on the form of customer/vendor groups (tab *General*) allows for specifying rules according to which the code of customer/vendor added to a given group should be defined. If a customer/vendor group has a code format defined, then, on the basis of that code format, when adding a customer/vendor to the group, the system verifies the correctness of the code assigned to that customer/vendor by the user.

The code format is created according to the following rules of RegEx syntax:

- **First, is necessary to enter a special character which defines type and interval of characters uded in the code, e.g.**
    - **[]** – indicating an element from a list
    - **()** – remembering the content in brackets as an item,
    - **$** – meaning the end of a row
    - **^** – adjusting to the field beginning (a character following ^ must be the beginning of an expression)
- Then, if the code is supposed to contain numbers, quantity quantifiers are used, e.g.:
    - **\d** – any number of digits
    - **\d?** – zero or one digit
    - **\d** – one digit
- **In order to use a white space (e.g., a space), it is necessary to add \s between expressions**
- **The remaining characters are entered permanently into a code format (i.e., aa\d indicates that these codes can only be in the following forms: aa1, aa2, aa3, etc.)**

Basic RegEx expressions:

Expressions Defining Possible Character Types

Expression	Meaning	Negation
[abcs23]	Character from a list	[^abcs]
[a-f]	Character from a range	[^a-f]
\d	Figure	\D
\w	Letter of figure	\W
\s	White space character (space character, enter, tab)	\S
.	Any character	

Expressions defining a number of repetitions of a given expression

Expression	Number of repetitions
*	Zero or more
+	One or more
?	Zero or one
{n}	Precisely n
{n,m}	From n to m
{n,}	At least n

Exemplary use of RegEx Code Format:

Code format	Exemplary Codes
\d{3}-\d{2}-\d{4}	215-84-6377
\d*[a-z]{5}	552345dress, lemon
\d{5}(-\d{4})?	33064, 33064-3597
\d{1,2} [A-Z]{3} \d{2}	10 AUG 59, 5 JUL 99
\(\d{3}\)[A-Za-z]{3}-\d{2}@\d{2}	(305)abc-45@55

| Code format	Exemplary Codes
\d{3}/\d{3}-\d{4}	000/785-4555
((\d)|([1][0,1])):[0-5]\d[A,P]M	5:30PM, 10:05AM
\d{1,2}' \d{1,2}''	5' 6", 12' 11''
4\d\w{3}-\d	41G1A-2, 42222-2, 41aaa-2
aaa[1-4]?\d	aaa1, aaa21, aaa49, aaa40

A code format can be also a part of a [configuration tool](#), however, in such case, the following expressions are not handled:

- **expressions containing special characters:**
- **\d**
- **\w**
- **\s**
- *****
- **+**
- **{n,}**

Defining customer/vendor groups

General information

Classification into customer/vendor groups facilitates managing of customers/vendors defined in the system. The tree of customer/vendor groups can be found in *Groups* panel, in the window of <<the list of customers/vendors>>.
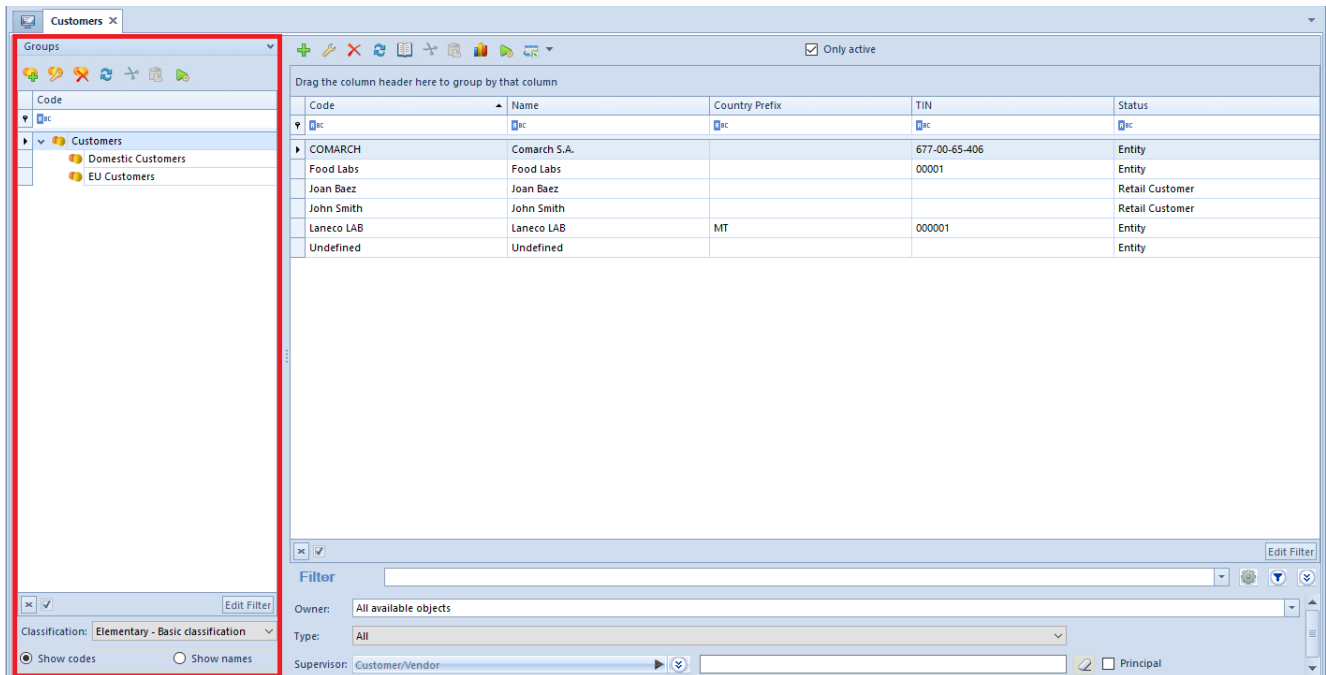
Tree of customer groups

Classification drop-down list, placed below the tree of groups, allows the user for selecting classification category according to which the tree of customer/vendor groups should be presented. The following values are defined in the system by default:

- **Elementary — Basic classification**
- **Comarch B2B** — classification defined in <<generic directory>> *Customers/Vendors Classification Categories.* For the classification to be available, it is necessary to chceck *Active* parameter in the directory.

The user can define his/her classification categories groups, form the level of <<generic directory>> *General → Customers/Vendors Classification Categories.* Then, it is possible to assign customer/vendor groups to appropriate categories, in *Object Availability* window (*Configuration → Company Structure → Object Availability).*

A new customer/vendor group can be added by clicking on [**Add**] button placed in the main menu or ergonomic panel above <<the list of customer/vendors>>. The button opens a new

customer/vendor group form divided into the following tabs: *General, Questionnaires, Attributes, Attachments*

Customer/vendor group form

Tab *General*

The tab *General* contains the following fields and parameters:

- **Code** – mandatory field
- **Name** – mandatory field
- **Update patterns** – parameter described below
- **Update elements** – parameter described below

and subtabs:

- **General**
- **Trade**
- **Description**
- **Analytical Description**
- **Attributes**
- **Attachments**
- **Availability**

Subtab *General*

Fields from the *General* subtab tab represent pattern for fields available on the form of customer/vendor belonging to a given group or its secondary group. When defining a customer/vendor or secondary group, the values of pattern fields are automatically transferred to the forms of that item or secondary group. The exception is <<*Code Format/Configuration Tool*>> which enable verification of the correctness or automatic assignment of customers/vendors' codes on the basis of created definition.

When the user modifies a pattern which was previously saved, in the main *General* tab are activated parameters allowing for

updating data on the forms of secondary groups and customers/vendors belonging to the group:

- **Update patterns** – applies to secondary groups
- **Update elements** – applies to customers/vendors

Next to each parameter, there is a drop-down list with the following options:

- **Changed fields — conditional** – updates fields in accordance with changes on the pattern. Only these fields are updated on the form of a group/customer/vendor, which before the change had the same value as on the pattern.

Example
Main Group (TIN: US)

Customer A3 (TIN: US) — assigned directly to Main Group

Group 1 (TIN: DE) — subsidiary to Main Group

Customer A1 (TIN: FR) — assigned to Group 1

Customer A2 (TIN: US) — assigned to Group 1

On the main group, the TIN is being changed from US to DE. The user checks the parameter
Update patterns (groups) and Update elements (customer forms) and selects the option
Changed fields — conditional. Only the TIN fields on Main Group, Customer A3 and Customer A2
will be updated.

- **Changed fields — unconditional** – updates fields in accordance with changes on the pattern. All changed fields are updated, regardless of their value before the update.

Example
Main Group (TIN: US)

Customer A3 (TIN: US) — assigned directly to Main Group

Group 1 (TIN: DE) — subsidiary to Main Group

Customer A1 (TIN: FR) — assigned to Group 1

Customer A2 (TIN: US) — assigned to Group 1

On the main group, the TIN is being changed from US to DE. The user checks the parameter
Update patterns (groups) and Update elements (customer forms) and selects the option
Changed fields — unconditional. The TIN fields on all groups and customer forms in DE group
will be updated.

- **All fields — unconditional** — updates all fields in accordance with the settings on the pattern, except for fields which would have effect on their uniqueness (e.g., code, name)

Example
Main Group (TIN: US)

Customer A3 (TIN: US) — assigned directly to Main Group

Group 1 (TIN: DE) — subsidiary to Main Group

Customer A1 (TIN: FR) — assigned to Group 1

Customer A2 (TIN: US) — assigned to Group 1

On the main group, the TIN is being changed from US to DE. The user checks the parameter
Update patterns (groups) and Update elements (customer forms) and selects the option All
fields — unconditional. All the fields will be updated in

compliance with the settings in the
patterns, apart from those that would affect their uniqueness.

The functions of substabs *Trade, Analytical Description* and *Availability* are the same as of those on the customer/vendor form.

Tab General on customer group form

Other tabs

Tab *Questionnaires* presents questionnaires related to a given customer/vendor group, whose definition is described in article <<Defining questionnaires>>.

The tabs *Attributes* and *Attachments,* which are also available in the tab *General,* contain lists of attachments and attributes related to a given customer/vendor grroup.

Functions of attributes and attachments are described in articles: *<<Attributes* and *Attachments>>*

The tab *Changes History* is available, if in the window *Configuration (Configuration → History → Configuration),* parameter *History Incrementally* is checked. The tab contains preview of operations involving object, including information such user name and date of change.

Customer/vendor history

General information

Customer/vendor history allows for previewing transactions registered with selected customer/vendor. To open the customer/vendor history, it is necessary to click on [**History**] button, available in the main menu or in the ergonomic panel above the list of items.

The form of customer/vendor history is divided into the following tabs: *Collectively, By Item Groups, By Item Codes*

Tab *Collectively*

Tab Collectively

The tab *Collectively* contains a list of all filtered documents issued on the selected customer/vendor presented chronologically. The list is composed of the following columns:

- **Date** – document date
- **Type** – document type
- **Document Number**
- **Contact** – number of customer's/vendor's contact person
- **Subtotal** – subtotal document value expressed in the system currency
- **VAT** – VAT tax value expressed in the system currency
- **Total** – total document value expressed in the system currency
- **Overdue Amount** – customer's/vendor's overdue amount due to open payables resulting from the document, expressed in the system currency
- **Currency**

Tab *By Item Groups*

Tab By Item Groups

The tab *By Item Groups* contains information about total number and value of transactions in which a given item was involved, ordered by groups to which customers/vendors, for whom the transaction documents were issued, are assigned. The list is composed of the following columns:

- **Item Group**
- **Quantity**
- **Value**
- **Price (Average)** – average price of an item from a given group
- **Currency** – if items were added in documents in companies operating on various currencies, then a given item group will be displayed in as many rows as the number of system currencies in which documents were registered for a given customer/vendor and for items included in that group.

Tab *By Item Codes*

Tab By Item Codes

The tab *By Item Codes* contains information about total number and value of transactions, sorted by codes and names of items included in these transactions. The list is composed of the following columns:

- **Item Code**
- **Item Name**
- **Quantity**
- **Value**
- **Price (Average)** — average price of each item
- **Currency**
- **Recent Price** (hidden by default) — unit subtotal price of item from the recently issued document in which a given item is included
- **Manufacturer** (hidden by default)

Filtering

Each list contains a default filter, where the following fields are available:

- **Date From/To** — searching transactions by date of issue
- **Warehouse** — searching transactions by warehouse

- **Item Classification Category** — drop-down list, available for the tab *By Item Groups* only
- **Item** — field available for the tab *Collectively* only, allows for searching transactions by an item involved in it (selected from among items registered in the system)
- **Document Status** — drop-down list containing default values: *Unconfirmed, Confirmed*
- **Document Type**

Vendor history filter

Detailed description of functioning of the filters can be found in category <<Searching and filtering data>>>

Verification of entity's TIN number

When defining a customer/vendor with *Entity* status, a user can verify its TIN number in Central Statistical Office of Poland (GUS) service and VIES service. It can be done with the use of a list placed next to the *TIN* field, in the header of a customer/vendor form, which contains the following options: *GUS, VIES* and *VAT*

Field TIN in the header of a customer/vendor form

Verification of TIN number in GUS and VIES database

Upon entering an appropriate value in the *TIN* field in the header of a customer/vendor form, it is necessary to select from the drop-down list the service from which the data is to be retrieved. For Polish customers/vendors, verification in GUS and VIES databases is available, whereas for UE customers/vendors only verification in VIES database is available. The option of verification is not available for non-EU customers/vendors or in case of entering an invalid TIN number format.

Note
For the function of downloading data from GUS and VIES to

operate correctly, it is necessary to unblock ports: 443 and 80 as well as addresses: www.erp.comarch.pl, http://ec.europa.eu/ (for GUS) and https://wyszukiwarkaregon.stat.gov.pl (for VIES).

Note
Verification in VIES and GUS is only possible in online mode. The service is only available for users having valid license key.
After a correct verification of a TIN number, the system displays a window confirming the verification.

Confirmation from GUS for a TIN number – correct verification

Checking the parameter *Edit data before update* allows for editing data on the form.

In case of a negative verification, the system displays the following window:
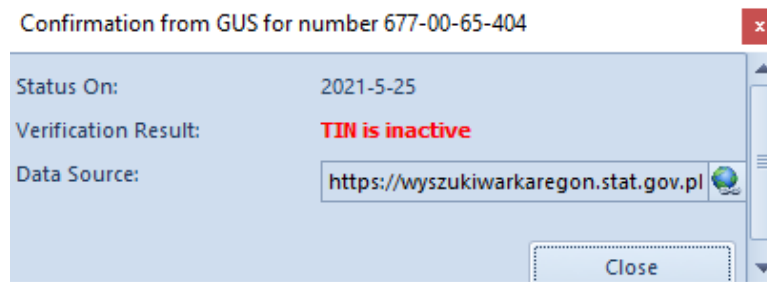
Confirmation from GUS for a TIN number — negative verification

Verification of entity's VAT status

For Polish entities, besides the TIN number verification, it is also possible to perform verification of VAT status. It can be done with the use of *VAT* option, available on the drop-down list placed next to the *TIN* field.

Note
Verification of VAT status of a customer/vendor is only possible in online mode. To ensure proper operation of this feature, it is necessary to unblock the port: 443 as well as the address: https://ppuslugi.mf.gov.pl/.
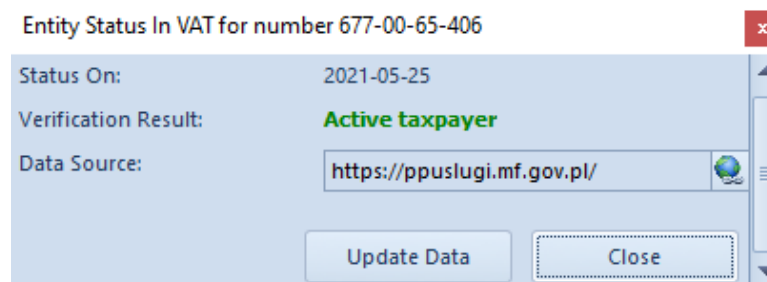
VAT status for an entity — correct verification

In case of a negative verification, the system displays an appropriate information in *Verification Result* field.

List of customers/vendors

List of customers/vendors contains information about particular customers/vendors cooperating with the company, that is purchasers or suppliers. Saved customers/vendors can be used in different places of the system, e.g., on invoices or other trade documents.

To open the list of customers/vendors, it is necessary to go to the *Main* menu and then, from *Directories* list of buttons, select [**Customers**] or [**Vendors**] button.

In the English version of the system, customers and vendors are presented on separated list. However, it can be changed by unchecking parameter *Show separated customers and vendors*, available in the system configuration (*System → Configuration → Trade)*. Upon unchecking the parameter, in the main menu, instead of the buttons [**Customers**] and [**Vendors**], one button will be available: [**Customers/Vendors**]

Note
The parameter *Show separated customers and vendors* is active only if no operations have been performed yet in a database.
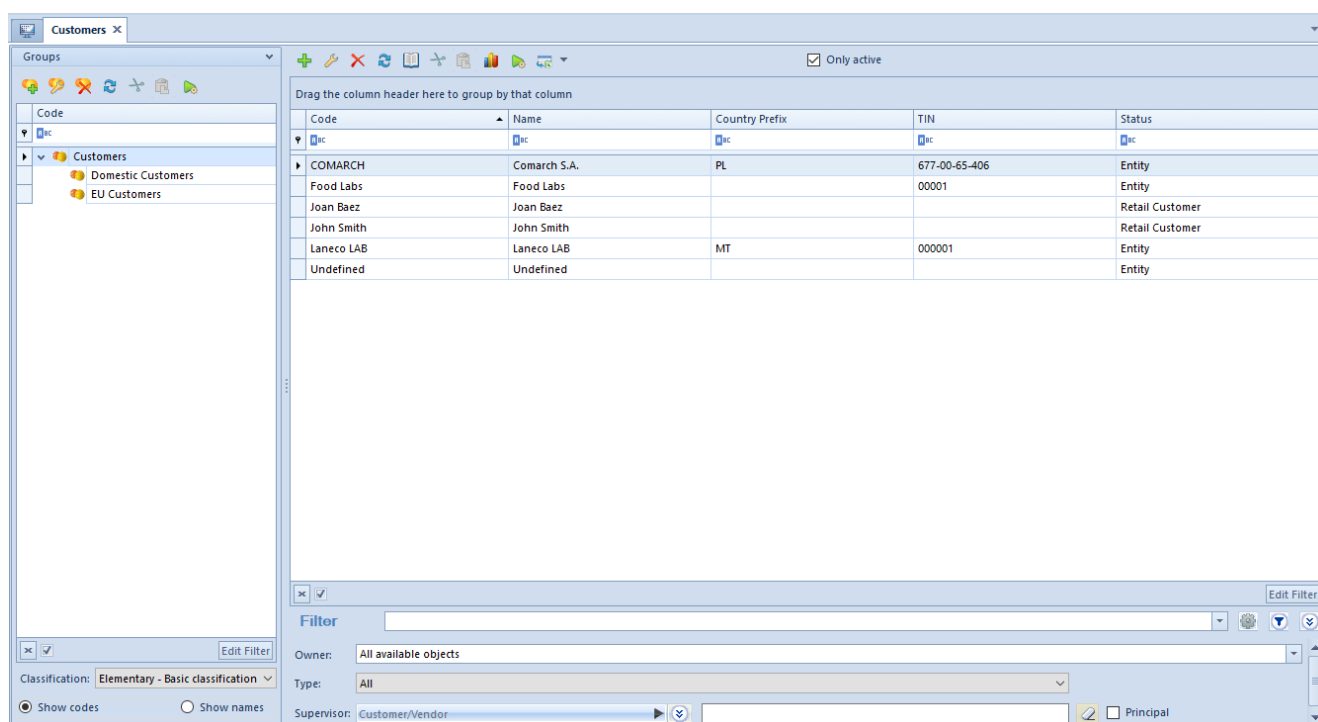
List of customers

On the left side of the window, there is the tree with groups of customers/vendors. The function of customer/vendor groups and their defining are described in article [Defining customer/vendor groups](#).
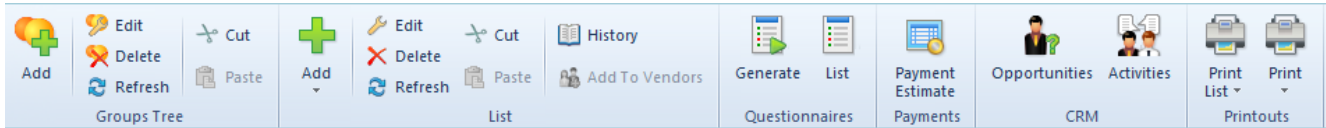
Menu of the list of customers

The menu of the list of customers/vendors contains standard buttons allowing for adding, editing and deleting groups of customers/vendors and customers/vendors, previewing change history of a customer/vendor, as well as printouts menu. For each item on the list, there are also available buttons related to <<generating questionnaires>> and a button opening customer's/vendor's [payment estimate](#), *CRM* group of buttons ([**Opportunities**], [**Activities**]) appears after attaching an employee to an operator (*Configuration → Company Structure → Operators →* operator's edition form).

The list of customers/vendors is composed of the following columns:

- **Code**
- **Country Prefix**
- **Name**
- **Status** – value from generic directory *Customer/Vendor Status.* The following values are defined in the system by default: *Entity* and *Retail Customer*
- **TIN**

Columns hidden by default:

- **City**
- **E-mail**

- **First Name**
- **Phone**
- **Second Name**
- **Street**
- **Title** – value from generic directory *Titles* from *General* categorythe following values are defined in the system by default: *, Ms.*
- **Zip Code**

Columns hidden by default corresponding to fields from tab *CRM* available on customer/vendor form:

- **CRM Activity Status**
- **Currency**
- **Employment**
- **Industry**
- **Legal Form**
- **Level of Finances**
- **Revenues**
- **Source**
- **Supervisors**
- **Type**

Filter of the list of customers

The list of customers/vendors is provided with a default filter, containing, among others, fields:

- **Classification** – allows for searching customer/vendor by type, drop-down list containing default values: *All, Customers* and
- **Supervisor** – allows for searching customer/vendor by supervisor who can be selected from among customers/vendors or employees defined in the system
- **Type** – allows for searching customer/vendor by type

specified in the tab *CRM* on customer/vendor form. The drop-down list contains predefined values retrieved from generic directory *Type: Customer, Lead, Partner, Prospect.*

Defining customer/vendor

A new customer/vendor can be added by clicking on [Add] button placed in the main menu or ergonomic panel ?? above the [list of customers/vendors](#) and selecting one of the following options:

- By Template – the status will be retrieved from the template of the group to which a customer/vendor is being added
- Retail Customer
- Entity

[Alert] After saving a customer/vendor form, it is possible to change his/her status only on condition that no contact person with dedicated relation type is associated with that customer/vendor. [/alert]

After selecting status, the form of newly created customer/vendor opens. On the left side of the form, there is customer/vendor form header containing the following fields and parameters completed by the user: Common elements for retail customer/vendor and entity:

- ID – item identification number in the database, non-editable field, filled-in automatically by the system
- Code – mandatory field, contains code used for a fast and easy identification of a customer/vendor (e.g. name

abbreviation), can be composed of 50 characters maximum (letters and/or digits). Codes of customers/vendors must be unique.

- TIN – it is possible to enter TIN in form of digits and letters, both without separators and with them. The field is preceded with a predefined list of country codes For a customer/vendor with *Entity* status it is mandatory to fill in the *TIN* field, if parameter *Active Taxpayer* is checked. Additionally, in case of checking the parameter *Active Taxpayer* and selecting *PL* country code, the type (digits only) and number of entered characters is verified in the field. The system also allows for retrieving and verifying customer/vendor data from Central Statistical Office of Poland (GUS) service and VIES service.
- NIN
- Type – drop-down list allowing for selecting the type of added customer/vendor from among the following options:
    - *Domestic* – customer/vendor running a business in a country in which the system is being used
    - *EU* – customer/vendor running a business within the European Union
    - *Non-EU* – customer/vendor running a business outside the European Union
- Status – drop-down list allowing for selecting customer/vendor status, that is *Entity* or *Retail Customer.* The value of this field affects the calculation of VAT direction on a document, provided that the following option of calculating VAT direction is selected in the document definition: *Depending on customer status*
- SAF-T Procedure Code – field allowing for selecting one of the values of a generic directory with the same name, which is available in the group of generic directories: *Transactions*

And parameters:

- Customer/Vendor — these parameters are available when customer and vendors are displayed on the same list
- Reverse charge — parameter used for marking customers/vendors as entitled to use reverse charge. The parameter is available after checking parameter *Handle reverse charge,* which is available in the system configuration (*System -> Configuration -> Trade).* More information reverse charge mechanism can be found in article [Handling reverse charge](#).
- URL — customer's/vendor's website

Fields with address data which are available on the forms of both types of customers/vendors are filled-on automatically on the basis of information entered in *Addresses* tab.

Fields and parameters available for customers/vendors with *Entity* status:

- Name — mandatory field, a name can be composed of any number of characters (digits and/or letters) Names of customers/vendors can repeat.
- REGON
- Associated unit — parameter allowing for marking the customers/vendors who are associated both in terms of capital and organization. The parameter is checked by default and it can be unchecked at any moment during work with the system.
- Active taxpayer — this parameter allows for marking a customer/vendor as an entity obliged to calculate, collect and pay tax due within due time
- In liquidation — this parameter allows for marking a customer/vendor as an entity being in liquidation. Setting of the parameter is verified while adding VAT-ZD notification

Fields and parameters available for customers/vendors with *Retail Customer* status:

- First Name — mandatory field
- Second Name
- ID Card Number — number of identity document identifying a customer/vendor
- Date of Issue — date of issue of selected identity document
- Issuing Authority — institution that has issued the identification document
- Date of Birth

The customer/vendor form contains also the following tabs: *Address, Groups, Trade, Credit Limits, CRM, Contact Persons, Accounting, Bank Accounts, Analytical Description, Availability, Attributes, Attachments, Change History*

Tab *Addresses*

In the tab *Addresses,* the user can define and add different types of customer's addresses. The following types of addresses are available:

- Main
- Delivery
- Subsidiary
- Mailing
- Billing
- Residence

The list of addresses contains default address of *Main* type generated by the system and it can be freely modified by the user, however it cannot be deleted. The user can add any number of customer's/vendor's addresses but only one of them can be marked as default. If the parameter *Active* placed next to an address is checked, it means that such address can be used in other places of the system. Addesses can be deactivated (archived) manually by unchecking the parameter *Active.* If an address, which has already been used in the system, gets modified on the form of an employee or on a

document, it is automatically archived by the system. An address marked as default for a the main type cannot be deactivated or deleted. Also the addresses which have already been used in the system (e.g. on a document) cannot be deleted. In order to issue a sales/purchase invoice, it is necessary to fill in the *City* field in customer's/vendor's address data. Otherwise, when confirming such document, the system will display a relevant message. It will then be possible to complete the missing data from a document level.

[Alert] Deactivation of an address is irreversible. [/alert]

In the *Addresses* tabs, there are also available the following subtabs:

- Customer's/Vendor's Contact Details – contains a list of contact data (e.g. phone number, e-mail, messenger) related to the address and allows for adding new ones
- Consents To Personal Data Processing – the consents to personal data processing have been described in detail in article <<Consent register>.
- Contact Person's Contact Details – contains contanct details of contact persons entered in the tab *Contact Persons* on customer's/vendor's form

Tab *Groups*

The tab *Groups* contains groups to which a given customer/vendor belongs. Here, the user can edit groups to which a customer/vendor belongs.

Tab *Trade*

The tab *Trade* allows for defining parameters and data used during trade transactions with a customer/vendor, that is:

- Payment – payment form assigned to a customer/vendor The value of this field is suggested automatically on a document issued for a given customer/vendor.

- Due Date – payment due date default for a given customer/vendor. When issuing a trade document for a given customer/vendor, the payment due date is set on the basis of the value deriving from that field and the date of issue of the document.
- EOM – parameter allowing for for designating a due date based on the end of the month.
- Correct By – parameter determining by how many days the due date that falls to the end of month should be corrected. The parameter can be edited only when *EOM* field is checked.
- Split payment – parameter available upon checking parameter *Handle split payment ??* on the form of company definition (*Configuration -> Company Structure -> Company).* Allows for processing payments with the use of the split payment parameter which has been described in detail in article *<<Split Payment mechanism>>.*
- Currency – drop-down list for selecting a currency for a customer-vendor. The list contains all currencies defined in the system.
- Terms – allows for assigning default terms for a customer/vendor
- Delivery Method – method of merchandise delivery assigned to a customer/vendor. Drop-down list, contains default value *Personal Collection.* The user can define his/her own institution groups, form the level of <<generic directory>> *Transactions -> Method of Delivery.*

Section *Applications* relates to the *Comarch B2B* application, allowing customers for the preview of available stock levels and for placing sales orders using web browser. From *B2B Warehouse* drop-down list the user can select a warehouse to which the order will be sent. The section is not available for vendors.

Section *Price Types for Released Items* allows for adding

<<price types for released items>> for a customer. The section is not available for vendors.

In field *EDI Formats,* it is possible to add formats of electronic exchange of documents (invoices and orders).

Tab *CRM*

The tab *CRM Data* contains the following fields completed by the user:

Section *General:*

- Type -drop-down list containing predefined values: *Customer, Lead, Partner, Prospect.* The user can also define new types in generic directory *CRM -> Type.*
- Legal Form -drop-down list containing predefined values: *Co-op, General Partnership, Joiny-Stock Company, LLC, LP, Other Business, SOE, Sole Proprietorship.* The user can also define new types in generic directory *CRM -> Legal Form ?*
- Industry — drop-down list allowing for indicating the industry in which contact person operates. The user can also define new industries in generic directory *CRM -> Industries.*
- SIC (Polish Classification of Activities) — inserting an appropriate number of SIC causes that the system selects an industry corresponding to it in the field
- Customer Acquisition Soruce — drop down list allowing for selecting customer acquisition source. The user can also define new sources in generic directory *CRM -> Source of Origin.*

Section *Loyalty:*

- Number of Points — field provided for information purposes, presents the number of loyalty points accumulated by a customer. The points are assigned to items in <<price lists>>.

- Loyalty Card Number – field in which it is possible to select customer's loyalty card from among cards registered in the system.
- Current Card Status

Section *Comapny Situation:*

- Employment – number of eployees assumed by a customer/vendor
- Revenues – amount of customer's/vendor's revenues for the previous year
- Level of Finances – drop-own list allowing for specifying financial situation of a company. The following values are defined in the system by default: *Bad, Good, No data.* The user can define his/her own values in generic directory *CRM -> Level of Finances.*

Section *Gaining New Customer* (information facilitating estimation of costs related to establishing cooperation with a customer/vendor registered in the system)

- Status – drop down list with predefined values: *Attempted to Contact, Contact in Future, Contacted, Junk, Lost, New.* The user can define his/her own values in generic directory *CRM -> ???*
- Estimated Costs in Period From-To – forecast costs of establishing cooperation with a customer/vendor

In section *Supervisors,* it is possible to select customer's/vendor's supervisors from among employees registered in the system.

Detailed information regarding the functionality can be found in category <<CRM and RODO>>.

Tab Bank Accounts

The tab *Bank Accounts* presents a list of bank accounts

assigned to a customer/vendor and allows for adding/editing/deleting them.

To save a new bank account, it is necessary to fill-in the following fields:

- Bank – list of banks defined from the level of *Main – Banks.*
- Account Number
- Account Type – drop-down list allowing for selecting the type of added bank account (*IBAN, NRB_PL, Other)*

On the list of bank accounts, besides the above-mentioned fields, there is also information about executed verification of a given bank account (column Reported) and its date.

Bank account verification

Dla firm rozliczających podatek VAT w Polsce, z poziomu zakładki *Rachunki bankowe*, istnieje możliwość weryfikacji rachunku na tzw. Białej liście podatników.

The bank account verification is available, if:

- the parameter is checked on company form
- at least one bank account is assigned to a customer/vendor
- cusotmer/vendor has TIN or NIN? number defined

After selecting the button, the system displays message about the result of the verification.

[Alert]

Verification of bank account is only possible in online mode. The service is only available for users having valid license key.

Activation of bank account verification is registered on customer/vendor form and in *Change History* tab, available on

bank account forms. It presents changes regarding:

- bank account number which was subject to verification
- date of activated verification
- customer's/vendor's TIN or NIN number
- Verification result — *Reported:Yes/No.*

Other tabs

Tab *<<Credit Limits>>* allows for adding credit limits which affects transactions concluded with a customer.

[Alert]

The tab is available for customers only.

Tab *Discouints* presents information about current discounts associated with a customer. More information regarding functioning of the discounts can be found in category <<Discounts>>.

Tab *Coupons* presents information about coupon-based promotions currently available for edited customer. More information regarding units of measure can be found in <<Coupon-based promotions>>.

Tab *Contact Persons* allows for associating contact persons with a customer/vendor. More information regarding contact persons can be found in category <<Contact persons>>.

The tab *Accounting* presents default bookkeeping accounts assigned to a given customer/vendor.

Tab *Availability* contains tree of centers for which a given customer/vendor is available and allows for attaching/detaching them.

Detailed description of the tabs *Analytical Description, Attributes, Attachments, History* can be found in <<article>>.