



How To Add Customer



ABCD
Online

Search in menu...

- Dashboard
- Organization
- Customer**
- Company
- Tasks
- Digital Signature
- Expense
- Items
- Sales
- Purchase
- Accounts
- Mailbox
- Pinned List
- Robot
- Settings
- Human Recourse
- Estimates
- Communication

Dashboard

Bank Accounts

ABCD (A/c.123456789)
In AnupalanBooks

Step 1

Click On the + Button or
Customer Section

Announcements

[View all](#)

To Do List [View all](#)

[Add new](#)

Sr No.	What To Do	Status	Start Date	End Date	Due Date	Action
No data available in table						

Showing 0 to 0 of 0 entries

5

PRIVATE
LIMITED

1

LLP

1

LIMITED

SHORTCUTS



Add Company



Add Customer



Add Invoice



Add Debit Note



DEEPAK AMARSHI VARIYA

Last Login: 16-08-2023 3:39 PM
Online

Search in menu...

- Dashboard
- Download Section
- Organization
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- Tasks
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- Expense
- Items
- Sales
- Purchase
- Auto Bank Reconciliation (ABR)
- Company Law

Dashboard

Sales



GENERAL

- + Organization
- + Employee
- + **Customer**
- + Company
- + Digital Signature
- + User
- + Leave
- + Lead
- + Department

BANKING

- + Import Transactions
- + Income Category
- + Expense Category
- + Bank
- + Petty Cash
- + Rules

SHARE CERTIFICATE

- + Equity Share
- + Preference Share
- + Debenture Share

SALES

- + Item
- + Invoice
- + Recurring Invoice
- + Credit Note
- + Estimates
- + Payment Receive

TASK

- + Tasks
- + Task Category
- + Task Call
- + Task Email
- + Task Notes
- + Task Comment
- + Task Update

CONTRACT/AGREEMENT

- + Registration
- + Insurance
- + Agreement
- + Contract

PURCHASE

- + Debit Note
- + Purchase
- + Expense
- + Payment Made
- + Vendor

COMPLIANCE

- + Form MBP 1
- + DIR 8
- + DIR 2
- + Auditor Appointment
- + Auditor Resignation
- + Directors Report
- + CTC Resolution
- + Minutes of Meeting
- + Share Transfer Deed
- + Director
- + ShareHolder

Day 16th August - 2023, Time 3:41:38 PM

Clock In

VARIYA &... This month

199,840.88
Sales (Including GST Tax)

28,424.88
GST Tax

185,999.28
Receivable

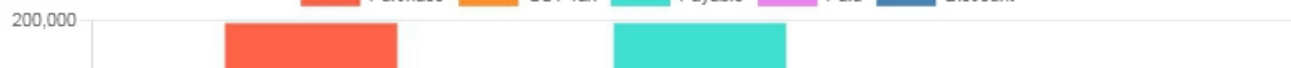
10,500
Collection

0
Bad Debts

Purchase

DEEPAK A. VARIYA &... This month

Purchase GST Tax Payable Paid Discount



199,650
Purchase (including GST Tax)

DEEPAK VARIYA
Online

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Customer

Filter

Customer List

Show 10 entries

Search:

Name	Email	Phone No	Mobile No	Primary C	Status	Action
MR PANDAV	no-reply@anupalanonline.com	90000000000	90000000000		Active	
MR. ABCD	no-reply@anupalanonline.com	022 2222 2222	+91 9898989898		Active	
MR. BOB	no-reply@anupalanonline.com	022 2222 2222	+91 9898989898	Mr. XYZ Mobile No : +919998889998	Active	
MR. DEFG	no-reply@anupalanonline.com	022 2222 2222	+91 9898989898	Mr. XYZ Mobile No : +919998889998 Email : info@anupalanonline.com	Active	
MR. HEY	no-reply@anupalanonline.com	022 2222 2222	+91 9898989898	Mr. XYZ Mobile No : +919998889998 Email : info@anupalanonline.com	Inactive	
MR. KAPOOR	no-reply@anupalanonline.com	022 2222 2222	+91 9898989898	Mr. XYZ Mobile No : +919998889998 Email : info@anupalanonline.com	Active	
MR. KHAN	no-reply@anupalanonline.com	022 2222 2222	9898989898		Inactive	
MR. MANTRI	no-reply@anupalanonline.com	022 2222 2222	90000000000		Inactive	
MR. MATELE	no-reply@anupalanonline.com	022 2222 2222	90000000000		Inactive	
Mr. MEHTA	no-reply@anupalanonline.com	022 2222 2222	90000000000		Active	

Showing 1 to 10 of 21 entries

Previous 1 2 3 Next

Step 2

if you go through Customer
Section You will Get this screen
Click On the + button

You can also Import All
Your Customers
by uploading Excel Sheet

DEEPAK VARIYA
Online

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Dashboard

Customer List Add Customer

Name *		City		Send SMS :	☐ No
Email *		Country	India	Send Email :	☐ No
For Invoice/Debit Note/Credit Note intimation		Zip code		Send Whatsapp :	☐ No
Short Note		Website		Active	☒ Yes
Phone		Skype id			
Mobile		Facebook URL			
Fax		Twitter URL			
Address		Linkedin URL			

Save

Save and Create Primary Contact

Cancel

Step 4

Click On the Save Button

Fill All The Mandatory Field
in this Form

Step 3

After Saving The Data You Will Be Directed To
All Customer List Page.

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Online

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Customer

Step 5

Click On the Switches As
Per Your Requirement

Filter

Customer List

On All Customer Page You Will Get An Option To Keep Your Customer ACTIVE OR INACTIVE According To Your Choice.

Name	Email	Phone No	Mobile No	Primary Contact	Status	Action
MR PANDAV	no-reply@anupalanonline.com	90000000000	90000000000		Inactive	View Edit
MR. ABCD	no-reply@anupalanonline.com	022 2222 2222	+91 9898989898	Mr. XYZ Mobile No : +919998889998 Email : info@anupalanonline.com	Active	View Edit
MR. BOB	no-reply@anupalanonline.com	022 2222 2222	+91 9898989898	Mr. XYZ Mobile No : +919998889998 Email : info@anupalanonline.com	Active	View Edit
MR. DEFG	no-reply@anupalanonline.com	022 2222 2222	+91 9898989898	Mr. XYZ Mobile No : +919998889998 Email : info@anupalanonline.com	Active	View Edit
MR. HEY	no-reply@anupalanonline.com	022 2222 2222	+91 9898989898	Mr. XYZ Mobile No : +919998889998 Email : info@anupalanonline.com	Inactive	View Edit
MR. KAPOOR	no-reply@anupalanonline.com	022 2222 2222	+91 9898989898	Mr. XYZ Mobile No : +919998889998 Email : info@anupalanonline.com	Active	View Edit
MR. KHAN	no-reply@anupalanonline.com	022 2222 2222	9898989898		Inactive	View Edit
MR. MANTRI	no-reply@anupalanonline.com	022 2222 2222	90000000000		Inactive	View Edit
MR. MATELE	no-reply@anupalanonline.com	022 2222 2222	90000000000		Inactive	View Edit
Mr. MEHTA	no-reply@anupalanonline.com	022 2222 2222	90000000000		Active	View Edit

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DEEPAK VARIYA
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Customer

Step 6

Click On the View Button

Filter

Customer List

Show

Click On View Button And Get The Dashboard Summary Of Due/paid And Total Amount Of Invoice, Due/paid And Total Amount Of Debit Note

Search:

Name	Email	Phone No	Mobile No	Primary Contact	Status	Action
MR PANDAV	no-reply@anupalanonline.com	90000000000	90000000000		Inactive	 
MR. ABCD	no-reply@anupalanonline.com	022 2222 2222	+91 9898989898	Mr. XYZ Mobile No : +919998889998 Email : info@anupalanonline.com	Active	 
MR. BOB	no-reply@anupalanonline.com	022 2222 2222	+91 9898989898	Mr. XYZ Mobile No : +919998889998 Email : info@anupalanonline.com	Active	 
MR. DEFG	no-reply@anupalanonline.com	022 2222 2222	+91 9898989898	Mr. XYZ Mobile No : +919998889998 Email : info@anupalanonline.com	Active	 
MR. HEY	no-reply@anupalanonline.com	022 2222 2222	+91 9898989898	Mr. XYZ Mobile No : +919998889998 Email : info@anupalanonline.com	Inactive	 
MR. KAPOOR	no-reply@anupalanonline.com	022 2222 2222	+91 9898989898	Mr. XYZ Mobile No : +919998889998 Email : info@anupalanonline.com	Active	 
MR. KHAN	no-reply@anupalanonline.com	022 2222 2222	9898989898		Inactive	 
MR. MANTRI	no-reply@anupalanonline.com	022 2222 2222	90000000000		Inactive	 
MR. MATELE	no-reply@anupalanonline.com	022 2222 2222	90000000000		Inactive	 
Mr. MEHTA	no-reply@anupalanonline.com	022 2222 2222	90000000000		Active	 

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ABCD
Online

Customer

₹ 0.00
Invoice Amount
[More info](#)

₹ ₹ 0.00
Due Amount - Invoice
[More info](#)

₹ 0.00
Paid Amount - Invoice
[More info](#)

₹ 0%
Paid Percentage

₹ 0.00
Debit Note Amount
[More info](#)

₹ ₹ 0.00
Due Amount - Debit Note
[More info](#)

₹ 0.00
Paid Amount - Debit Note
[More info](#)

₹ 0%
Paid Percentage

Details (MR PANDAV)

Contacts

Payments

Company

Tasks

Debit Note

Invoices

Credit Note

Notes

Transactions

Ledger

Reminder

MR PANDAV - Details

Name : MR PANDAV

City : MUMBAI

Contact Person :

Country : India

Email : no-reply@anupalanonline.com

Zip code : 400072

Phone : 90000000000

Website :

Mobile : 90000000000

Skype id : Skype .id1302

Fax : 90000000000

Facebook URL : Facebook URL Feeding

Address : Plot No.801C Uran Mumbai City MH 400702 IN

Twitter URL : Twitter URL Feeding

Short Note : no-reply@anupalanonline.com

Linkedin URL : Linkedin URL Feeding

Step 7

Read The Caption Below

This page will also provide you options & summary such as Details, Contacts, Payments, Company, Tasks, Debit Note, Invoices, Credit Note, Notes, Transactions, Ledger, Reminder.