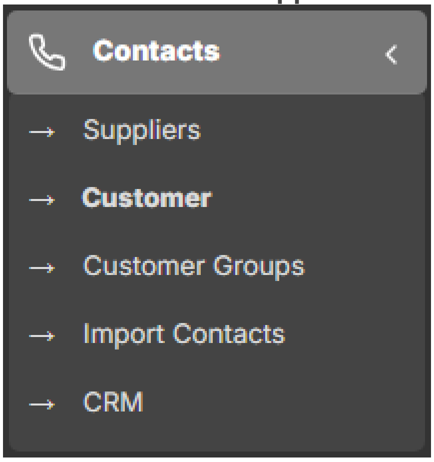
# Contact Management

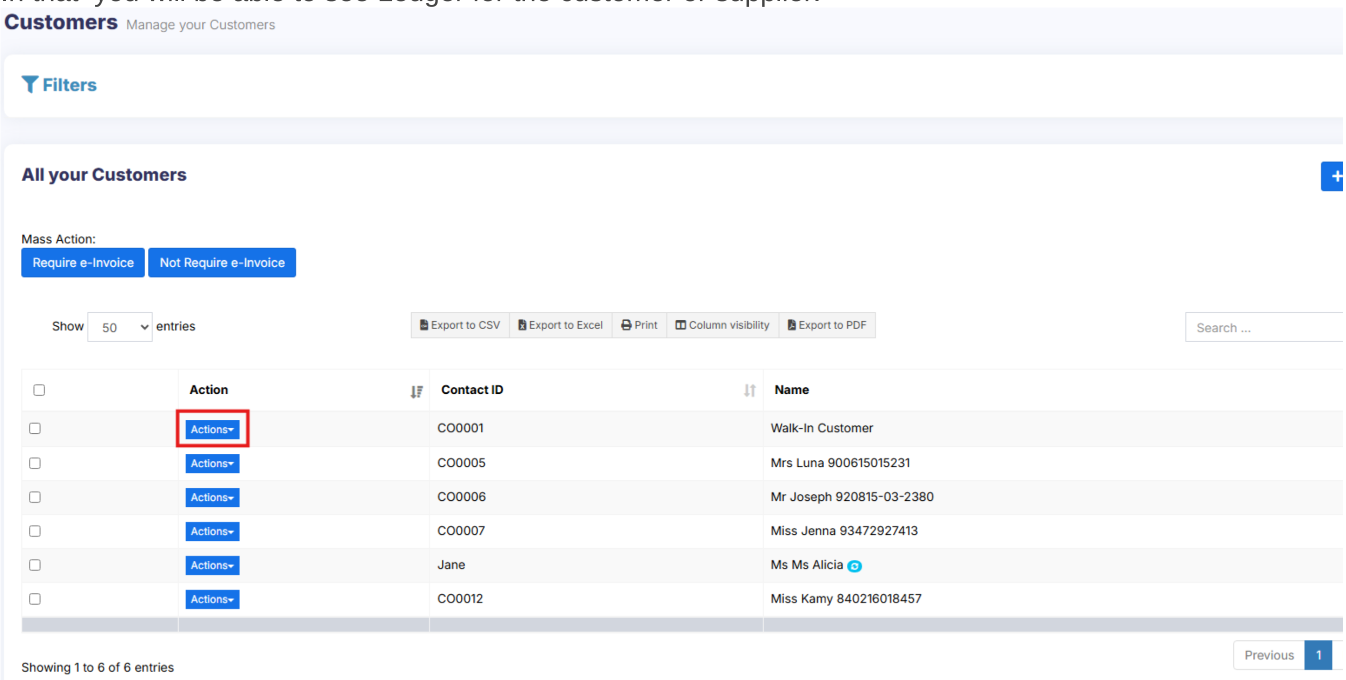
# Customer & Supplier Ledger

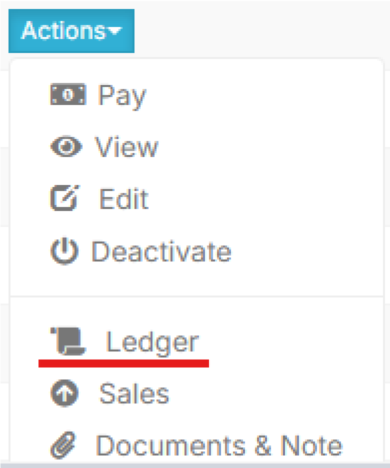
To view customer or supplier ledger

1. Go to **Contacts** -> **Supplier/Customer** and click on actions button.

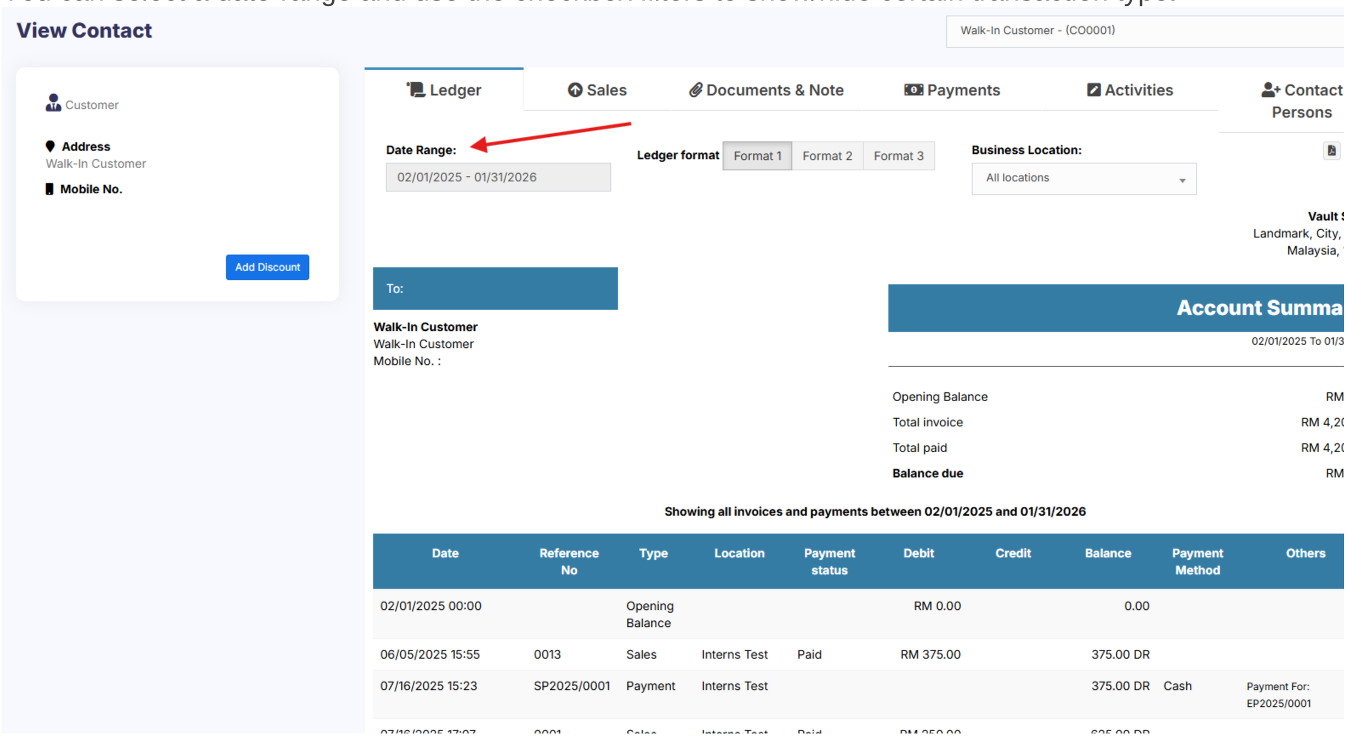



2. In that you will be able to see Ledger for the customer or supplier.





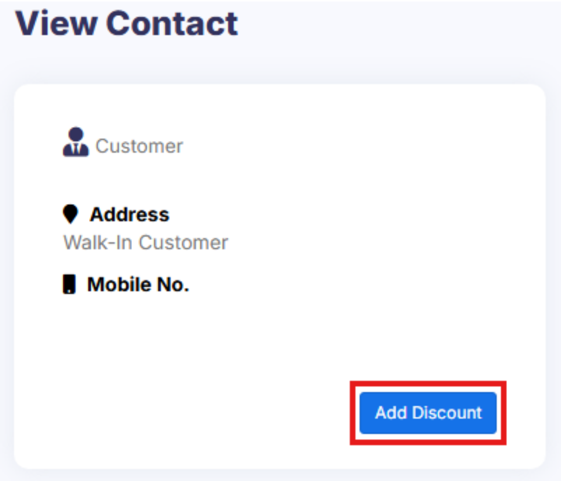

3. You can select a date-range and use the checkbox filters to show/hide certain transaction type.



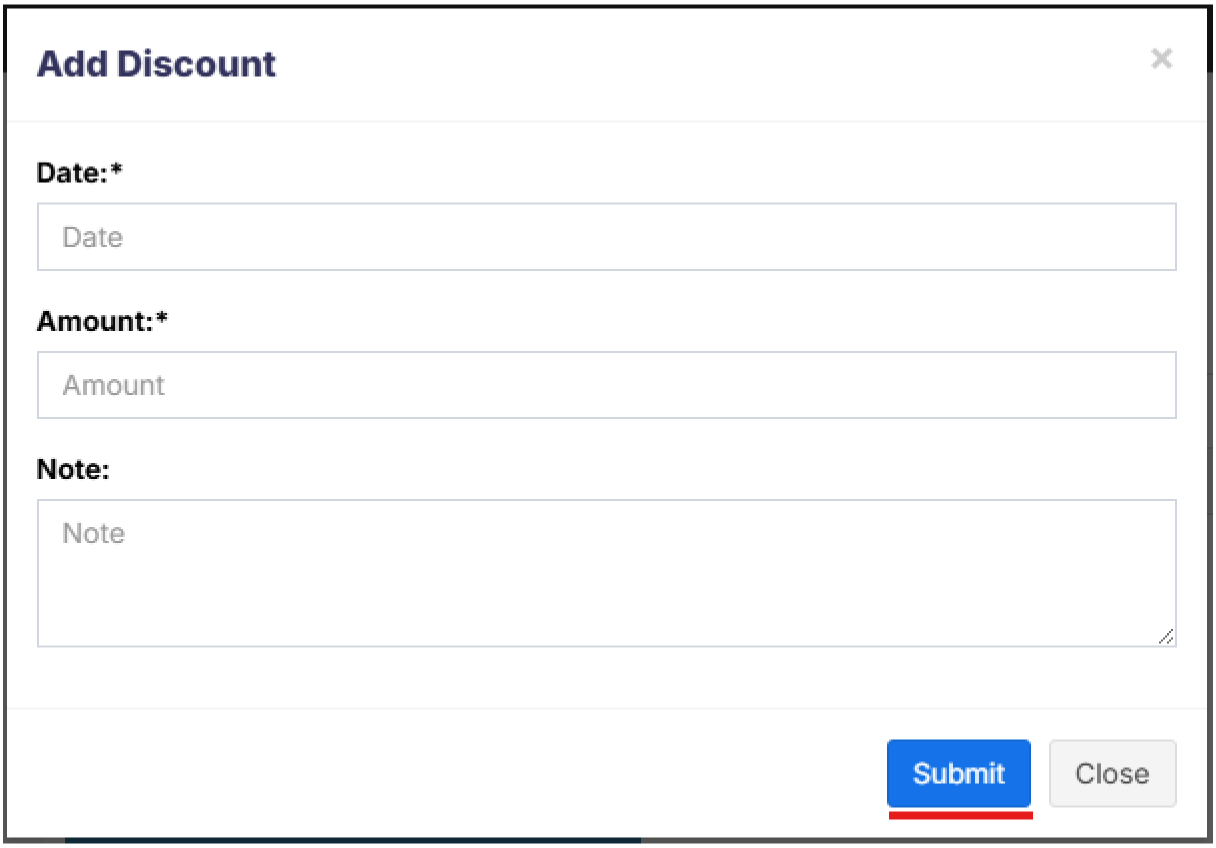

# Adding Discount for Customer/Supplier on Balance due:

Discount for balance due amount can be added for customer/supplier.

Click the add discount button on the customer/supplier ledger screen




On clicking the button it shows a popup, enter the details and click save.




The discounted amount will be accounted for in their ledger.

# NOTES

**1**: This discount can only be added by the admin and not by other users.

**2**: Also, the Ledger Discount is different from the Sale Discount.

While adding a Ledger Discount it will not be reflected in Sale Discount because the invoice details are not added for the ledger discount. And it is not possible to find to which invoice the discount is added.

# Video Demonstration:

https://www.youtube.com/embed/FkDHCavtdZc

# Adding opening balance & payment

## Opening balance:

Opening balance is the balance contact (customer or supplier) have at the beginning of using the software.

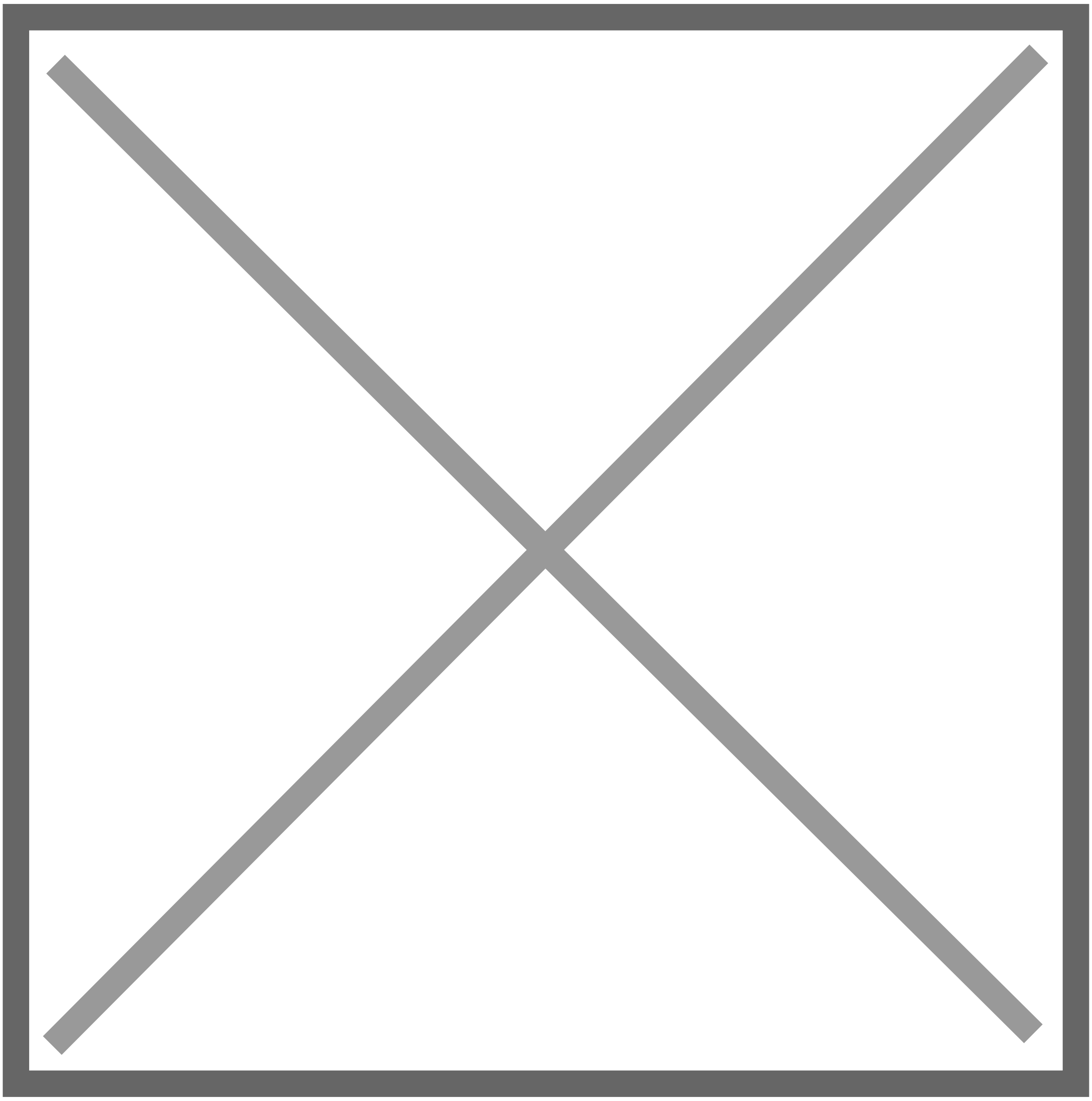
Suppose you’re shifting the data from another software to SenangUrus Business then the opening balance of the contact will be the balance amount which the contact has to pay/receive to/from you.

**Opening balance for customer** = Amount the customer has to pay

**Opening balance for supplier** = Amount you have to pay to the supplier.

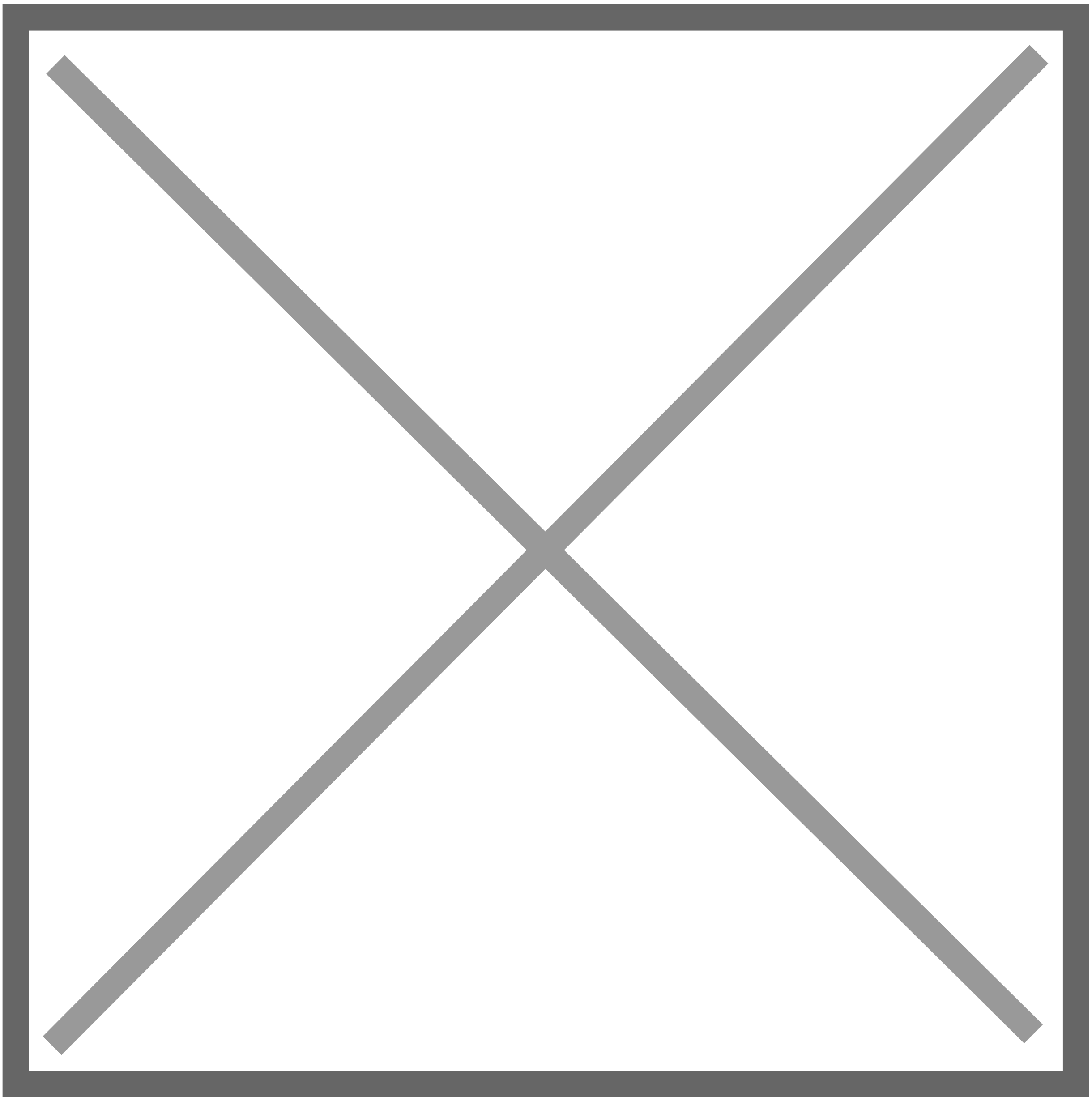
## Adding Opening balance

You can add an opening balance when adding/editing the supplier or customer. In the add contact screen, you will find the opening balance field.



# View Opening balance payment

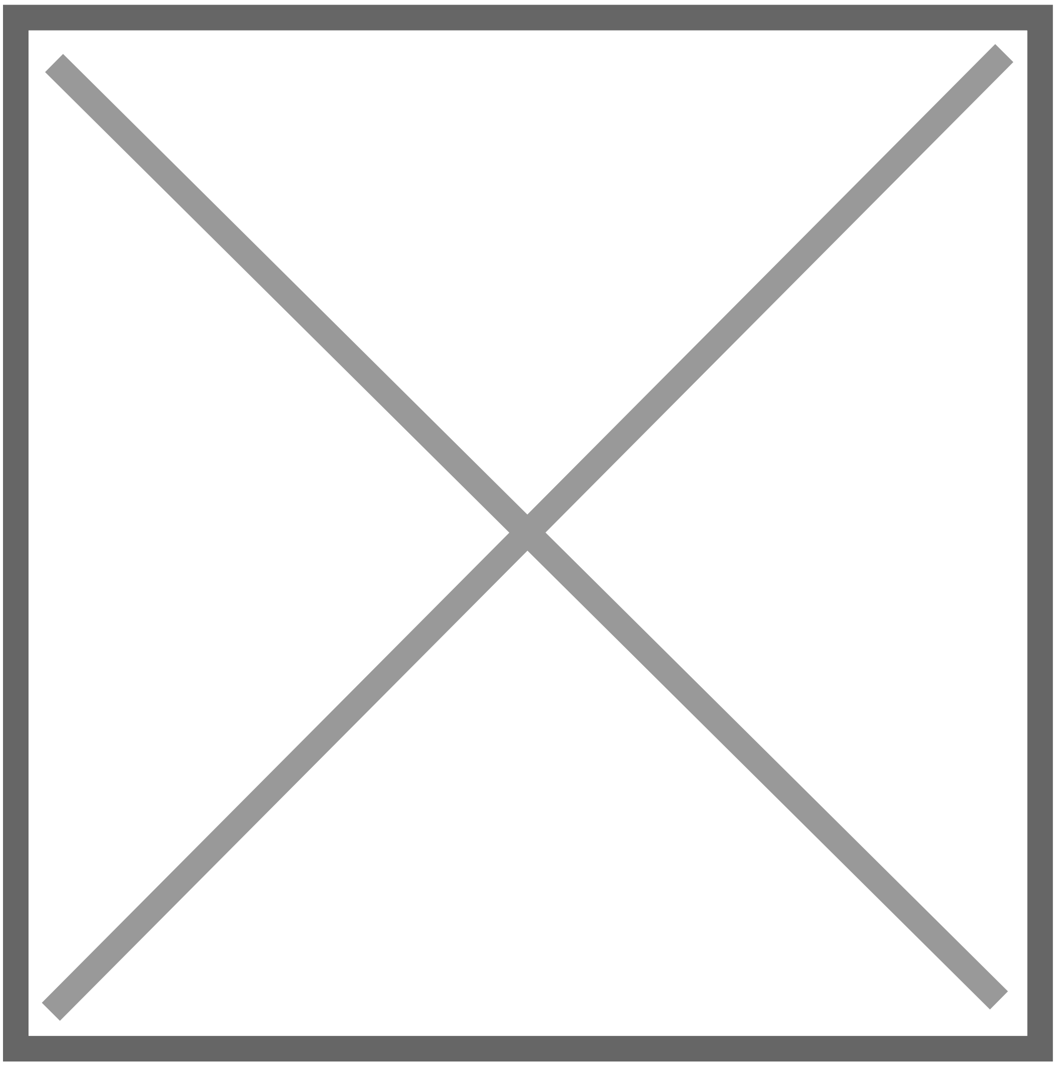
To view the opening balance of contact, go to List Supplier/customer, go to view, and on the view page, you will find the opening balance & opening balance due.

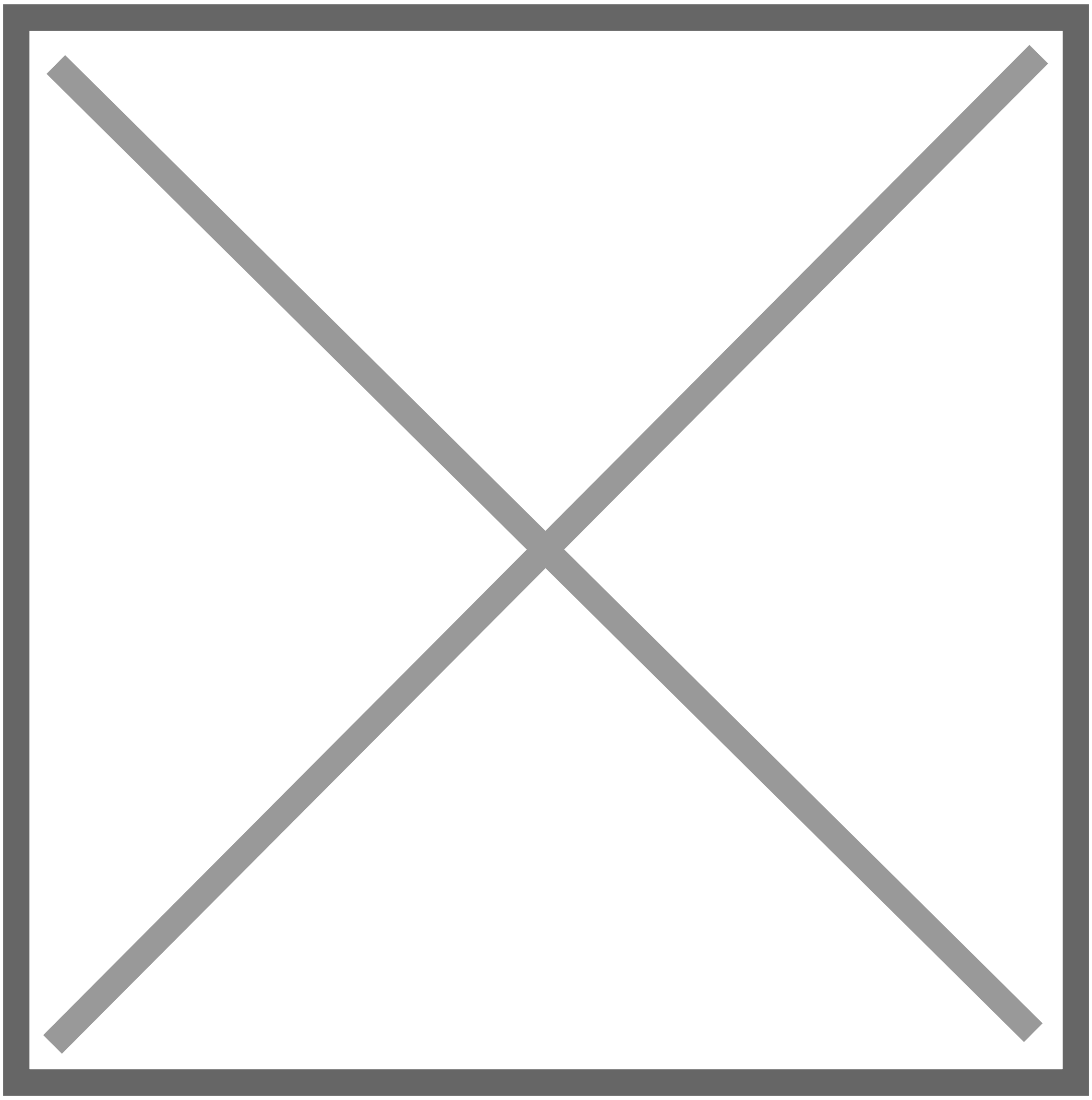


# Pay or receive payment of opening Balance

Adding payment of the opening balance is the same as any other payments. Go to list Customer/Supplier -> Actions -> Pay.

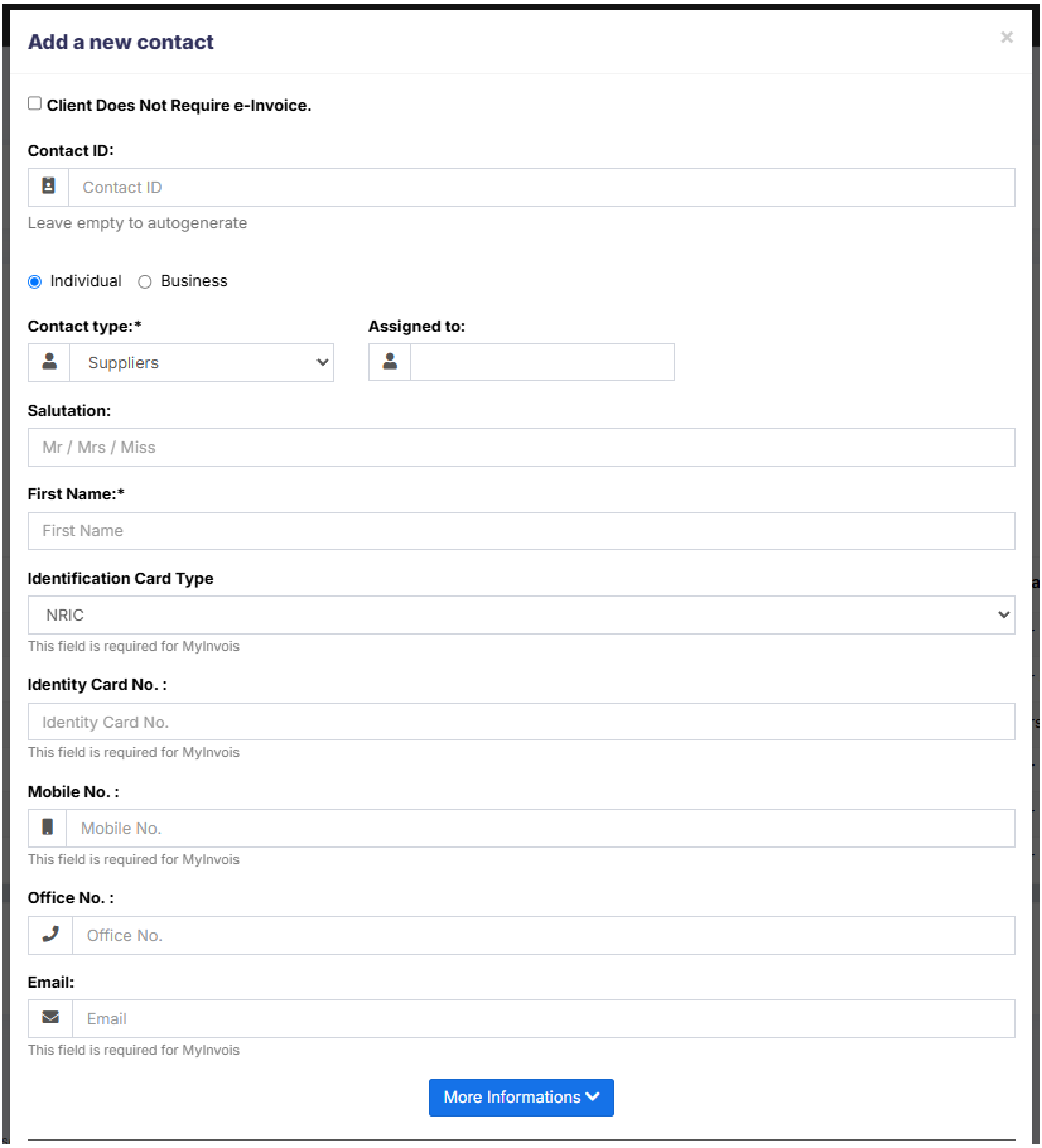
It will open a popup modal where you can enter the payment amount.

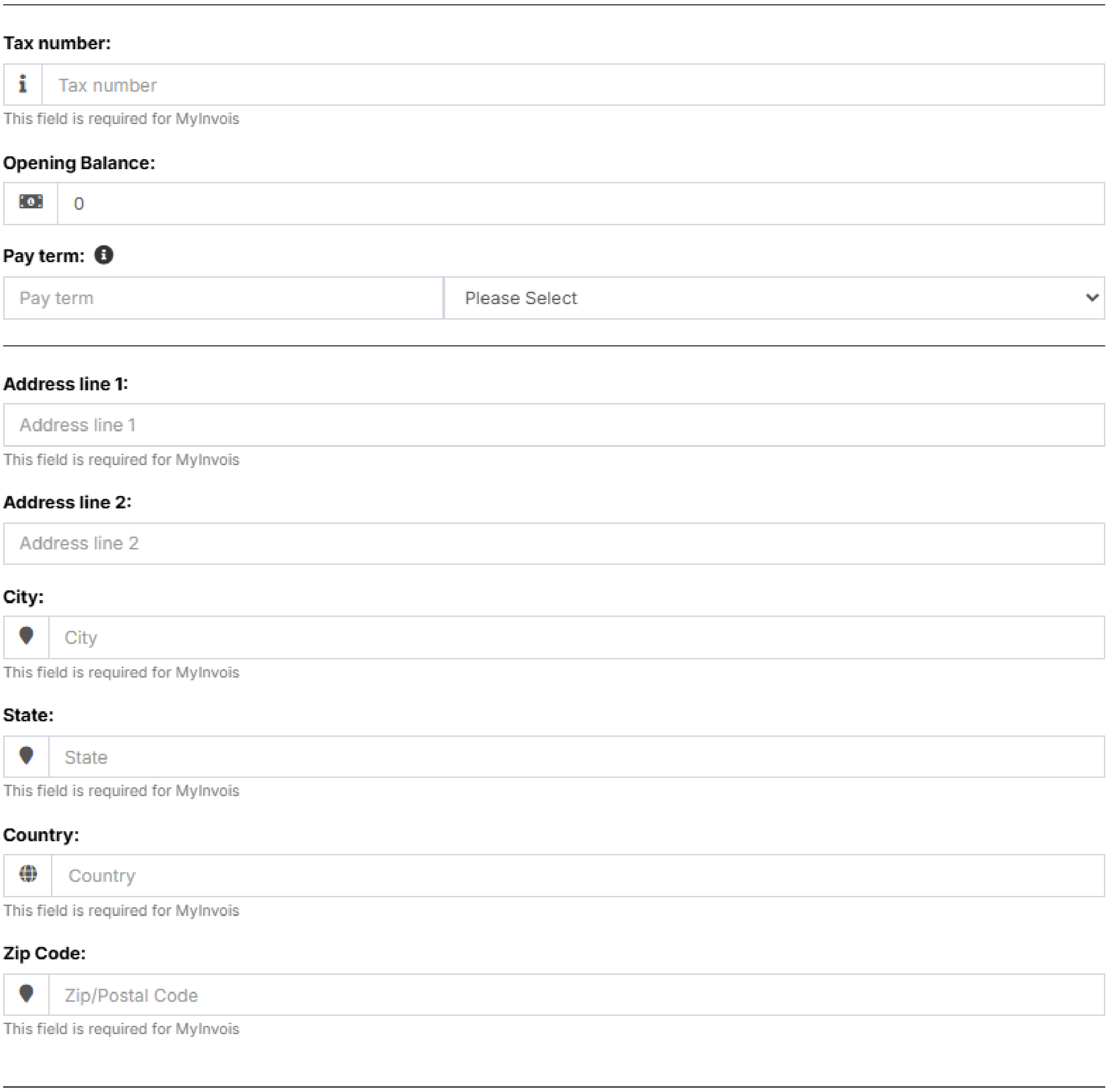




# Contacts Management (Supplier & Customers)

## Adding Suppliers & Customers






1. Go to Contacts -> Suppliers or Customer
2. Click on add new contact. Select contact type – Supplier/Customer/Both
3. Based on the contact type selected – it will show the relevant fields. Fill the relevant details.
4. Click on More More Information button to see more field.
5. **Pay Terms**: This will help the system to notify you of any pending payments for suppliers & customers. You can specify pay term in either days or months.
6. **Customer Group:** [Read details here](#).
7. **Credit Limit:** This is the maximum amount of credit that can be given to the customer. If in any sales the credit exceeds this amount then it won't allow selling on credit.
8. **Opening Balance:** Opening balance of a customer or supplier before you start using SenangUrus Business. So if there is any previous balance you can add here.
9. **Advance balance:** Sometimes customer/supplier pay/takes money in advance. This will show the amount of advance balance paid or take by the customer/supplier respectively.

# Viewing Suppliers & Customers

1. To view details about a Supplier or Customer click on View button. It will show the complete details along with the relevant transactions (Purchases & Sales) for that contact.

2. **Pay Due amount:** You can use this button to pay the due amount for a customer or supplier. This will pay the overall due amount for all invoices.

# Assigning Contacts to Users

You can assign contacts(customers & suppliers) to a particular use by following the steps below.

1. In your pos\config\constants.php change the value of enable_contact_assign to true.
2. When adding the user check the label “assign to specific contact”.
3. Now when adding contact select the user to whom you want to assign.

# Changing default customer name

If you want to change the default customer name “walk-in-customer” to something else follow the steps below.

1. Go to the database contacts data table.
2. Change the first name field to anything required.

# Credit Limit for Customer

Credit limits can be added to customers.

When the credit limit is reached the partial or credit sale can’t be sone for those customers.

To set the credit limit Go to Contacts > Customers > Action > Edit > More Information > Credit Limit.

Set this field blank for not having any credit limit for customers.

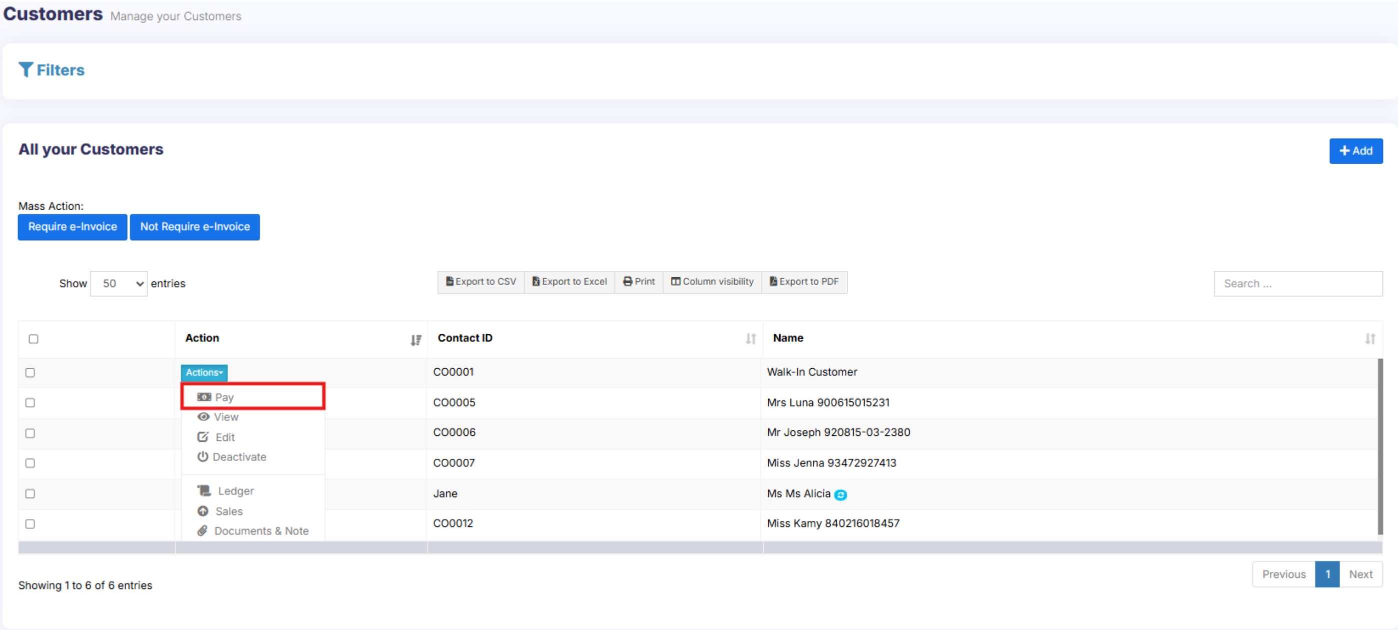
**NOTE**: Do not set the credit limit as 0 for having no credit limit.
Credit Limit = 0 (the credit for the customer is 0)
Credit Limit = blank (no restriction for credit limit(infinite))

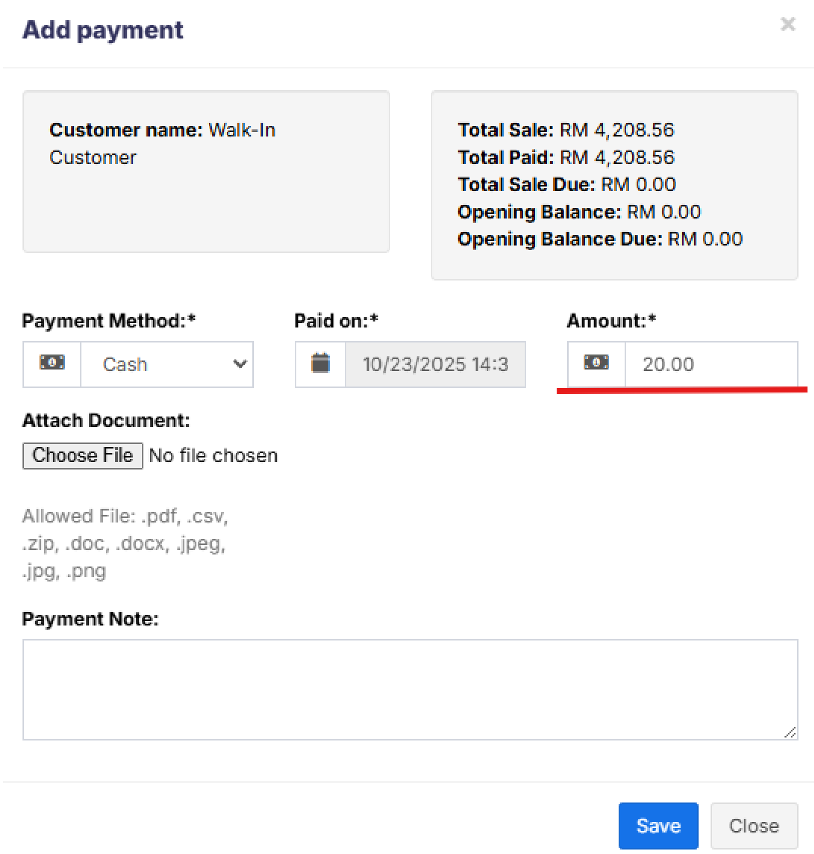
# Advanced balance

Advanced balance(to customers) is the sum of the amount that the business should pay for the customers.

Advanced balance(to suppliers) is the sum of the amount that the suppliers should pay for the business.

To add an advanced balance, Go to **Customers -> customers/suppliers** and click on the action button. Here you will find a pay option and click on it.  Add payment pop up will be shown and add the required amount value and click on save button.



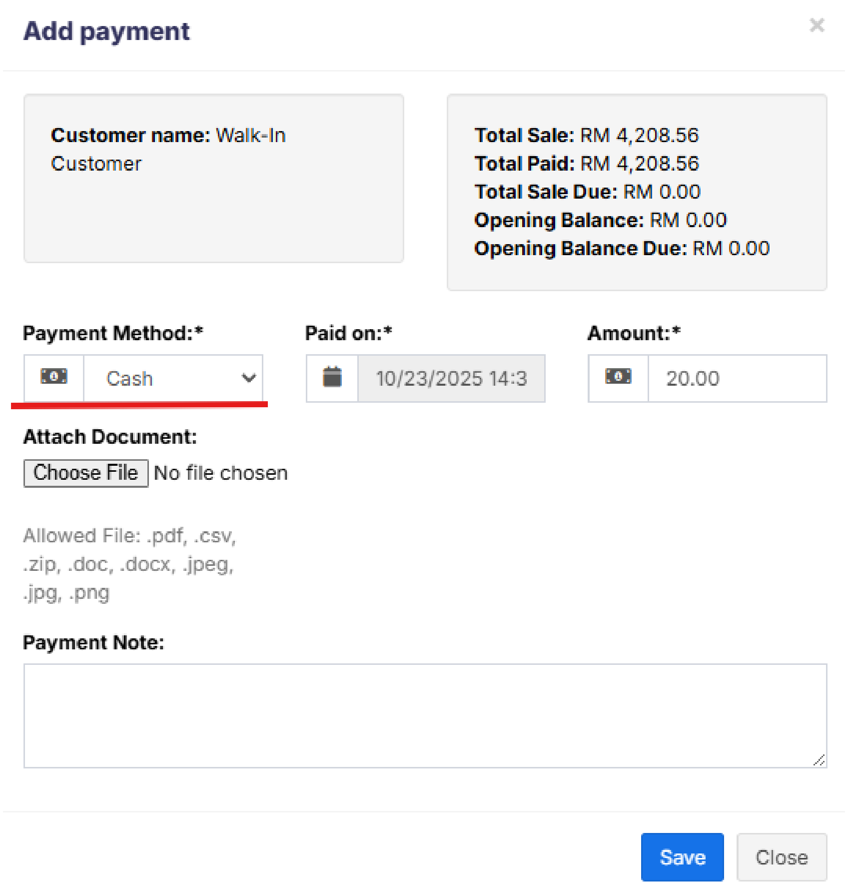



# Making sales/purchases using an advanced balance:

To make a purchase or sale using this advanced balance, add a sale or purchase.

Select the customer/supplier. While making the payment, select the **advance payment** in payment method option and save it.

**Note:** Payment from advance balance will only be used only if **advance payment** method is selected.


Add payment
×
Customer name: Walk-In Customer
Total Sale: RM 4,208.56
Total Paid: RM 4,208.56
Total Sale Due: RM 0.00
Opening Balance: RM 0.00
Opening Balance Due: RM 0.00
Payment Method:*
Cash
Paid on:*
10/23/2025 14:3
Amount:*
20.00
Attach Document:
Choose File
No file chosen
Allowed File: .pdf, .csv, .zip, .doc, .docx, .jpeg, .jpg, .png
Payment Note:
Save
Close

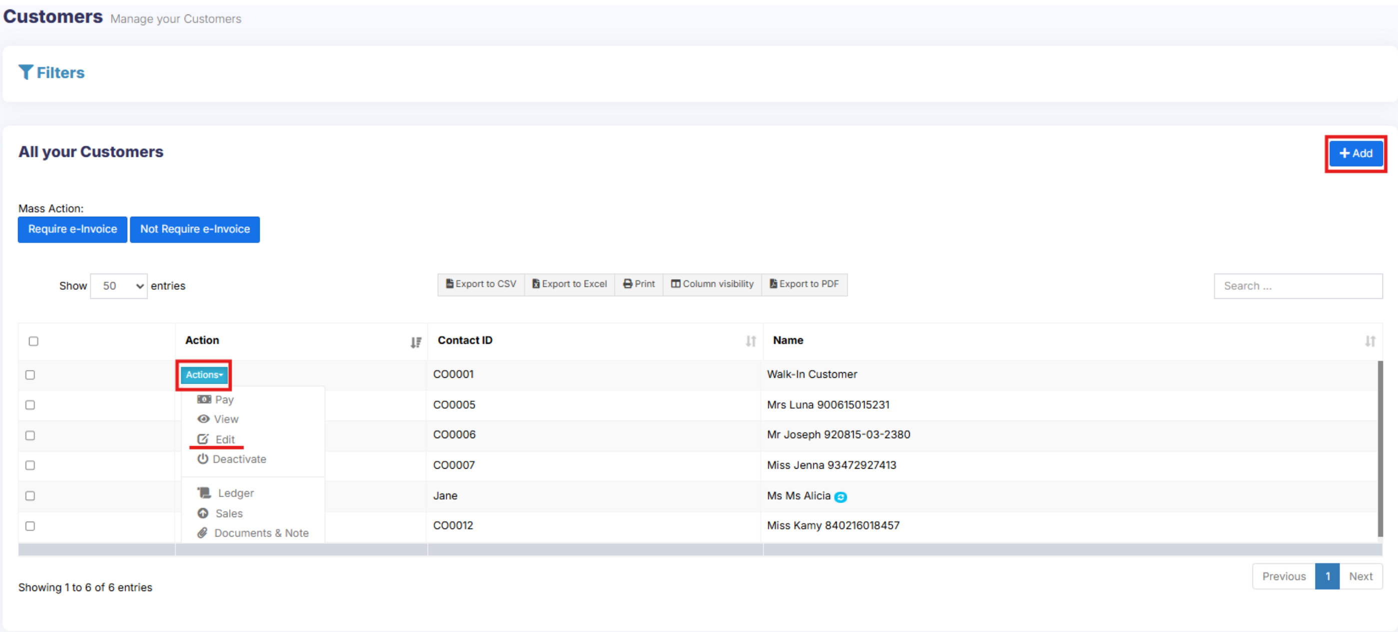
# Opening Balance

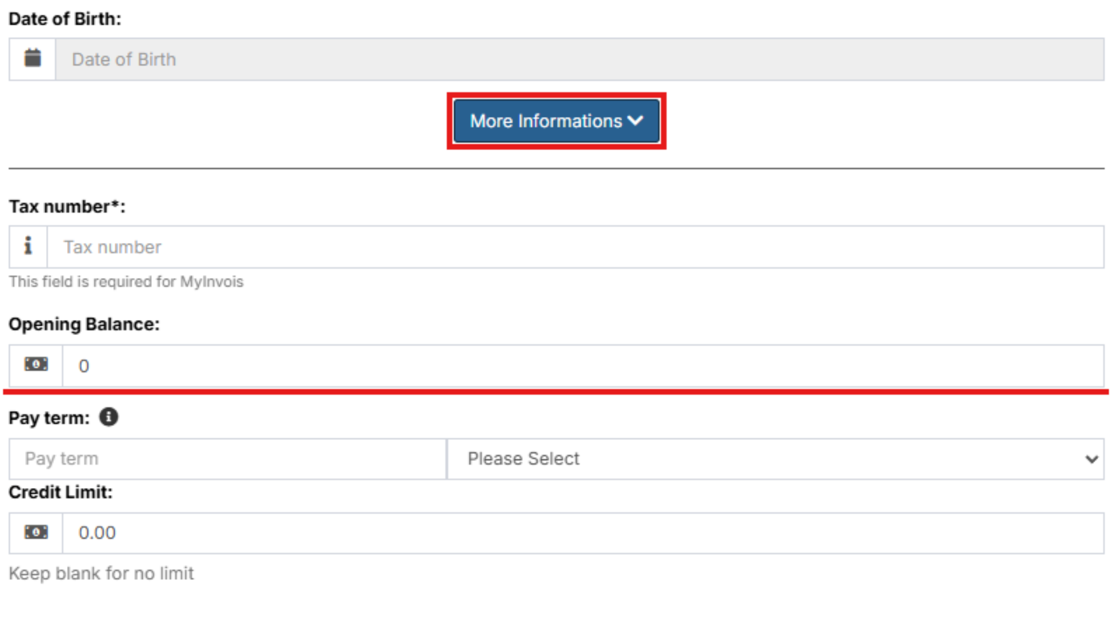
Opening balance(to customers) is the sum of the amount that the customers have to pay for the business.

Opening balance(to suppliers) is the sum of the amount that the business has to pay for the suppliers.

## Adding an opening balance

To add an opening balance, Go to **Contacts->customers/suppliers.** Either select the add button or click on edit for an existing user. There you could find a more information button, click on that and add the opening balance amount to be added for that user.



# Loyalty Cards

## Enabling Reward Points:

Before diving into Loyalty Cards, make sure you've enabled the reward points feature. You can find detailed instructions in our documentation here.

## Creating Loyalty Cards for Customers:

Once your reward points are active, follow these straightforward steps to set up Loyalty Cards for your customers:

1. **Assign a Customer ID:** When adding a new customer, make sure to provide them with a unique Customer ID. This ID will serve as their key to unlocking exclusive benefits.
2. **Printing the Loyalty Card:** Using the assigned Customer ID, print the Loyalty Card. This card is your customer's ticket to accumulating and redeeming reward points. You need to design & print the card externally (maybe use canva or other designing software to design the card for printing.)
3. **Using Loyalty Cards at the Point of Sale (POS):**
    1. **Select Customer:** Begin by selecting the customer making the purchase. You can scan the QR/barcode code on their Loyalty Card or enter the customer's mobile number or enter the customer's name to associate the sale with their account.
    2. **Complete the Sale:** The system will automatically link the sale to the customer's Loyalty Card, ensuring they receive the deserved reward points.

That's it! You've successfully integrated Loyalty Cards into your SenangUrus Business system. Your customers can now enjoy a personalized and rewarding shopping experience.

# Customer Groups

*(Not available in SenangUrus-Enterprise)*

## Customer Groups:

With customer Groups, you can classify a customer as Retail Customers, Wholesale Customer, Friends, Colleagues and whatever you will love to…

1. To add a “Customer Group” go to Contacts -> Customer Groups & Click on “Add” button.

2. It will show a popup asking for customer group name & Calculation Percentage.
Calculation percentage is used to calculate selling price.

**Example:**

– Suppose if the Selling Price set for a product Product1 is $200
– Customer Group Name = Friend
Calculation Percentage = -20
– **Note**: -20 (notice a minus sign) or you may set it 20 = +20%

– And you have created a customer with Harry with Customer Group assigned as Friend.

– Now go to pos or Sell screen. Select the customer Harry and add the product1.

– You will notice that the selling price set for the product1 will be 200-20% = $160

This is how customer Group works.

Customer Group does an internal calculation and applied the calculation percentage to the selling price. It will not show a separate discount on the invoice or the pos screen.

***This feature is highly useful when you have retail, wholesale or different customer categories.***

You can view report for different customer group from “Customer Groups Report” or in other terms if you have retail and wholesale customer group you can see which type of customer group is giving more sale.