

Welcome to the BillStore Help Center.
Here you will find all the guides you need to get started quickly and easily.

Create and Manage Customers

After logging in, you can add and manage customers.
Customers are required for creating invoices.

Create a new customer

You can create new customers in two ways:

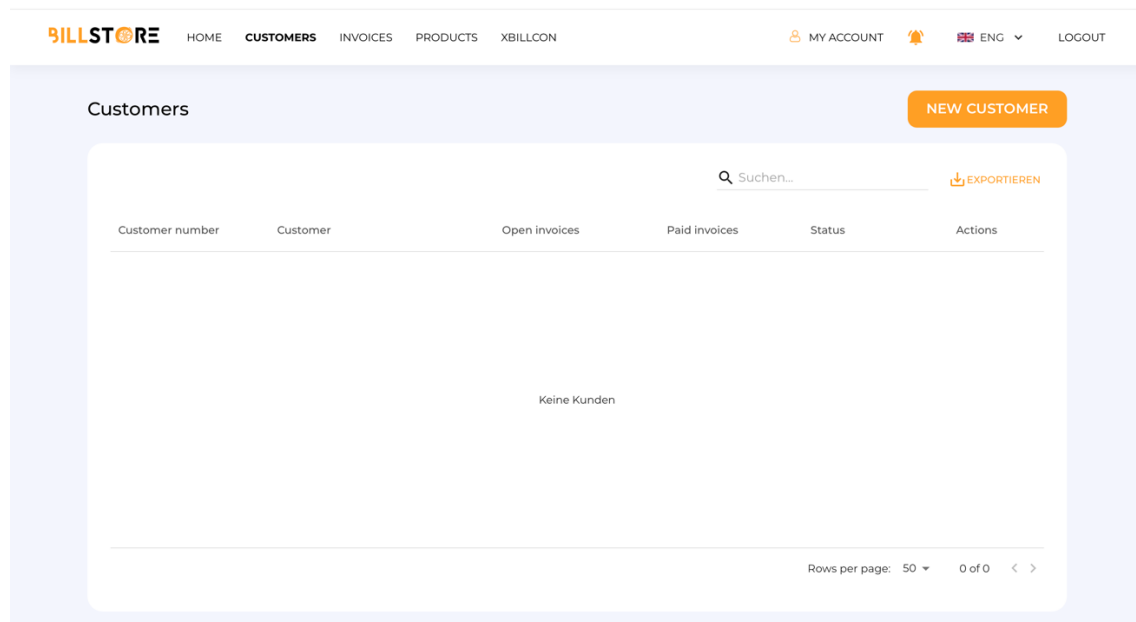
- via the Customer section (more information in this chapter)
- directly within the Invoice section (more information in the “Create Invoices” section)

Follow these steps to create a new customer.

1. Open the customer section

After logging in, you will be on the dashboard.

Click “Customers” in the top navigation menu to access customer management.



The screenshot shows the BillStore web interface. At the top, there is a navigation bar with the BillStore logo and menu items: HOME, CUSTOMERS, INVOICES, PRODUCTS, and XBILLCON. On the right side of the navigation bar, there are links for MY ACCOUNT, a notification bell, a language dropdown menu (ENG), and LOGOUT. Below the navigation bar, the main content area is titled "Customers" and features a prominent orange "NEW CUSTOMER" button. A search bar with the placeholder text "Suchen..." and a search icon is located above a table. To the right of the search bar is a download icon labeled "EXPORTIEREN". The table has columns for "Customer number", "Customer", "Open invoices", "Paid invoices", "Status", and "Actions". The table is currently empty, displaying the text "Keine Kunden" in the center. At the bottom right of the table, there is a pagination control showing "Rows per page: 50" and "0 of 0" with navigation arrows.

2. Create a new customer

Click “New Customer” to create a new customer record.

3. Select customer type

Choose the appropriate customer type:

- Private individual
- Business customer

The screenshot shows a modal window titled 'Customer Type' with a progress indicator showing step 1 of 4. The form contains a dropdown menu labeled 'Customer Type' with two options: 'Private Individual' and 'Business Customer'. A 'NEXT' button is located at the bottom right of the modal. The background shows the 'NEW CUSTOMER' form with fields for 'Customer number' and 'Actions'.

4. Enter contact information

Enter the customer's contact details.

Note:

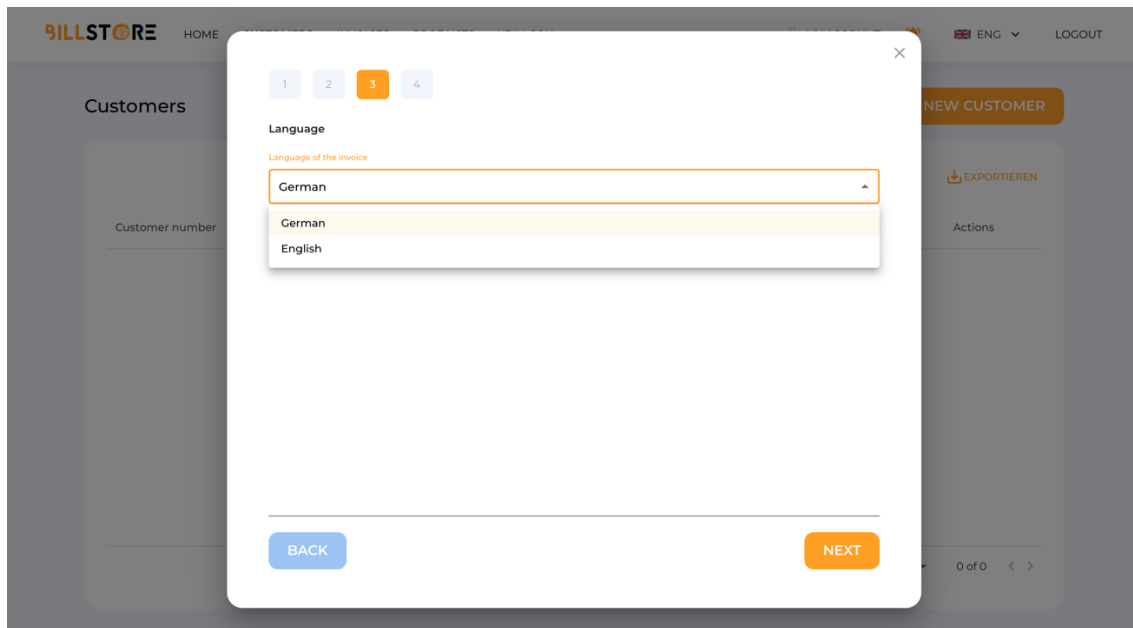
Required fields are marked with an (*) and must be completed.
All other information is optional.

The screenshot shows a modal window titled 'Contact Details' with a progress indicator showing step 2 of 4. The form contains several fields: 'Salutation *' (dropdown), 'First Name *' and 'Last Name *' (text boxes), 'Street *' and 'House No. *' (text boxes), 'ZIP Code *' and 'City *' (text boxes), 'Country *' (dropdown with 'Germany' selected), 'E-Mail' (text box), and 'Phone Number *' (text box). 'BACK' and 'NEXT' buttons are at the bottom. The background shows the 'NEW CUSTOMER' form with fields for 'Customer number' and 'Actions'.

5. Set invoice language

Choose the language in which invoices for this customer should be generated.

The selected language determines how invoice documents will be displayed.

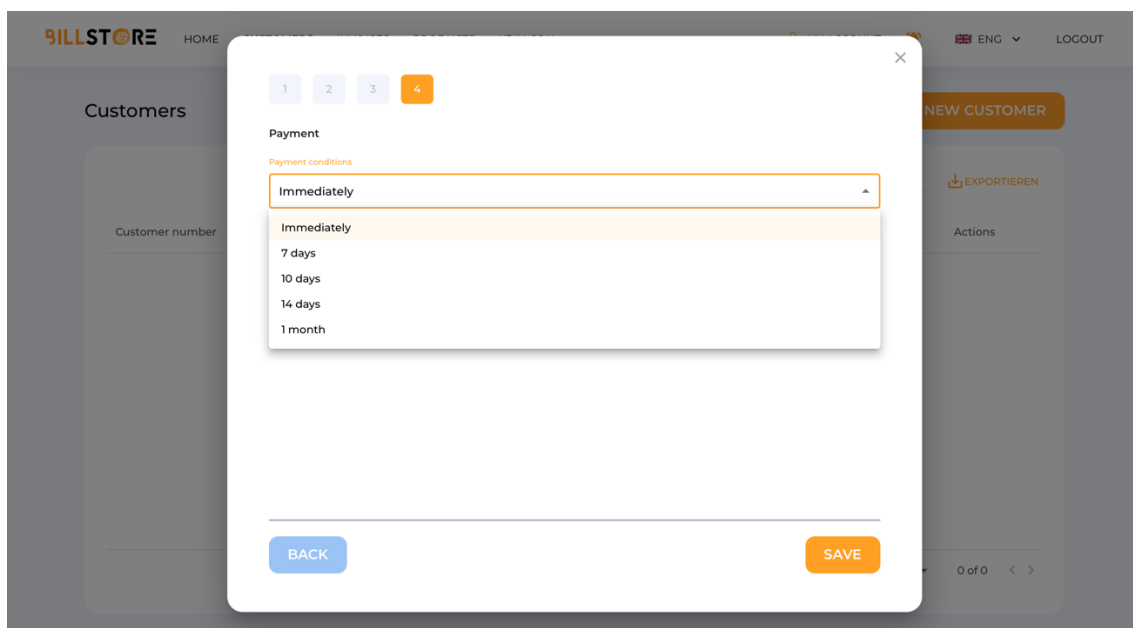


6. Set payment terms

Define the payment period within which invoices should be paid. This setting serves as the default payment term for all invoices of the selected customer. It can be adjusted individually when creating an invoice.

Available options include:

- Immediately
- 7 days
- 10 days
- 14 days
- 1 month



Customer Overview

After creating a customer, they will appear in the customer overview.

There you can view, among other things:

- Customer number
- Customer name
- Open and paid invoices
- Customer status

Manage customers

In the customer overview, you can:

- Search for customers
- Export customer data
- Edit customer information
- Deactivate or delete customers

Note:




Customers for whom invoices have already been created cannot be permanently deleted from the system. In this case, you can deactivate the customer instead.

Customers

NEW CUSTOMER

Suchen...

EXPORTIEREN

Customer number	Customer	Open invoices	Paid invoices	Status	Actions
K-0001	Max Mustermann	0,00 €	0,00 €	Active	  

Rows per page: 50 1 of 1 < >