

Create and Manage Customers in RunOnWeb

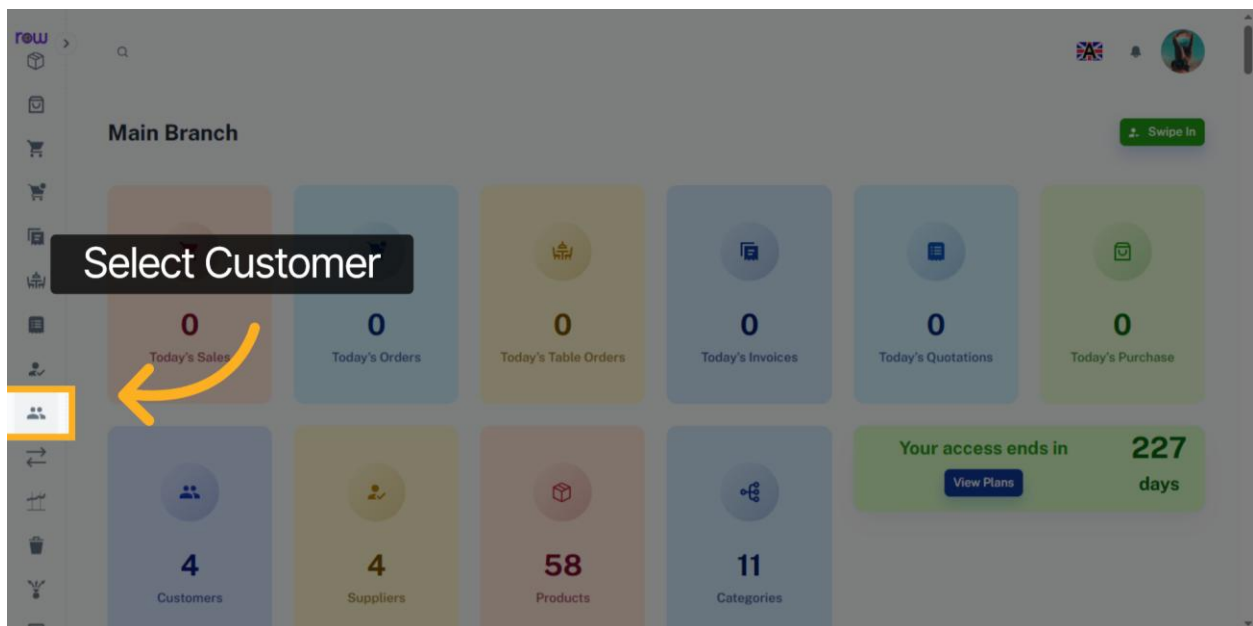
Go to runonweb.com

1. Introduction

In this tutorial you learn how to create and manage the Customers.

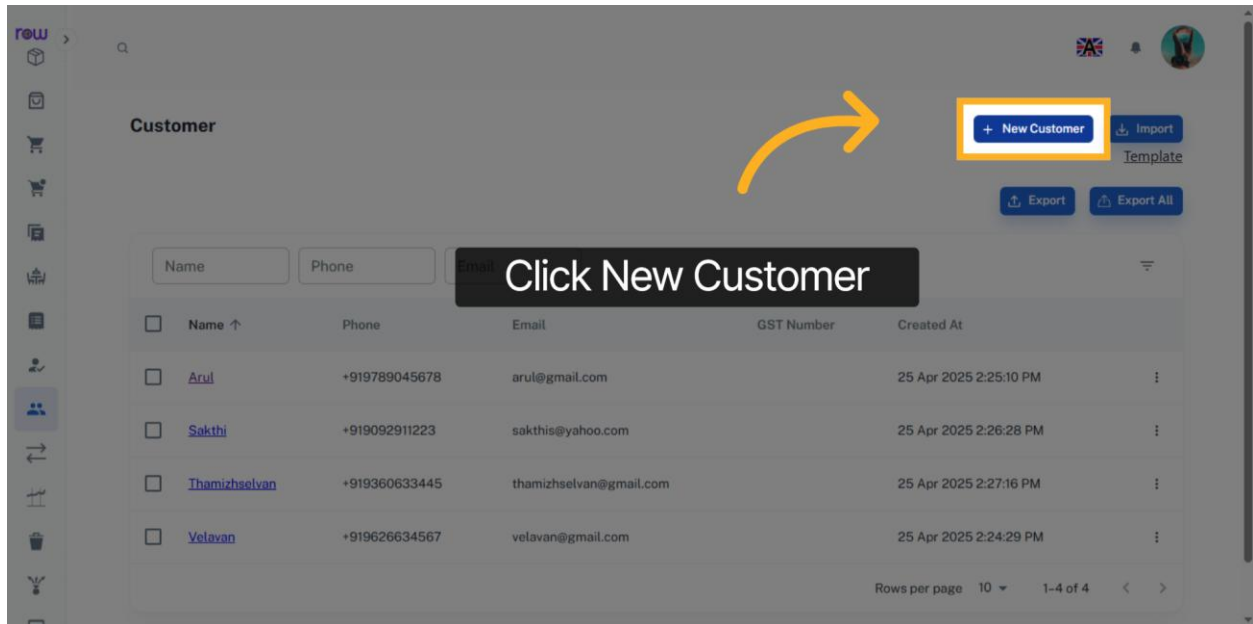
2. Select Customer

Select Customer menu to open the Customer list Screen.



3. New Customer Button

Click the New Customer button to create a new Customer.



4. Necessary Fields

Please enter the new Customer details.

The screenshot shows the 'New Customer' form. It has a 'Back' button at the top right. The form contains several input fields: 'Name', 'Phone' (with a dropdown for country code, currently showing '+91'), 'Email', 'Date of Birth' (with a calendar icon), 'GST Number' (with a hint 'Enter GST Number'), 'Opening Balance', 'Address Line1', 'Address Line2', 'City', 'State' (with a dropdown), and 'Pincode'. At the bottom, there is an 'Add' button.

5. Add

Click Add button to create the new Customer.

New Customer

← Back

Name Phone +91 Email

Date of Birth dd-mm-yyyy GST Number Opening Balance

Address Line1 Address Line2

City State Pincode

Click Add

Add

6. Customer Screen

You will be redirected to the Customers List screen after a new Customer is successfully created.

Customer

+ New Customer Import

Template

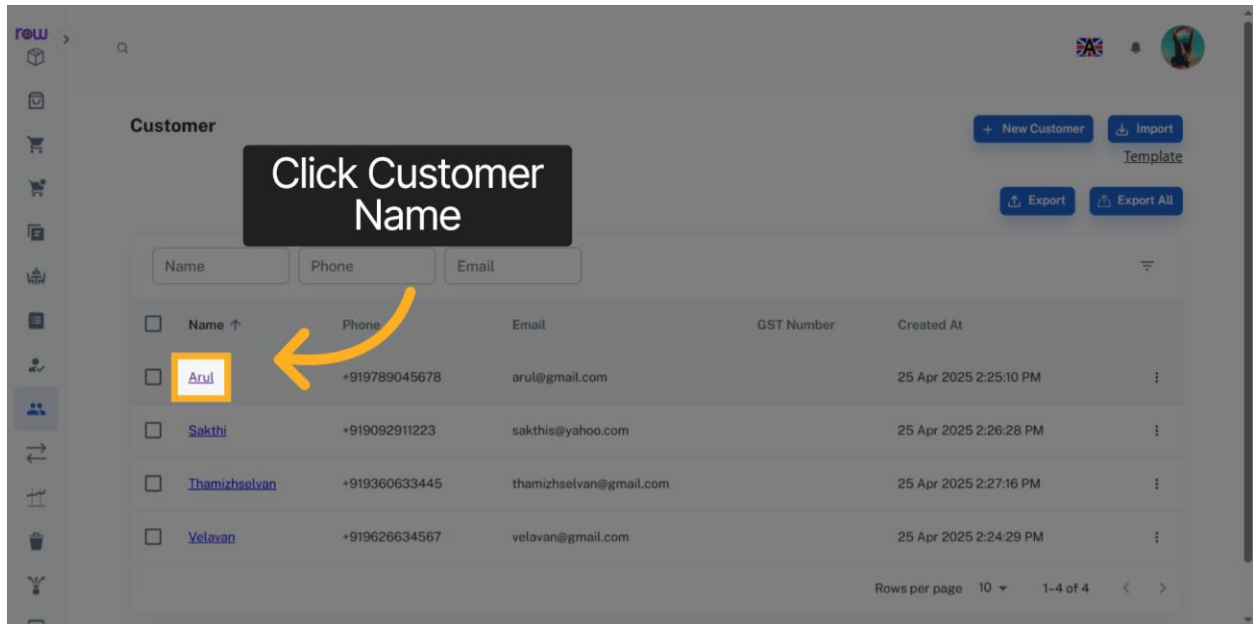
Export Export All

<input type="checkbox"/>	Name ↑	Phone	Email	GST Number	Created At	
<input type="checkbox"/>	Arul	+919789045678	arul@gmail.com		25 Apr 2025 2:25:10 PM	⋮
<input type="checkbox"/>	Sakthi	+919092911223	sakthis@yahoo.com		25 Apr 2025 2:26:28 PM	⋮
<input type="checkbox"/>	Thamizhselvan	+919360633445	thamizhselvan@gmail.com		25 Apr 2025 2:27:16 PM	⋮
<input type="checkbox"/>	Velavan	+919626634567	velavan@gmail.com		25 Apr 2025 2:24:29 PM	⋮

Rows per page 10 1-4 of 4

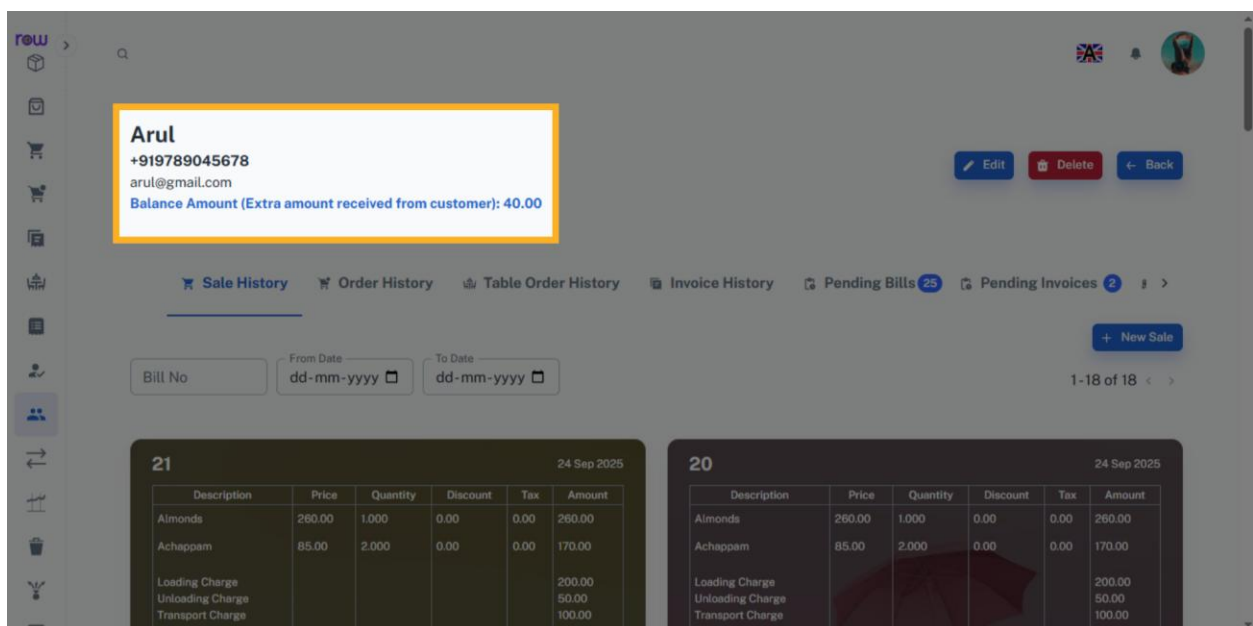
7. Customer Details

Click the Customer name to view and edit the Customer's details.



8. Customer

You can view the Customer's email, phone number, address and balance amount on this page.



9. Edit Customer

Click the Edit button to edit the Customer details.

The screenshot shows the customer profile for 'Arul' with contact details: +919789045678 and arul@gmail.com. The balance amount is 40.00. Below the profile, there are tabs for 'Sale History', 'Order History', 'Table Order History', 'Invoice History', 'Pending Bills' (25), and 'Pending Invoices' (2). A yellow arrow points to the 'Edit' button in the top right corner. A black box with the text 'Click Edit' is overlaid on the 'Order History' tab.

Description	Price	Quantity	Discount	Tax	Amount
Almonds	260.00	1.000	0.00	0.00	260.00
Achappam	85.00	2.000	0.00	0.00	170.00
Loading Charge					200.00
Unloading Charge					50.00
Transport Charge					100.00
Special Discount					50.00

Description	Price	Quantity	Discount	Tax	Amount
Almonds	260.00	1.000	0.00	0.00	260.00
Achappam	85.00	2.000	0.00	0.00	170.00
Loading Charge					200.00
Unloading Charge					50.00
Transport Charge					100.00
Special Discount					50.00

10. Edit Customer Details

You can edit the Customer's details here.

The 'Edit Customer' form contains the following fields:

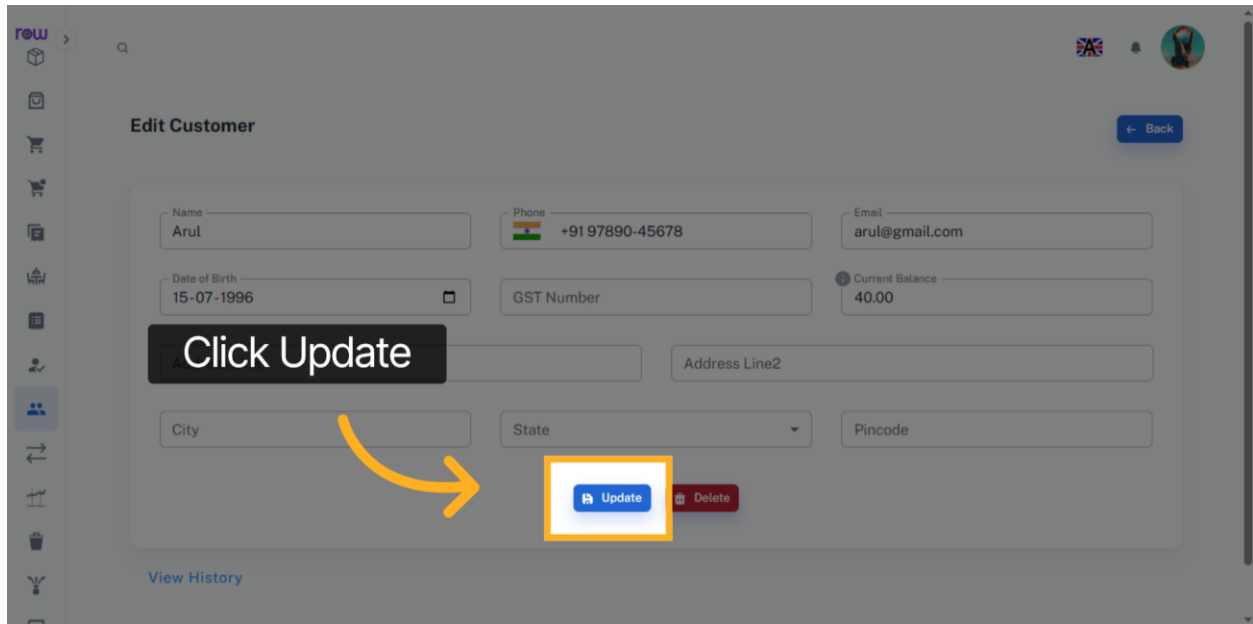
- Name: Arul
- Phone: +91 97890-45678
- Email: arul@gmail.com
- Date of Birth: 15-07-1996
- GST Number: Enter GST Number
- Current Balance: 40.00
- Address Line1
- Address Line2
- City
- State
- Pincode

Buttons: Update, Delete, Back

[View History](#)

11. Update

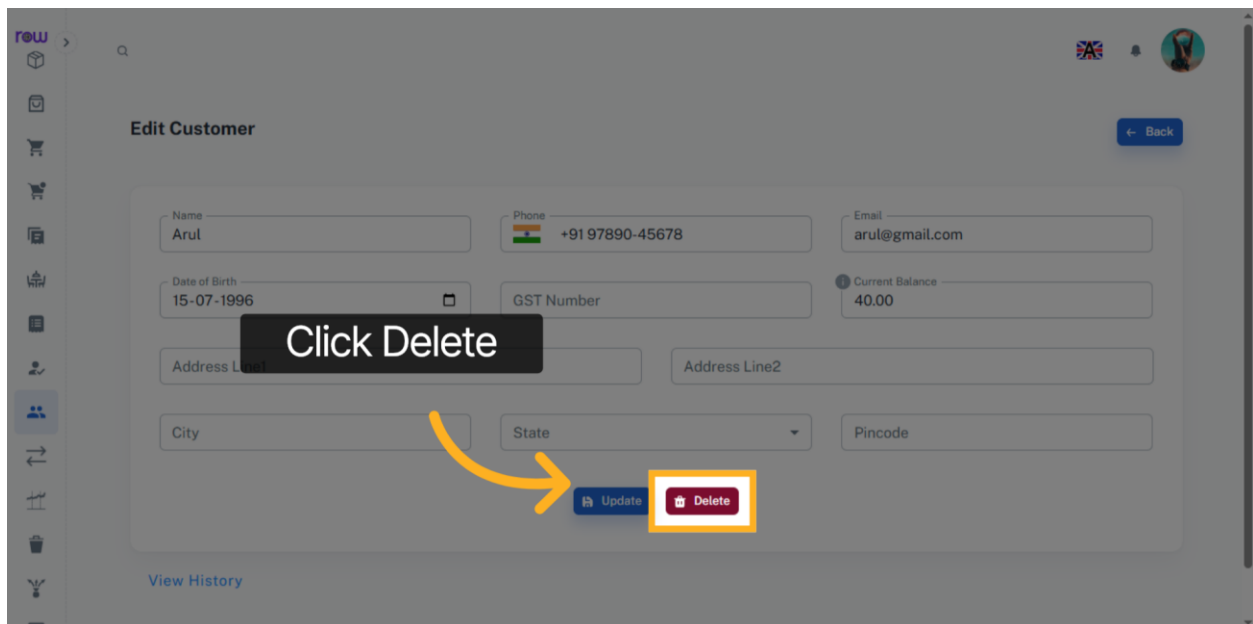
Click Update to save the Changes.



The screenshot shows the 'Edit Customer' form in a web application. The form contains the following fields: Name (Arul), Phone (+91 97890-45678), Email (arul@gmail.com), Date of Birth (15-07-1996), GST Number, Current Balance (40.00), Address Line1, Address Line2, City, State, and Pincode. A black callout box with the text 'Click Update' and an orange arrow points to the 'Update' button, which is highlighted with a yellow border. A 'Delete' button is also visible next to the 'Update' button. A 'View History' link is located at the bottom left of the form.

12. Delete Customer

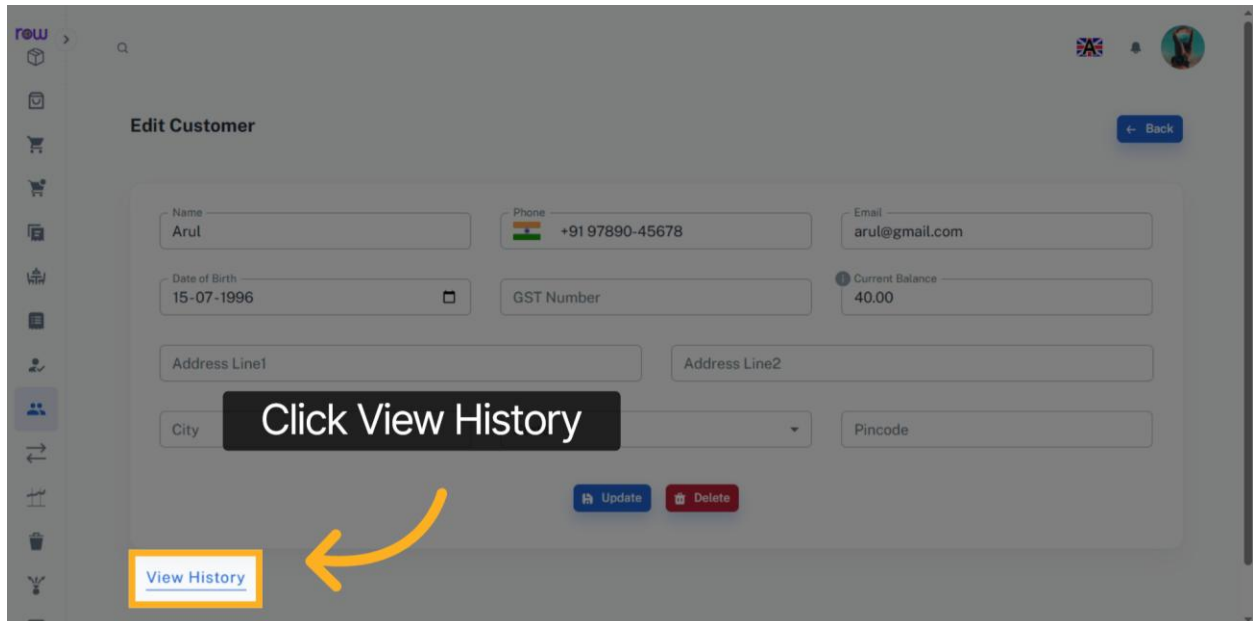
Click the Delete button to delete the Customer.



The screenshot shows the 'Edit Customer' form in a web application. The form contains the following fields: Name (Arul), Phone (+91 97890-45678), Email (arul@gmail.com), Date of Birth (15-07-1996), GST Number, Current Balance (40.00), Address Line1, Address Line2, City, State, and Pincode. A black callout box with the text 'Click Delete' and an orange arrow points to the 'Delete' button, which is highlighted with a yellow border. An 'Update' button is also visible next to the 'Delete' button. A 'View History' link is located at the bottom left of the form.

13. View History

Click the View History link to see the Custom's history.



The screenshot shows the 'Edit Customer' form for a customer named Arul. The form includes fields for Name, Phone, Email, Date of Birth, GST Number, Current Balance, Address Line1, Address Line2, City, and Pincode. A 'View History' link is located at the bottom left of the form, highlighted with a yellow box. A yellow arrow points from the text 'Click View History' to this link.

Name	Phone	Email
Arul	+91 97890-45678	arul@gmail.com

Date of Birth	GST Number	Current Balance
15-07-1996		40.00

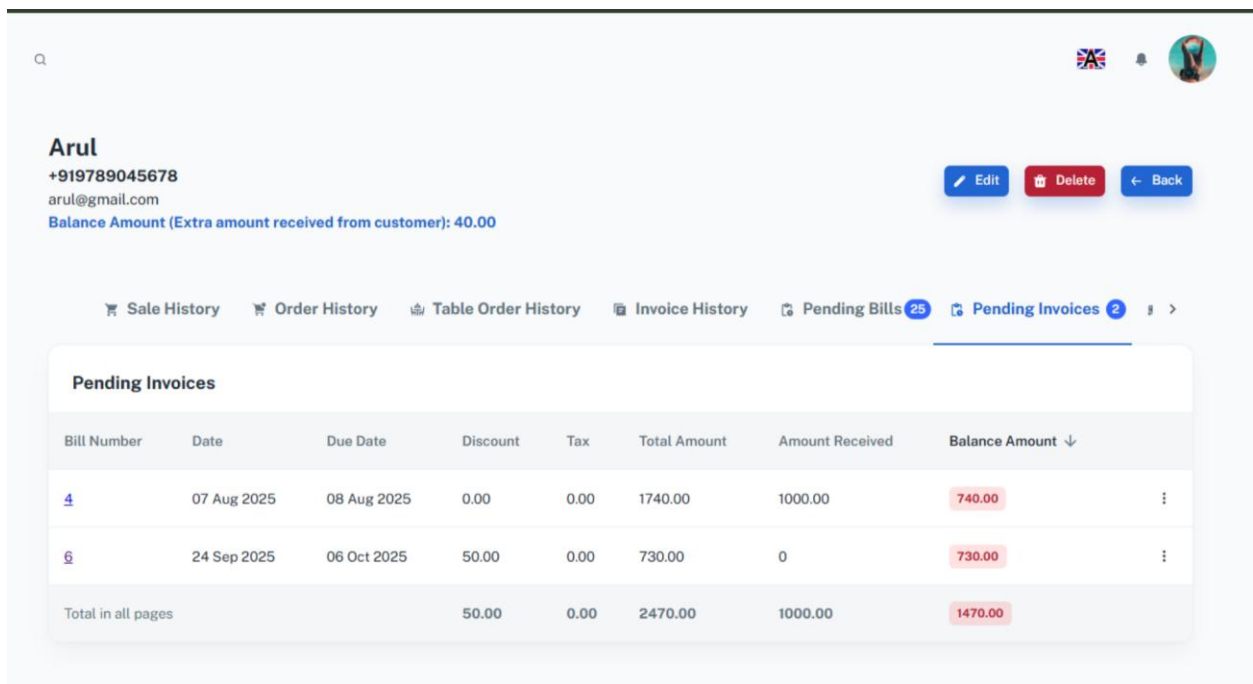
Address Line1	Address Line2

City	Pincode

[View History](#)

14. Features

You can also view the Sales History, Order History, Table Order History, Invoice History, Pending Bills, Pending Invoices and Transactions of a customer.

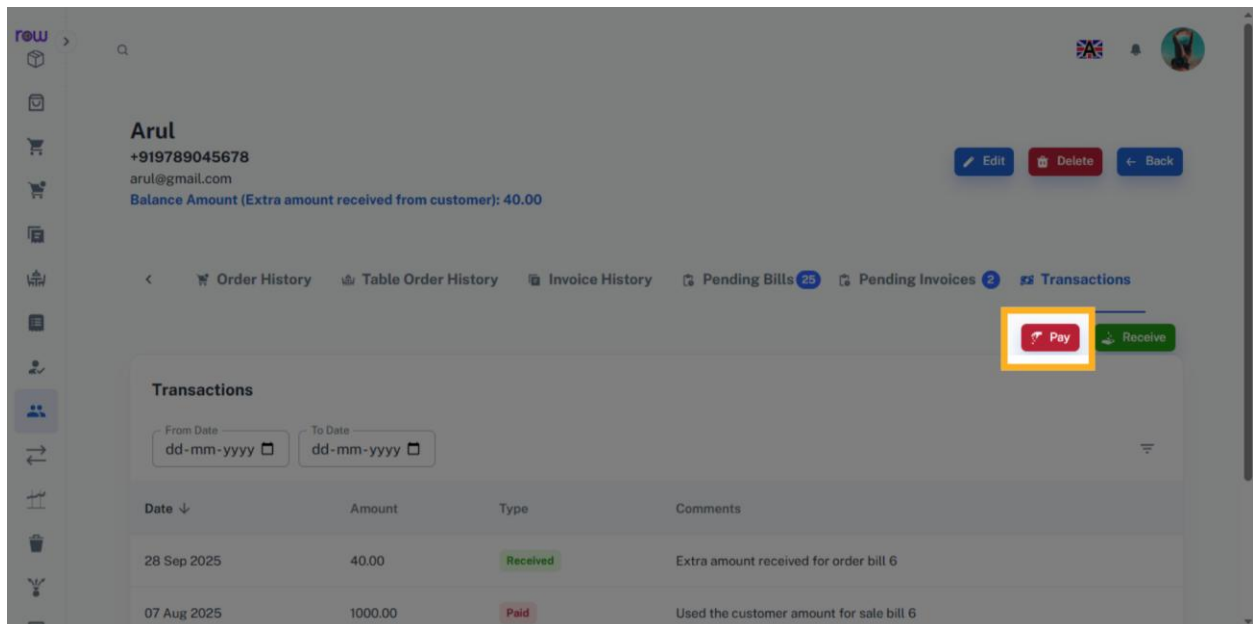


The screenshot shows the customer profile page for Arul. The navigation bar includes links to Sales History, Order History, Table Order History, Invoice History, Pending Bills (25), and Pending Invoices (2). The 'Pending Invoices' section is active, showing a table of pending invoices.

Bill Number	Date	Due Date	Discount	Tax	Total Amount	Amount Received	Balance Amount ↓
4	07 Aug 2025	08 Aug 2025	0.00	0.00	1740.00	1000.00	740.00
6	24 Sep 2025	06 Oct 2025	50.00	0.00	730.00	0	730.00
Total in all pages			50.00	0.00	2470.00	1000.00	1470.00

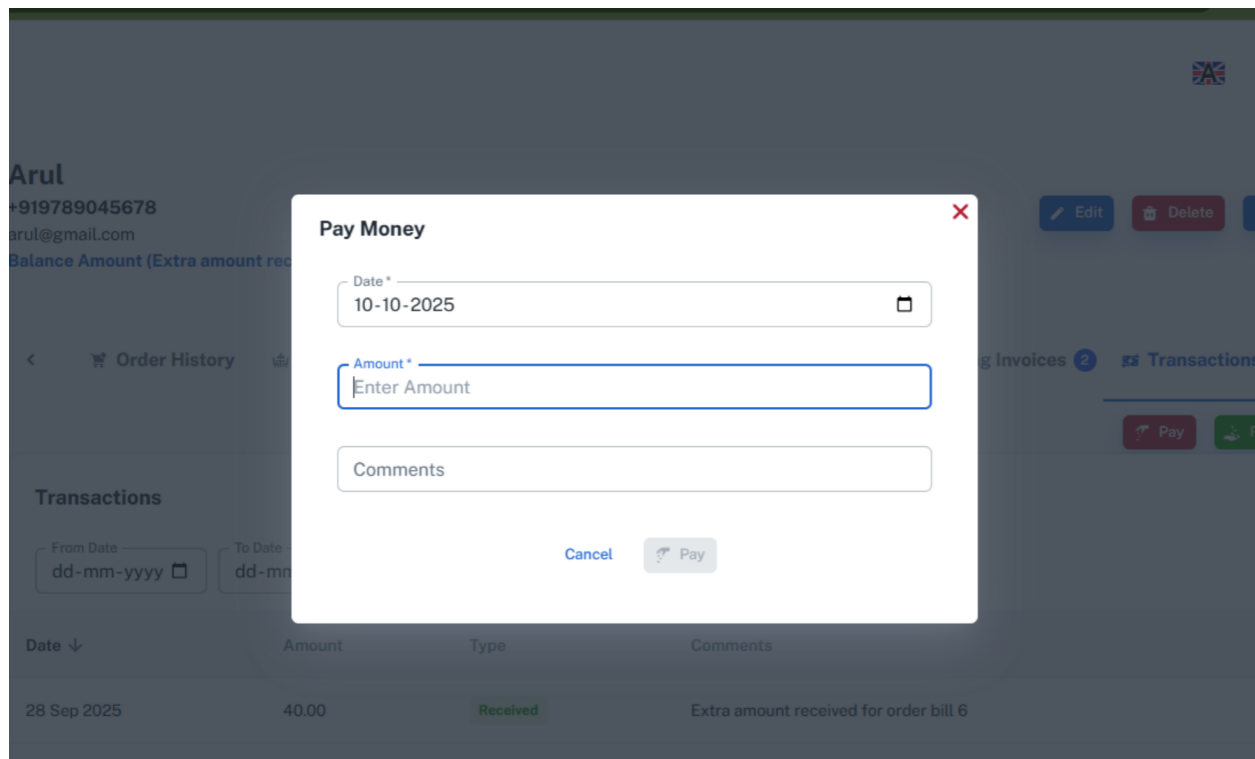
15. Pay

You can make payments in the transactions tab.



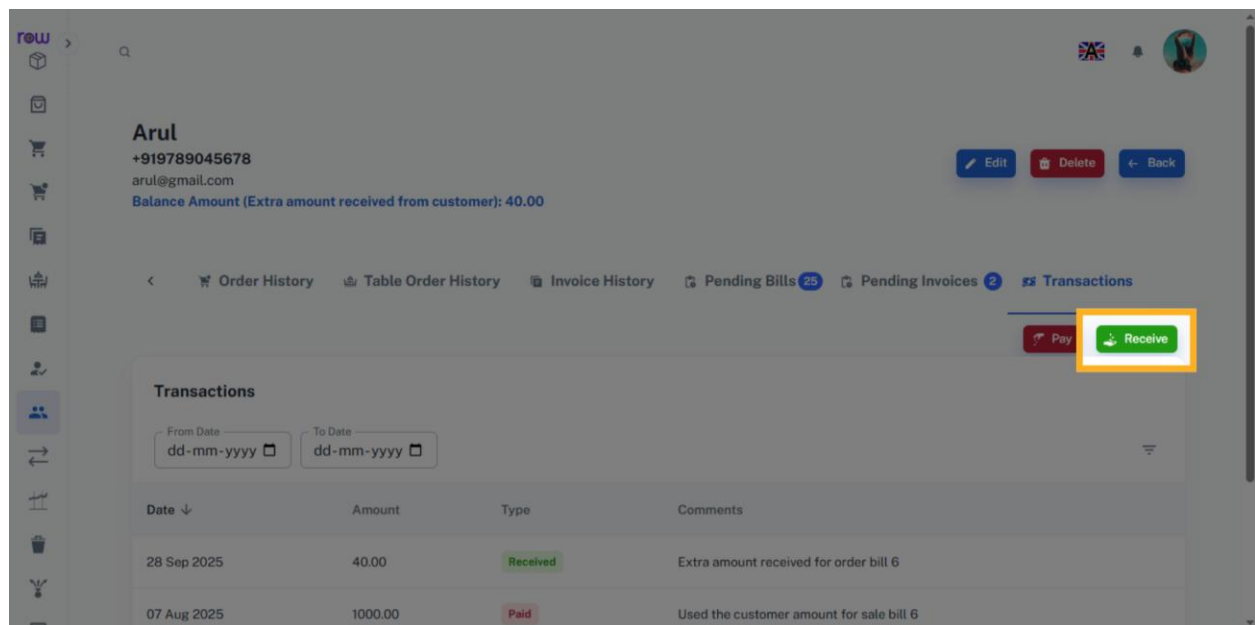
16. Payments

You can pay the customer if they have a balance amount. The amount paid will be reduced from their balance. If the customer does not have any balance, the payment cannot be processed.



17. Receive

You can receive payments in the transactions tab.



18. Payments

Enter the amount to be received from a customer. You may also clear pending bills by selecting them. The amount will be automatically allocated, and the pending bills will be cleared from the pending bills list. The Extra amount received will be added to the customer balance.

Receive Money

Date *
10-10-2025

Amount *
Enter Amount

Comments

Select the pending bills which you want to clear now:

Pending Sales Bills

- ☐ Bill 1 Created At 02 Aug 2025 : Pending Amount (600.00)
- ☐ Bill 4 Created At 07 Aug 2025 : Pending Amount (15.00)
- ☐ Bill 6 Created At 07 Aug 2025 : Pending Amount (294.00)
- ☐ Bill 7 Created At 12 Aug 2025 : Pending Amount (330.00)
- ☐ Bill 9 Created At 27 Sep 2025 : Pending Amount (100.00)
- ☐ Bill 10 Created At 27 Sep 2025 : Pending Amount (415.00)
- ☐ Bill 11 Created At 27 Sep 2025 : Pending Amount (520.00)

Arul
+919789045678
arul@gmail.com
Balance Amount (Extra amount received)

Transactions

From Date: dd-mm-yyyy To Date: dd-mm-yyyy

Date ↓			
28 Sep 2025			
07 Aug 2025	1000.00	Paid	Used the customer amount for sale bill 6



Thank You