

Customer management API0

Customer management API manages:

- Customer resource
- Customer account resource

Main attributes of Customer are:

- Id: Unique identifier of the customer
- Name: Displayable name
- Status: Used to track the lifecycle status, e.g. existing, prospective or former customers
- Description: Detailed description of the customer
- Valid For: Extension to manage start Date and end Date of customer states
- Customer Rank: Relative importance of this customer compared to other customers
- Characteristics: Characteristics of the customer (only the one valid at the moment : no history is managed on characteristics)
- Contact Medium: Describes the contact mediums that could be used to contact the customer (emails, phone numbers, postal addresses)
- Customer Account: Accounts of the customer
- Related Party: Party linked to this customer: the link used can be an URI to an organization or an individual depending on the type of customer.
- Customer Credit Profile: Credit profile for the customer (containing credit scoring ...). By default only the current credit profile is retrieved. It can be used as a list to give the customer credit profiles history; the first one in the list will be the current one.
 - Credit Profile Date: Date when the profile was established
 - Credit Risk Rating: This is an integer whose value is used to rate the risk of this Customer paying late or defaulting versus paying on time.
 - Credit Score: A measure of a person or organization creditworthiness calculated on the basis of a combination of factors such as their income and credit history.
 - Valid For: The period for which the profile is valid.

Main attributes of Customer Account are:

- Id: Unique identifier for the customer account
- Last Modified: date of last modification of customer account
- Name: The name of the account.
- Account Type: A categorization of an account, such as individual, joint, and so forth, whose instances share some of the same characteristics.
- Status: The condition of the account, such as "due", "paid", "in arrears", "in collection".
- Description: Detailed description of the customer
- Credit Limit: The maximum amount of money that may be charged on an account.
- Pin: A multi digit personal identification number that is used by a Customer to gain access to a Customer Account
- Receivable Balance: Overall receivable balance for the customer account
- Customer Account Tax Exemption: Proof of freedom from taxes imposed by a taxing jurisdiction.
 - Issuing Jurisdiction: name of the taxing jurisdiction for which taxes are exempt
 - Certificate Number: identifier of a document that shows proof of exemption from taxes for the taxing jurisdiction.
 - Valid For: period for which the exemption is valid.
 - Reason: Reason of the tax exemption
- Customer Account Relationship: Significant connection between Customer Accounts.
 - Relationship Type: Type of relationship
 - Valid For: Validity period of that relationship
 - Customer Account: The target linked customer account
- Contact:
 - Contact Type: Type of contact: primary, secondary ...
 - Valid For: Validity period of that contact
 - Contact Medium: The contact to access
 - Contact Name: A displayable name for the contact
 - Party Role Type: precise what kind of Party Role type is linked to this contact (a customer account manager, ...)
 - Related Party: A link to the party whose contact is represented here (only if possible and useful)
- Customer: A link to the customer
- Customer Account Balance: Balances linked to the customer account
 - Id: Identifier of the customer account balance
 - Type: Deposit balance, Disputed balance, Loyalty balance, Receivable balance
 - Amount: Balance amount
 - Status: Due, Paid ...
 - Valid For: Balance validity period
- Payment Plan: Defines a plan for payment (when a customer wants to spread his payments)
 - Id: Identifier of the payment plan
 - Status: Status of the payment plan (effective, ineffective).
 - Type: Type of payment plan
 - Priority: Priority of the payment plan
 - Amount: Amount paid.
 - Payment Frequency: Monthly, Bimonthly ...
 - Number Of Payments: Number of payments used to spread the global payment.
 - Valid For: Validity period of the payment plan.
 - Payment Means: For each payment plan a payment method has to be specified