

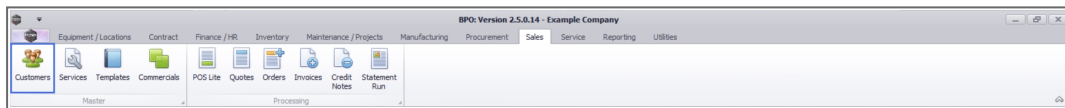
## SALES

### CUSTOMERS - DEACTIVATE CUSTOMER

Customers can only be deactivated if the customer does not have contracts, open part requests, return requests, internal assets issued against them; unprocessed credit notes (sales and contracts), unprocessed invoices, sales orders, quotes, purchase requisitions and purchase orders.

Deleting a Customer will change the status for the Customer to *(I) Inactive*. If BPO is integrated with *Evolution*, the customer will show as *On Hold=1*.

**Ribbon** Select *Sales > Customers*



The *Customer Listing* screen will be displayed.

#### Select the Site

Your employee user record should be linked to a default site. In this case, the site will auto populate with this default, otherwise the site must be manually selected.

Another site can be selected, if required, and if you have the security rights to access the site.

If *All Sites* displays here, then you do not have a default site configured on your user record, and need to select the required site.

Upon opening, this screen will default to the *Active* status, listing all the *Active* contracts for the selected site.

Customer Listing - BPO Version 2.5.0.14 - Example Company

Processing: Add, Edit, Deactivate, Delete, Sync, View, Save Layout, Workspaces, Hold, Release, Approve Account, Decline Account, Active, Refresh, Export, Reports, Print Statement

Links: Enter text to search...

Drop a column header here to group by that column

CustomerCode	CustomerType	CustomerName	Department	DepName	SiteDescription	CustomerCreditLimit	CustomerWebSite	CustomerPhoneNumber	CustomerVATNo
HOP001	RE	Hope Works (Pty) Ltd			Durban	1,000,000.00	www.hopeworks.co.za	031 123 4567	987654321
DER001	RE	Derton / Technologies			Durban	250.00	www.dertonweb.co.za	031 123 4785	987654321
OFF001	RE	Office Supplies Unlimited			Durban	75,000.00	www.off.co.za	031 789 4561	987456321
YES001	CO	Young Electric			Durban	100,000.00	0825555555	2314687641	123456789
WES001	RE	Westwood Dynamic			Durban	100,000.00	www.web.co.za	031 789 4561	123456789
TIAN001	RE	Tian Group			Durban	100,000.00	www.web.co.za	031 852 9632	12328741369
BOT001	IT	Bothas Networking Inc			Durban	50,000.00	www.web.co.za	031 789 4563	9874563201
SAM001	RE	Samanthas Diner			Durban	45,000.00	www.samsdiner.co.za	031 123 4567	123456789
DAN001	IT	Danny Storm IT Cafe			Durban	75,000.00	031 785 4785	123456789	123456789
STR002	IT	Stringfield Internet Cafe			Durban	75,000.00	031 456 7894	123456789	123456789
HAC001	IT	Hack PC - IT Shop			Durban	0.00	031 789 4561	6654321355	1234
PIN001	GV	Pink Shoes			Durban	0.00	031 456 7894	1234	00000
HEL000001	HELLOCRESTP	Mary Contrary			Durban	0.00	083 559	00000	123456789
JUS001	RE	Just In Time			Durban	50,000.00	www.justdtime.co.za	031 123 4567	123456789
LIT0001	RE	Little Bee Honey			Durban	0.00	www.bee.co.za	031 123 4567	123456789
GRE001	RE	Green Tea Supplies			Durban	75,000.00	031 456 7891	123456789	1234
PIN001	RE	Pine Har Salon			Durban	0.00	www.firehair.co.za	031 123 4567	1234
BET0001	RE	Bettes Summer Shop at the Beach			Durban	0.00	0.00	0.00	0
banca0	RE	North West Branch			Durban	0.00	0.00	0.00	0
DAN002	IT	Dancing Shoes			Durban	10,000.00	031 123 4567	123456789	123456789
BIG0001	CO	Big Bargains			Durban	10,000.00	031 456 7897	123456789	0
MAN0001	RE	Mandy Norton			Durban	0.00	0.00	0.00	123456789
DAN0003	IT	Dance Shoes			Durban	0.00	0.00	0.00	0
BLU001	CO	Bllys Barn			Durban	0.00	0.00	0.00	123456789
ANU0001	ACC	Another new customer			Durban	0.00	www.newcust.co.za	031 123 4567	123456789
APP0001	RE	Apple Juice Inc			Durban	0.00	0.00	013 123 4567	123456789
APN0001	IT	APN Juice Co			Durban	0.00	0.00	0.00	08765432101

User : BancaD | 04/11/2022 | Version : 2.5.0.14 | Example Company

- Select the **row** of the **customer** that you wish to process.

Customer Listing - BPO Version 2.5.0.14 - Example Company

Processing: Add, Edit, Deactivate, Delete, Sync, View, Save Layout, Workspaces, Hold, Release, Approve Account, Decline Account, Active, Refresh, Export, Reports, Print Statement

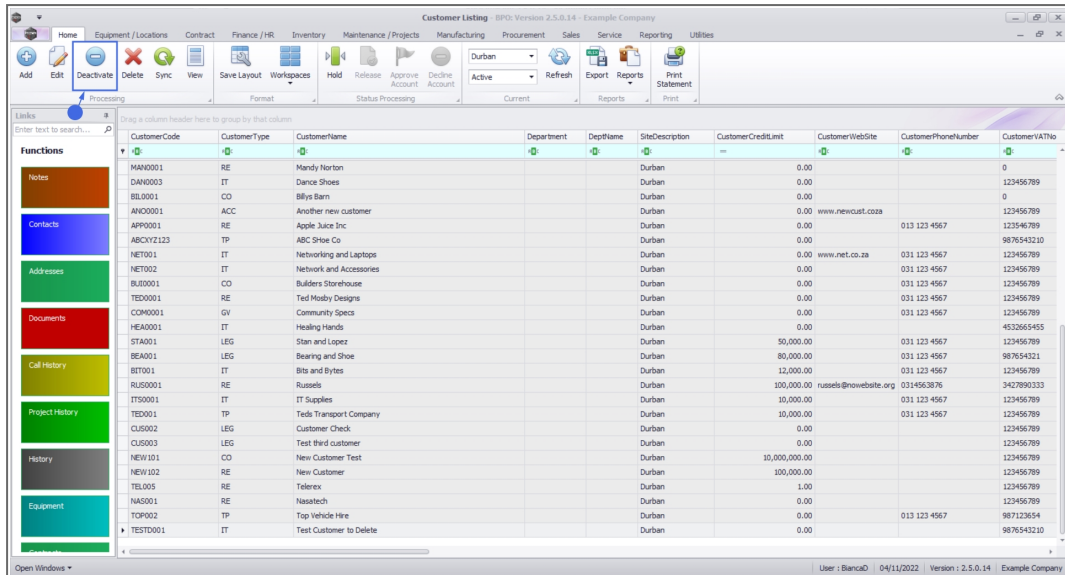
Links: Enter text to search...

Drop a column header here to group by that column

CustomerCode	CustomerType	CustomerName	Department	DepName	SiteDescription	CustomerCreditLimit	CustomerWebSite	CustomerPhoneNumber	CustomerVATNo
HOP001	RE	Hope Works (Pty) Ltd			Durban	1,000,000.00	www.hopeworks.co.za	031 123 4567	987654321
DER001	RE	Derton / Technologies			Durban	250.00	www.dertonweb.co.za	031 123 4785	987654321
OFF001	RE	Office Supplies Unlimited			Durban	75,000.00	www.off.co.za	031 789 4561	987456321
YES001	CO	Young Electric			Durban	100,000.00	0825555555	2314687641	123456789
WES001	RE	Westwood Dynamic			Durban	100,000.00	www.web.co.za	031 789 4561	123456789
TIAN001	RE	Tian Group			Durban	100,000.00	www.web.co.za	031 852 9632	12328741369
BOT001	IT	Bothas Networking Inc			Durban	50,000.00	www.web.co.za	031 789 4563	9874563201
SAM001	RE	Samanthas Diner			Durban	45,000.00	www.samsdiner.co.za	031 123 4567	123456789
DAN001	IT	Danny Storm IT Cafe			Durban	75,000.00	031 785 4785	123456789	123456789
STR002	IT	Stringfield Internet Cafe			Durban	75,000.00	031 456 7894	123456789	123456789
HAC001	IT	Hack PC - IT Shop			Durban	0.00	031 789 4561	6654321355	1234
PIN001	GV	Pink Shoes			Durban	0.00	031 456 7894	1234	00000
HEL000001	HELLOCRESTP	Mary Contrary			Durban	0.00	083 559	00000	123456789
JUS001	RE	Just In Time			Durban	50,000.00	www.justdtime.co.za	031 123 4567	123456789
LIT0001	RE	Little Bee Honey			Durban	0.00	www.bee.co.za	031 123 4567	123456789
GRE001	RE	Green Tea Supplies			Durban	75,000.00	031 456 7891	123456789	1234
PIN001	RE	Pine Har Salon			Durban	0.00	www.firehair.co.za	031 123 4567	1234
BET0001	RE	Bettes Summer Shop at the Beach			Durban	0.00	0.00	0.00	0
banca0	RE	North West Branch			Durban	0.00	0.00	0.00	0
DAN002	IT	Dancing Shoes			Durban	10,000.00	031 123 4567	123456789	123456789
BIG0001	CO	Big Bargains			Durban	10,000.00	031 456 7897	123456789	0
MAN0001	RE	Mandy Norton			Durban	0.00	0.00	0.00	123456789
DAN0003	IT	Dance Shoes			Durban	0.00	0.00	0.00	0
BLU001	CO	Bllys Barn			Durban	0.00	0.00	0.00	123456789
ANU0001	ACC	Another new customer			Durban	0.00	www.newcust.co.za	031 123 4567	123456789
APP0001	RE	Apple Juice Inc			Durban	0.00	0.00	013 123 4567	123456789
APN0001	IT	APN Juice Co			Durban	0.00	0.00	0.00	08765432101

User : BancaD | 04/11/2022 | Version : 2.5.0.14 | Example Company

- Click on the **Deactivate** button.



Customer Listing - BPD: Version 2.5.0.14 - Example Company

Links: Drag a column header here to group by that column

Enter text to search...

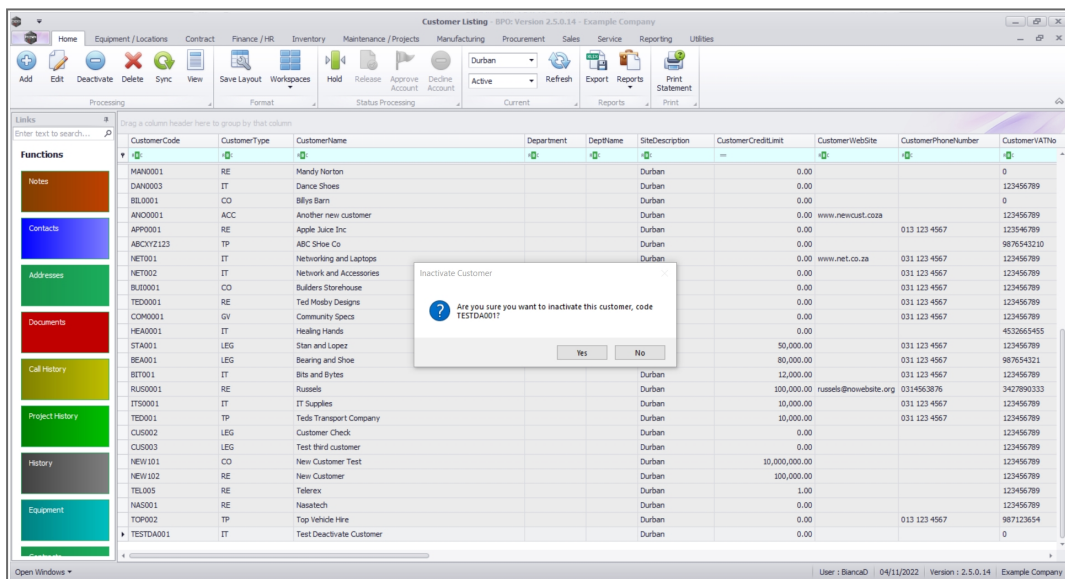
Functions: Notes, Contacts, Addresses, Documents, Call History, Project History, History, Equipment

CustomerCode	CustomerType	CustomerName	Department	DepName	SiteDescription	CustomerCreditLimit	CustomerWebSite	CustomerPhoneNumber	CustomerVATNo
MAN0001	RE	Mandy Norton			Durban	0.00			0
DAN0003	IT	Dance Shoes			Durban	0.00			123456789
BL0001	CO	Bllys Barn			Durban	0.00			0
AN0001	ACC	Another new customer			Durban	0.00	www.newcust.co.za		123456789
AP0001	RE	Apple Juice Inc			Durban	0.00		013 123 4567	123456789
ABCKYZ123	TP	ABC Shoe Co			Durban	0.00			9876543210
NET001	IT	Networking and Laptops			Durban	0.00	www.net.co.za	031 123 4567	123456789
NET002	IT	Network and Accessories			Durban	0.00		031 123 4567	123456789
BU0001	CO	Builders Storehouse			Durban	0.00		031 123 4567	123456789
TE0001	RE	Ted Moby Designs			Durban	0.00		031 123 4567	123456789
COM0001	GV	Community Specs			Durban	0.00		031 123 4567	123456789
HEA0001	IT	Healing Hands			Durban	0.00			453265455
STA001	LEG	Stan and Lopez			Durban	50,000.00		031 123 4567	123456789
BEA001	LEG	Bearing and Shoe			Durban	80,000.00		031 123 4567	987654321
BIT001	IT	Bits and Bytes			Durban	12,000.00		031 123 4567	123456789
RUS0001	RE	Russels			Durban	100,000.00	russels@nowwebsite.org	0314563876	3427890333
ITS0001	IT	IT Supplies			Durban	10,000.00		031 123 4567	123456789
TE0001	TP	Teds Transport Company			Durban	10,000.00		031 123 4567	123456789
CUS002	LEG	Customer Check			Durban	0.00			123456789
CUS003	LEG	Test third customer			Durban	0.00			123456789
NEW101	CO	New Customer Test			Durban	10,000,000.00			123456789
NEW102	RE	New Customer			Durban	100,000.00			123456789
TEL005	RE	Tellerex			Durban	1.00			123456789
NAS001	RE	Nasatech			Durban	0.00			123456789
TOP002	TP	Top Vehicle Hire			Durban	0.00		013 123 4567	987123654
TESTD001	IT	Test Customer to Delete			Durban	0.00			9876543210

User: BiancaD 04/11/2022 Version: 2.5.0.14 Example Company

A message box will come up, asking: ***Are you sure you want to deactivate this customer, code [customer code]?***

- Click on the **Yes** button.



Customer Listing - BPD: Version 2.5.0.14 - Example Company

Links: Drag a column header here to group by that column

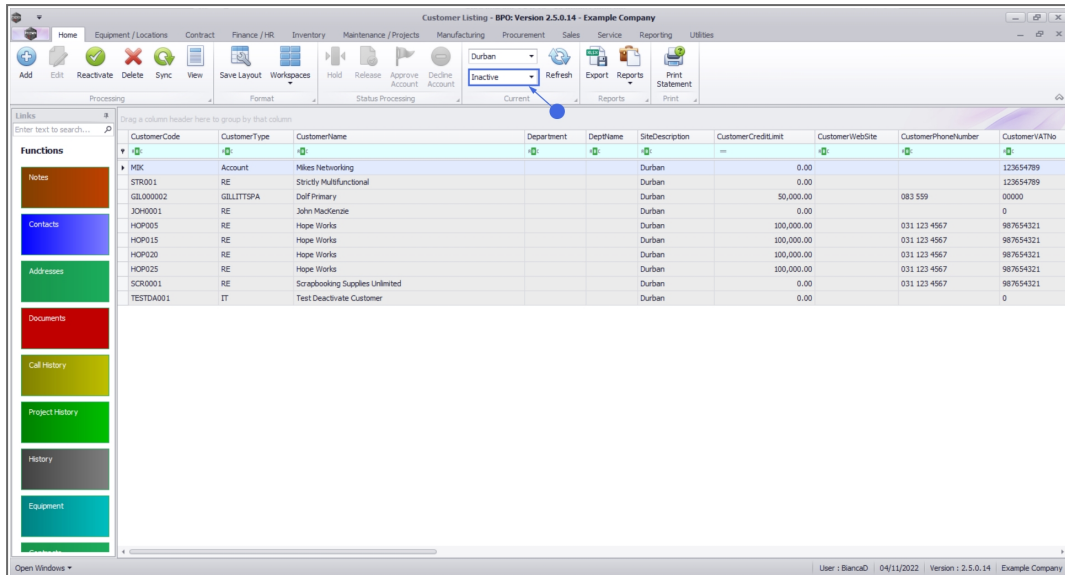
Enter text to search...

Functions: Notes, Contacts, Addresses, Documents, Call History, Project History, History, Equipment

CustomerCode	CustomerType	CustomerName	Department	DepName	SiteDescription	CustomerCreditLimit	CustomerWebSite	CustomerPhoneNumber	CustomerVATNo
MAN0001	RE	Mandy Norton			Durban	0.00			0
DAN0003	IT	Dance Shoes			Durban	0.00			123456789
BL0001	CO	Bllys Barn			Durban	0.00			0
AN0001	ACC	Another new customer			Durban	0.00	www.newcust.co.za		123456789
AP0001	RE	Apple Juice Inc			Durban	0.00		013 123 4567	123456789
ABCKYZ123	TP	ABC Shoe Co			Durban	0.00			9876543210
NET001	IT	Networking and Laptops			Durban	0.00	www.net.co.za	031 123 4567	123456789
NET002	IT	Network and Accessories			Durban	0.00		031 123 4567	123456789
BU0001	CO	Builders Storehouse			Durban	0.00		031 123 4567	123456789
TE0001	RE	Ted Moby Designs			Durban	0.00		031 123 4567	123456789
COM0001	GV	Community Specs			Durban	0.00		031 123 4567	123456789
HEA0001	IT	Healing Hands			Durban	0.00			453265455
STA001	LEG	Stan and Lopez			Durban	50,000.00		031 123 4567	123456789
BEA001	LEG	Bearing and Shoe			Durban	80,000.00		031 123 4567	987654321
BIT001	IT	Bits and Bytes			Durban	12,000.00		031 123 4567	123456789
RUS0001	RE	Russels			Durban	100,000.00	russels@nowwebsite.org	0314563876	3427890333
ITS0001	IT	IT Supplies			Durban	10,000.00		031 123 4567	123456789
TE0001	TP	Teds Transport Company			Durban	10,000.00		031 123 4567	123456789
CUS002	LEG	Customer Check			Durban	0.00			123456789
CUS003	LEG	Test third customer			Durban	0.00			123456789
NEW101	CO	New Customer Test			Durban	10,000,000.00			123456789
NEW102	RE	New Customer			Durban	100,000.00			123456789
TEL005	RE	Tellerex			Durban	1.00			123456789
NAS001	RE	Nasatech			Durban	0.00			123456789
TOP002	TP	Top Vehicle Hire			Durban	0.00		013 123 4567	987123654
TESTD001	IT	Test Deactivate Customer			Durban	0.00			0

User: BiancaD 04/11/2022 Version: 2.5.0.14 Example Company

The will be inactivated and can be found by selecting the **Inactive** status.



The screenshot shows the 'Customer Listing - BPD Version 2.5.0.14 - Example Company' window. The top toolbar contains various icons for actions like Add, Edit, Reactivate, Delete, Sync, View, Save Layout, Workspaces, Hold, Release, Approve Account, Decline Account, and a dropdown menu currently set to 'Durban'. The 'Deactivate' button is highlighted with a blue circle. Below the toolbar, there is a sidebar with 'Functions' (Notes, Contacts, Addresses, Documents, Call History, Project History, History, Equipment) and a main table displaying customer data.

CustomerCode	CustomerType	CustomerName	Department	DepName	SiteDescription	CustomerCreditLimit	CustomerWebSite	CustomerPhoneNumber	CustomerIATNo
STR001	Account	Miles Networking			Durban	0.00		123654789	
GL000002	RE	Strictly Multifunctional			Durban	0.00		123654789	
JCH0001	RE	John Mackenzie			Durban	50,000.00		083 559	00000
HOP005	RE	Hope Works			Durban	0.00			0
HOP015	RE	Hope Works			Durban	100,000.00		031 123 4567	987654321
HOP020	RE	Hope Works			Durban	100,000.00		031 123 4567	987654321
HOP025	RE	Hope Works			Durban	100,000.00		031 123 4567	987654321
SCR0001	RE	Scrapbooking Supplies Unlimited			Durban	100,000.00		031 123 4567	987654321
TESTDA001	IT	Test Deactivate Customer			Durban	0.00		031 123 4567	987654321
					Durban	0.00			0

MNU.061.007