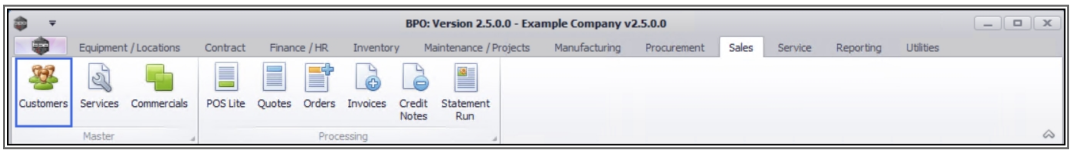
SALES

CUSTOMERS - DECLINE CRM CUSTOMER

CRM customer details can only be ***viewed*** in the ***New - CRM*** status. The customer has to be ***Released for approval*** in ***CRM*** once the customer details and information have been checked and validated.

Once this has been done, the new customer can be **Approved** and will then be ***Active*** in BPO2 and will move to the ***Released*** status.

Ribbon Access: *Sales > Customers*



1. The ***Customer Listing*** screen will be displayed.
2. Select the ***Site*** where the Customer can be located.
    - The example has ***Durban*** selected.
3. Change the ***Status*** to **Released**.

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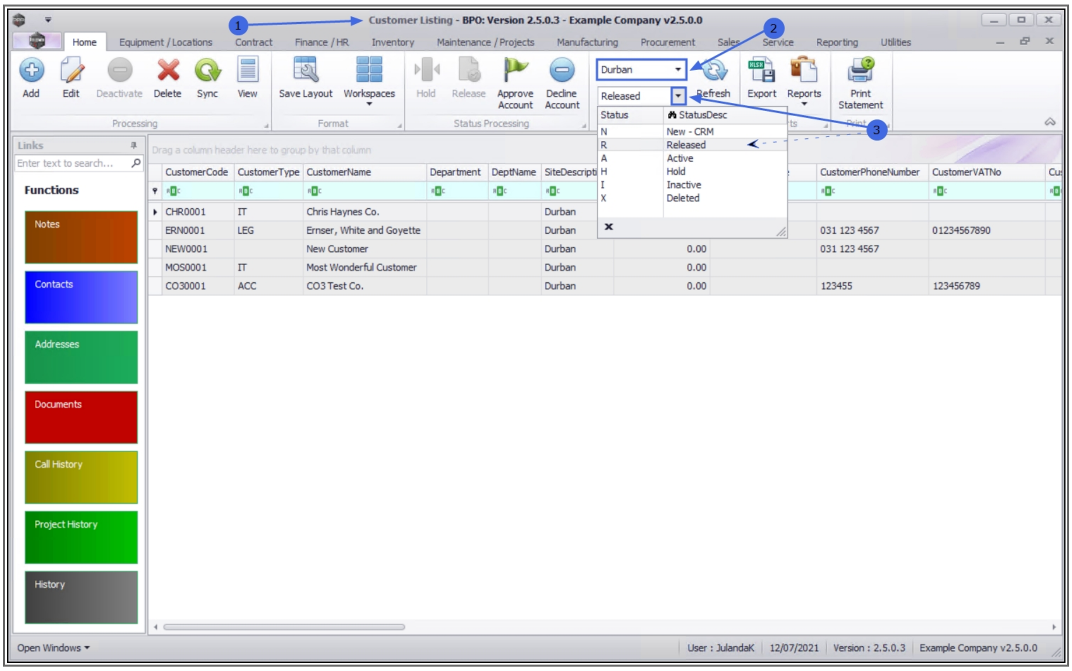

4. The ***Customer Listing*** screen will be updated using the Status filter selected to display all the Customers waiting for ***Approval***.
5. Select the ***row*** of the ***Customer*** that you wish to ***decline*** the account for.
6. Click on ***Decline Account***.

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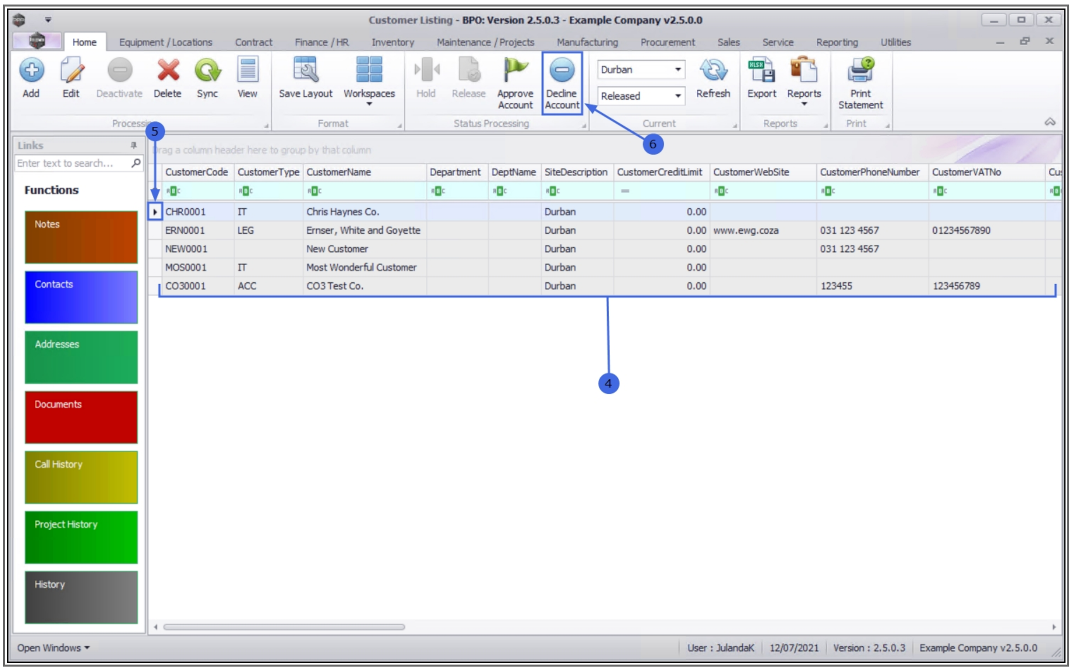
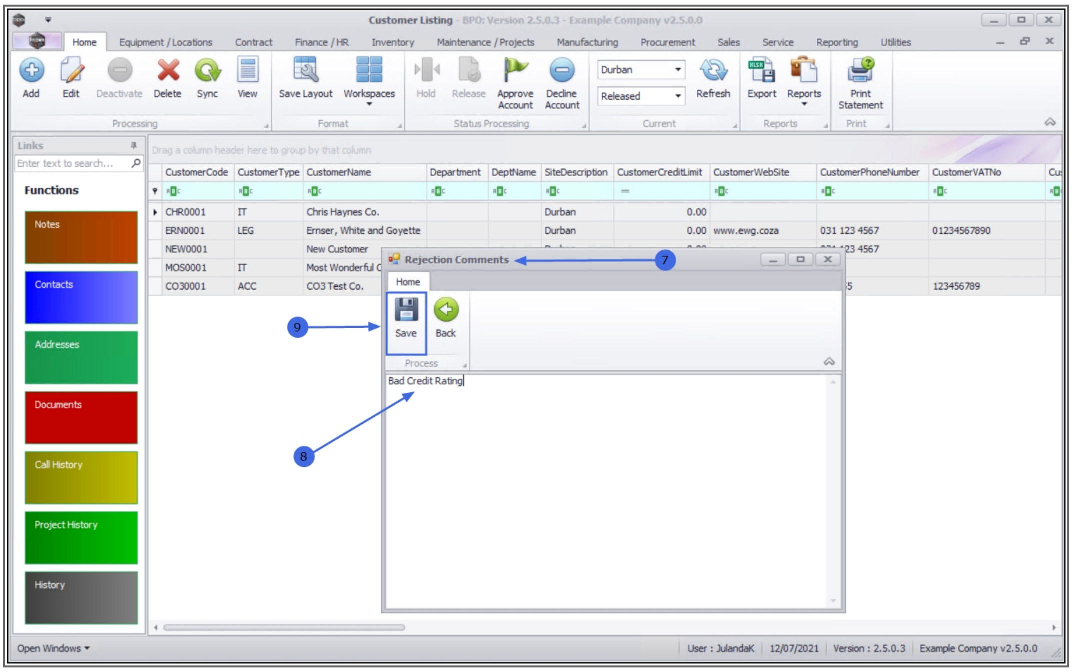


7. The ***Rejection Comments*** text box will display.
8. Click in the text area to type in the rejection comment against the Customer.
9. Click on ***Save***.



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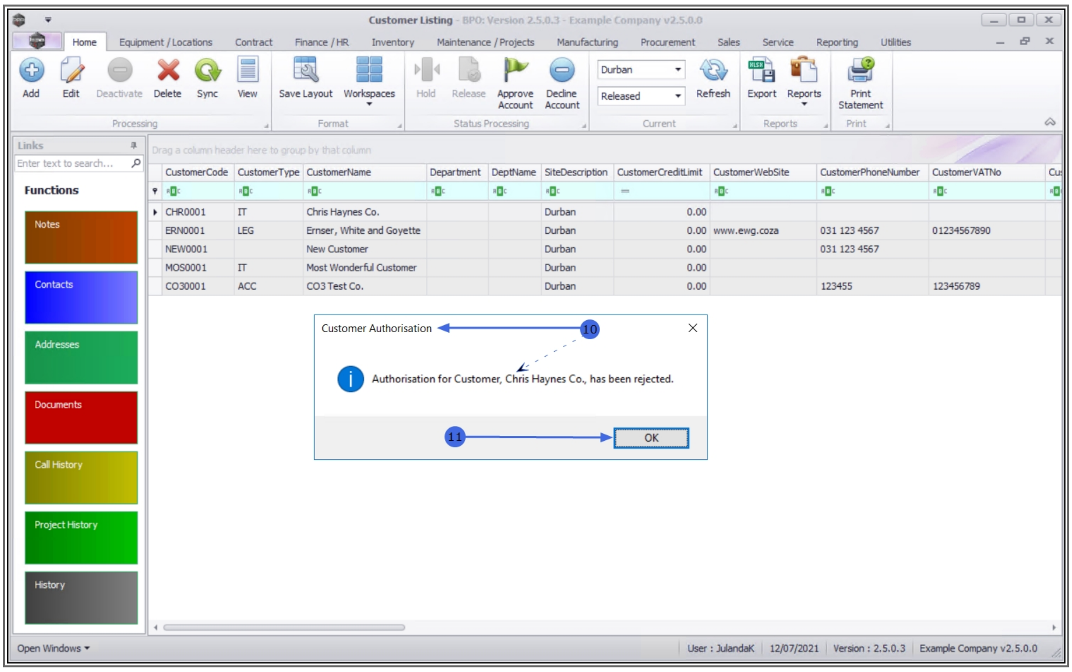
10. When you receive the ***Customer Authorisation*** message to confirm that;
    - ***Authorisation for Customer, [****customer code****] has been rejected.***
11. Click on ***OK***.



VIEW DECLINED CUSTOMER

The Customer will be *removed* from the Customer Listing screen where the status is set to *Released*.

1. Change the Status to ***New - CRM*** using the Status drop-down list.
2. You can now view the declined Customer on the Customer Listing screen.

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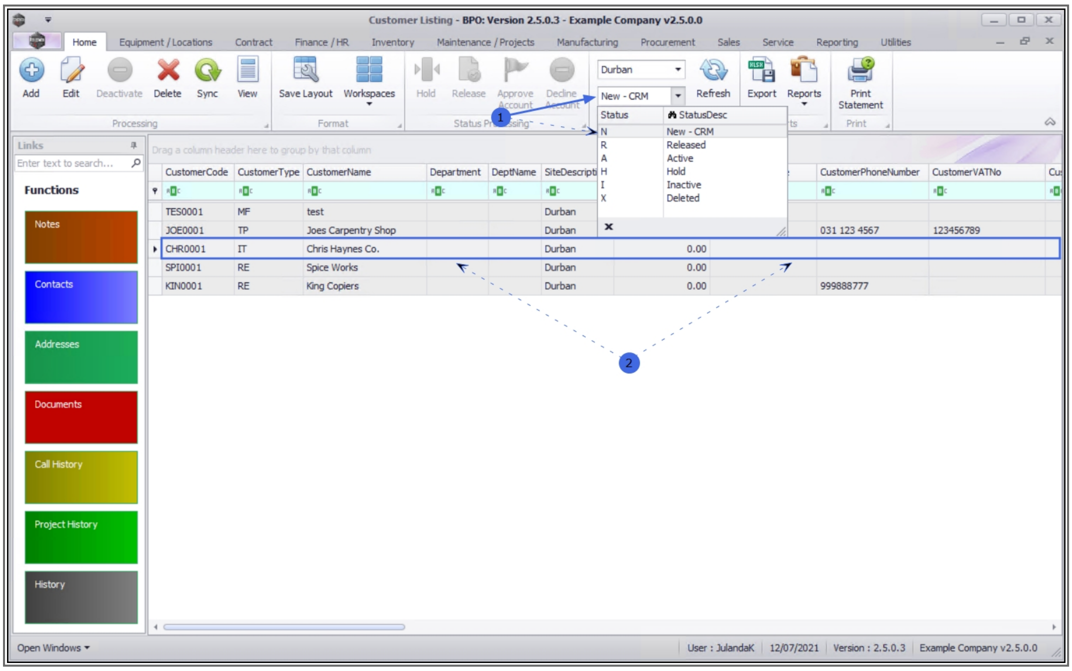

The customer will need to be re-checked and validated in CRM before they can be re-released.

MNU.061.045

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