SALES

INTRODUCTION TO CUSTOMERS

A customer can be a **Debtor** or a **Cash Sales Customer**. You will need to set up a customer in order to create many of the documents in BPO2, for example:

- Quotes
- Orders
- Calls
- Invoices
- Contracts
- Credit Notes

By setting up the customer as **Is Debtor**, BPO will create an account for this customer in your financial system. You do not need to specify an account code for the customer in BPO.

If you do not set up the customer as a **Debtor**, then the customer will be treated as a **Cash Sales** customer. You will then need to specify a **GL Account Code** for the customer in BPO, in order to post to your **Cash Sales** account in your financial system.

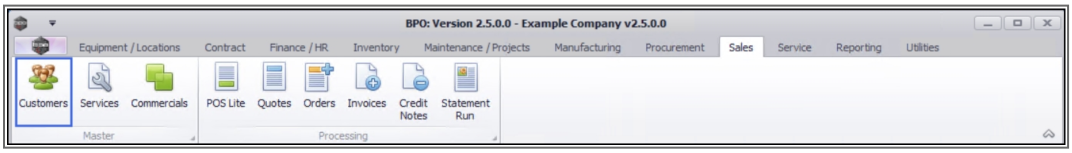
You can set up customer **credit limits**, **credit checks** and **credit terms**. Any changes you make to these, will update in Pastel.

Must Haves:

- An Accounts Contact (Pastel account contact)
- A Primary Contact (Pastel account contact if Account Contact is not set up & Call Notification Contact)

- An Invoice Delivery method (for contract billing - invoice emailing)
- One Billing address (and only 1 billing address)
- At least 1 Shipping address (for Sales Shipping and Machine Location links)

Ribbon Access: *Sales > Customers*

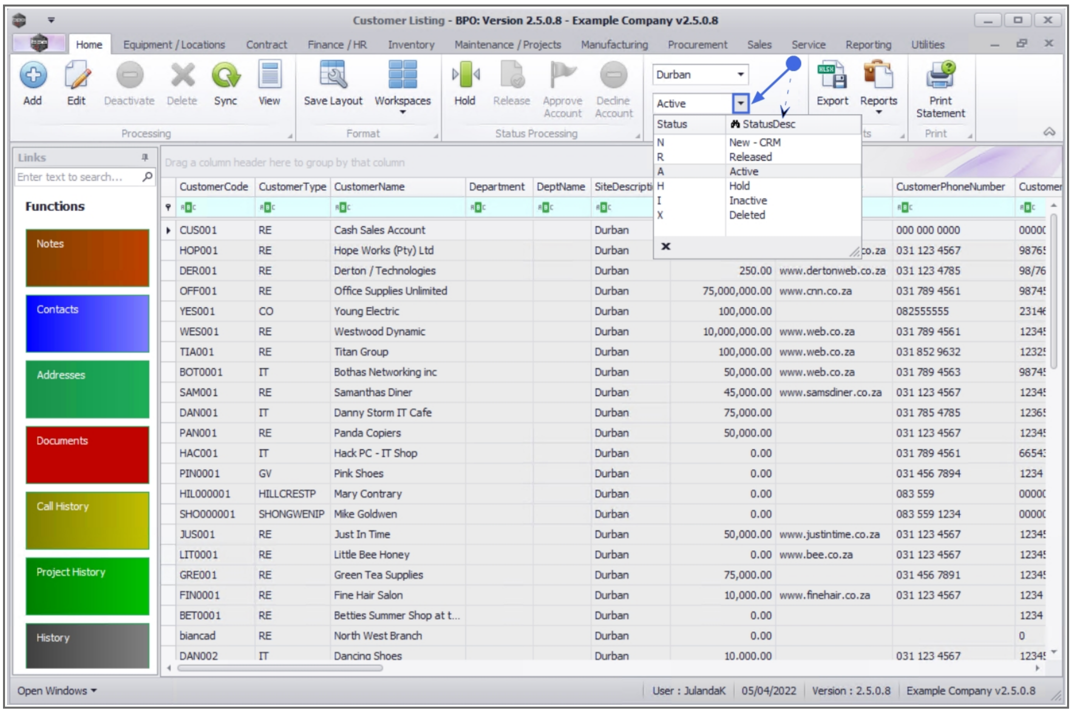


1. The ***Customer Listing*** screen will be displayed.
2. From this screen you can view a list of all your customers for the ***site*** and ***status*** selected.
3. This screen will open by default in the ***Active*** status.

CUSTOMER STATUS

All the customers in the ***Customer Listing*** screen are sorted depending on the ***Site*** and ***Status*** selected:

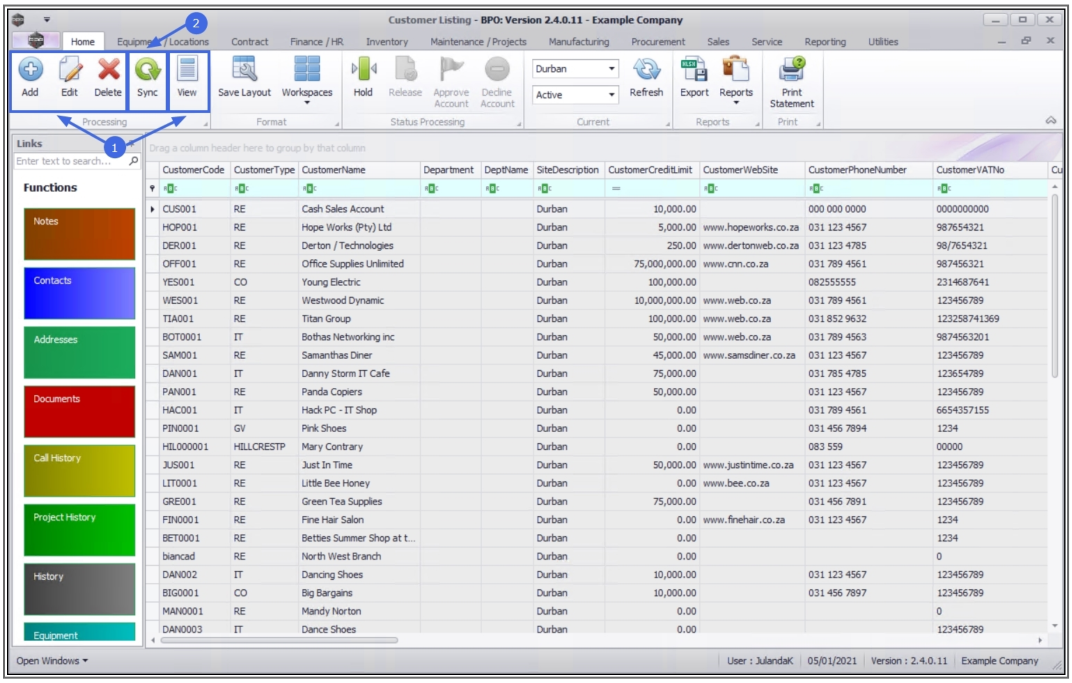
- New - CRM
- Released
- Active
- Hold
- Inactive



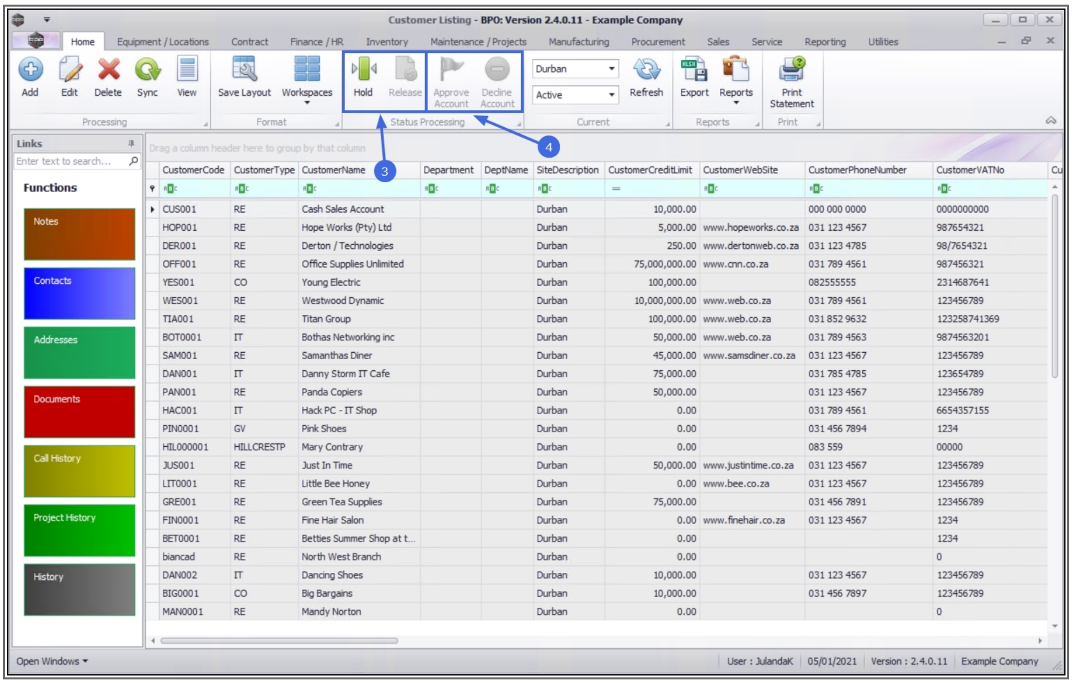
RIBBON ACTION BUTTONS

Customer ribbon action buttons will be available (bold) or unavailable (greyed out) depending on the status selection.

1. In this screen, you can Add, Edit, Delete or View, a customer.
2. You can synchronise customers with your financial system.



3. You can place a customer on Hold or Release a customer from Hold.
4. You can Approve or Decline a CRM customer account.



EXPORT

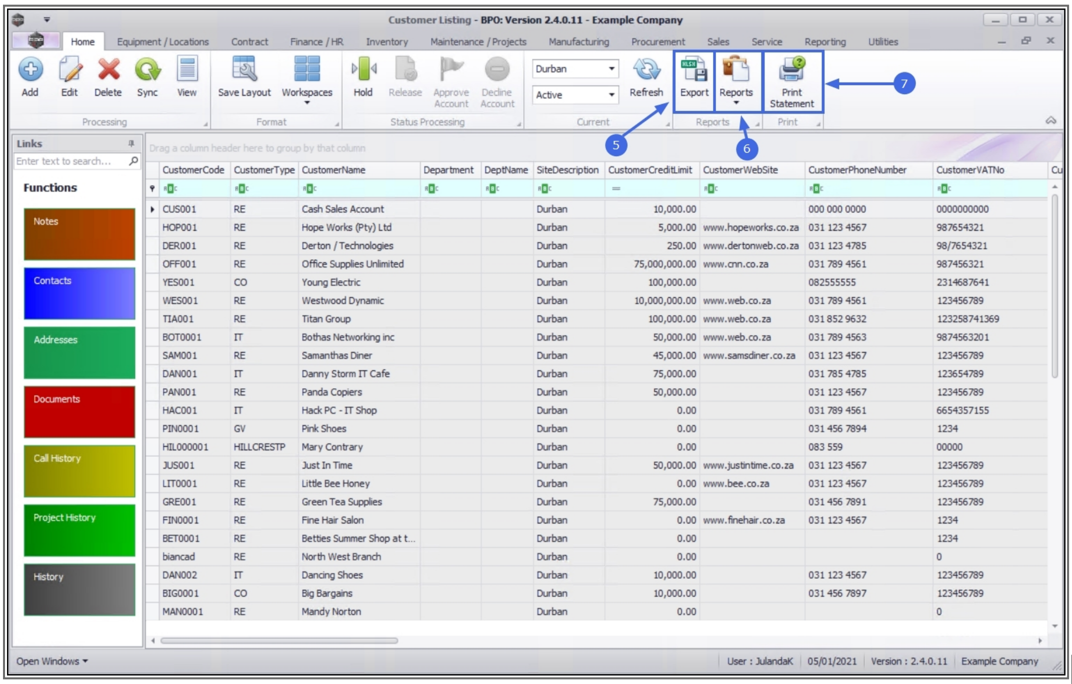
5. ***Export*** allows you to export a Customer List to Microsoft Excel.

REPORTS

6. ***Reports*** allows you to print Customer Reports e.g. Invoices, Credit Notes, Debit Orders, Performance, etc. For more information on selecting and running a report refer to Introduction to All Reports - Run a Report.

PRINT STATEMENT

7. ***Print Statement*** allows you to print and/or email a Customer Statement directly from this screen.



FUNCTIONS AND PROCESSING TILES

On the left side of the ***View Customer*** screen is the ***Links*** panel which contains the Customer ***Functions*** and ***Processing*** tiles. Each tile, when clicked on, will take you to further information concerning the selected customer. For the purpose of this manual, we are reviewing each tile from the ***Customer Listing*** screen.

These tiles can be accessed from the following screens:

- **Customer Listing**
- **View Customer**
- **Customer Maintenance**
- **Add Customer**
- **Edit Customer**

> *Important Note:* If you are working from the **Customer Listing** screen, ensure that you have selected the correct customer before you click on any tile.

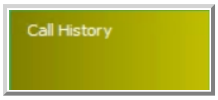
FUNCTIONS TILES

The Notes tile will direct you to the Customer Note Listing where you can ***Add***, ***View*** and ***Modify*** customer notes. Refer to Customers - Notes

The Contacts tile will direct you to the Contacts for Customer where you can ***Add***, ***Edit***, ***Delete*** and ***View*** the contacts for the Customer e.g. Account contact, Primary contact, etc. Refer to Customers - Contacts

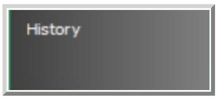
The Addresses tile will direct you to the Addresses for Customer where you will be able to ***Add***, ***Edit*** and ***Delete*** the Shipping and Billing Addresses for the Customer. Refer to Customers - Addresses

The Documents tile will direct you to the Documents for Customer screen where you can ***Add***, ***Edit Delete*** and ***View*** digital documents for the customer. Refer to Customers - Documents

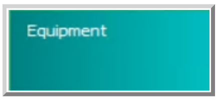


The Call History tile will direct you to the Calls for Customer screen where you can ***Add***, ***Edit***, ***Close*** or ***Complete*** a Call, as well as ***Release***, put a call on ***Hold*** or ***Pending*** status. Refer to Customers - Call History

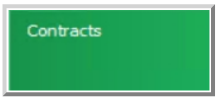
The Project History tile will direct you to the ***Project Listing for Customer*** screen where you can ***Add***, ***Edit***, ***Apply a Project Methodology*** or ***Adjust Project Baseline***, as well as maintain the ***Employee*** and ***Project Time***. Refer to Customers - Project History



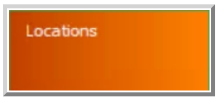
The History tile will direct you to the History Listing for the Customer displaying a data grid of the ***historical changes*** made for the Customer. Refer to Customers - History



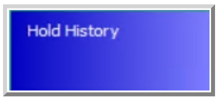
The Equipment tile will direct you to the Machine List screen where you can ***Add***, ***View***, ***Edit*** and ***Delete*** all serialised items (machines) that are linked to the customer. Refer to Customers - Equipment



The Contracts tile will direct you to the ***Contracts for Customer*** screen which will allow you to View the Contracts linked to the Customer. Refer to Customers - Contracts



The Locations tile will direct you to the ***Functional Locations for Customer*** screen where you can create a Main Location, Parent and Sub-Locations. Refer to Customers - Locations



The Hold History tile will direct you to the Hold Listing for Customer screen where you can be view hold information for the customer. Refer to Customers - Hold History

The Invoice Delivery tile displays how invoices will be delivered for the Customer. From the Invoice Delivery

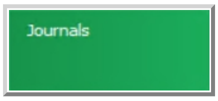
Methods for Customer screen you can ***Add***, ***Edit***, ***View*** and ***Delete*** an Invoice Delivery Method. Refer to Customers - Invoice Delivery Method

The Commercial Exceptions tile will display the Commercial Exceptions for the customer you have selected. You can Add, Edit and Delete the Commercial Exceptions for this customer. These are the parts, labour and/or services that are excluded from the commercial details set up on the customer. Refer to Customers - Commercial Exceptions

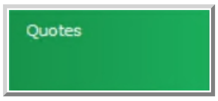
The Commercial Details tile will display the ***Commercial Maintain*** information for the Customer. You will only be able to ***view*** the Commercial information and not changes or additions can be made. Refer to Customers - Commercial Details

The Statement Run tile will display the ***Statement Run for Customer*** screen to generate Customer Statements and/or Invoices. Refer to Customers - Statement Run

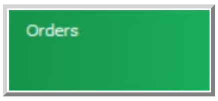
PROCESSING TILES



The Journals tile will direct you to the ***Accounts Journals for Customer*** screen. From here you can ***view*** all transactional information on the Customer's account in Sage Evolution that has a transaction balance and an outstanding balance. Refer to Customers - Journals

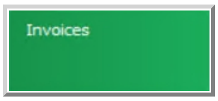


The Quotes tile will direct you to the ***Sales Quotes for Customer*** screen. You have to option to create a sales order from a quote, raise a Quote against a Customer on Hold or Clone a quote. Refer to Customers - Quotes

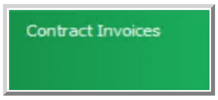


The Orders tile will direct you to the ***Sales Orders for Customer*** screen where you will be able to convert a Sales

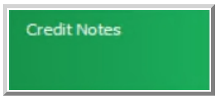
Quote into a Sales Order, or create a Sales Order. Refer to Customers - Orders



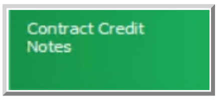
The Invoices tile will direct you to the ***Sales Invoices for Customer*** screen, where you can view, add, edit and reprint invoices. Refer to Customers - Invoices



The Contract Invoices tile will direct you to the ***Contract Invoices for Customer*** screen will be displayed. Here, you can Add and View contract invoices for this customer. Refer to Customers - Contract Invoices



The Credit Notes tile will direct you to the ***Sales Credit Notes for Customer*** screen. Refer to Customers - Credit Notes



The Contract Credit Notes tile will direct you to the ***Contract Credit Notes for Customer*** screen. You will be able to ***Add***, ***View***, ***Delete*** and ***Release*** or ***Remove*** or ***Reject*** a contract credit note for this customer with Auto Re-Invoice or without Auto Re-Invoice. Refer to Customers - Contract Credit Notes

---

Related Topics

- Customers - Credit Limit, Terms and Check

BPO.MNU.061