

# **SALES**

# **CUSTOMERS - ADD CUSTOMER**

You will need to set up customers in order to create:

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

A customer can be a **Debtor** or a **Cash Sales Customer**. 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 <u>do not</u> 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.

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

#### Must Haves when Creating a Customer:

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



- An <u>Invoice Delivery method</u> (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)

If you are using a *Customer Code Prefix* with the Customer Code -

For a detailed handling of this topic refer to Add Customer with Customer Code Prefix

#### **Ribbon Access:** Sales > Customers

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		Equipment / Locatio	ns Contract	Finance / HR	Inventory N	laintenance / Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	
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- 1. The *Customer Listing* screen will be displayed.
- 2. Select the *Site* where the customer can be located.
  - The example has *Durban* selected.
- 3. Click on Add.

Short cut key: *Right click* to display the *All groups* menu list. Click on *Add*.



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4. The *Customer Maintenance* screen will be displayed.

#### **CUSTOMER DETAILS**

- Type: Search for and select the type of customer, e.g. Retail.
- Customer Code: Type in the Customer Code / Account No for this client. (not required if the <u>Auto Customer Code Generation is</u> <u>configured</u>).

**Note 1:** The Customer Code is very important because it is linked to **Pastel Evolution** and all the customer information and history will be linked to this code and not the Customer Name.

**Note 2:** If you are manually entering the Customer Code, the recommended standard is using a customer code which is 6 characters long starting with 3 letters and then 3 numbers.



**Note 3:** The recommended setting is to <u>auto generate</u> the customer code.

# **Note 4:** From BPO2 v2.5.1.4 restrictions have been put into place to prevent special characters from being saved. You will only be allowed to save upper case characters and digits from 0 to 9.

- Customer Name: Type in the name of the customer.
- Customer Credit Limit: Type in the credit limit for the customer.
- Web Site: Type in the customer's website, if applicable.
- **Customer Phone Number:** Type in the customer telephone number.
- **Customer Tax Rate:** This field defaults to the current tax rate, e.g. 15% VAT, but you can search for and select a different tax rate.
- Vat No: Type in the customer's VAT number.
- **Registered Name:** Type in the registered (legal) company name for the customer.
- **Registration No:** Type in the customer's registration number, if required.
- Holding Company: Click on the *search* button and select *Is Hold-ing*.
  - If you need to set this up as a Pastel 'Linked' Customer, then search for the customer you wish to link this new customer to.

**Note** that if you link an account here, all transactions done for this customer will post to that account (based on what is set in <u>Company Configuration</u>).



- **Currency:** Click on the *search* button to select the customer currency.
- Account Code: This is the account you will post to in your financial system
  - For Debtors: The account code is not required, as a customer account will be created in the financial system and linked to this customer.
  - For Cash Sales Customers: Type in the General Ledger account code that will be used in your financial system, to post entries to.
    - Alternately, click on the *search* button to select a Debtor to link this cash sale customer to.
- Credit Check: Click on the *search* button to select the credit checking required:
  - A: Terms and Limit BPO will check to see whether the customer has exceeded its terms and credit limit before allowing invoicing.
  - **B: Limit check only** BPO will only check to see whether the customer has exceeded their credit limit before allowing invoicing.
  - N: No check BPO will allow invoicing regardless of whether the customer has exceeded their terms or credit limit.
- **Credit Terms:** Click on the *search* button to select the customer 'Terms' required, e.g. 30 day or 60 day.
- **Reporting Area:** This field is used in conjunction with CRM Customer Area, e.g. Sandton, Nelspruit, etc.
- **Salesman:** Click on the *search* button to select the main salesman linked to this customer. The salesman will be automatically be



assigned to Sales Quotes, Orders and Invoices raised for this customer. This can however be changed on the individual documents.

- Account Manager: Click on the *search* button to select the employee responsible for managing the account. This is the person the customer will contact with regards to queries on their account.
- Is Debtor: This check box will auto populate by default and determines whether your customer is a Debtor or Cash Sales Customer.
  - For Debtors: Make sure this item is selected. This means that an account will be created in your financial system.
  - For Cash Sales Customers: Do <u>not</u> select this item. Make sure you specify an Account Code.
- Is Consolidated: Relates to Contract billing. If selected, one contract invoice will be created for all contracts linked to this customer. If unselected, one contract invoice will be created per contract.
- Send SMS: Select this option to have the system send a call status change SMS<sup>1</sup> to the customer primary contact.
- Send Email: Select this option to have the system send a call status change email<sup>2</sup> to the customer primary contact. (*Refer to Related Topics*)

<sup>1</sup>This is dependent on an SMS gateway.

<sup>&</sup>lt;sup>2</sup>This is based on the Auto Call Status Change Email flag that has been set in the Company Configuration.



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Ipen Windows 🔻					User : Julandak	07/01/2021	Version : 2.4.0.11	Example Company	y

#### **CUSTOMER DETAILS CONTINUE**

• **Primary Contact:** Type in the name and surname for the customer contact.

The primary contact receives all operational or business related emails e.g. Call Status Change emails.
The primary contact is also required for customer item task generation and contract closure notification.
If an Accounts contact does not exist, then the system will use the primary contact as the default contact in the financial

- Email Address: Type in the email address for the primary contact.
- **Invoice Method:** The Invoice Delivery Method defines how the system will deliver the Invoices<sup>1</sup> during the 'Run Print / Email

<sup>1</sup>The options are EMAIL, POST (for printing) and PREM for Email and Print



Batch' step of the Month End Billing Run.

- For Emails: Make sure that the contact you link to the delivery method has a valid email address.
- **To Print:** These documents will print to the printer specified in the **Printer Service Setup**.
- **Primary is Accounts Contact:** This flag identifies and configures the Primary Contact as the Accounts Contact.
  - This information will be copied to the Accounts Contact and Email address fields.
- Accounts Contact: Type in the name and surname of the Accounts Contact.
  - The Accounts Contact receives all the financial related emails and will be saved as the main contact in the financial system. Month End Contract Billing run emails are usually<sup>1</sup> sent to this contact.
- Email Address: Type in the email address for the accounts contact.
- Complete the **Shipping** and **Billing Address** details.

**Note 1:** The Billing Address is <u>mandatory</u>. If the Billing and Shipping addresses are the same, then first type in the Billing Address, then click on the *Copy Billing to Shipping* check box to quick-populate the Shipping fields.

Note 2: The *Billing Address* is where the invoices are sent.

<sup>1</sup>This is defined by the Invoice Method.



Note 3: The *Shipping Address* is where an asset or equipment item is located or where services are required. If you are using TechConnect, this is the <u>address where the Technician goes</u> to render services when he accepts a Call.

- **Trading As Name:** Type in the customer's trading name. This is what the company is known as.
- Shift Pattern: Search for and select the relevant shift. This is the customer's trading (business) hours and is linked to <u>SLA</u>. Refer to <u>Setting up Shifts</u> if the shift required is not on the list.
- Note: <u>SLA</u> will be calculated based on the shift pattern e.g. if the trading hours are from 8 am 5 pm and a call is logged at 4 pm, <u>SLA</u> will start calculating at 4 pm and stops at 5 pm and resumes again the next day at 8 am.
- **Rank:** This is used in conjunction with CRM Call cycle rank<sup>1</sup>.

**Note** that rank is based on how much you value this customer and helps to define the Call cycle per client. For example, a **Wood** ranking indicates that you will only contact this customer every 365 days - this customer is **not** valuable to you. However a **Platinum** ranking indicates that this is a **very** important customer that you wish to maintain a good relationship with, therefore you will contact them every 15 days.

> Each customer <u>must</u> be <u>linked to a Rank in CRM</u> as well as linked in this *Customer Maintenance* screen in BPO2.

 $^1\mathrm{For}$  example:- Gold - Call Cycle 30 days Silver - Call Cycle 90 days Bronze - Call Cycle 180 days



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Open Windows 🔻						User :	JulandaK	07/01/2021	Version: 2.4.0.	11 Example Company

## **COMMERCIAL FRAME**

- When you have finished filling in the customer details, click on the *Commercial* tab.
  - **Sites:** A customer could be linked to a single site or multiple sites. Ensure that the correct site(s) are allocated.
  - Banking Details: Type in the *Bank Name*, *Branch Name*, *Branch Code*, *Account Name*, *Account Number* and select the *Account Type*.

This is important for customers who use the Debit Order payment method.

- **Payment Method:** Search for and select the method the customer will use to pay.
  - If this customer need to be included in the Debit Order run, you need to ensure a Payment Method is selected



where the <u>Payment Method</u> Code Type is DO (Debit Order).

- **Commercial:** Click on the *search* button to select the commercial (price list) you wish to link to this customer.
- **Department:** Search for and select the department for this customer.
  - This is important when you use a segmented ledger where department is one of the segments. This is for reporting purposes.
- Salesman: Check this field to link an additional Salesman to this customer.
  - Can be used as a reference from BPO if the main salesman is not available, or in CRM - also allows selected Salesman access to the Customer.
- **Custom 1-10:** You can use these fields to add additional information not currently set up for the customer. The field names can be re-named according to your company requirements. Please contact your BPO specialist or CO3 Support for assistance.

#### **USER DEFINED FIELDS**

The inclusion of User Defined Fields is to provide more information within the Asset, Contract, Customer and Location modules so that associated work/processes can be carried out more efficiently. It will serve as connective tissue between contracts and call center functions to improve call center performance by having readily accessible information.

Version Compatibility<sup>1</sup>

• Click on the User Defined dock panel tab to open the panel

<sup>1</sup> BPO2 v2.5.0.8 or higher. "Add Interest Rate " on page 2



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	Web Site	www.hopeworks.co.za	Accounts Contact	Mandy Jefferson					
Contractor	Phone No.	031 123 4567	Email Address	bianca@co3.co.za					
Contacts	Tax Rate	15.00 -	<ul> <li>Billing Address</li> </ul>		*				
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Addresses	Registration No.	123456789		Durban South South Africa					
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	Credit Check		-	Forest Hills					
	Credit Terms			New Town					
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	Account Manager		Postal Code						
Project History	Is Debtor		Trading As Name						
	Send SMS	Send Email	Shift Pattern						
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Contracts									
Authorisation Information									
Open Windows 🔻							User : BiancaD	23/04/2022 Version : 2.5.0.9	Example Company

### Add New Custom Field

New User Defined Customer Fields can be created from here. Any User Defined field created will be available for update on all customers.

Right click in User Defined panel and select Add New Custom
 Field



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- Type in a **Code** and **Description** for the new User Defined Field.
- Select the Input Type.
- Click on the **Save** button.

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#### Add Lookup Items

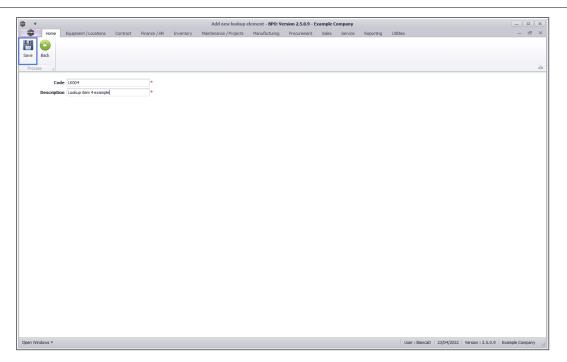
For Lookup Input Variables - the right click context menu includes the option to add items to the Lookup List.

 Right click on Lookup input type Custom Field and select Add new lookup item (you may need to scroll down).

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		www.hopeworks.co.za	Accounts Contact			CUST_CODE03			
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	VAT No.	987654321		Forest Hills	_		Add new lookup item	-	
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	Credit Terms	30 Days 👻		New Town	-				
Call History	Reporting Area	Durban 👻		Durban South	-				
	Salesman	Blanca Du Tolt 🔹 •		South Africa	-				
	Account Manager	Bianca Du Toit 🔹	Postal Code	1234	-				
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- Type in the lookup item *Code* and *Description*.
- Click on the *Save* button.





# **Update Custom Field**

This will update the detail for the User Defined Field for this contract.

• Variable Value: Type in, pick from the Lookup List or Toggle Yes/No depending on the Input type.



<b>.</b>			Customer Maint	enance - BPO: Version 2.5.0.9 -	Example Co	mpany				×
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Save Back										
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Functions	Customer Code		,	biancadts@gmail.com		Code	CodeDescription	VariableValue		Defined
		Hope Works (Pty) Ltd	Invoice Method		•	CUST_CODE01	Customer UDF Free Input Text Example	Text		
Notes	Credit Limit	5000 1		Primary is Accounts Conta	+	CUST_CODE02	Customer UDF Lookup List Example	LK002		
		www.hopeworks.co.za	Accounts Contact			I CUST_CODE03	Customer UDF Yes No Example	✓		
		031 123 4567		bianca@co3.co.za						
Contacts	Tax Rate	15.00 -	Billing Address	PO Box 7452						
	VAT No.	987654321		Forest Hills						
	Registered Name	Hope Works (Pty) Ltd		New Town						
Addresses	Registration No.	123456789		Durban South						
	Holding Company	No Holding Co 🔎		South Africa						
	Currency	South African Rand 🔹 *	Bill Postal Code							
Documents	Account Code		Physical Address	Copy Billing to Shipping	_					
	Credit Check	No Check 🔹		Forest Hills						
	Credit Terms	30 Days 🔻		New Town						
Call History	Reporting Area	Durban 🔻		Durban South						
	Salesman	Blanca Du Tolt 🔹 🔹		South Africa						
	Account Manager	Bianca Du Toit 🔹	Postal Code	1234						
Project History		Is Consolidated	Trading As Name	Hope Works						
	Send SMS	Send Email 🗸	Shift Pattern	Normal Week	<b>*</b> *					
			Rank	Gold	-					
History										
Equipment										
Contracts										
Authorisation Information										
Open Windows 🔻							User : BiancaD 23/04/2022 Ve	ersion : 2.5.0.9 Example	e Company	

#### SAVE CUSTOMER DETAILS

8. When you have completed the new customer details, click on *Save*.

		Cust	omer Maintenance - BPO: Vers	sion 2.4.0.11 - Exar	nple Company				_ <b>_</b> ×
Home Equipr	nent / Locations Contra	ct Finance / HR Inver	ntory Maintenance / Projects	Manufacturing	Procurement S	ales Service	Reporting	Utilities	_ & ×
			7						
Save Back	-8	_							
Process 🔺			1						6
Links 4	Detail Commercial		Ý						
Enter text to search P	Fitor	A New Test Site	Ealorman	Abigail Milne					
Functions	Sites	Bloemfontein	Salesinan	Andie Khumalo	0				
- uncerents		Cape Town		Arial Blythe					
Notes		🗹 Durban		🗹 Belinda Sharman					
		Pretoria		Ben Johnson	-				
	Bank Name		• Other1						
Contacts	Branch Name		Other2						
	Branch Code		Other3						
	Account Name		Other4						
Addresses			Other5						
	Account No.								
	Account Type		<ul> <li>Other6</li> </ul>	Field 6					
Documents	Payment Method		<ul> <li>Other7</li> </ul>	Field 7					
	Commercial	Default	• • Other8	Field 8					
	Department		<ul> <li>Other9</li> </ul>	Field 9					
Call History			Other10	Field 10					
Project History									
r roject notor j									
History									
Authorisation Information									
Open Windows 🔻						User : JulandaK	07/01/2021	Version : 2.4.0.11	Example Company



 You will return to the *Customer Listing* screen where you can *view* the Customer details in the *Active* status.

				Custor	ner Listing -	BPO: Versio	n 2.4.0.11 - Exa	ample Company				JU
Home Eq	uipme	ent / Locations	Contract F	inance / HR Inventory	Maintenan	ce / Projects	Manufacturir	ng Procurement	Sales Service	Reporting Utilities	- 5	7
🕀 🍃 🗙	G		2			0	Durban	•	à 🛍 🖉	}		
Add Edit Delete	Syr	nc View	Save Layout Wo	rkspaces Hold Releas	Approve Account	Decline Account	Active	<ul> <li>Refresh Exp</li> </ul>	ort Reports Print			
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	a				a roccasing	9	Guire	- 16	inclusion a mini-			
	* 0					Y						
nter text to bearch	1	CustomerC	ode CustomerType	CustomerName	Department	DeptName	SiteDescription	CustomerCreditLimit	CustomerWebSite	CustomerPhoneNumber	CustomerVATNo	
Functions		P =0:	* <b>0</b> ¢	a 🗖 c	<ul> <li>C</li> </ul>	* <b>0</b> :	R <b>O</b> C	-	a 🗖 c	* <b>0</b> :	a 🗖 c	
		CUS001	RE	Cash Sales Account			Durban	10,000.00		000 000 0000	0000000000	
Notes		HOP001	RE	Hope Works (Pty) Ltd			Durban	5,000.00	www.hopeworks.co.za	031 123 4567	987654321	
		DER001	RE	Derton / Technologies			Durban	250.00	www.dertonweb.co.za	031 123 4785	98/7654321	
		OFF001	RE	Office Supplies Unlimited			Durban	75,000,000.00	www.cnn.co.za	031 789 4561	987456321	
Contacts		YES001	CO	Young Electric			Durban	100,000.00		082555555	2314687641	
		WES001	RE	Westwood Dynamic			Durban	10,000,000.00	www.web.co.za	031 789 4561	123456789	
		TIA001	RE	Titan Group			Durban	100,000.00	www.web.co.za	031 852 9632	123258741369	
Addresses		BOT0001	Π	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	Π	Danny Storm IT Cafe			Durban	75,000.00	1	031 785 4785	123654789	
Documents		PAN001	RE	Panda Copiers			Durban	50,000.00		031 123 4567	123456789	
Cocamento		HAC001	IT	Hack PC - IT Shop			Durban	0.00		031 789 4561	6654357155	
		PIN0001	GV	Pink Shoes			Durban	0.00		031 456 7894	1234	
		HIL000001	HILLCRESTP	Mary Contrary			Durban	0.00		083 559	00000	
Call History		JUS001	RE	Just In Time			Durban	50,000.00	www.justintime.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	
Project History		FIN0001	RE	Fine Hair Salon			Durban	0.00	www.finehair.co.za	031 123 4567	1234	
		BET0001	RE	Betties Summer Shop at t			Durban	0.00			1234	
		biancad	RE	North West Branch			Durban	0.00			0	
History		DAN002	Π	Dancing Shoes			Durban	10,000.00		031 123 4567	123456789	
		BIG0001	CO	Big Bargains			Durban	10,000.00		031 456 7897	123456789	
		MAN0001	RE	Mandy Norton			Durban	0.00			0	
		4 C										Þ

#### QUICK CUSTOMER LOAD

- Quick Customer Load gives you the ability to *quickly* save a customer without having to enter *all* the customer details. Using this mode, assumes that the customer being loaded is a *person* instead of a *company*.
  - In this example, only the *mandatory* fields have been filled in - a few of these will populate by default.
  - The *Customer Code*has not been typed in, as the company configuration is set to <u>auto generate</u> the customer code.
     This means that when saving the customer, the *Customer Code* will be populated based on the *Customer Name*.
- 2. Click on *Save*.



â		Customer Maintenanc	e - B	3PO: Version 2.5.0.3 -	Example Com	pany v2.5.0.0						x
Home Equipment	t / Locations Contract	Finance / HR Inventory	Maint	tenance / Projects M	anufacturing	Procurement	Sales	Service	Reporting	Utilities	- 8	×
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		1234123412	•		Whitton Road							
	Registered Name		-		Westriding							
Addresses	Registration No.		1		Durban							
	Holding Company	No Holding Co	ρ		KZN							
	Currency	South African Rand	• •	Bill Postal Code								
Documents	Account Code		P	Physical Address	Copy Billin	ig to Shipping						
	Credit Check	Terms and Limit	•	Physical Address								
	Credit Terms	COD	•									
Call History	Reporting Area		•									
	Salesman	Arial Blythe	•									
	Account Manager		•	Postal Code								
Project History		un		Trading As Name								
	Send SMS	Send Email	$\checkmark$	Shift Pattern	Normal Week		•					
				Rank			•					
Authorisation Information												
Open Windows 🔻					U	lser : JulandaK	11/08/2	021 Vers	ion: 2.5.0.3	Example Co	ompany v2.5.0.0	

- On saving the 'quick' customer, the system will auto create a *Cus*tomer Code based on the *Customer Name*.
- You can now *view* the Customer in the *Customer Listing* screen where the status is set to *Active*.
- You can go back and <u>add to or edit the Customer details</u> at a later stage, if necessary.



	Home	Equin	oman	t / Locations	Contract Fi	inance / HR	) Tour	entory		ce / Projects		ample Company	Sales Service	Reporting Utilities		-
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Notes			OFF001	RE		pplies Unlir	mited		1	Durban		www.cnn.co.za	031 789 4561	987456321		
			YES001	CO	Young Ele				1	Durban	100,000.00		08255555	2314687641 123456789		
			WES001 TIA001	RE		d Dynamic			1	Durban Durban		www.web.co.za	031 789 4561 031 852 9632	123456789		
Contacts			BOT0001	IT	Titan Gro	up etworking i			/	Durban		www.web.co.za	031 852 9632	9874563201		
			SAM001	RE	Samantha	-	Inc	1		Durban		www.web.co.za	031 123 4567	123456789		
			DAN001	IT		orm IT Cat	60	1		Durban	75,000.00		031 785 4785	123654789		
Addresses			PAN001	RE	Panda Co		ic.	;		Durban	50,000.00		031 123 4567	123456789		
			HAC001	П	Hack PC -			1		Durban	0.00		031 789 4561	6654357155		
				PIN0001	GV	Pink Shoe			1		Durban	0.00		031 456 7894	1234	
				HIL000001	HILLCRESTP	Mary Con					Durban	0.00		083 559	00000	
Docum	Documents			JUS001	RE	Just In Ti		/			Durban	50,000.00	www.justintime.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 Tei	a Supplies				Durban	75,000.00		031 456 7891	123456789	
Call History			FIN0001	RE	Fine Hair	Salon				Durban	0.00	www.finehair.co.za	031 123 4567	1234		
			BET0001	RE	Bettes Su	ummer Sho	p at t			Durban	0.00			1234		
			biancad	RE	North We	st Branch				Durban	0.00			0		
Project History		У		DAN002	п	Dancing S	hoes				Durban	10,000.00		031 123 4567	123456789	
				BIG0001	co	Big Barga	ins				Durban	10,000.00		031 456 7897	123456789	
				MAN0001	Æ	Mandy No	orton				Durban	0.00			0	
History				DAN0003 🖌	π	Dance Sh	oes				Durban	0.00			123456789	
		+	BIL0001	CO	Billys Barr	ı				Durban	0.00			0		
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			4	Ċ												

#### **Related Topics**

• Company Configuration

MNU.061.001