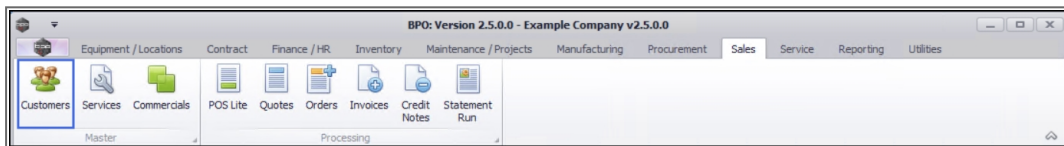


SALES

CUSTOMERS - VIEW CUSTOMER

The **View** button allows you to view more information linked to your customer.

Ribbon Access: *Sales > Customers*

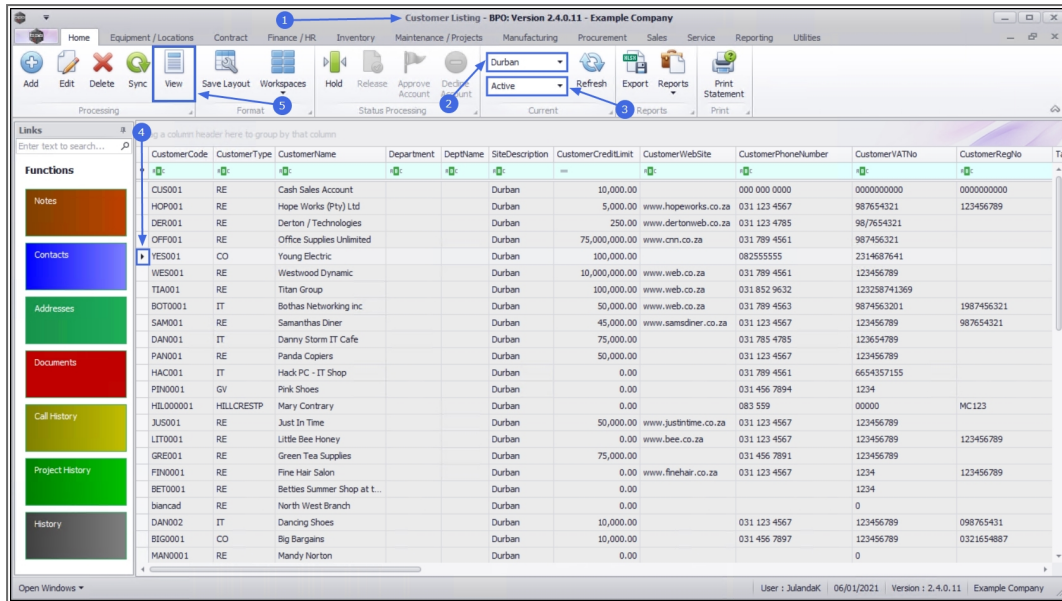


1. The **Customer Listing** screen will be displayed.
2. Select the **Site** where the customer can be located.
 - The example has Durban selected.
3. Select the **Status** for the customer.



Note that you can view customer information for a customer in any status.

- The example has **Active** selected.
4. Select the **row** of the **customer** you wish to view.
 5. Click on **View**.



6. The **View Customer** screen will be displayed.

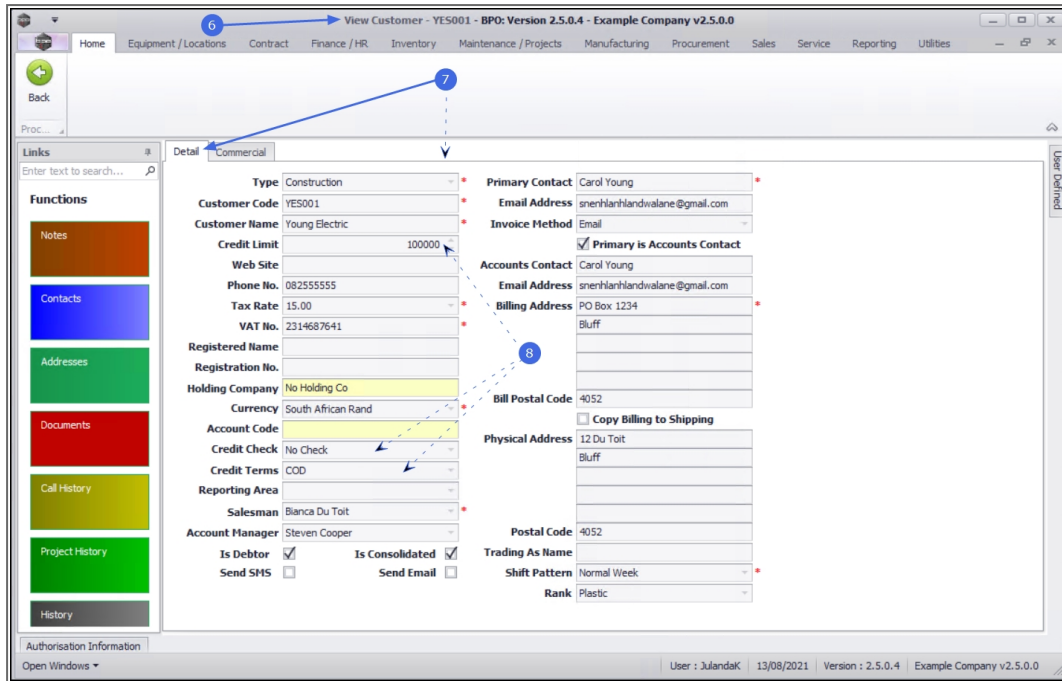


Note that this is for view only and no changes can be made or saved on this screen.

7. This screen will open with the **Detail** panel by default.

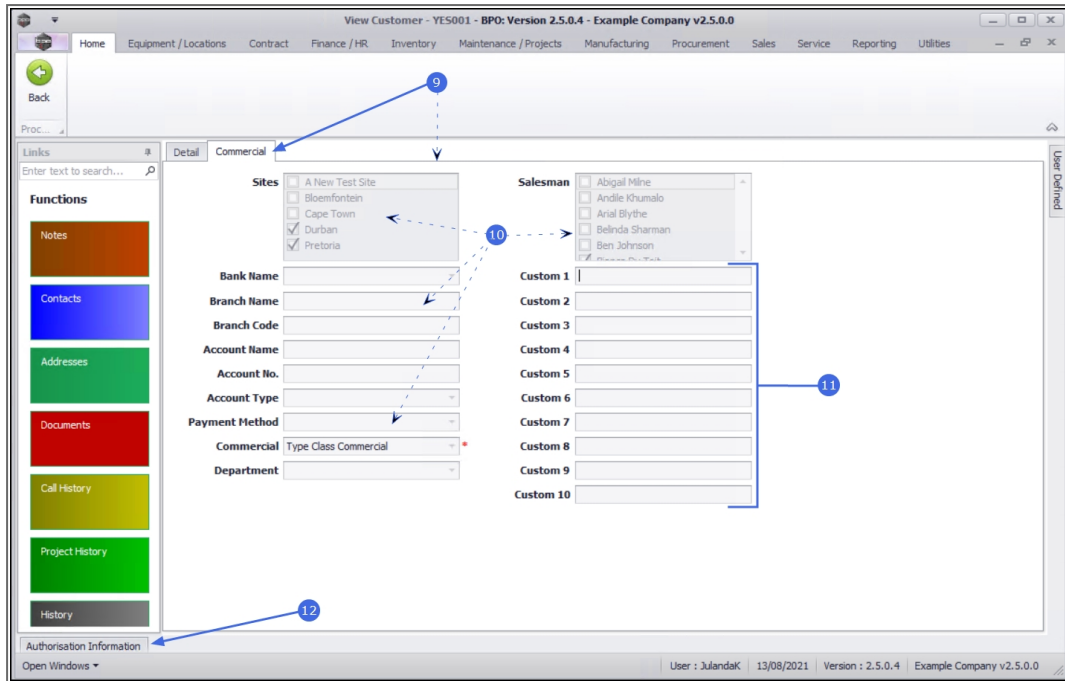
DETAIL PANEL

8. From the Detail panel you can view most of the customer details including Credit Limit, Credit Check and Credit Terms.



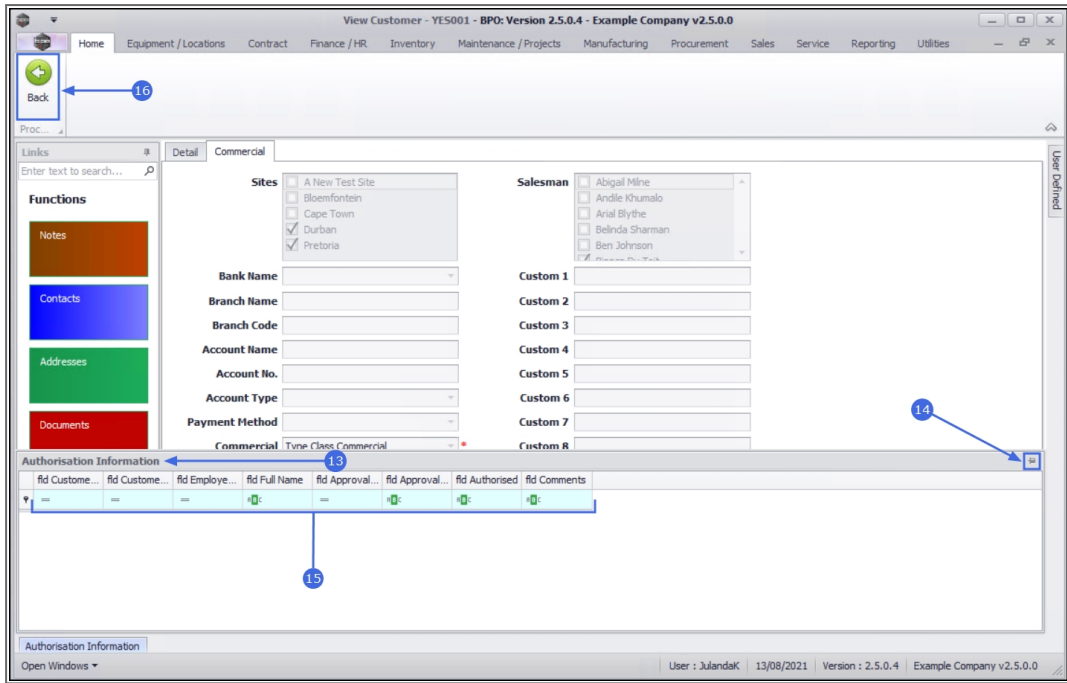
COMMERCIAL PANEL

9. Click on the **Commercial** tab to display the **Commercial details** frame.
10. Here you can view the sites and salespersons linked to this customer, as well as the customer banking details, payment method e.g. Debit Order and the customer commercial.
11. **Custom 1 - 10**: Any additional data added e.g. alternative payment method can be viewed. These field names are configured according to your company requirements. Contact your BPO Specialist or CO3 Support for assistance.
12. Click on the **Authorisation Information** tab.



AUTHORISATION INFORMATION PANEL

13. The **Authorisation Information** panel will be expanded.
14. You can **dock** this screen to make it easier to work in.
15. Here you can view the **Approval Date** and **Time**, the **Name** of the person who authorised this customer as well as any **Comments**, where applicable.
16. Click on **Back** to return to the **Customer Listing** screen.



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