

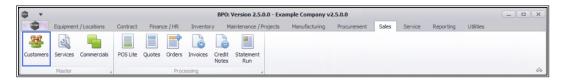
# **SALES**

## **CUSTOMERS - EDIT CUSTOMER**

The **Edit** customer functionality allows you to edit certain details on the Customer Maintenance screen.

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



- 1. The *Customer Listing* screen will be displayed.
- 2. Select the *Site* that you wish to work in.
  - The example has **Durban** selected.
- 3. Select the *Status* for the customer you wish to edit.

Note that you can edit a customer in all States except for *New-CRM* and *Inactive*.

- The example has *Active* selected.
- 4. Click on the *row* of the *customer* you wish to edit.
- 5. Click on *Edit*.

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



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- 6. The *Customer Maintenance* screen will be displayed.
- 7. This screen will open with the *Detail* panel by default.
- 8. From the Detail panel you can now *edit* and *add* to the customer Details, as required.

## **EDIT COMMERCIAL TAB**

9. Click on the *Commercial* tab to display the commercial details.



#### Customers - Edit Customer

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- Add or edit the Sites and Salespersons linked to this customer, as well as the Customer Banking Details, the Payment Method, e.g. Debit Order and the Customer Commercial.
- 11. **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.

## **AUTHORISATION TAB**

12. Click on the *Authorisation* tab.



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Documents Payment Method Automated Transfers  Custom 7 Field 7
Commercial Discount Commercial   Custom 8 Field 8
Department Sales Department   Custom 9 Field 9
Call History Custom 10 Field 10
Project History 13 Authorisation Information
Authorsation Information   Dpen Windows ▼ User : JulandaK   12/08/2021   Version : 2.5.0.4   Example Company v2.5.0.0

- 13. The *Authorisation Information* panel will be expanded. This panel cannot be edited from this screen. You can *dock* this panel to the screen.
- 14. Here you can <u>view</u> the *Approval Date* and *Time*, the *Name* of the person who authorised this customer with *Comments*, where applicable.

## **SAVE EDITS**

- 15. Click on *Save* to update the Customer information and save any changes. *Close* this screen to return to the *Customer Listing* screen.
  - Click on *Back* if no changes are required or to discard any changes made.



### Customers - Edit Customer

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