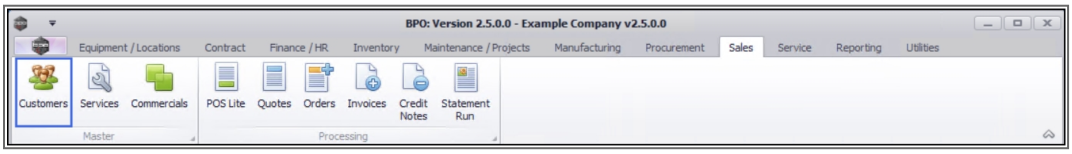
SALES

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*

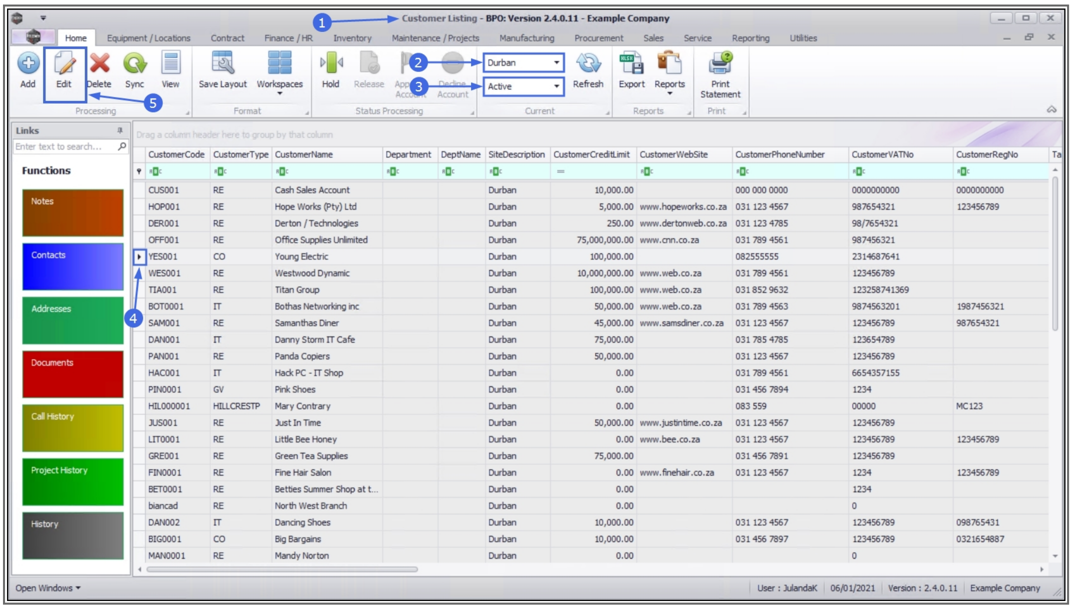


1. The ***Customer Listing*** screen will be displayed.
2. Select the ***Site*** that you wish to work in.
   - The example has ***Durban*** selected.
3. Select the ***Status*** for the customer you wish to edit.

   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***.

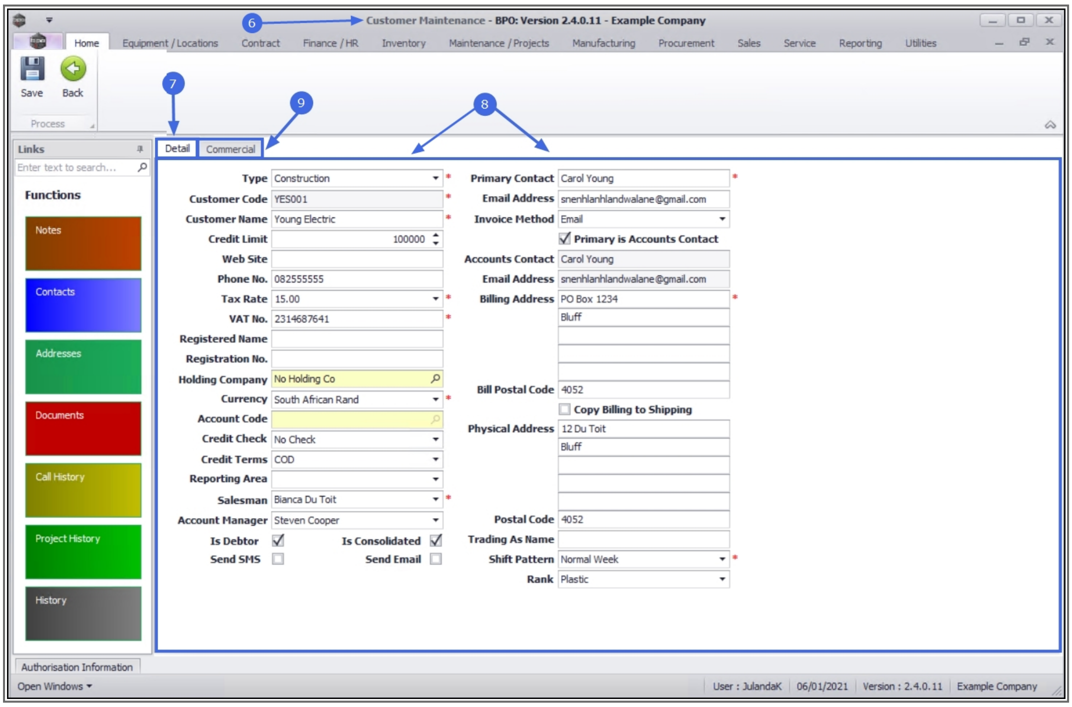
   Short cut key: ***Right click*** to display the ***All groups*** menu list. Click on ***Edit***.



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

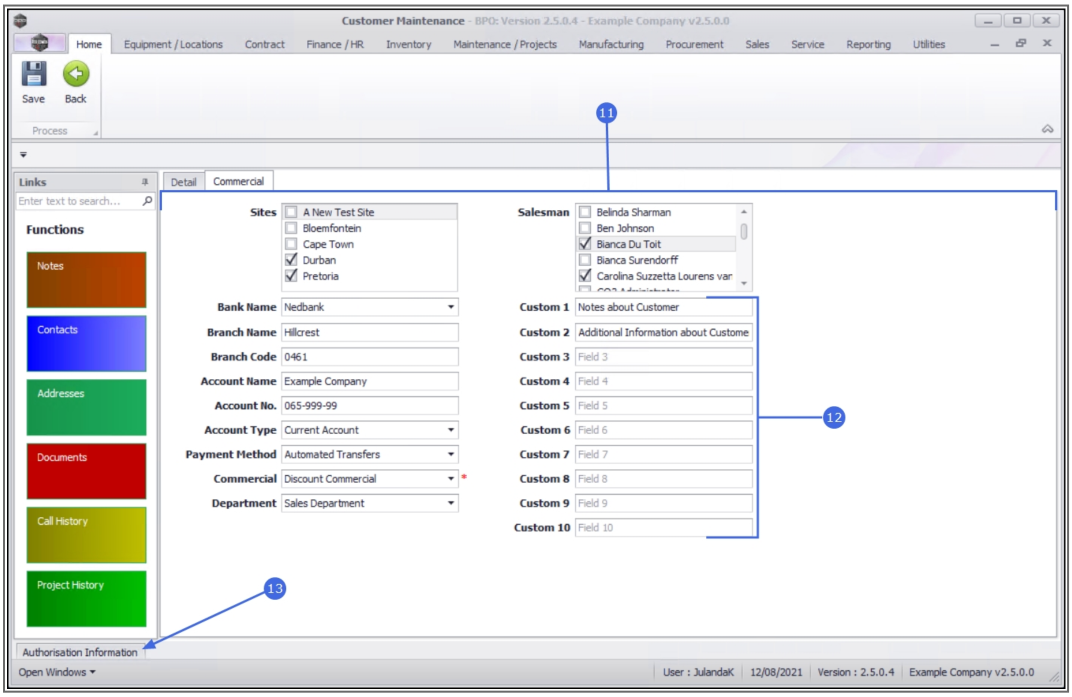
9. Click on the ***Commercial*** tab to display the commercial details.



10. ***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

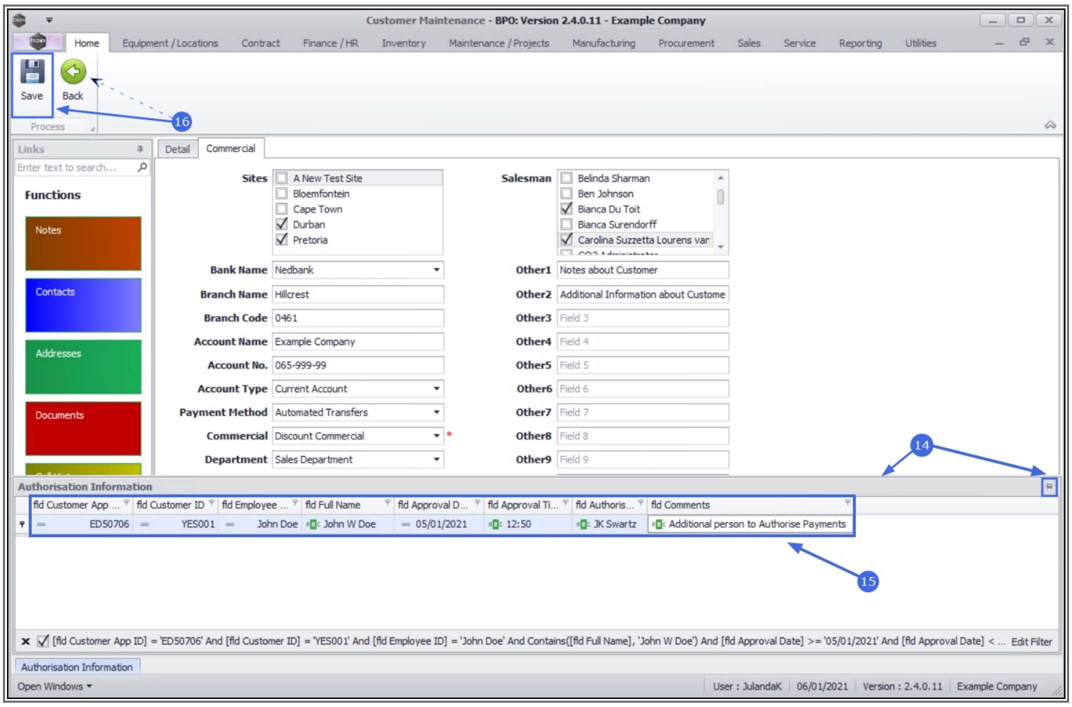
12. Click on the ***Authorisation*** tab.



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 view 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.



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