SALES

CUSTOMERS - NEW CRM CUSTOMER

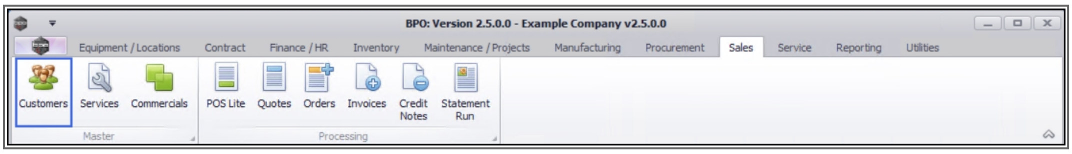
Customers can be raised in CRM, and can be found in BPO2 in the Customer Listing screen under the:

- **New - CRM** status (waiting to be Released) and in the
- **Released** status (waiting to be Approved or Declined).

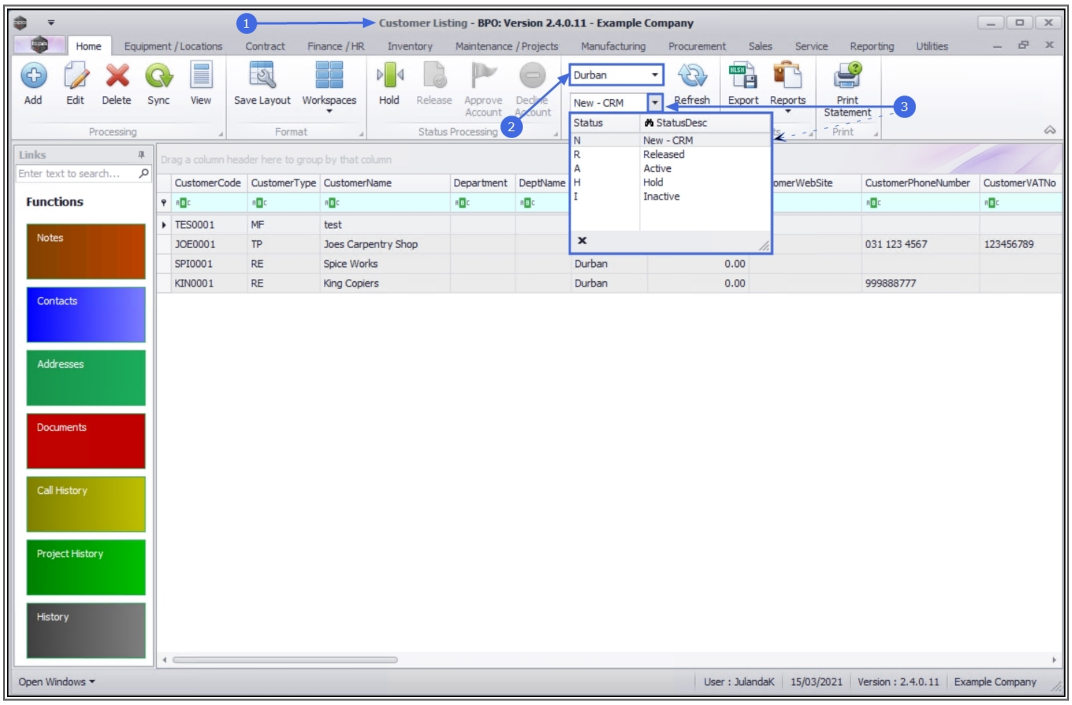
Once the customer details and information have been checked and validated and then **Released**, the customer can then be **Approved** and will then be **Active** in BPO2.

If Is Debtor is selected in the View Customer screen, then the customer will also be raised in Pastel.

Ribbon Access: *Sales > Customers*



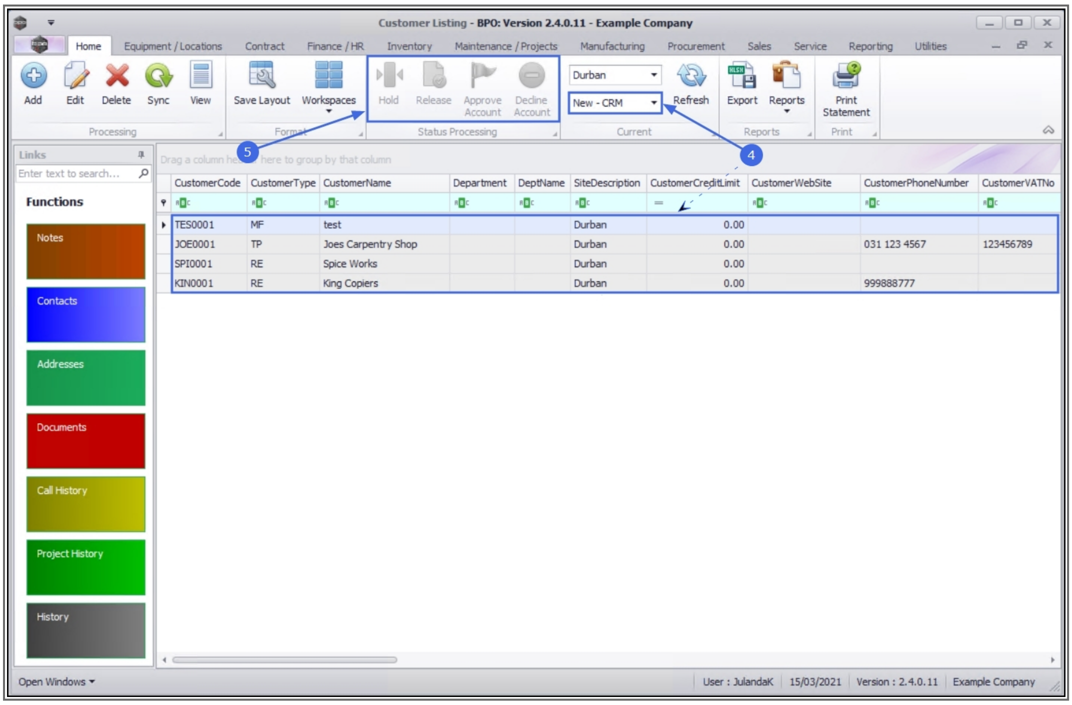
1. The ***Customer Listing*** screen will be displayed.
2. Select the ***Site*** that you wish to work in.
    - The example has ***Durban*** selected.
3. Change the ***Status*** to **New - CRM**.



4. The Customer listing screen will now filter using the ***New-CRM*** status.
5. You will note that the ***Hold***, ***Release***, ***Approve*** and ***Decline*** buttons are inactive in this status, because these Customers are waiting to be ***checked*** and Released.

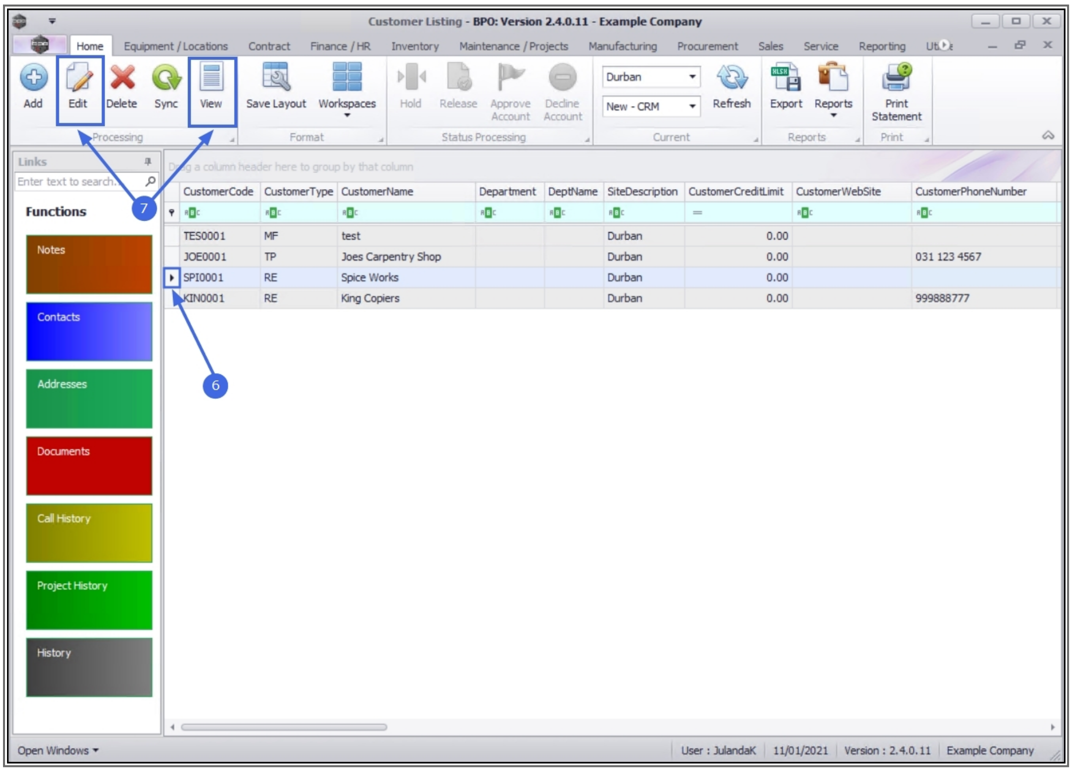
> Note that the *Hold* and *Release* processes are done in *CRM*.

> Note that the *Approve Account* and *Decline Account* processes are done in the *Released* status of the *Customer Listing* screen.



6. Select the ***row*** of the ***new CRM customer*** that you wish to view the details of.
7. Click on either ***Edit*** or ***View***.

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

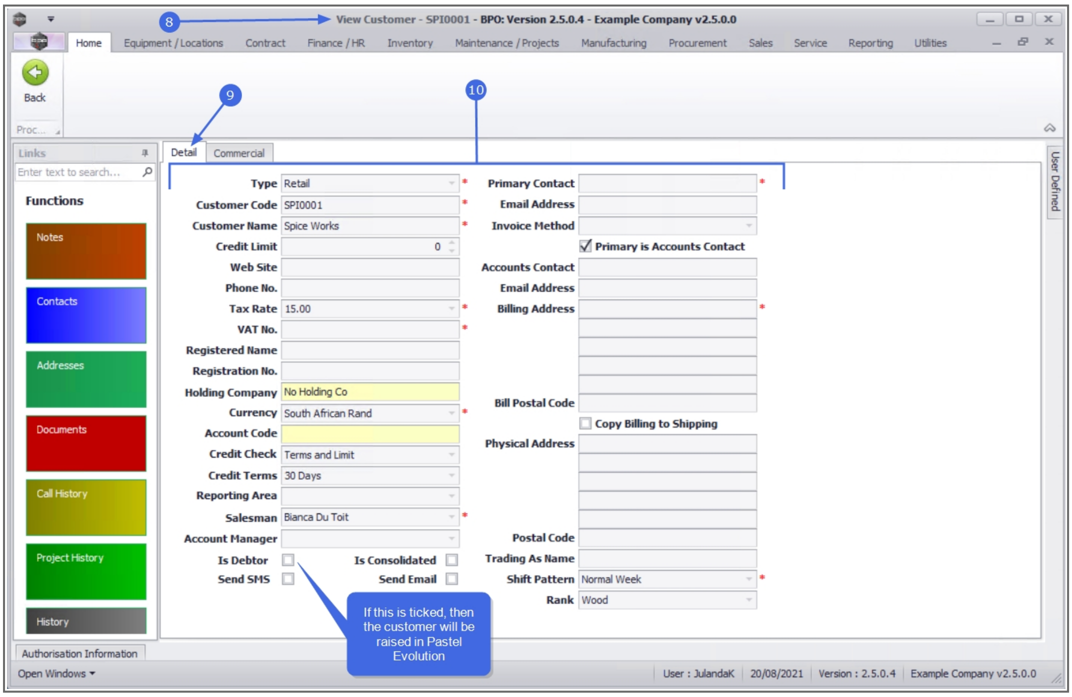


8. The ***View Customer - [ ]*** screen will be displayed.

> Note that the information is *view-only* and no changes can be made or saved as this CRM customer is in the *New* status.

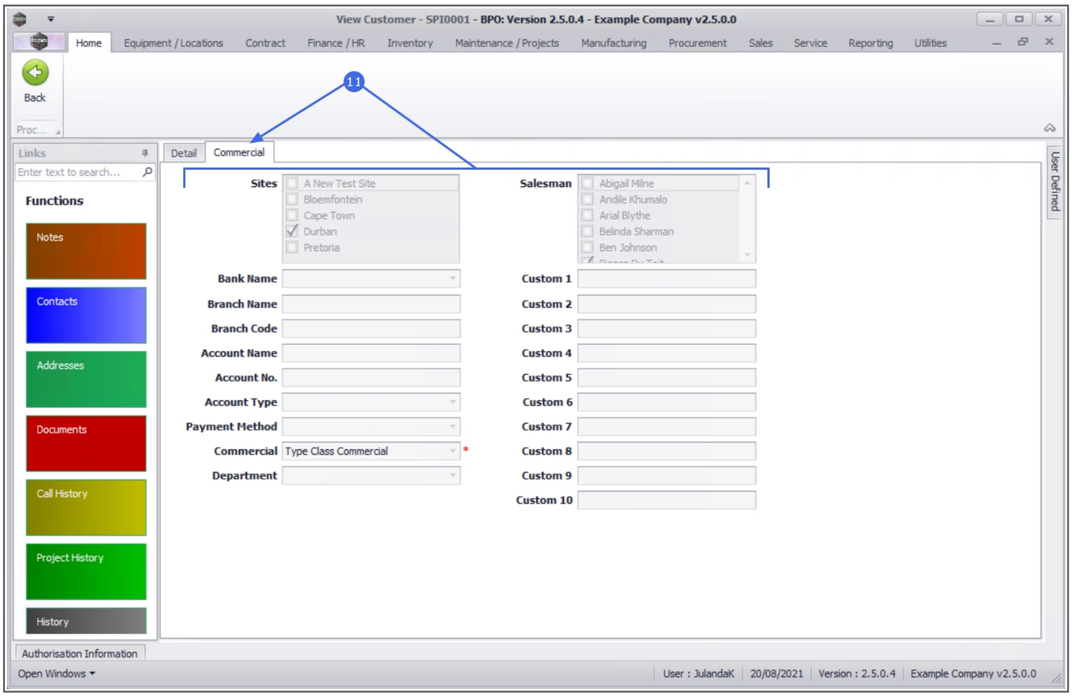
9. The customer ***Detail*** frame will display by default.
10. You can view the Customer Name, Billing and Physical address, Tax Rate, Registration information and Financial details for this customer.

> Note the *Is Debtor* check box - If it is ticked, then the customer will be raised in Pastel Evolution.



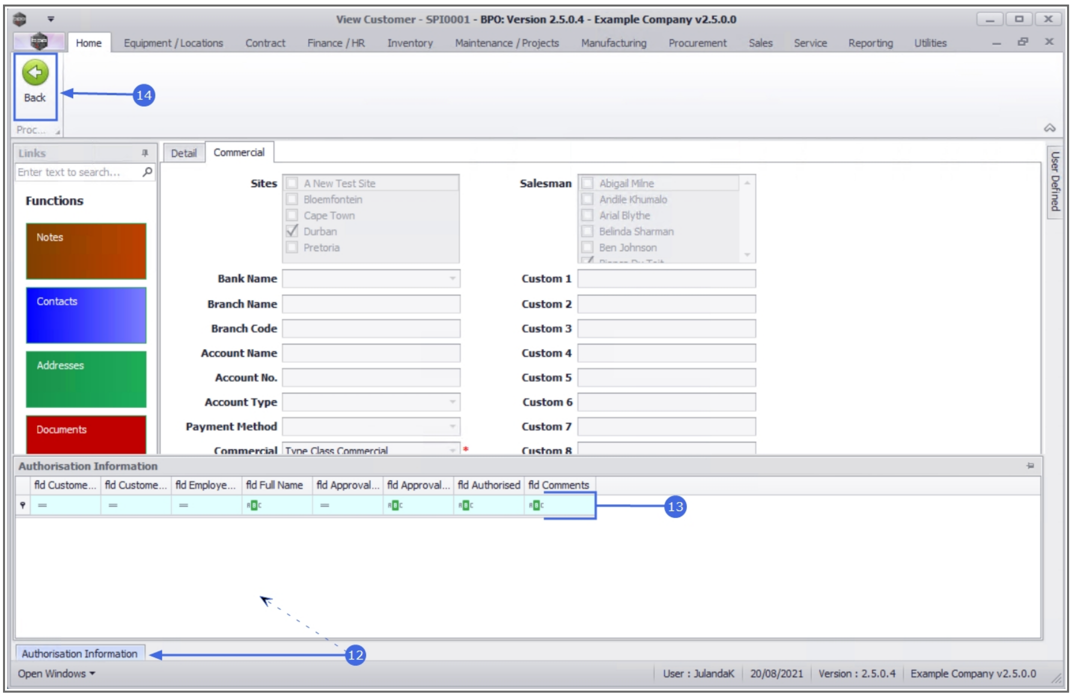
COMMERCIALS TAB

11. Click on the ***Commercials*** tab to view the ***Site*** and ***Salesman*** name that the customer is linked to as well as the ***Banking details*** and ***Custom 1 - 10*** fields



AUTHORISATION INFORMATION

12. Click on the ***Authorisation*** Information tab to expand the ***Authorisation Information*** panel
13. You will be able to ***view*** information regarding the authorisation of this CRM customer ***once it has been authorised***.
14. Click on ***Back*** to return to the ***Customer Listing*** screen.



Related Topics

- Customers - Approve CRM Customer
- Customers - Decline CRM Customer

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