

SALES

CUSTOMERS - APPROVE CRM CUSTOMER

CRM customer details can only be *viewed* in the *New - CRM* status. The customer has to be *Released for approval* in *CRM* once the customer details and information have been checked and validated.

Once this has been done, the new customer can be **Approved** and will then be **Active** in BPO2 and will move to the **Released** status.

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. Change the *Status* to **Released**.



Customers - Approve CRM Customer

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- 4. The *Customer Listing* screen will be updated using the Status filter selected to display all the Customers waiting for *Approval*.
- 5. Select the *row* of the Customer you wish to *Approve*.
- 6. Click on *Approve Account*.

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



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- 7. When you receive the *Customer Authorisation* message informing you that;
 - Authorisation for Customer, [customer name], has been successful.
- 8. Click on *OK*.



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The Customer will be *removed* from the Customer Listing screen where the status is set to *Released*.

VIEW APPROVED CUSTOMER IN ACTIVE STATUS

- 1. Change the Status to *Active* using the Status drop-down list.
- 2. You can now view the *approved customer* on the Customer Listing screen.



Customers - Approve CRM Customer

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Related Topics

Customers - Decline CRM Customer

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