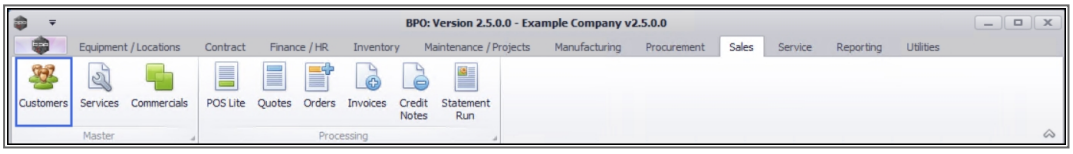
SALES

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**.

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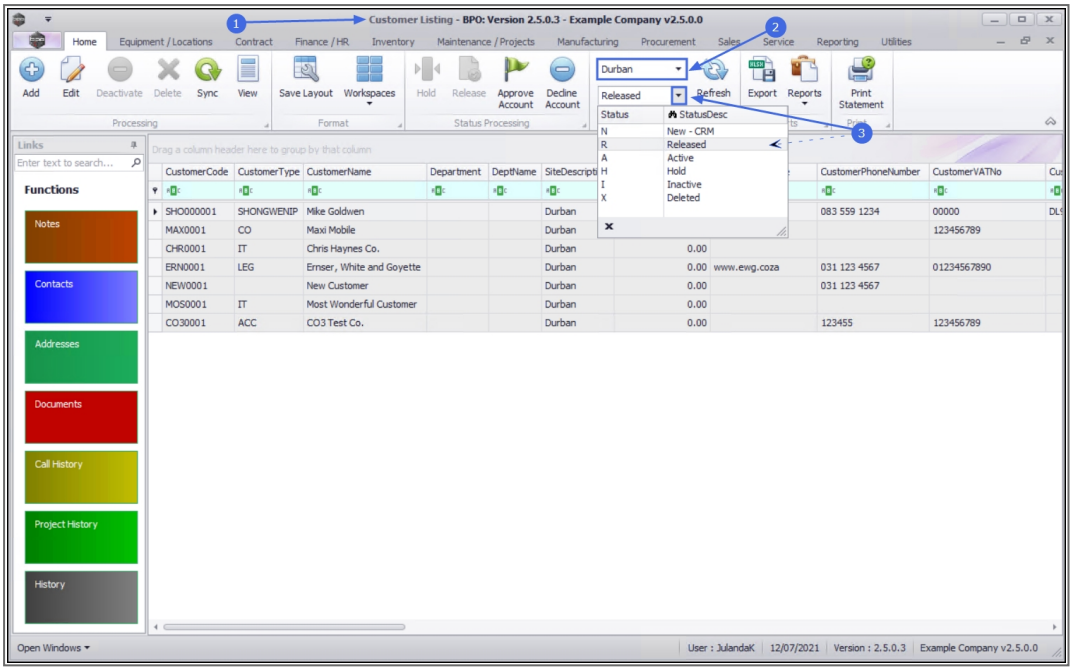

4. The ***Customer Listing*** screen will be updated using the Status filter selected to display all the Customers waiting for ***Approval***.
5. Select the ***row*** of the Customer you wish to ***Approve***.
6. Click on ***Approve Account***.

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

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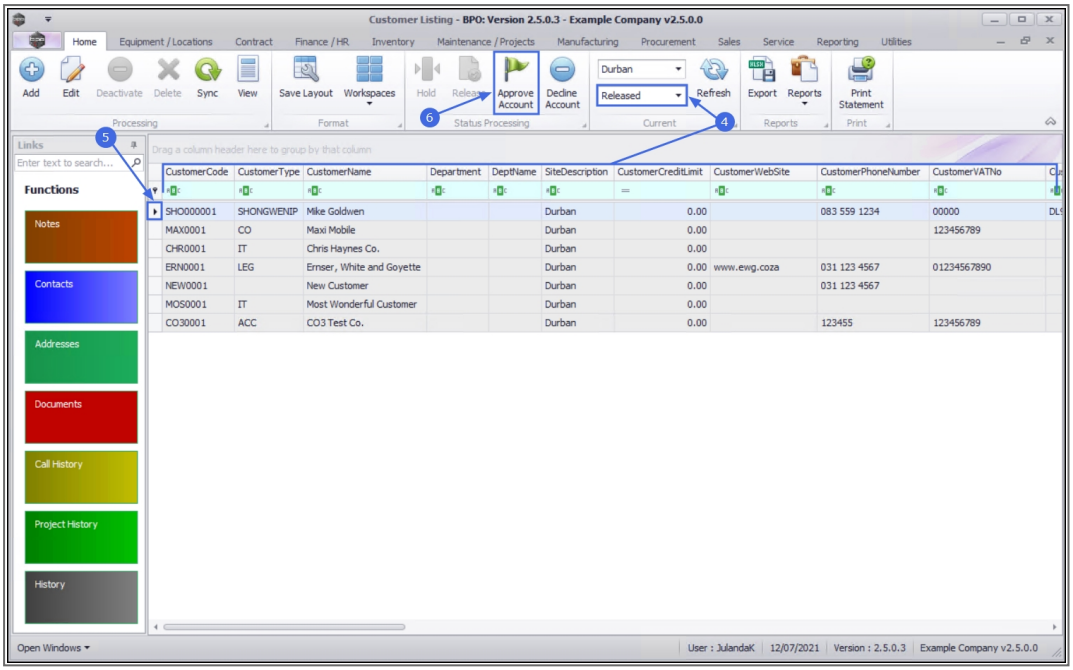

7. When you receive the ***Customer Authorisation*** message informing you that;
    - ***Authorisation for Customer, [****customer name****], has been successful.***
8. Click on ***OK***.

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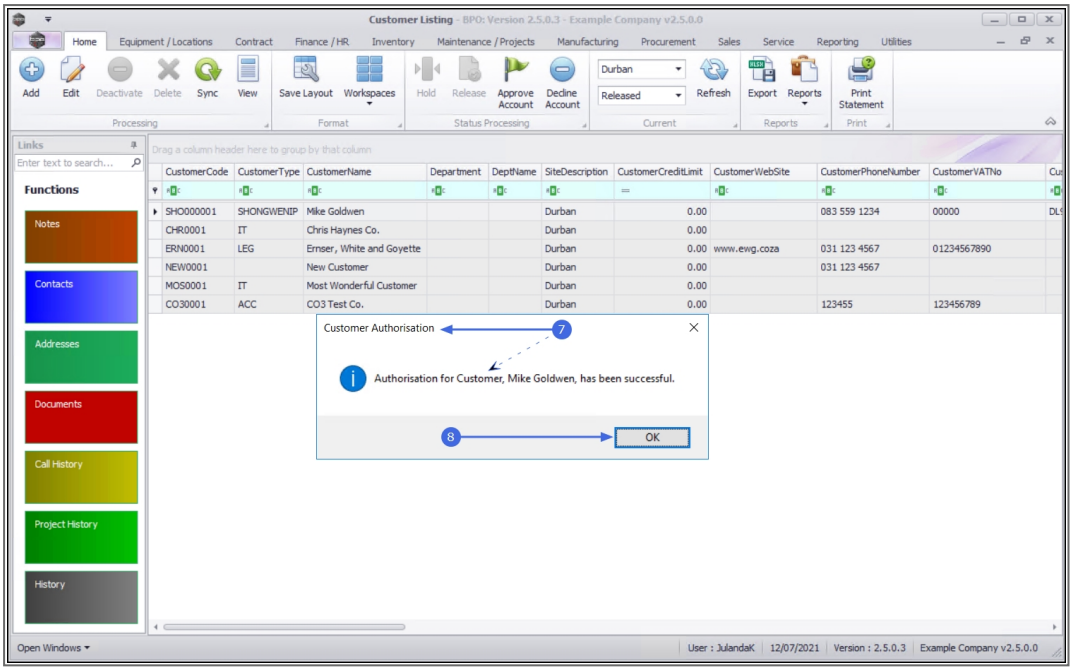

The Customer will be ***removed*** from the Customer Listing screen where the status is set to ***Released***.

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.

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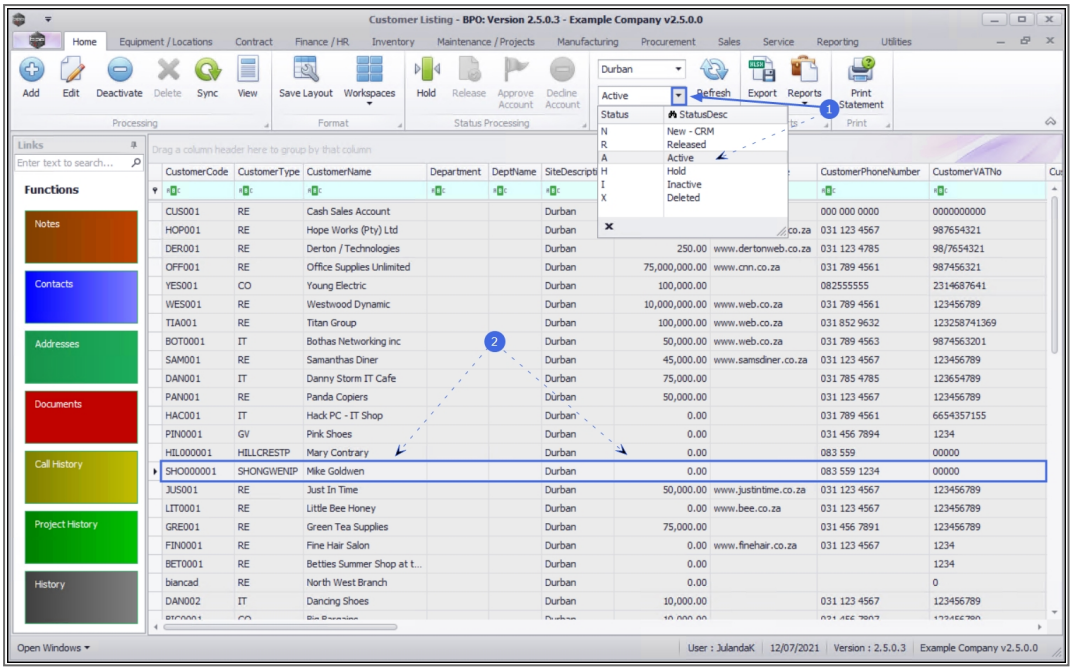

Related Topics

- Customers - Decline CRM Customer

MNU.061.026

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