

SALES

CUSTOMERS - DECLINE 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* that you wish to *decline* the account for.
- 6. Click on *Decline Account*.



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- 7. The *Rejection Comments* text box will display.
- 8. Click in the text area to type in the rejection comment against the Customer.
- 9. Click on Save.

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- 10. When you receive the *Customer Authorisation* message to confirm that;
 - Authorisation for Customer, [customer code] has been rejected.
- 11. Click on *OK*.

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VIEW DECLINED CUSTOMER

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

- 1. Change the Status to *New CRM* using the Status drop-down list.
- 2. You can now view the declined Customer on the Customer Listing screen.



Customers - Decline CRM Customer

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The customer will need to be re-checked and validated in CRM before they can be re-released.

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