

We are currently updating our site; thank you for your patience.

SALES

CUSTOMERS – ADD CUSTOMER

You will need to set up customers in order to create:

- Quotes
- Orders
- Calls
- Invoices
- Contracts
- Credit Notes

A customer can be a **Debtor** or a **Cash Sales Customer**. By setting up the customer as '**Is Debtor**', BPO will create an account for this customer in your financial system. You do not need to specify an account code for the customer in BPO.

If you do not set up the customer as a Debtor, then the customer will be treated as a Cash Sales customer. You will then need to specify a **GL Account Code** for the customer in BPO, in order to post to your Cash Sales account in your financial system.

When you add a customer, you can set up customer **credit limits**, **credit checks** and **credit terms**. Any changes you make to these, will update in Pastel.

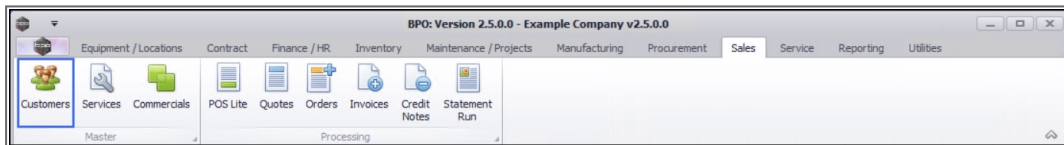
Must Haves when Creating a Customer:

- An [Accounts Contact](#) (Pastel account contact)
- A [Primary Contact](#) (Pastel account contact if Account Contact is not set up & Call Notification Contact)
- An [Invoice Delivery method](#) (for contract billing - invoice emailing)
- One Billing address (and only 1 billing address)
- At least 1 Shipping address (for Sales Shipping and Machine Location links)



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](#)

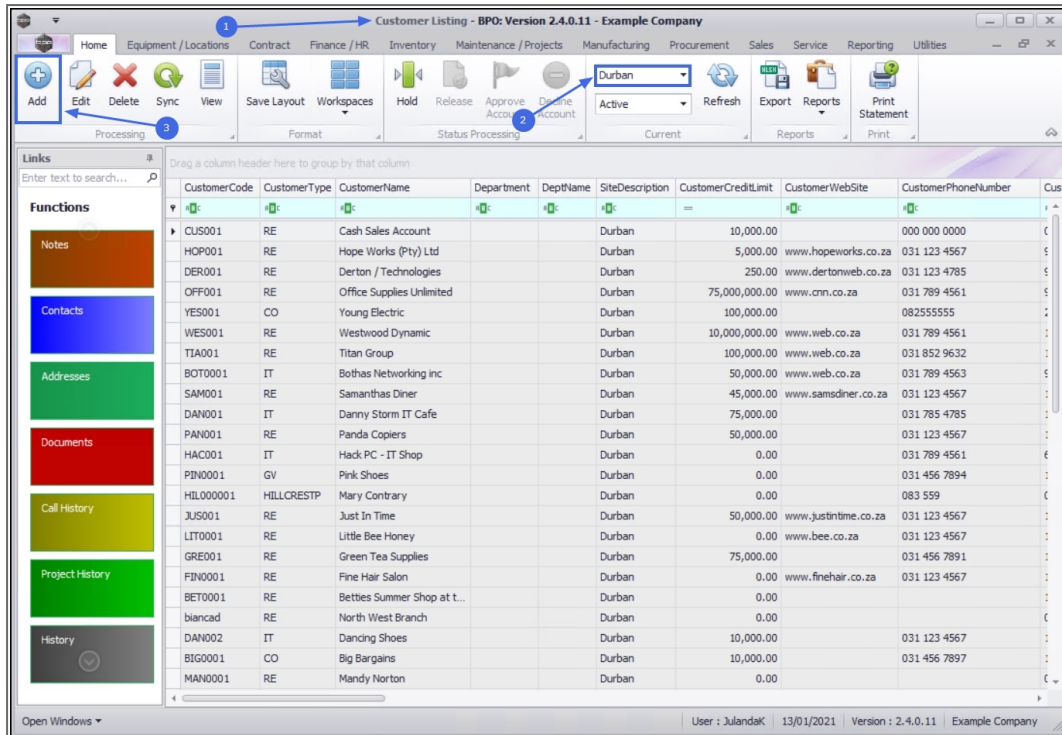
Ribbon Access: Sales > Customers



1. The **Customer Listing** screen will be displayed.
2. Select the **Site** where the customer can be located.
 - The example has **Durban** selected.
3. Click on **Add**.



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



4. The **Customer Maintenance** screen will be displayed.

CUSTOMER DETAILS

- **Type:** Search for and select the type of customer, e.g. Retail.
- **Customer Code:** Type in the Customer Code / Account No for this client. (not required if the [Auto Customer Code Generation is configured](#)).



Note 1: The Customer Code is very important because it is linked to **Pastel Evolution** and all the customer information and history will be linked to this code and not the Customer Name.



Note 2: If you are manually entering the Customer Code, the recommended standard is using a customer code which is 6 characters long starting with 3 letters and then 3 numbers.



Note 3: The recommended setting is to [auto generate](#) the customer code.



Note 4: From BPO2 v2.5.1.4 restrictions have been put into place to prevent special characters from being saved. You will only be allowed to save upper case characters and digits from 0 to 9.

- **Customer Name:** Type in the name of the customer.
- **Customer Credit Limit:** Type in the credit limit for the customer.
- **Web Site:** Type in the customer's website, if applicable.
- **Customer Phone Number:** Type in the customer telephone number.
- **Customer Tax Rate:** This field defaults to the current tax rate, e.g. 15% VAT, but you can search for and select a different tax rate.
- **Vat No:** Type in the customer's VAT number.
- **Registered Name:** Type in the registered (legal) company name for the customer.
- **Registration No:** Type in the customer's registration number, if required.
- **Holding Company:** Click on the **search** button and select **Is Holding**.
 - If you need to set this up as a Pastel 'Linked' Customer, then search for the customer you wish to link this new customer to.



Note that if you link an account here, all transactions done for this customer will post to that account (based on what is set in [Company Configuration](#)).

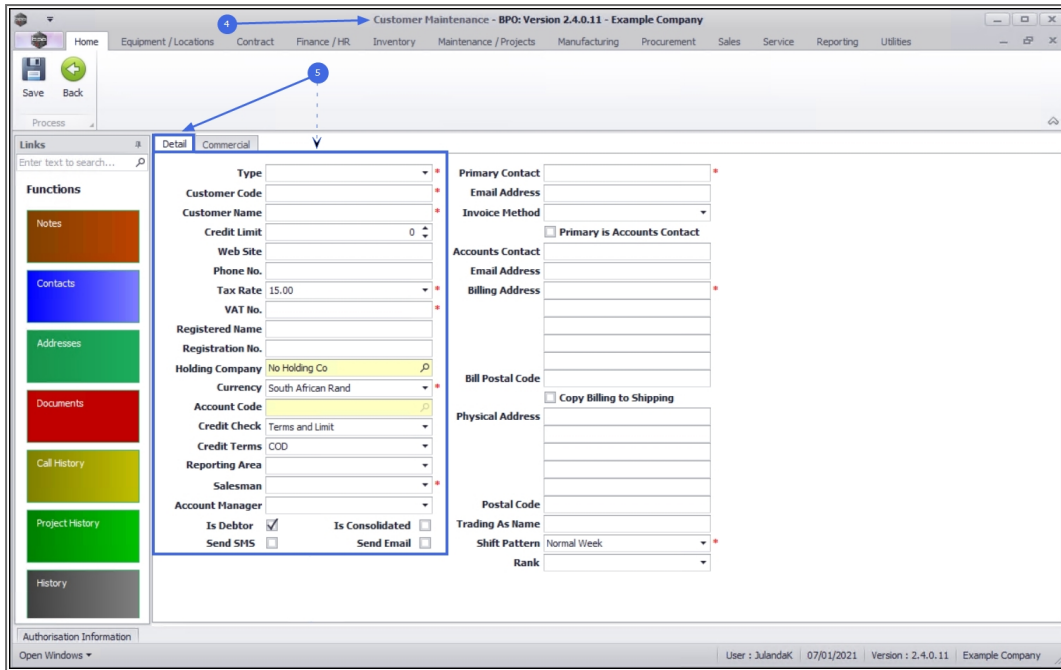
- **Currency:** Click on the **search** button to select the customer currency.
- **Account Code:** This is the account you will post to in your financial system
 - **For Debtors:** The account code is not required, as a customer account will be created in the financial system and linked to this customer.
 - **For Cash Sales Customers:** Type in the General Ledger account code that will be used in your financial system, to post entries to.
 - Alternately, click on the **search** button to select a Debtor to link this cash sale customer to.
- **Credit Check:** Click on the **search** button to select the credit checking required:
 - **A: Terms and Limit** - BPO will check to see whether the customer has exceeded its terms and credit limit before allowing invoicing.
 - **B: Limit check only** - BPO will only check to see whether the customer has exceeded their credit limit before allowing invoicing.
 - **N: No check** - BPO will allow invoicing regardless of whether the customer has exceeded their terms or credit limit.
- **Credit Terms:** Click on the **search** button to select the customer 'Terms' required, e.g. 30 day or 60 day.
- **Reporting Area:** This field is used in conjunction with CRM - Customer Area, e.g. Sandton, Nelspruit, etc.
- **Salesman:** Click on the **search** button to select the main salesman linked to this customer. The salesman will be automatically

be assigned to Sales Quotes, Orders and Invoices raised for this customer. This can however be changed on the individual documents.

- **Account Manager:** Click on the **search** button to select the employee responsible for managing the account. This is the person the customer will contact with regards to queries on their account.
- **Is Debtor:** This check box will auto populate by default and determines whether your customer is a Debtor or Cash Sales Customer.
 - **For Debtors:** Make sure this item is **selected**. This means that an account will be created in your financial system.
 - **For Cash Sales Customers:** **Do not select** this item. Make sure you specify an Account Code.
- **Is Consolidated:** Relates to Contract billing. If selected, one contract invoice will be created for all contracts linked to this customer. If unselected, one contract invoice will be created per contract.
- **Send SMS:** Select this option to have the system send a **call status change SMS**¹ to the customer primary contact.
- **Send Email:** Select this option to have the system send a **call status change email**² to the customer primary contact. (Refer to Related Topics)

¹This is dependant on an SMS gateway.

²This is based on the Auto Call Status Change Email flag that has been set in the Company Configuration.



CUSTOMER DETAILS CONTINUE

- **Primary Contact:** Type in the name and surname for the customer contact.

- The primary contact receives all operational or business related emails e.g. Call Status Change emails.
- The primary contact is also required for customer item task generation and contract closure notification.
- If an Accounts contact does not exist, then the system will use the primary contact as the default contact in the financial system.

- **Email Address:** Type in the email address for the primary contact.
- **Invoice Method:** The Invoice Delivery Method defines how the system will **deliver the Invoices**¹ during the 'Run Print / Email

¹The options are EMAIL, POST (for printing) and PREM for Email and Print

Batch' step of the [Month End Billing Run](#).

- **For Emails:** Make sure that the contact you link to the delivery method has a valid email address.
- **To Print:** These documents will print to the printer specified in the [Printer Service Setup](#).
- **Primary is Accounts Contact:** This flag identifies and configures the Primary Contact as the Accounts Contact.
 - This information will be copied to the Accounts Contact and Email address fields.
- **Accounts Contact:** Type in the name and surname of the Accounts Contact.
 - The Accounts Contact receives all the financial related emails and will be saved as the main contact in the financial system. Month End Contract Billing run emails are **usually**¹ sent to this contact .
- **Email Address:** Type in the email address for the accounts contact.
- Complete the **Shipping** and **Billing Address** details.



Note 1: The Billing Address is mandatory. If the Billing and Shipping addresses are the same, then first type in the Billing Address, then click on the **Copy Billing to Shipping** check box to quick-populate the Shipping fields.



Note 2: The **Billing Address** is where the invoices are sent.

¹This is defined by the Invoice Method.



Note 3: The **Shipping Address** is where an asset or equipment item is located or where services are required. If you are using TechConnect, this is the [address where the Technician goes](#) to render services when he accepts a Call.

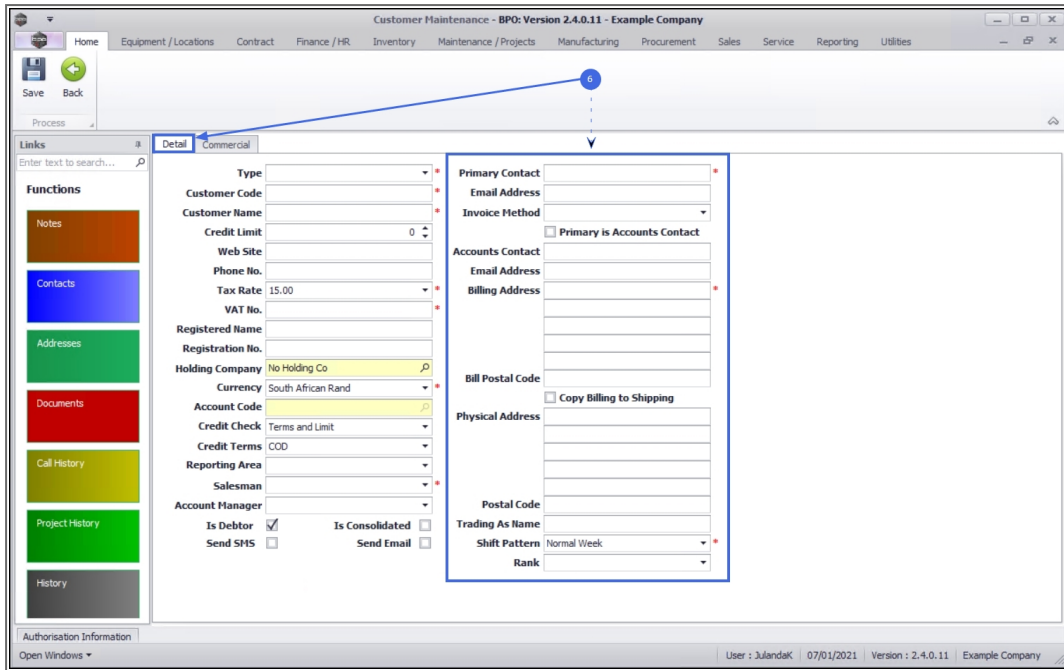
- **Trading As Name:** Type in the customer's trading name. This is what the company is known as.
- **Shift Pattern:** Search for and select the relevant shift. This is the customer's trading (business) hours and is linked to [SLA](#). Refer to [Setting up Shifts](#) if the shift required is not on the list.
- **Note:** [SLA](#) will be calculated based on the shift pattern e.g. if the trading hours are from 8 am - 5 pm and a call is logged at 4 pm, [SLA](#) will start calculating at 4 pm and stops at 5 pm and resumes again the next day at 8 am.
- **Rank:** This is used in conjunction with CRM - [Call cycle rank](#)¹.



Note that rank is based on how much you value this customer and helps to define the Call cycle per client. For example, a **Wood** ranking indicates that you will only contact this customer every 365 days - this customer is **not** valuable to you. However a **Platinum** ranking indicates that this is a **very** important customer that you wish to maintain a good relationship with, therefore you will contact them every 15 days.

- Each customer must be [linked to a Rank in CRM](#) as well as linked in this **Customer Maintenance** screen in BPO2.

¹For example:- Gold - Call Cycle 30 days Silver - Call Cycle 90 days Bronze - Call Cycle 180 days



COMMERCIAL FRAME

7. When you have finished filling in the customer details, click on the **Commercial** tab.

- **Sites:** A customer could be linked to a single site or multiple sites. Ensure that the correct site(s) are allocated.
- **Banking Details:** Type in the **Bank Name, Branch Name, Branch Code, Account Name, Account Number** and select the **Account Type**.



This is important for customers who use the Debit Order payment method.

- **Payment Method:** Search for and select the method the customer will use to pay.
 - If this customer need to be included in the Debit Order run, you need to ensure a Payment Method is selected

where the [Payment Method](#) Code Type is DO (Debit Order).

- **Commercial:** Click on the **search** button to select the commercial (price list) you wish to link to this customer.
- **Department:** Search for and select the department for this customer.
 - This is important when you use a segmented ledger where department is one of the segments. This is for reporting purposes.
- **Salesman:** Check this field to link an additional Salesman to this customer.
 - Can be used as a reference from BPO if the main salesman is not available, or in CRM - also allows selected Salesman access to the Customer.
- **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.

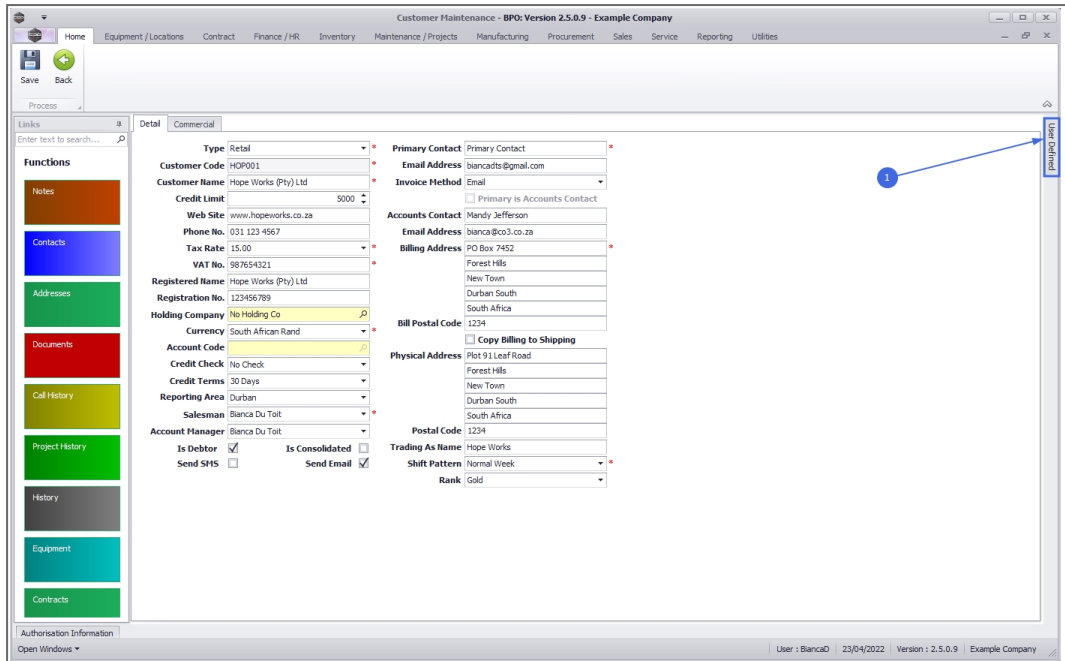
USER DEFINED FIELDS

The inclusion of User Defined Fields is to provide more information within the Asset, Contract, Customer and Location modules so that associated work/processes can be carried out more efficiently. It will serve as connective tissue between contracts and call center functions to improve call center performance by having readily accessible information.

Version Compatibility¹

- Click on the **User Defined** dock panel tab to open the panel

¹ BPO2 v2.5.0.8 or higher. " [Add Interest Rate](#) " on page 3



Add New Custom Field

New User Defined Customer Fields can be created from here. Any User Defined field created will be available for update on all customers.

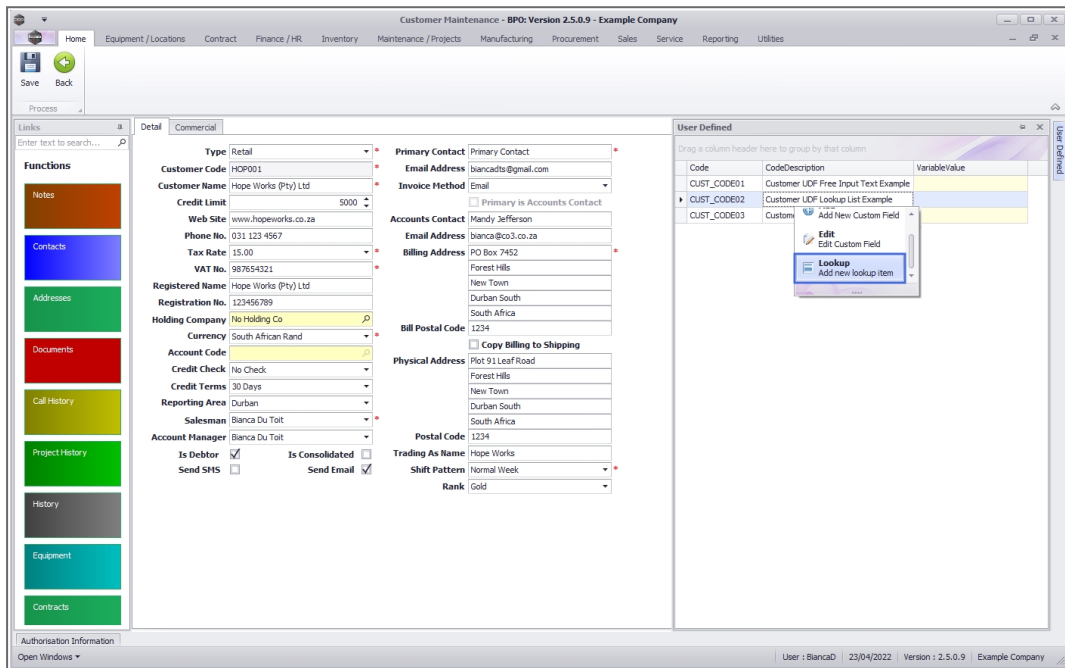
- Right click in User Defined panel and select **Add New Custom Field**

- Type in a **Code** and **Description** for the new User Defined Field.
- Select the Input Type.
- Click on the **Save** button.

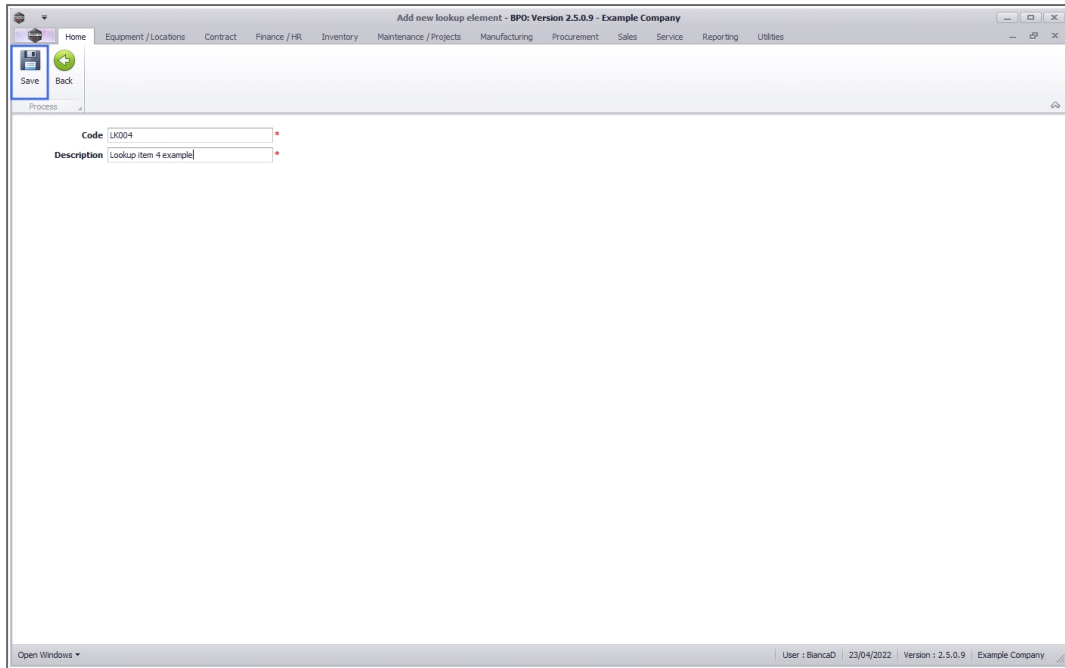
Add Lookup Items

For Lookup Input Variables - the right click context menu includes the option to add items to the Lookup List.

- Right click on Lookup input type Custom Field and select **Add new lookup item** (you may need to scroll down).



- Type in the lookup item **Code** and **Description**.
- Click on the **Save** button.



Update Custom Field

This will update the detail for the User Defined Field for this contract.

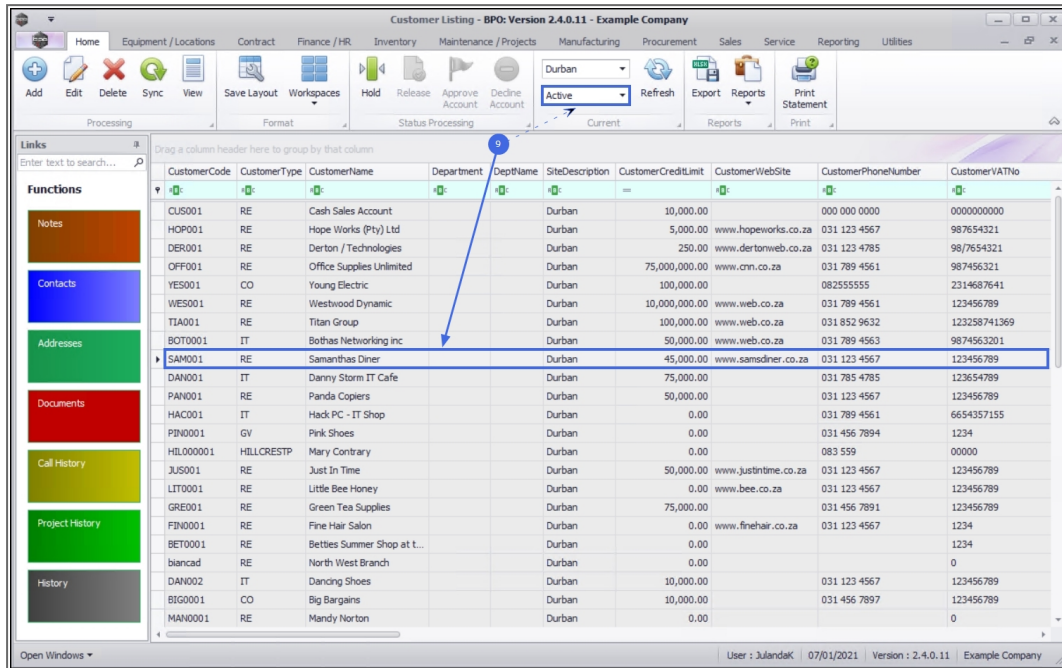
- **Variable Value:** Type in, pick from the Lookup List or Toggle Yes/No depending on the Input type.

Code	CodeDescription	VariableValue
CUST_CODE01	Customer UDF Free Input Text Example	Text
CUST_CODE02	Customer UDF Lookup List Example	Lookup
CUST_CODE03	Customer UDF Yes No Example	Yes/No

SAVE CUSTOMER DETAILS

8. When you have completed the new customer details, click on **Save**.

9. You will return to the **Customer Listing** screen where you can **view** the Customer details in the **Active** status.

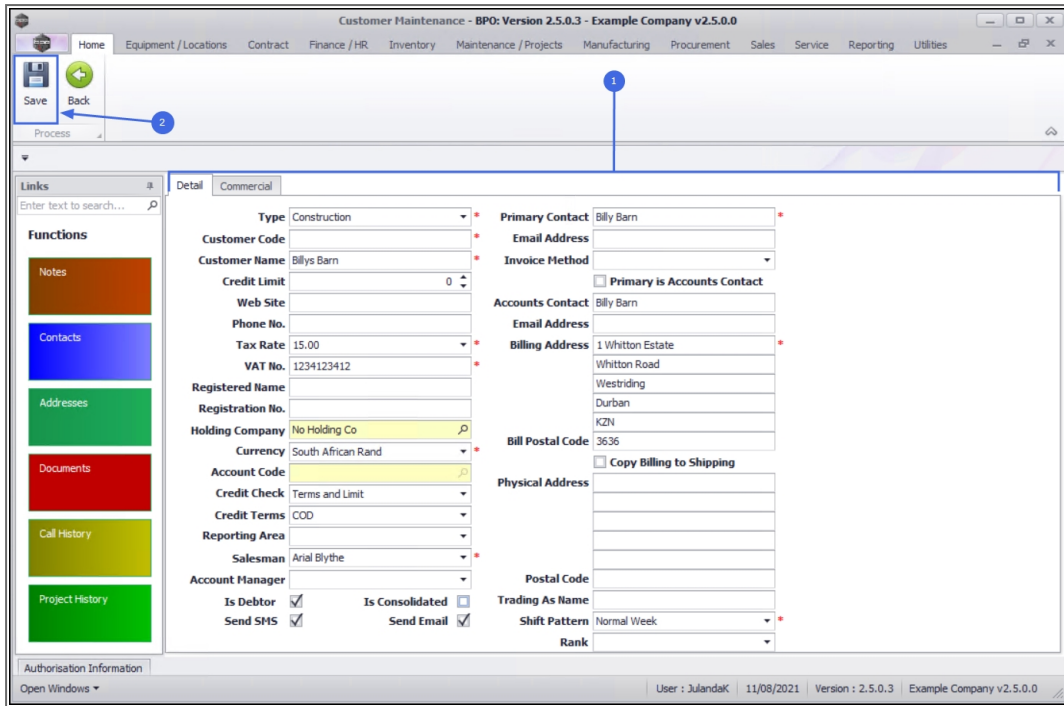


QUICK CUSTOMER LOAD

1. Quick Customer Load gives you the ability to **quickly** save a customer without having to enter **all** the customer details. Using this mode, assumes that the customer being loaded is a **person** instead of a **company**.

- In this example, only the **mandatory** fields have been filled in - a few of these will populate by default.
- The **Customer Code** has not been typed in, as the company configuration is set to **auto generate** the customer code. This means that when saving the customer, the **Customer Code** will be populated based on the **Customer Name**.

2. Click on **Save**.



- On saving the 'quick' customer, the system will auto create a **Customer Code** based on the **Customer Name**.
- You can now **view** the Customer in the **Customer Listing** screen where the status is set to **Active**.
- You can go back and [add to or edit the Customer details](#) at a later stage, if necessary.

Customer Listing - BPO: Version 2.4.0.11 - Example Company

Home | Equipment / Locations | Contract | Finance / HR | Inventory | Maintenance / Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Processing | Format | Status Processing | Current | Reports | Print

Links: Enter text to search...

Functions: Notes, Contacts, Addresses, Documents, Call History, Project History, History

CustomerCode	CustomerType	CustomerName	Department	DeptName	SiteDescription	CustomerCreditLimit	CustomerWebSite	CustomerPhoneNumber	CustomerVATNo
OFF001	RE	Office Supplies Unlimited			Durban	75,000,000.00	www.cnn.co.za	031 789 456 1	987456321
YES001	CO	Young Electric			Durban	100,000.00		082555555	2314687641
WES001	RE	Westwood Dynamic			Durban	10,000,000.00	www.web.co.za	031 789 456 1	123456789
TIAC001	RE	Titan Group			Durban	100,000.00	www.web.co.za	031 852 9632	123258741369
BOT0001	IT	Bothas Networking Inc.			Durban	50,000.00	www.web.co.za	031 789 456 3	9874563201
SAM001	RE	Samanthas Diner			Durban	45,000.00	www.samsdiner.co.za	031 123 456 7	123456789
DAN001	IT	Danny Storm IT Cafe			Durban	75,000.00		031 785 4785	123654789
PAN001	RE	Panda Copiers			Durban	50,000.00		031 123 456 7	123456789
HAC001	IT	Hack PC - IT Shop			Durban	0.00		031 789 456 1	6654357155
PIN0001	GV	Pink Shoes			Durban	0.00		031 456 789 4	1234
HLL00001	HLLCRESTP	Mary Contrary			Durban	0.00		083 559	00000
JUS001	RE	Just In Time			Durban	50,000.00	www.justintime.co.za	031 123 456 7	123456789
LIT0001	RE	Little Bee Honey			Durban	0.00	www.bee.co.za	031 123 456 7	123456789
GRE001	RE	Green Tea Supplies			Durban	75,000.00		031 456 789 1	123456789
FIN0001	RE	Fine Hair Salon			Durban	0.00	www.finehair.co.za	031 123 456 7	1234
BET0001	RE	Bethies Summer Shop at t...			Durban	0.00			1234
biancad	RE	North West Branch			Durban	0.00			0
DAN002	IT	Dancing Shoes			Durban	10,000.00		031 123 456 7	123456789
BIG0001	CO	Big Bergans			Durban	10,000.00		031 456 789 7	123456789
MAN0001	RE	Mandy Norton			Durban	0.00			0
DAN0003	IT	Dance Shoes			Durban	0.00			123456789
BIL0001	CO	Billys Barn			Durban	0.00			0
ANO0001	ACC	Another new customer			Durban	0.00	www.newcust.co.za		123456789

Open Windows | User : JulandaK | 08/01/2021 | Version : 2.4.0.11 | Example Company

Related Topics

- [Company Configuration](#)

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