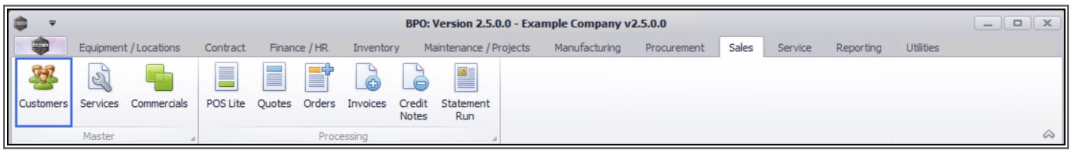
We are currently updating our site; thank you for your patience.

SALES

CUSTOMERS – VIEW CUSTOMER

The **View** button allows you to view more information linked to your customer.

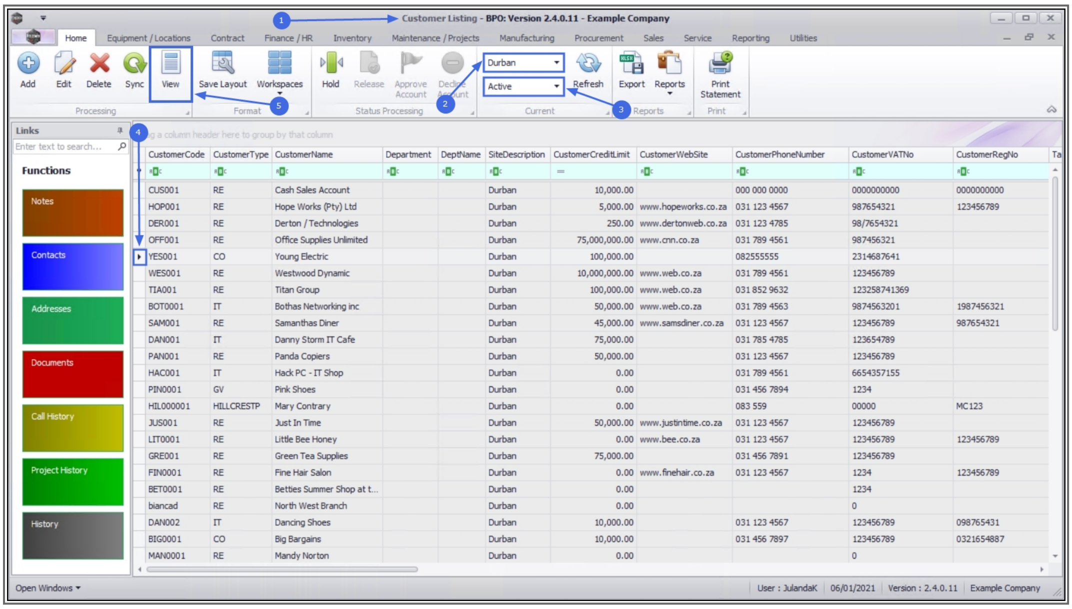
Ribbon Access: Sales > Customers



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

> Note that you can view customer information for a customer in any status.

    - The example has **Active** selected.
4. Select the **row** of the **customer** you wish to view.
5. Click on **View**.



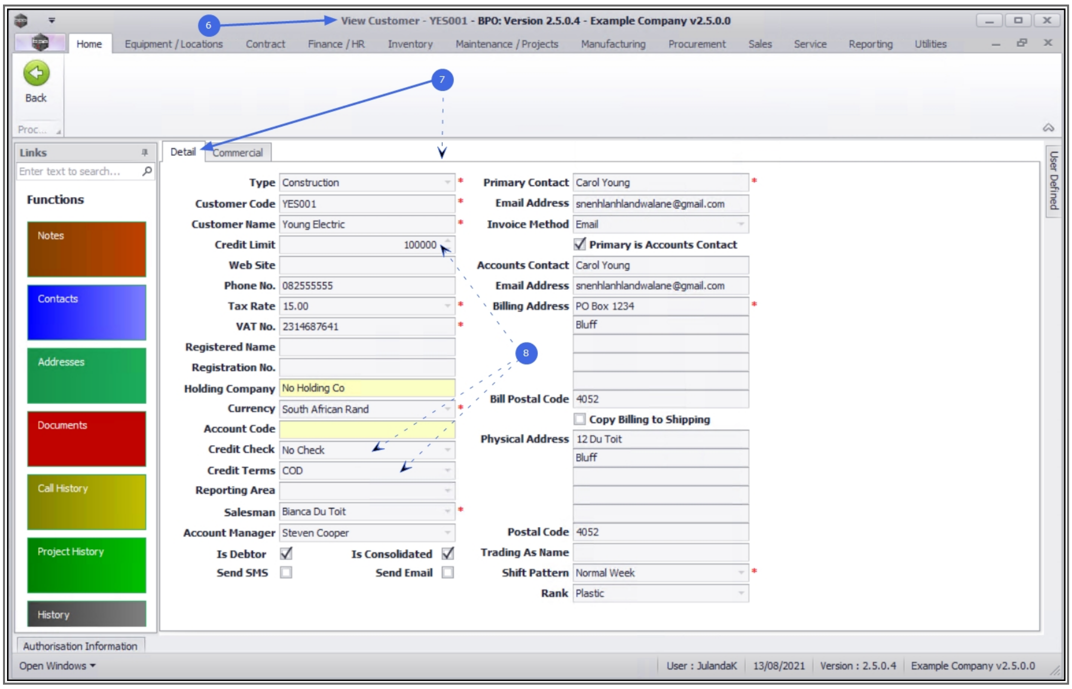
6. The **View Customer** screen will be displayed.

> Note that this is for view only and no changes can be made or saved on this screen.

7. This screen will open with the **Detail** panel by default.

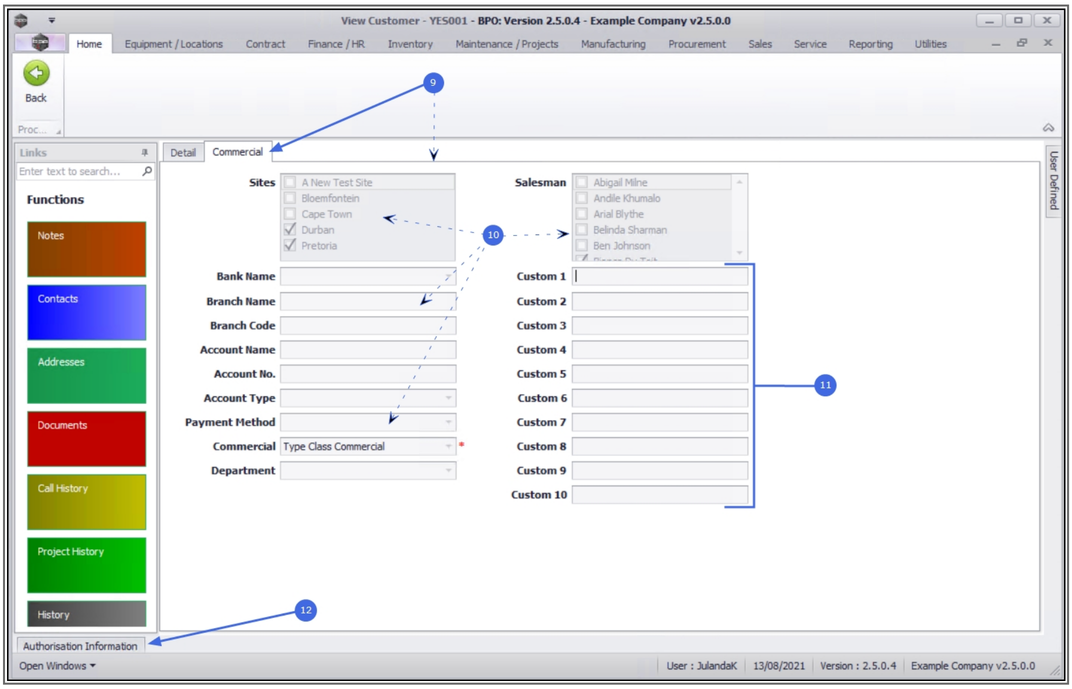
DETAIL PANEL

8. From the Detail panel you can view most of the customer details including Credit Limit, Credit Check and Credit Terms.



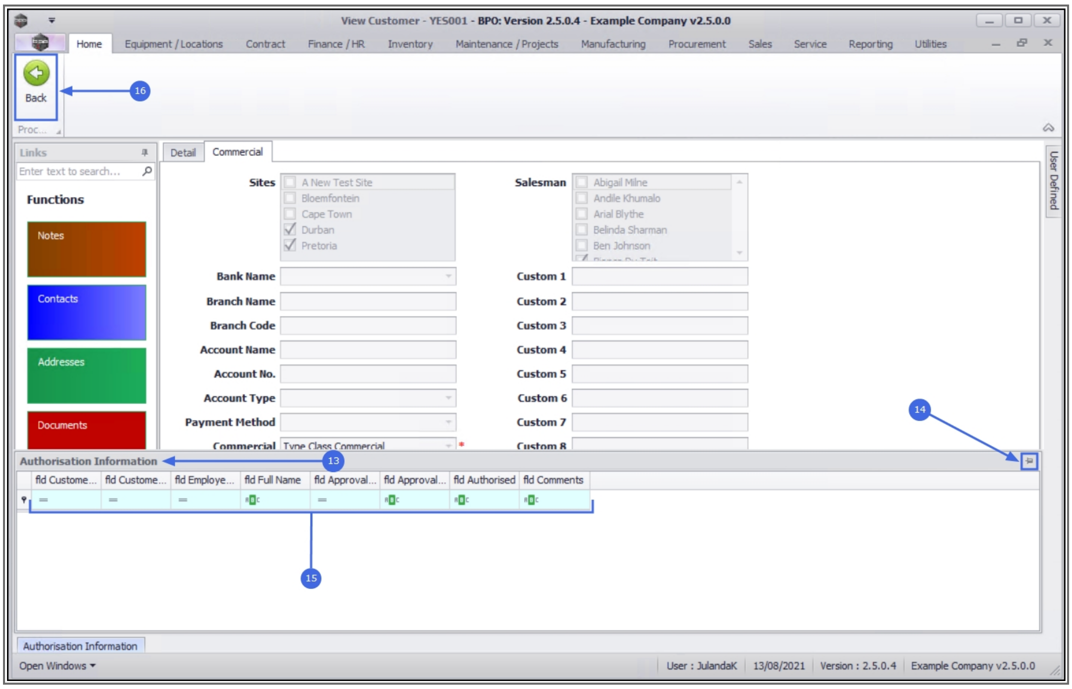
COMMERCIAL PANEL

9. Click on the **Commercial** tab to display the **Commercial details** frame.
10. Here you can view the sites and salespersons linked to this customer, as well as the customer banking details, payment method e.g. Debit Order and the customer commercial.
11. **Custom 1 - 10**: Any additional data added e.g. alternative payment method can be viewed. These field names are configured according to your company requirements. Contact your BPO Specialist or CO3 Support for assistance.
12. Click on the **Authorisation Information** tab.



AUTHORISATION INFORMATION PANEL

13. The **Authorisation Information** panel will be expanded.
14. You can **dock** this screen to make it easier to work in.
15. Here you can view the **Approval Date** and **Time**, the **Name** of the person who authorised this customer as well as any **Comments**, where applicable.
16. Click on **Back** to return to the **Customer Listing** screen.


View Customer - YES001 - BPO: Version 2.5.0.4 - Example Company v2.5.0.0
Home
Equipment / Locations
Contract
Finance / HR
Inventory
Maintenance / Projects
Manufacturing
Procurement
Sales
Service
Reporting
Utilities
Back
16
Links
Enter text to search...
Functions
Notes
Contacts
Addresses
Documents
Detail
Commercial
Sites
A New Test Site
Bloemfontein
Cape Town
Durban
Pretoria
Salesman
Abigail Milne
Andile Khumalo
Arial Blythe
Belinda Sharman
Ben Johnson
Bank Name
Branch Name
Branch Code
Account Name
Account No.
Account Type
Payment Method
Custom 1
Custom 2
Custom 3
Custom 4
Custom 5
Custom 6
Custom 7
User Defined
14
Authorisation Information
13
fld Authorised
fld Comments
15
Authorisation Information
Open Windows
User : JulandaK
13/08/2021
Version : 2.5.0.4
Example Company v2.5.0.0

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