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

SALES

CUSTOMERS – NEW CRM CUSTOMER

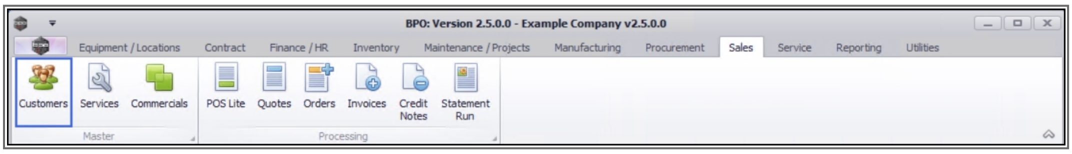
Customers can be raised in CRM, and can be found in BPO2 in the Customer Listing screen under the:

- **New - CRM** status (waiting to be Released) and in the
- **Released** status (waiting to be Approved or Declined).

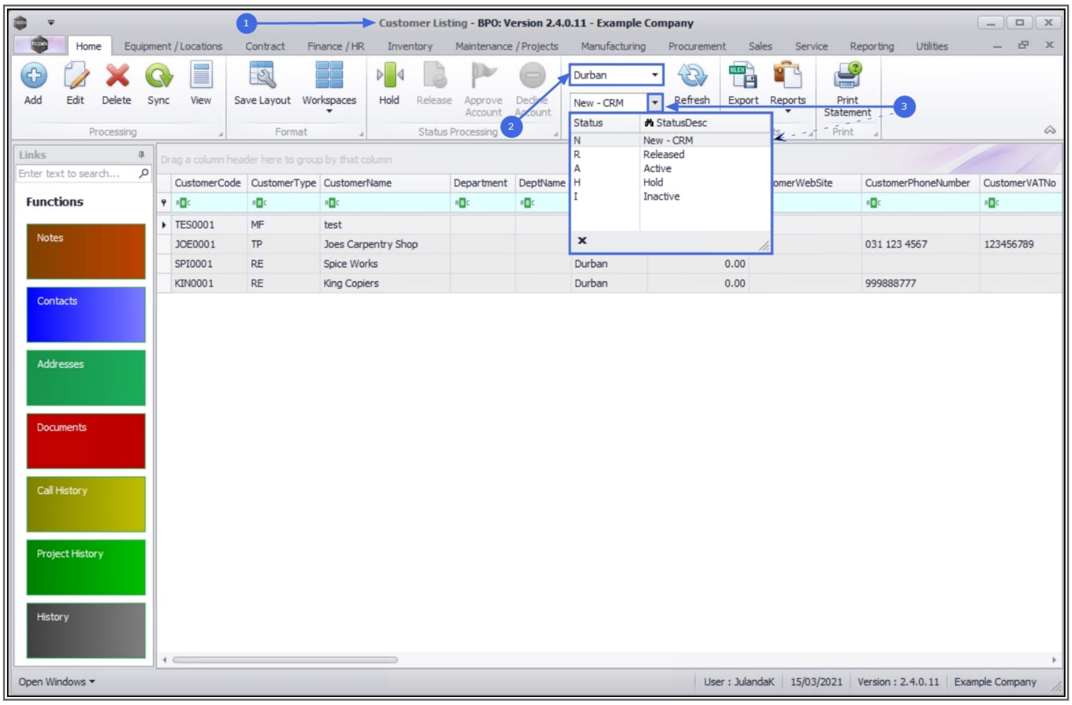
Once the customer details and information have been checked and validated and then **Released**, the customer can then be **Approved** and will then be **Active** in BPO2.

If Is Debtor is selected in the View Customer screen, then the customer will also be raised in Pastel.

Ribbon Access: Sales > Customers



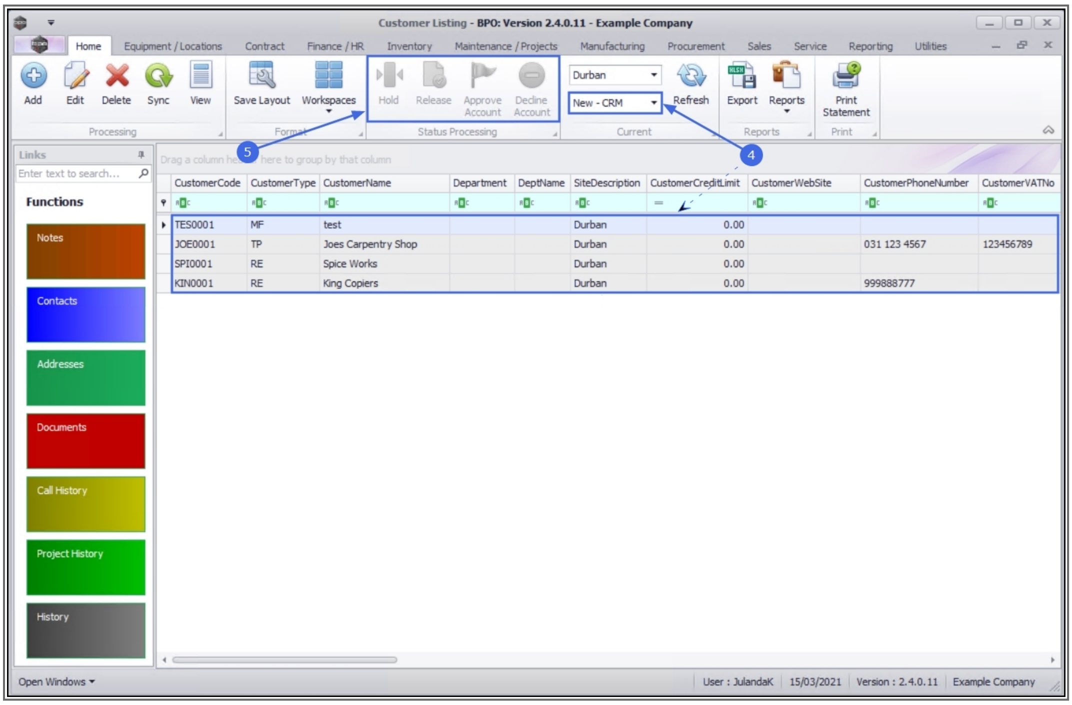
1. The **Customer Listing** screen will be displayed.
2. Select the **Site** that you wish to work in.
    - The example has **Durban** selected.
3. Change the **Status** to **New - CRM**.



4. The Customer listing screen will now filter using the **New-CRM** status.
5. You will note that the **Hold**, **Release**, **Approve** and **Decline** buttons are inactive in this status, because these Customers are waiting to be **checked** and Released.

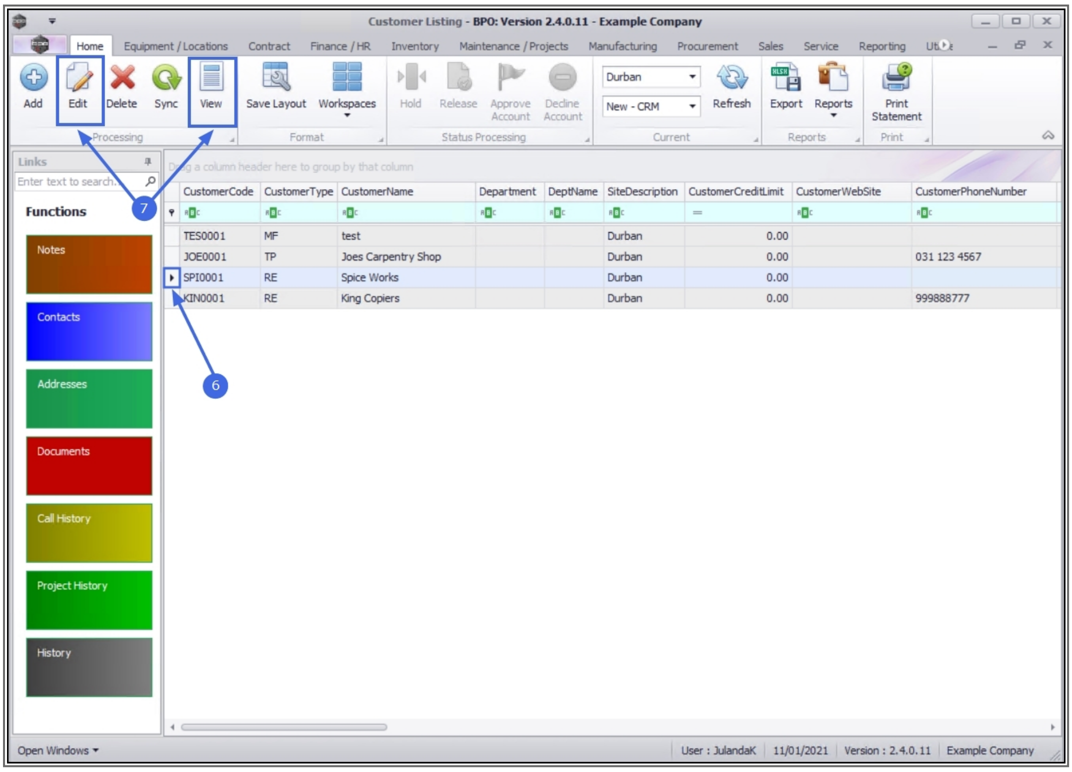
> Note that the Hold and Release processes are done in CRM.

> Note that the Approve Account and Decline Account processes are done in the Released status of the Customer Listing screen.



6. Select the **row** of the **new CRM customer** that you wish to view the details of.
7. Click on either **Edit** or **View**.

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

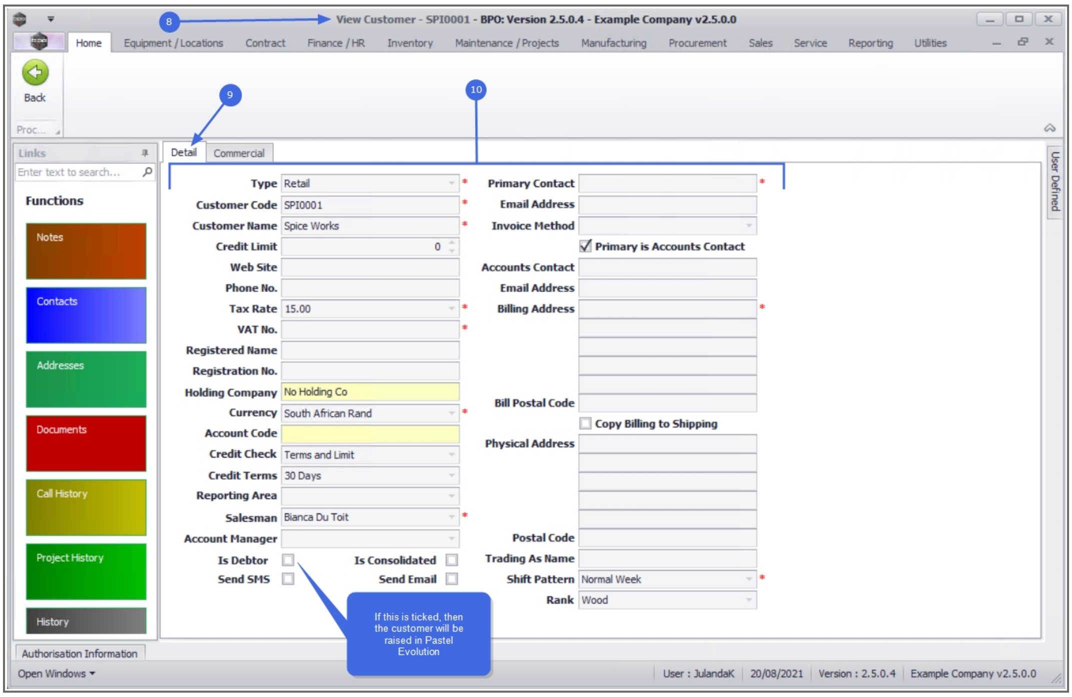


8. The **View Customer - [ ]** screen will be displayed.

> Note that the information is view-only and no changes can be made or saved as this CRM customer is in the New status.

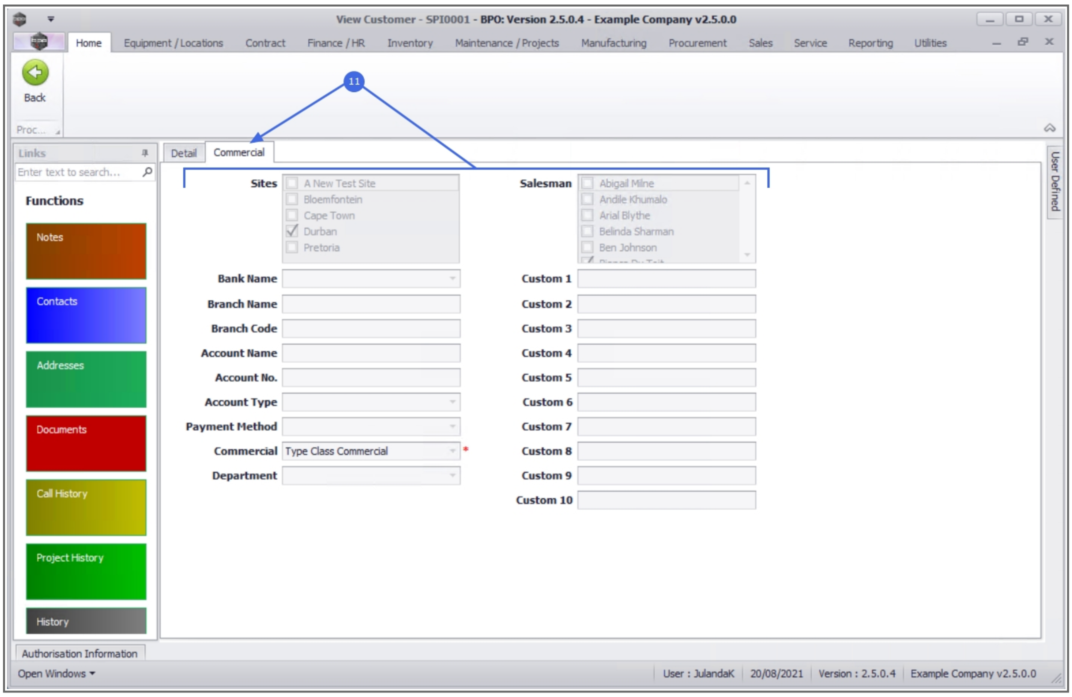
9. The customer **Detail** frame will display by default.
10. You can view the Customer Name, Billing and Physical address, Tax Rate, Registration information and Financial details for this customer.

> Note the Is Debtor check box - If it is ticked, then the customer will be raised in Pastel Evolution.



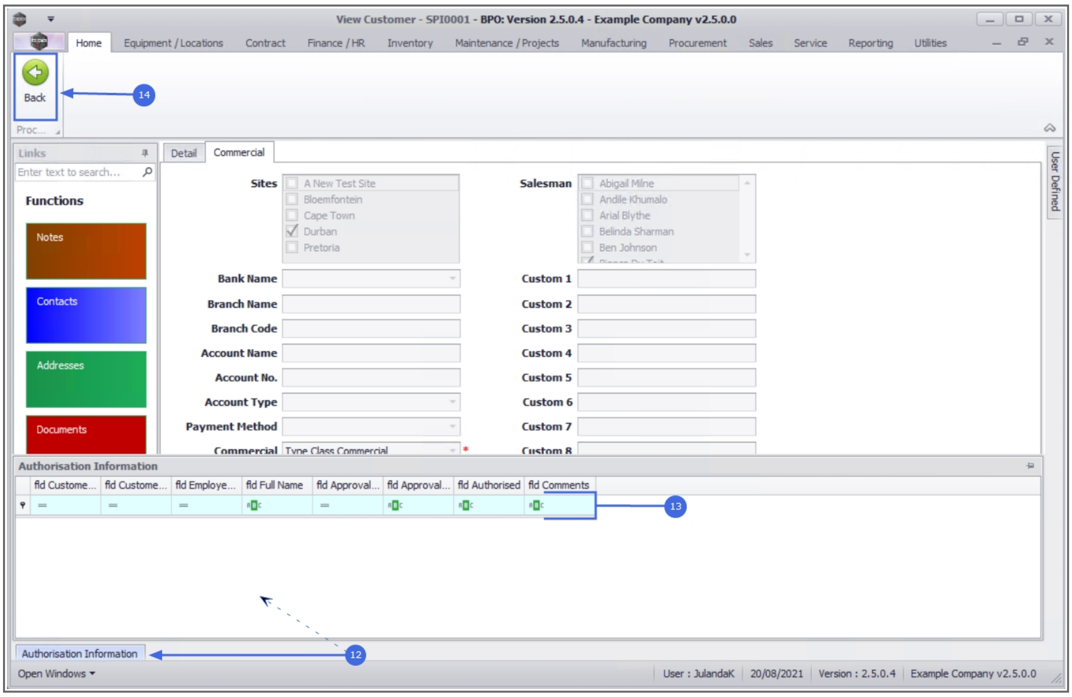
COMMERCIALS TAB

11. Click on the **Commercials** tab to view the **Site** and **Salesman** name that the customer is linked to as well as the **Banking details** and **Custom 1 - 10** fields



AUTHORISATION INFORMATION

12. Click on the **Authorisation** Information tab to expand the **Authorisation Information** panel
13. You will be able to **view** information regarding the authorisation of this CRM customer **once it has been authorised**.
14. Click on **Back** to return to the **Customer Listing** screen.



Related Topics

- Customers - Approve CRM Customer
- Customers - Decline CRM Customer

MNU.061.016