

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 <u>Is Debtor</u> is selected in the View Customer screen, then the customer will also be raised in Pastel.

Ribbon Access: Sales > Customers

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- 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.



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- 4. The Customer listing screen will now filter using the **New-CRM** status.
- 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 <u>Released</u>.

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.



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- 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.



Customers - New CRM Customer

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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.



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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



Customers - New CRM Customer

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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.



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Related Topics

- Customers Approve CRM Customer
- Customers Decline CRM Customer

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