

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

SALES

CUSTOMERS - DELETE CUSTOMER

Customers can only be deleted if the customer does not have any transactions or assets or contracts or calls. Customer records with contacts and addresses only are allowed for deletion.

Deleting a Customer will change the status for the Customer to **(X) Deleted**. If BPO is integrated with Evolution, the customer will show as **Deleted in BPO**.

Ribbon Select Sales > Customers



The **Customer Listing** screen will be displayed.

Select the Site

Your employee user record should be linked to a default site. In this case, the site will auto populate with this default, otherwise the site must be manually selected.

Another site can be selected, if required, and if you have the security rights to access the site.

If **All Sites** displays here, then you do not have a default site configured on your user record, and need to select the required site.

Upon opening, this screen will default to the **Active** status, listing all the **Active** contracts for the selected site.



Home Equipm	ent / Locations Contra	t Finance / HR	Inventory Maintenance / Projects Manufacturing Pro	urement Sales	Service	Reporting Utilitie				- 8
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	CustomerCode	CustomerType	CustomerName	Department	DeptName	SiteDescription	CustomerCreditLimit	CustomerWebSite	CustomerPhoneNumber	CustomerVA
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Notes	HOP001	RE	Hope Works (Pty) Ltd			Durban		www.hopeworks.co.za		987654321
	DER001	RE	Derton / Technologies			Durban		www.dertonweb.co.za		98/7654321
	OFF001 RE		Office Supplies Unlimited			Durban		www.cnn.co.za	031 789 4561	987456321
	YES001	co	Young Electric			Durban	100,000.00		082555555	231468764
Contacts	WES001	RE	Westwood Dynamic			Durban		www.web.co.za	031 789 4561	123456789
	TIA001 RE		Titan Group			Durban		www.web.co.za	031 852 9632	1232587413
	BOT0001	п	Bothas Networking inc			Durban		www.web.co.za	031 789 4563	9874563201
Addresses	SAM001	RE	Samanthas Diner			Durban	45,000.00	www.samsdiner.co.za	031 123 4567	123456789
	DAN001	Π	Danny Storm IT Cafe			Durban	75,000.00		031 785 4785	123654789
	STR002	Π	Stringfield Internet Cafe			Durban	75,000.00		031 456 7894	123654789
Documents	HAC001	Π	Hack PC - IT Shop			Durban	0.00		031 789 4561	6654357155
	PIN0001	GV	Pink Shoes			Durban	0.00		031 456 7894	1234
	HIL000001	HILLCRESTP	Mary Contrary			Durban	0.00		083 559	00000
	JUS001	RE	Just In Time			Durban	50,000.00	www.justintime.co.za	031 123 4567	123456789
Call History	LIT0001	RE	Little Bee Honey			Durban	0.00	www.bee.co.za	031 123 4567	123456789
	GRE001	RE	Green Tea Supplies			Durban	75,000.00		031 456 7891	123456789
	FIN0001	RE	Fine Hair Salon			Durban	0.00	www.finehair.co.za	031 123 4567	1234
Project History	BET0001	RE	Betties Summer Shop at the Beach			Durban	0.00			1234
	biancad	RE	North West Branch			Durban	0.00			0
	DAN002	π	Dancing Shoes			Durban	10,000.00		031 123 4567	123456789
fistory	BIG0001	co	Big Bargains			Durban	10,000.00		031 456 7897	123456789
	MAN0001	RE	Mandy Norton			Durban	0.00			0
	DAN0003	п	Dance Shoes			Durban	0.00			123456789
Equipment	BIL0001	co	Billys Barn			Durban	0.00			0
	ANO0001	ACC	Another new customer			Durban	0.00	www.newcust.coza		123456789
	APP0001	RE	Apple Juice Inc			Durban	0.00		013 123 4567	123546789
	ARCYY7123	тр	ARC SHoe Co			Durban	0.00			9876543210

• Select the **row** of the **customer** that you wish to process.

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	OFF001	RE	Office Supplies Unlimited			Durban	75,000.00	www.099.09.28	031 789 4561	987456321
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Addresses	SAM001	RE	Samanithas Diner			Durban	45,000.00	www.samsdiner.co.za	031 123 4567	123456789
	DAN001	π	Danny Storm IT Cafe			Durban	75,000.00		031 785 4785	123654789
	STR002	π	Stringfield Internet Cafe			Durban	75,000.00		031 456 7894	123654789
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al Hotory	LIT0001	RE	Little Bee Honey			Durban	0.00	www.bee.co.za	031 123 4567	123456789
	GRE001	RE	Green Tea Supplies			Durban	75,000.00		031 456 7891	123456789
	FIN0001	RE	Fine Hair Salon			Durban	0.00	www.finehair.co.za	031 123 4567	1234
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	biancad	RE	North West Branch			Durban	0.00			0
	DAN002	π	Dancing Shoes			Durban	10,000.00		031 123 4567	123456789
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	MAN0001	RE	Mandy Norton			Durban	0.00			0
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	APP0001	RE	Apple Juice Inc			Durban	0.00		013 123 4567	123546789
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• Click on the **Delete** button.



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	NET001	IT		Networking an	d Laptops					Durban	0.00	www.net.co.za	031 123 4567	123456789
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	BIT001	IT		Bits and Bytes						Durban	12,000.00)	031 123 4567	123456789
	RUS0001	RE		Russels						Durban	100,000.00	russels@nowebsite.org	0314563876	3427890333
	ITS0001	IT		IT Supplies						Durban	10,000.00)	031 123 4567	123456789
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A message box will come up, asking: **Are you sure you want to delete this customer, code [customer code]?**

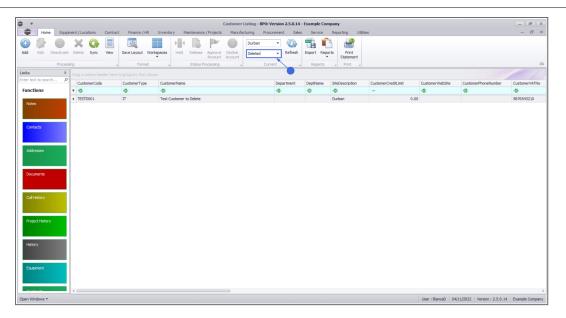
• Click on the **Yes** button.

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Project History	TED001	TP	Teds Transport Company					Durban	10,000.00		031 123 4567	123456789
	CUS002	LEG	Customer Check				Durban		0.00			123456789
	CUS003	LEG	Test third customer					Durban	0.00			123456789
History	NEW101	со	New Customer Test				Durban		10,000,000.00			123456789
	NEW 102	RE	New Customer					Durban	100,000.00			123456789
	TEL005	RE	Telerex					Durban	1.00			123456789
Equipment	NAS001	RE	Nasatech	Nasatech				Durban	0.00			123456789
	TOP002	TP	Top Vehicle Hire					Durban	0.00		013 123 4567	987123654
	TESTD001	Π	Test Customer to Delete					Durban	0.00			9876543210

The Customer will be deleted and can be found by selecting the **Deleted** status.



Customers - Delete Customer



MNU.061.025