

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

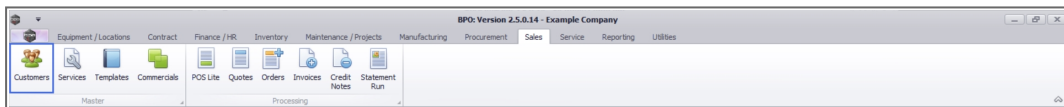
## SALES

### 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.

CustomerCode	CustomerType	CustomerName	Department	DepName	SiteDescription	CustomerCreditLimit	CustomerWebSite	CustomerPhoneNumber	CustomerVATNo
HOP001	RE	Hope Works (Pty) Ltd			Durban	1,000,000,000.00	www.hopeworks.co.za	031 123 4567	987654321
DER001	RE	Derton / Technologies			Durban	250.00	www.dertonweb.co.za	031 123 4785	987654321
OFF001	RE	Office Supplies Unlimited			Durban	75,000.00	www.off.co.za	031 789 4561	987654321
YES001	CO	Young Electric			Durban	100,000.00	0825555555	2314687641	
WES001	RE	Westwood Dynamic			Durban	100,000.00	www.web.co.za	031 789 4561	123456789
TIAN001	RE	Tian Group			Durban	100,000.00	www.web.co.za	031 852 9632	12328741369
BOT0001	IT	Bothas Networking Inc			Durban	50,000.00	www.web.co.za	031 789 4563	9874563201
SAM001	RE	Samanthas Diner			Durban	45,000.00	www.samsdiner.co.za	031 123 4567	123456789
DAN001	IT	Danny Storm IT Cafe			Durban	75,000.00		031 785 4785	123654789
STR002	IT	Springfield Internet Cafe			Durban	75,000.00		031 456 7894	123654789
HACK001	IT	Hack PC - IT Shop			Durban	0.00		031 789 4561	665432155
PINK001	GV	Pink Shoes			Durban	0.00		031 456 7894	1234
HIL00001	HILCRESTP	Mary Conraby			Durban	0.00		083 559	00000
JUST001	RE	Just In Time			Durban	50,000.00	www.justintime.co.za	031 123 4567	123456789
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
BET0001	RE	Bettes Summer Shop at the Beach			Durban	0.00			1234
banca0	RE	North West Branch			Durban	0.00			0
DAN002	IT	Dancing Shoes			Durban	10,000.00		031 123 4567	123456789
BIG0001	CO	Big Bergans			Durban	10,000.00		031 456 7897	123456789
MAN0001	RE	Mandy Norton			Durban	0.00			0
DAN003	IT	Dance Shoes			Durban	0.00			123456789
BLU001	CO	Bliss Barn			Durban	0.00			0
AN00001	ACC	Another new customer			Durban	0.00	www.newcust.co.za		123456789
APP0001	RE	Apple Juice Inc			Durban	0.00		013 123 4567	123456789
APR11111	TD	APR - Glass P...			Durban	0.00			6876543210

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

CustomerCode	CustomerType	CustomerName	Department	DepName	SiteDescription	CustomerCreditLimit	CustomerWebSite	CustomerPhoneNumber	CustomerVATNo
HOP001	RE	Hope Works (Pty) Ltd			Durban	1,000,000,000.00	www.hopeworks.co.za	031 123 4567	987654321
DER001	RE	Derton / Technologies			Durban	250.00	www.dertonweb.co.za	031 123 4785	987654321
OFF001	RE	Office Supplies Unlimited			Durban	75,000.00	www.off.co.za	031 789 4561	987654321
YES001	CO	Young Electric			Durban	100,000.00	0825555555	2314687641	
WES001	RE	Westwood Dynamic			Durban	100,000.00	www.web.co.za	031 789 4561	123456789
TIAN001	RE	Tian Group			Durban	100,000.00	www.web.co.za	031 852 9632	12328741369
BOT0001	IT	Bothas Networking Inc			Durban	50,000.00	www.web.co.za	031 789 4563	9874563201
SAM001	RE	Samanthas Diner			Durban	45,000.00	www.samsdiner.co.za	031 123 4567	123456789
DAN001	IT	Danny Storm IT Cafe			Durban	75,000.00		031 785 4785	123654789
STR002	IT	Springfield Internet Cafe			Durban	75,000.00		031 456 7894	123654789
HACK001	IT	Hack PC - IT Shop			Durban	0.00		031 789 4561	665432155
PINK001	GV	Pink Shoes			Durban	0.00		031 456 7894	1234
HIL00001	HILCRESTP	Mary Conraby			Durban	0.00		083 559	00000
JUST001	RE	Just In Time			Durban	50,000.00	www.justintime.co.za	031 123 4567	123456789
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
BET0001	RE	Bettes Summer Shop at the Beach			Durban	0.00			1234
banca0	RE	North West Branch			Durban	0.00			0
DAN002	IT	Dancing Shoes			Durban	10,000.00		031 123 4567	123456789
BIG0001	CO	Big Bergans			Durban	10,000.00		031 456 7897	123456789
MAN0001	RE	Mandy Norton			Durban	0.00			0
DAN003	IT	Dance Shoes			Durban	0.00			123456789
BLU001	CO	Bliss Barn			Durban	0.00			0
AN00001	ACC	Another new customer			Durban	0.00	www.newcust.co.za		123456789
APP0001	RE	Apple Juice Inc			Durban	0.00		013 123 4567	123456789
APR11111	TD	APR - Glass P...			Durban	0.00			6876543210

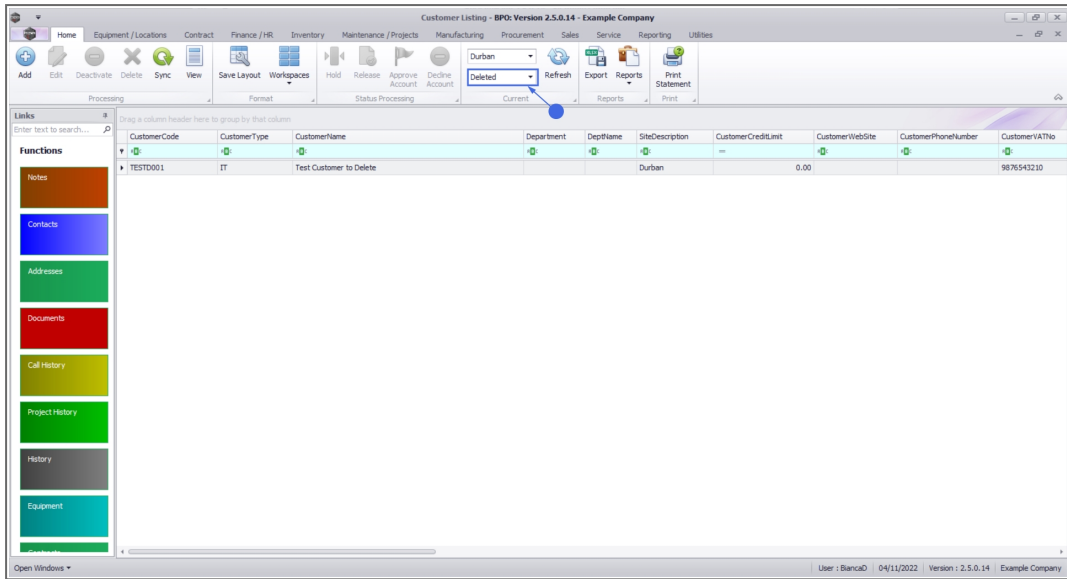
- Click on the **Delete** button.

CustomerCode	CustomerType	CustomerName	Department	DepName	SiteDescription	CustomerCreditLimit	CustomerWebSite	CustomerPhoneNumber	CustomerVATNo
MAN0001	RE	Mandy Norton			Durban	0.00			0
DAN0003	IT	Dance Shoes			Durban	0.00			123456789
BL0001	CO	Bllys Barn			Durban	0.00			0
AN00001	ACC	Another new customer			Durban	0.00	www.newcust.co.za		123456789
AP0001	RE	Apple Juice Inc			Durban	0.00		013 123 4567	123456789
ABCXYZ123	TP	ABC Shoe Co			Durban	0.00			9876543210
NET001	IT	Networking and Laptops			Durban	0.00	www.net.co.za	031 123 4567	123456789
NET002	IT	Network and Accessories			Durban	0.00		031 123 4567	123456789
BLU0001	CO	Builders Storehouse			Durban	0.00		031 123 4567	123456789
TED0001	RE	Ted Moby Designs			Durban	0.00		031 123 4567	123456789
COM0001	CV	Community Specs			Durban	0.00		031 123 4567	123456789
HEA0001	IT	Healing Hands			Durban	0.00			4532654555
STA001	LEG	Stan and Lopez			Durban	50,000.00		031 123 4567	123456789
BEA001	LEG	Bearing and Shoe			Durban	80,000.00		031 123 4567	987654321
BIT001	IT	Bits and Bytes			Durban	12,000.00		031 123 4567	123456789
RUS0001	RE	Russels			Durban	100,000.00	russels@nowwebsite.org	0314563876	3427890333
ITS0001	IT	IT Supplies			Durban	10,000.00		031 123 4567	123456789
TED001	TP	Teds Transport Company			Durban	10,000.00		031 123 4567	123456789
CLU5002	LEG	Customer Check			Durban	0.00			123456789
CLU5003	LEG	Test third customer			Durban	0.00			123456789
NEW101	CO	New Customer Test			Durban	10,000,000.00			123456789
NEW102	RE	New Customer			Durban	100,000.00			123456789
TEL005	RE	Telerex			Durban	1.00			123456789
NAS001	RE	Nasatech			Durban	0.00			123456789
TOP002	TP	Top Vehicle Hire			Durban	0.00		013 123 4567	987123654
TESTD001	IT	Test Customer to Delete			Durban	0.00			9876543210

A message box will come up, asking: **Are you sure you want to delete this customer, code [customer code]?**

- Click on the **Yes** button.

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



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