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

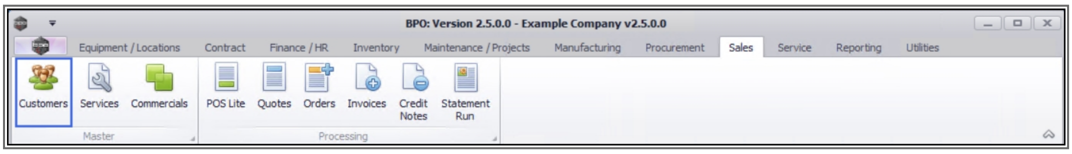
SALES

CUSTOMERS – APPROVE CRM CUSTOMER

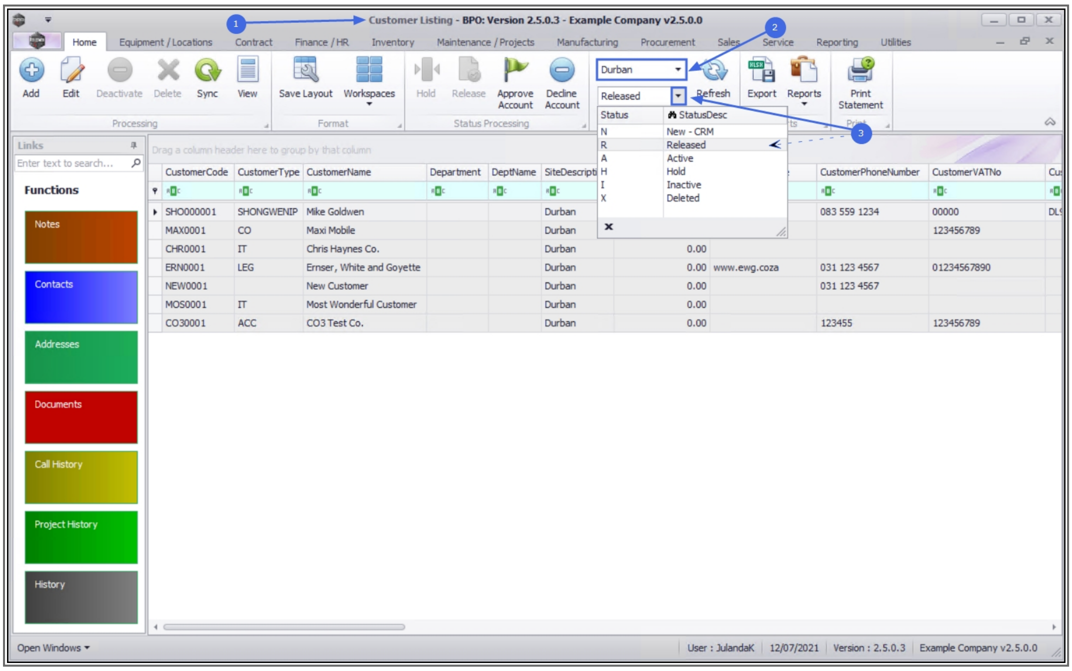
CRM customer details can only be **viewed** in the **New - CRM** status. The customer has to be **Released for approval** in **CRM** once the customer details and information have been checked and validated.

Once this has been done, the new customer can be **Approved** and will then be **Active** in BPO2 and will move to the **Released** status.

Ribbon Access: Sales > Customers

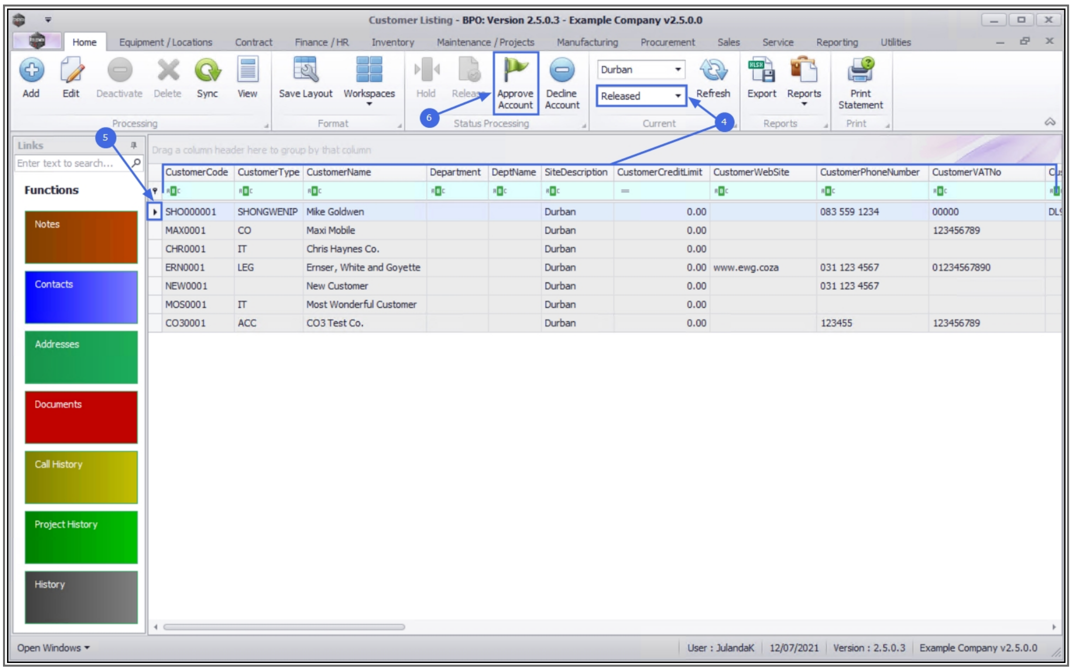


1. The **Customer Listing** screen will be displayed.
2. Select the **Site** where the Customer can be located.
    - The example has **Durban** selected.
3. Change the **Status** to **Released**.

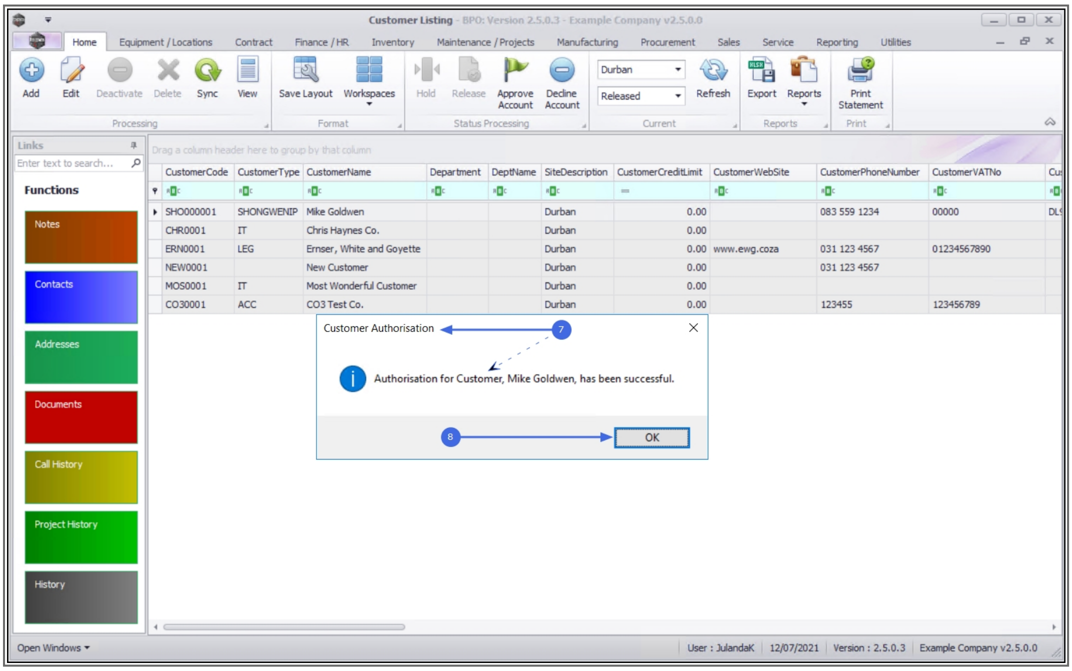


4. The **Customer Listing** screen will be updated using the Status filter selected to display all the Customers waiting for **Approval**.
5. Select the **row** of the Customer you wish to **Approve**.
6. Click on **Approve Account**.

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



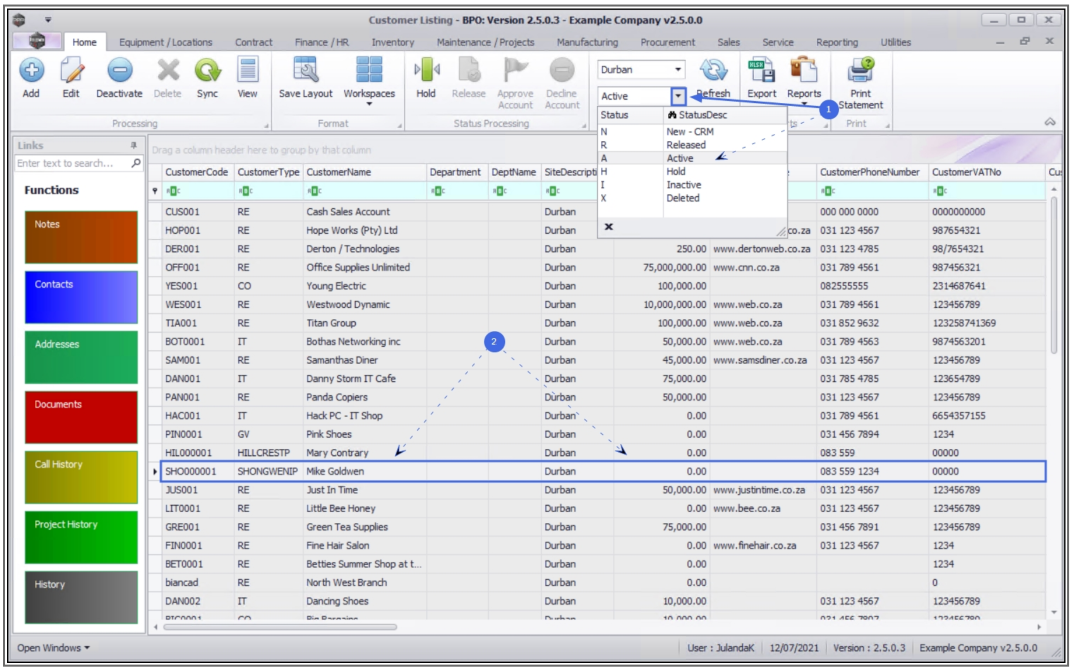
7. When you receive the **Customer Authorisation** message informing you that;
    - **Authorisation for Customer, [**customer name**], has been successful.**
8. Click on **OK**.



The Customer will be **removed** from the Customer Listing screen where the status is set to **Released**.

VIEW APPROVED CUSTOMER IN ACTIVE STATUS

1. Change the Status to **Active** using the Status drop-down list.
2. You can now view the **approved customer** on the Customer Listing screen.



Related Topics

- Customers - Decline CRM Customer

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