

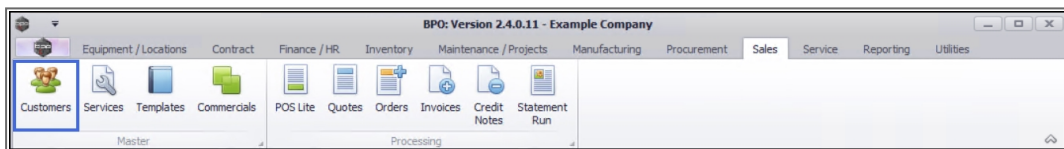
We are currently updating our site; thank you for your patience.

SALES

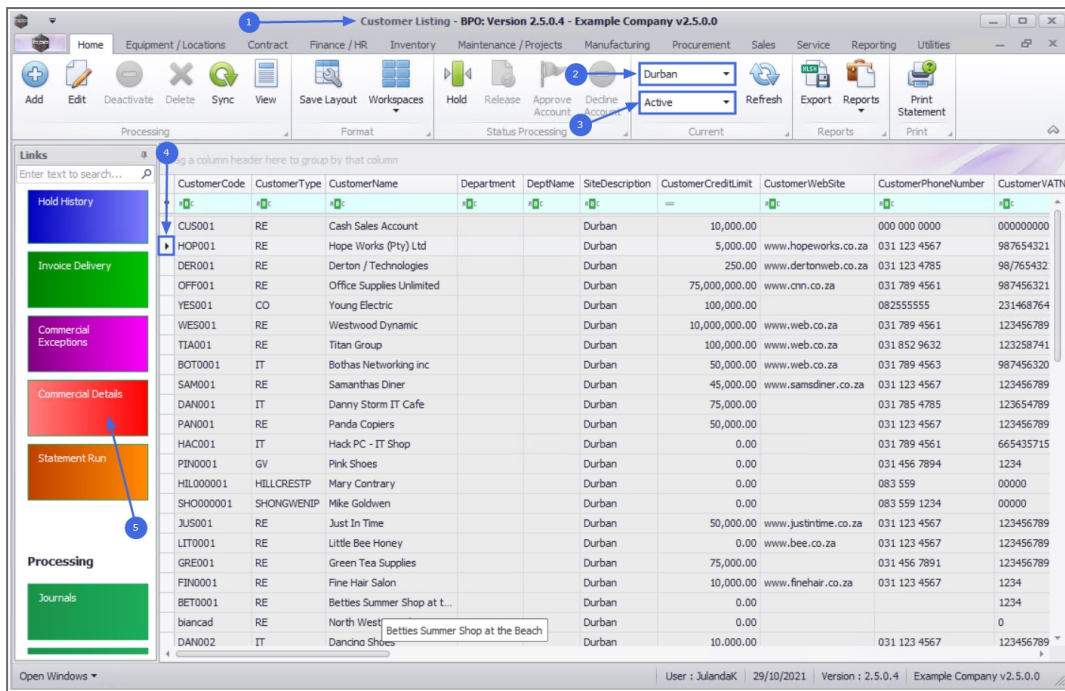
CUSTOMERS – COMMERCIAL DETAILS

The Customers Commercial Maintain screen allows you to make changes to the Commercial Header Details and the Individual Item Lines. For a detailed handling of Customer Commercials click on the link to navigate to [Sales Commercials](#).

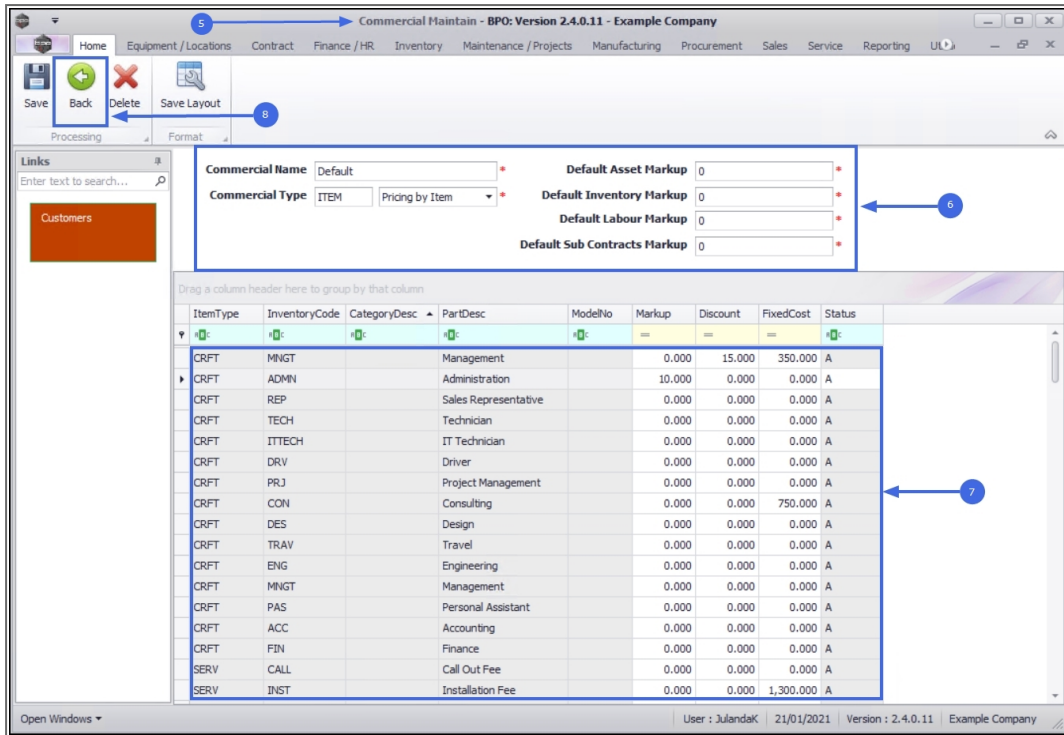
Ribbon Access: Sales > Customers



1. The **Customer Listing** screen will be displayed.
2. Select the **Site** where the customer can be located.
 - The example has **Durban** selected.
3. Select the **Status** for the customer.
 - The example has **Active** selected.
4. Select the **row** of the **customer** whose Commercial Details you wish to view.
5. Click the to **Commercial Details** tab.



6. The **Commercial Maintain** screen will be displayed.
7. Here you can **View, Add** and **Edit** customer pricing details e.g. Pricing by Item or Pricing by Type
8. You can also **View, Add** and **Edit** specific details. For example: set a specific Markup, Discount or Fixed Cost for the following pricing items:
 - Asset (serialised items)
 - Inventory (non-serialised)
 - Labour
 - Sub-Contract (third-party)
9. Click on **Back** to return to the **Customer Maintenance** screen.



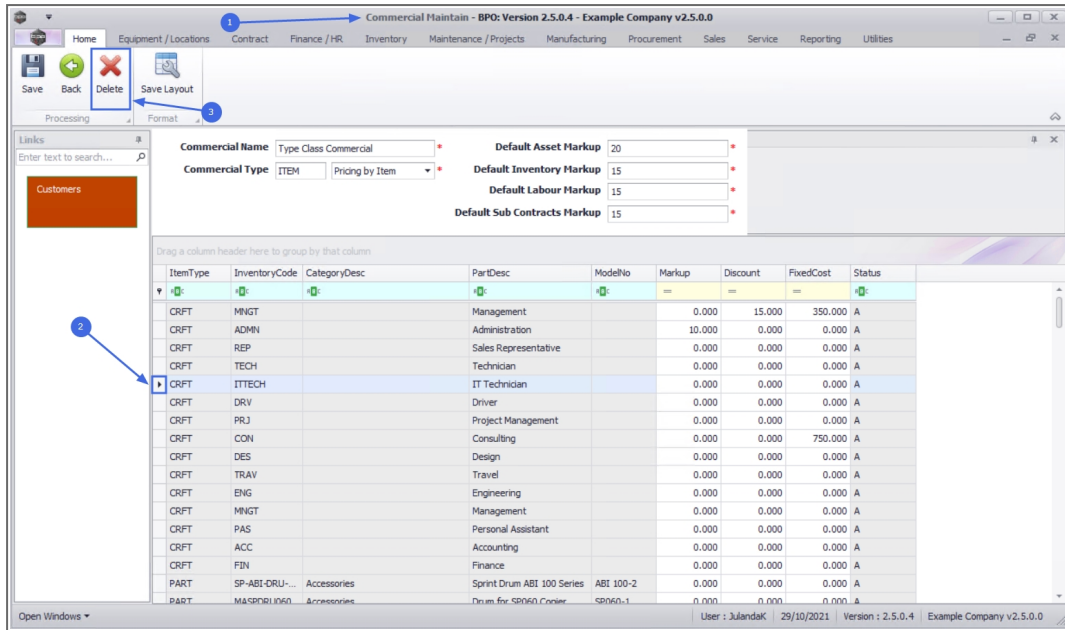
DELETE / DEACTIVATE COMMERCIAL ITEM

It is a good habit to first view the Customer list for the Commercial, to ensure that no Customers are still linked to the commercial, before deactivating it.

1. From the **Commercial Maintain** screen,
2. Click on the **row selector** in front of the Sales Commercial you wish to remove or deactivate.
3. Click on **Delete**.



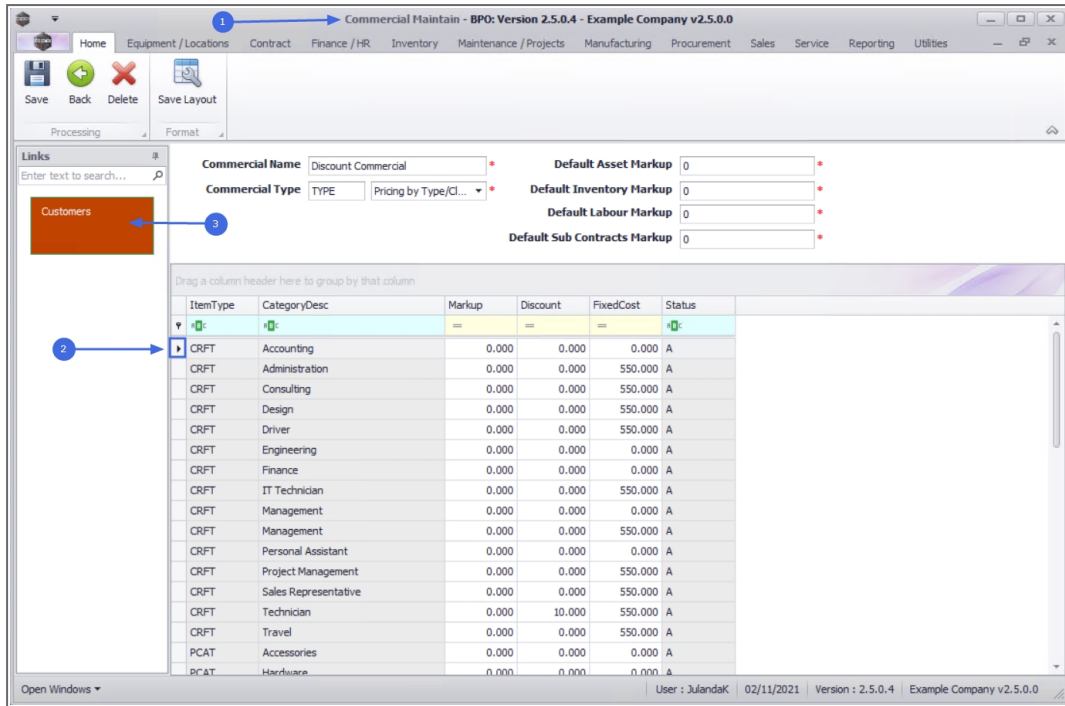
Short cut key: Right click to display the **Process** menu list. Click on **Delete**.



For a detailed handling of this topic refer to [Commercials - Delete \(Deactivate\) Commercial](#)

VIEW CUSTOMERS LINKED TO COMMERCIAL

1. From the **Commercial Maintain** screen,
2. Click on the **row** of the Sales Commercial item you wish to view.
3. Click on the **Customers** tile.

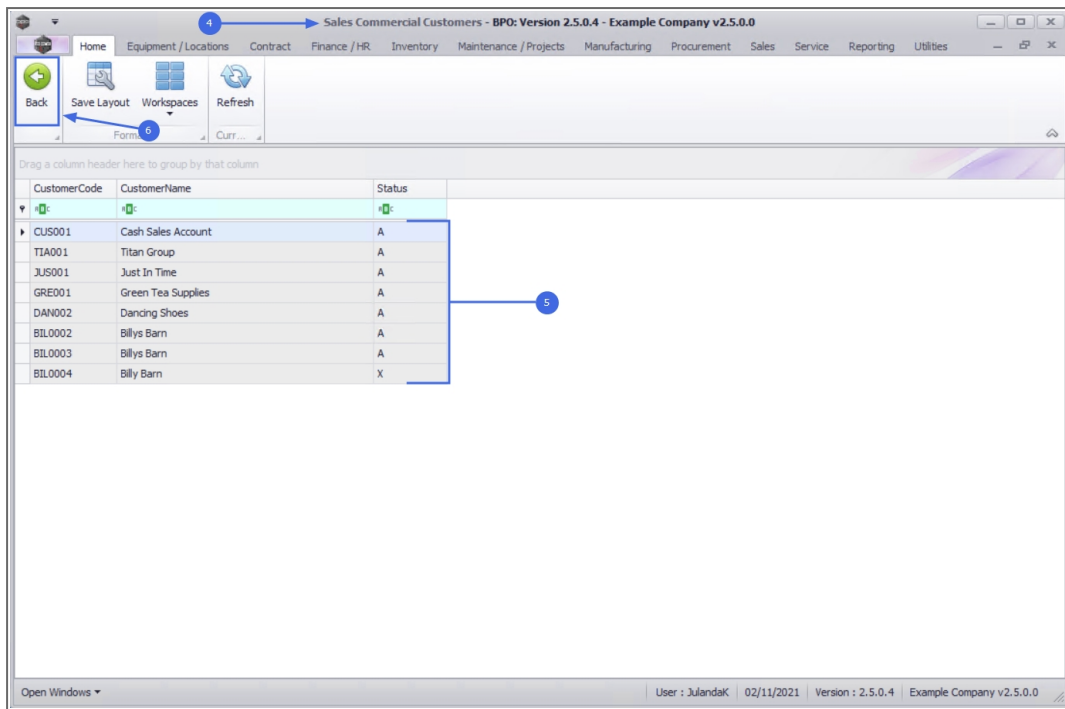


4. The **Sales Commercial Customers** screen will display.
5. From this screen you can view a list of all the customers linked to the selected Sales Commercial.



Note that the information on this screen can only be viewed and no changes can be made.

6. Click on **Back** to return to the **Sales Commercials** screen.



4 Sales Commercial Customers - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

6

CustomerCode	CustomerName	Status
CUJ001	Cash Sales Account	A
TIA001	Titan Group	A
JUS001	Just In Time	A
GRE001	Green Tea Supplies	A
DAN002	Dancing Shoes	A
BIL0002	Billys Barn	A
BIL0003	Billys Barn	A
BIL0004	Billy Barn	X

5

Open Windows | User : JulandaK | 02/11/2021 | Version : 2.5.0.4 | Example Company v2.5.0.0

Related Topics

- [Introduction to Commercials](#)
- [Customers - Commercial Exceptions](#)

MNU.061.029