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

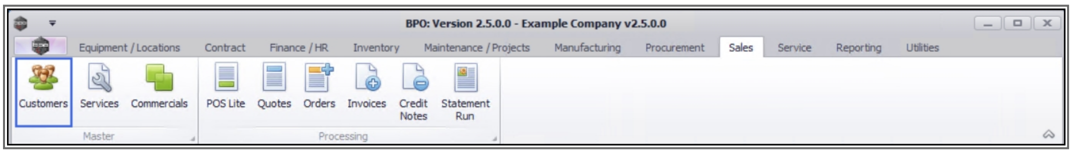
SALES

CUSTOMERS - DECLINE CRM CUSTOMER

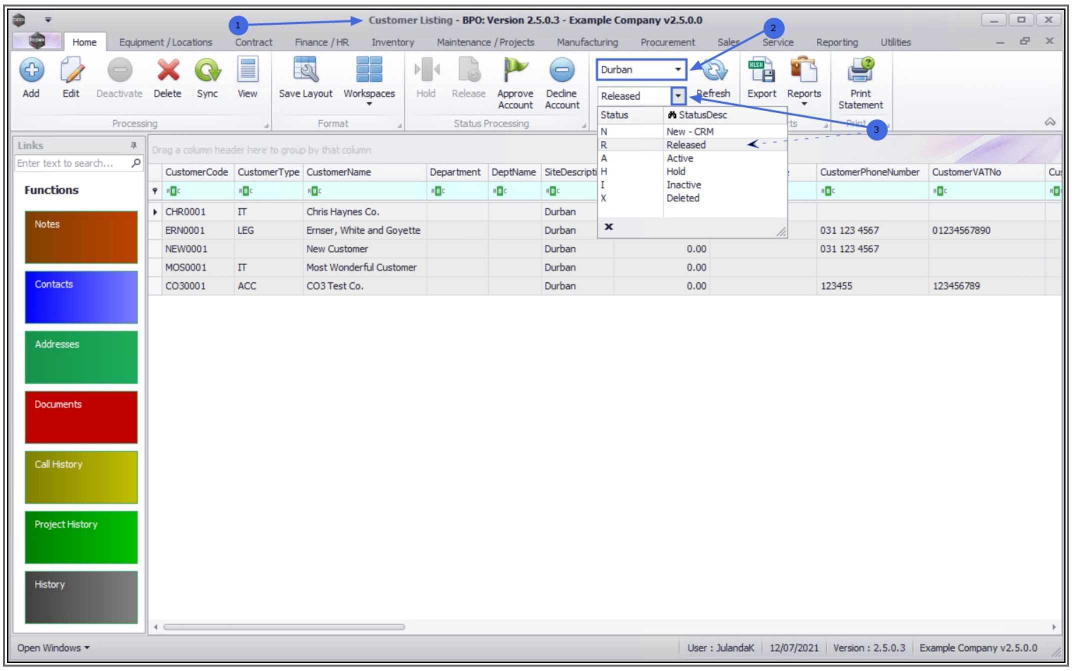
CRM customer details can only be **viewed** in the **New - CRM** status. The customer has to be **Released for approval** in **CRM** once the customer details and information have been checked and validated.

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.

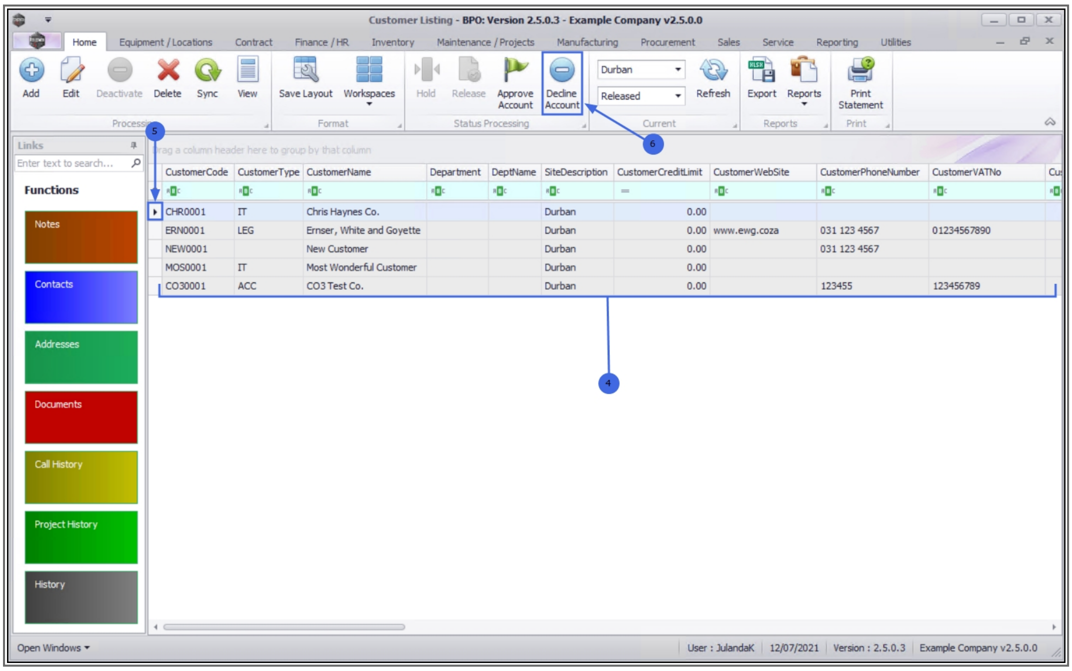
Ribbon Access: Sales > Customers



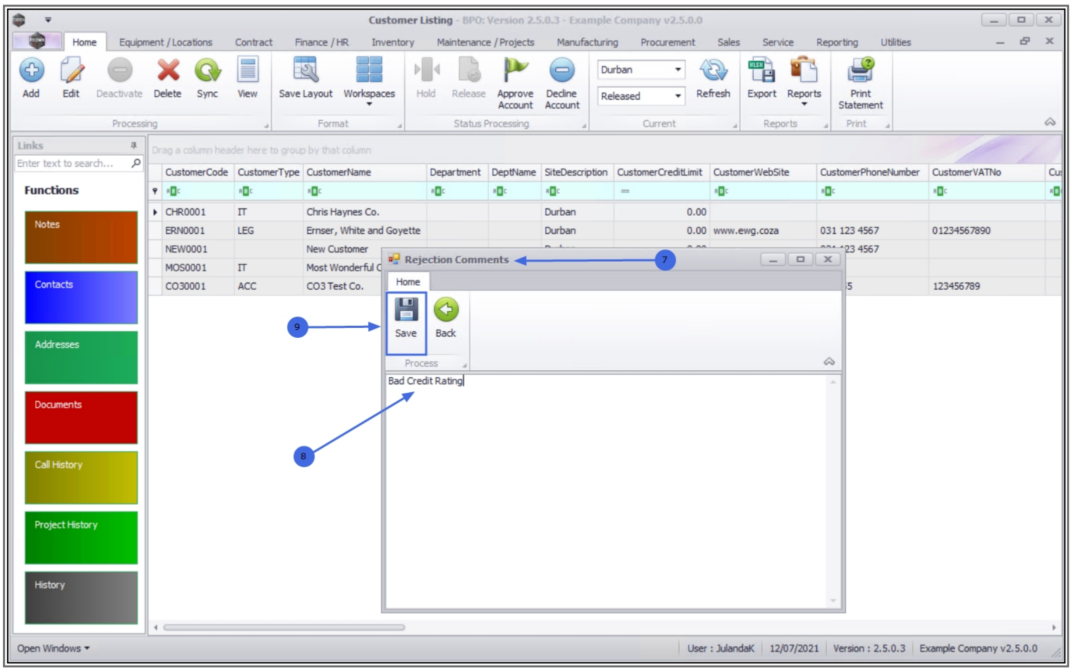
1. The **Customer Listing** screen will be displayed.
2. Select the **Site** where the Customer can be located.
    - The example has **Durban** selected.
3. Change the **Status** to **Released**.



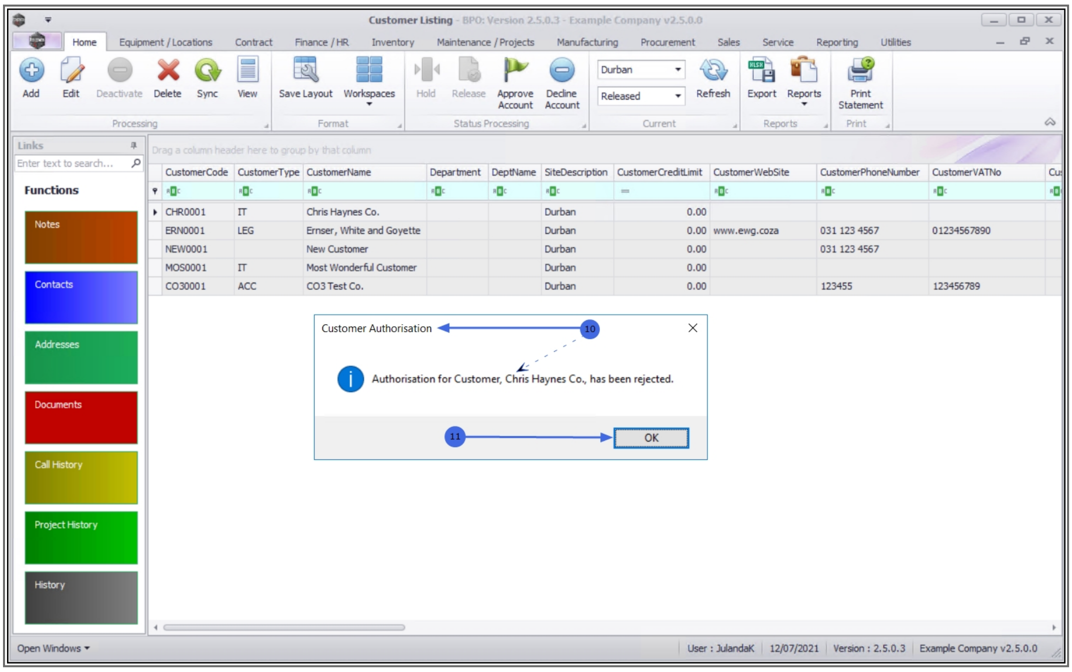
4. The **Customer Listing** screen will be updated using the Status filter selected to display all the Customers waiting for **Approval**.
5. Select the **row** of the **Customer** that you wish to **decline** the account for.
6. Click on **Decline Account**.



7. The **Rejection Comments** text box will display.
8. Click in the text area to type in the rejection comment against the Customer.
9. Click on **Save**.



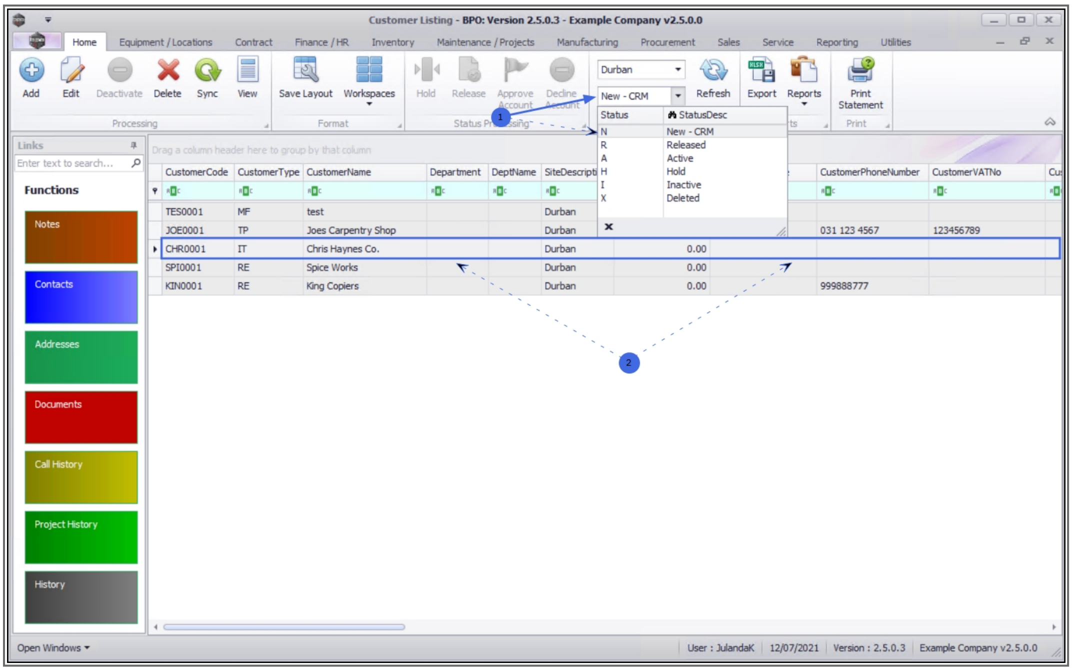
10. When you receive the **Customer Authorisation** message to confirm that;
    - **Authorisation for Customer, [**customer code**] has been rejected.**
11. Click on **OK**.



VIEW DECLINED CUSTOMER

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

1. Change the Status to **New - CRM** using the Status drop-down list.
2. You can now view the declined Customer on the Customer Listing screen.



The customer will need to be re-checked and validated in CRM before they can be re-released.

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