

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

SALES

INTRODUCTION TO CUSTOMERS

A customer can be a **Debtor** or a **Cash Sales Customer**. You will need to set up a customer in order to create many of the documents in BPO2, for example:

- Quotes
- Orders
- Calls
- Invoices
- Contracts
- Credit Notes

By setting up the customer as **Is Debtor**, BPO will create an account for this customer in your financial system. You do <u>not</u> need to specify an account code for the customer in BPO.

If you do <u>not</u> set up the customer as a **Debtor**, then the customer will be treated as a **Cash Sales** customer. You will then need to specify a **GL Account Code** for the customer in BPO, in order to post to your **Cash Sales** account in your financial system.

You can set up customer **credit limits**, **credit checks** and **credit terms**. Any changes you make to these, will update in Pastel.

Must Haves:



- An Accounts Contact (Pastel account contact)
- A Primary Contact (Pastel account contact if Account Contact is not set up & Call Notification Contact)
- An <u>Invoice Delivery method</u> (for contract billing invoice emailing)
- One <u>Billing address</u> (and <u>only 1</u> billing address)
- At least 1 <u>Shipping address</u> (for Sales Shipping and Machine Location links)

Ribbon Access: Sales > Customers



- 1. The **Customer Listing** screen will be displayed.
- 2. From this screen you can view a list of all your customers for the **site** and **status** selected.
- 3. This screen will open by default in the **Active** status.

CUSTOMER STATUS

All the customers in the **Customer Listing** screen are sorted depending on the **Site** and **Status** selected:

- New CRM
- Released
- Active
- Hold
- Inactive



Introduction to Customers

	Home	Equipm	ent /	Locations (Contract I	Finance / HR	Inventory N	laintenar	nce / Projec	ts M	anufacturing	Procur	ement Sales	Service Report	ing	Jtilities —	凸 X
Add	Edit De	eactivate	Del	C C Sync	View S	ave Layout	Workspaces H	fold R		prove ccount	Dedine Account	Durban Active Status	• • • Status	Y	orts	Print Statement	
		Process	ing			Form	nat 🔺	S	itatus Proce	essing		N	New - CR	ts	4	Print 🖌	4
inks		ų										R	Released				
Enter tex	ct to search.	P										A	Active				1
_				CustomerCode			herName	Depart			SiteDescript	T	Hold			tomerPhoneNumber	Custor
Funct	ions		٩	C	A D C	n O C		я∎с	- D		40¢	x	Deleted		n .		u n c
Notes		 CUS001 		RE Cas		ales Account				Durban					000 0000	00000	
Note	s			HOP001	RE	Hope V	Vorks (Pty) Ltd				Durban	x		// 00.3	a 031	123 4567	98765
				DER001	RE	Derton	/Technologies				Durban		250.00	www.dertonweb.co.	a 031	123 4785	98/76
_				DFF001	RE	Office	Supplies Unlimited				Durban		75,000,000.00	www.cnn.co.za	031	789 4561	98745
Cont	acts			ES001	CO	Young	Electric				Durban		100,000.00		082	555555	23146
				VES001	RE	Westw	ood Dynamic				Durban		10,000,000.00	www.web.co.za	031	789 4561	12345
				TA001	RE	Titan G	iroup				Durban		100,000.00	www.web.co.za	031	852 9632	12325
Addr	esses		1	BOT0001	Π	Bothas	Networking inc				Durban		50,000.00	www.web.co.za	031	789 4563	98745
				SAM001	RE	Saman	thas Diner				Durban		45,000.00	www.samsdiner.co.z	a 031	123 4567	12345
				DAN001	Π	Danny	Storm IT Cafe				Durban		75,000.00		031	785 4785	12365
Decu	ments			AN001	RE	Panda	Copiers				Durban		50,000.00		031	123 4567	12345
Cocu	incirus -			HAC001	Π	Hack P	C - IT Shop				Durban		0.00		031	789 4561	66543
				PIN0001	GV	Pink Sh	ioes				Durban		0.00		031	456 7894	1234
				HIL000001	HILLCREST	P Mary C	ontrary				Durban		0.00		083	559	00000
Call H	listory			HO000001	SHONGWE	VIP Mike G	oldwen				Durban		0.00		083	559 1234	00000
				US001	RE	Just In	Time				Durban		50,000.00	www.justintime.co.za	031	123 4567	12345
_				.IT0001	RE	Little B	ee Honey				Durban		0.00	www.bee.co.za	031	123 4567	12345
Proje	ect History		-	SRE001	RE	Green	Tea Supplies				Durban		75,000.00		031	456 7891	12345
				IN0001	RE	Fine Ha	air Salon				Durban		10,000.00	www.finehair.co.za	031	123 4567	1234
				ET0001	RE	Betties	Summer Shop at t				Durban		0.00				1234
Histo	ry			biancad	RE	North V	West Branch				Durban		0.00				0
				AN002	Π	Dancin	a Shoes				Durban		10.000.00		031	123 4567	12345

RIBBON ACTION BUTTONS

Customer ribbon action buttons will be available (bold) or unavailable (greyed out) depending on the status selection.

- 1. In this screen, you can <u>Add</u>, <u>Edit</u>, <u>Delete</u> or <u>View</u>, a customer.
- 2. You can <u>synchronise</u> customers with your financial system.



Introduction to Customers

2	Home	¥ 6		Locations	Contract		ice / HR		entory	Mainten			Durban	acturing		rocurem	REEL		(?	Reportir	ig Utilities			
Add	Edit D	elete S	Sync	View	Save Layout			Hold	Releas				Active			efresh	Expo	rt Reports						
		_				*				Accour		ount						•	Stateme	ent				
	Proc	essing	/	× 4	Form	at	A		Status	Processing	3			Current	t		R	eports	a Print					
inks			Drag	a column l																				
nter text	t to search	,o	0	ustomerCo	de Customer	Type Cu	stomer	lame		Departme	ent De	ptName	SiteDescri	iption	Custom	erCredit	tLimit	CustomerW	ebSite	Custom	erPhoneNumber	Custor	nerVATNo	
Functi	ions		9 n	.	#Ec	-0	c			R E C	-0	c	* 0 ¢					<u>ال</u>		R B C		# 		
			. 0	US001	RE	Ca	sh Sales	Account					Durban			10,0	00.00			000 000	0000	00000	00000	
Notes			н	OP001	RE	Ho	pe Worl	ks (Pty) L	td				Durban			5,0	00.00	www.hopev	vorks.co.za	031 12	3 4567	98765	4321	
			D	ER001	RE	De	rton / T	echnologi	es				Durban			2	50.00	www.dertor	nweb.co.za	031 12	3 4785	98/76	4321	
			0	FF001	RE	Of	fice Sup	plies Unli	nited				Durban		7	5,000,0	00.00	www.cnn.c	o.za	031 78	9 4561	98745	5321	
Contacts		YE	S001	со	Yo	ung Elec	tric					Durban			100,0	00.00			082555	555	23146	37641		
			W	ES001	RE	We	estwood	Dynamic					Durban		1	0,000,0	00.00	www.web.c	o.za	031 78	9 4561	12345	5789	
			П	A001	RE	Tit	an Grou	p					Durban			100,0	00.00	www.web.c	o.za	03185	2 9632	12325	3741369	
Addresses		B	DT0001	Π	Bo	thas Ne	tworking	inc				Durban			50,0	00.00	www.web.c	o.za	031 78	9 4563	98745	53201		
			S	AM001	RE	Sar	mantha	s Diner					Durban			45,0	00.00	www.samso	liner.co.za	031 12	3 4567	12345	5789	
			D	AN001	Π	Da	inny Sto	rm IT Cat	fe				Durban			75,0	00.00			031 78	5 4785	12365	4789	
Dogu	mente		P	AN001	RE	Par	nda Cop	piers					Durban			50,0	00.00			031 12	3 4567	12345	5789	
Cocui	locuments		н	AC001	Π	Ha	ick PC -	IT Shop					Durban				0.00			031 78	9 4561	66543	57155	
			PI	N0001	GV	Pin	k Shoes						Durban				0.00			031 45	5 7894	1234		
			н	L000001	HILLCREST	rp Ma	ary Cont	rary					Durban				0.00			083 55	9	00000		
Call H	listory		JL	JS001	RE	Jus	st In Tir	ne					Durban			50,0	00.00	www.justin	time.co.za	031 12	3 4567	12345	5789	
			LI	T0001	RE	Litt	tle Bee H	Honey					Durban				0.00	www.bee.c	o.za	031 12	3 4567	12345	5789	
			G	RE001	RE	Gre	een Tea	Supplies					Durban			75,0	00.00			031 45	5 7891	12345	5789	
Projec	ct History		FI	N0001	RE	Fin	ne Hair S	alon					Durban				0.00	www.fineha	air.co.za	031 12	3 4567	1234		
			B	T0001	RE	Bet	tties Su	mmer Sho	p at t				Durban				0.00					1234		
			bi	ancad	RE	No	rth Wes	t Branch					Durban				0.00					0		
Histor			D	AN002	Π	Da	incing Sł	noes					Durban			10,0	00.00			031 12	3 4567	12345	5789	
			BI	G0001	CO	Big	Bargair	ns					Durban			10,0	00.00			031 45	5 7897	12345	5789	
			М	AN0001	RE	Ma	andy Nor	rton					Durban				0.00					0		
Equip	ment		D	AN0003	Π	Da	nce Sho	es					Durban				0.00					12345	5789	

3. You can place a customer on <u>Hold</u> or <u>Release</u> a customer from Hold.

4. `	You can <mark>App</mark>	orove or <u>Decli</u>	ne a CRM	customer	account.
------	--------------------------	-----------------------	----------	----------	----------

🔂 🥢 🗙 🕻	nc View S	Save Layout Wo		e Approve	Dedine	Durban	Refresh Exp	ort Reports Print			
Hou car occir by	inc incir i	ave eayour mo	*	Account	Account	Active	• Rencari cap	 Stateme 			
Processing		Format	⊿ Status	Processing	-	Curre	nt 🔺 I	Reports a Print			
inks 4			p by that column			4					
nter text to search 🔎	CustomerCode	e CustomerType	CustomerName	Department	DeptName	SiteDescription	CustomerCreditLimit	CustomerWebSite	CustomerPhoneNumber	CustomerVATNo	
Functions	P #0c	* 0 ¢	100	REC	# C	* 0 :	-	(D)	* D ¢	8 0 0	
	CUS001	RE	Cash Sales Account			Durban	10.000.00		000 000 0000	000000000	
Notes	HOP001	RE	Hope Works (Pty) Ltd			Durban	5,000.00	www.hopeworks.co.za	031 123 4567	987654321 98/7654321	
	DER001	RE	Derton / Technologies			Durban	250.00	www.dertonweb.co.za			
	OFF001	RE	Office Supplies Unlimited			Durban	75,000,000.00	www.cnn.co.za	031 789 4561	987456321	
Contacts	YES001	co	Young Electric			Durban	100,000.00		082555555	2314687641	
	WES001	RE	Westwood Dynamic			Durban	10,000,000.00	www.web.co.za	031 789 4561	123456789	
	TIA001	RE	Titan Group			Durban	100,000.00	www.web.co.za	031 852 9632	123258741369	
Addresses	BOT0001	Π	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	п	Danny Storm IT Cafe			Durban	75,000.00		031 785 4785	123654789	
Documents	PAN001	RE	Panda Copiers			Durban	50,000.00		031 123 4567	123456789	
	HAC001	Π	Hack PC - IT Shop			Durban	0.00		031 789 4561	6654357155	
	PIN0001	GV	Pink Shoes			Durban	0.00		031 456 7894	1234	
California	HIL000001	HILLCRESTP	Mary Contrary			Durban	0.00		083 559	00000	
Call history	JUS001	RE	Just In Time			Durban	50,000.00	www.justintime.co.za	031 123 4567	123456789	
Documents 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	
Project History	FIN0001	RE	Fine Hair Salon			Durban		www.finehair.co.za	031 123 4567	1234	
	BET0001	RE	Betties Summer Shop at t			Durban	0.00			1234	
	biancad	RE	North West Branch			Durban	0.00			0	
History	DAN002	Π	Dancing Shoes			Durban	10,000.00		031 123 4567	123456789	
	BIG0001	CO	Big Bargains			Durban	10,000.00		031 456 7897	123456789	
	MAN0001	RE	Mandy Norton			Durban	0.00			0	



EXPORT

5. **Export** allows you to <u>export</u> a Customer List to Microsoft Excel.

REPORTS

 Reports allows you to print Customer Reports e.g. Invoices, Credit Notes, Debit Orders, Performance, etc. For more information on selecting and running a report refer to <u>Introduction to All Reports - Run a</u> <u>Report</u>.

PRINT STATEMENT

7. **Print Statement** allows you to <u>print and/or email</u> a Customer Statement directly from this screen.

Home 6	G	nt / Locations	Contract Fi	inance / HR Inventory	Maintenand	Projects	Manufacturin Durban	Procurement		Reporting Utilities	_ 1	8
Add Edit Delete	e Syn	c View S	ave Layout Wo	rkspaces Hold Releas		Dedine Account	Active	▼ Refresh Exp	ort Reports Print T Stateme	ent		
Processir	ng	4	Format	4 Statu:	Processing		Curren	it i	Reports Print	4		
nks	4							6	6			
nter text to search	P	CustomerCode		CustomerName	Department	DeptName	SiteDescription	CustomerCreditLimit	CustomerWebSite	CustomerPhoneNumber	CustomerVATNo	
Functions		AD:	ill:		all c	nt:	I C	=			ADC	
	_ ,	CUS001	RE	Cash Sales Account			Durban	10,000.00		000 000 0000	000000000	
Notes		HOP001	RE	Hope Works (Pty) Ltd			Durban	5,000.00	www.hopeworks.co.za	031 123 4567	987654321	
		DER001	RE	Derton / Technologies			Durban	250.00	www.dertonweb.co.za	031 123 4785	98/7654321	
		OFF001 RE		Office Supplies Unlimited			Durban	75,000,000.00	www.cnn.co.za	031 789 4561	987456321	
Contacts		YES001	CO	Young Electric			Durban	100,000.00		082555555	2314687641	
		WES001	RE	Westwood Dynamic			Durban	10,000,000.00	www.web.co.za	031 789 4561	123456789	
		TIA001	RE	Titan Group			Durban	100,000.00	www.web.co.za	031 852 9632	123258741369	
Addresses		BOT0001	п	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	Π	Danny Storm IT Cafe			Durban	75,000.00		031 785 4785	123654789	
Documents		PAN001	RE	Panda Copiers			Durban	50,000.00		031 123 4567	123456789	
Cocuments		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	
		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	
Project History		FIN0001	RE	Fine Hair Salon			Durban	0.00	www.finehair.co.za	031 123 4567	1234	
		BET0001	RE	Betties Summer Shop at t			Durban	0.00			1234	
		biancad	RE	North West Branch			Durban	0.00			0	
History		DAN002	Π	Dancing Shoes			Durban	10,000.00		031 123 4567	123456789	
		BIG0001	CO	Big Bargains			Durban	10,000.00		031 456 7897	123456789	
		MAN0001	RE	Mandy Norton			Durban	0.00			0	



FUNCTIONS AND PROCESSING TILES

On the left side of the **View Customer** screen is the **Links** panel which contains the Customer **Functions** and **Processing** tiles. Each tile, when clicked on, will take you to further information concerning the selected customer. For the purpose of this manual, we are reviewing each tile from the **Customer Listing** screen.

These tiles can be accessed from the following screens:

- Customer Listing
- View Customer
- Customer Maintenance
- Add Customer
- Edit Customer

Important Note: If you are working from the **Customer Listing** screen, ensure that you have selected the <u>correct</u> customer <u>before</u> you click on any tile.

contact. etc. Refer to Customers - Contacts

FUNCTIONS TILES



The Notes tile will direct you to the Customer Note Listing where you can Add, View and Modify customer notes. Refer to Customers - Notes



The **Contacts tile** will direct you to the Contacts for Customer where you can **Add**, **Edit**, **Delete** and **View** the contacts for the Customer e.g. Account contact, Primary

Addresses

The Addresses tile will direct you to the Addresses for Cus-

tomer where you will be able to **Add**, **Edit** and **Delete** the Shipping and Billing Addresses for the Customer. Refer to **Customers - Addresses**





The Documents tile will direct you to the Documents for Customer screen where you can Add, Edit Delete and View digital documents for the customer. Refer to Customers -Documents

The Call History tile will direct you to the Calls for Customer screen where you can Add, Edit, Close or Complete a Call, as well as Release, put a call on Hold or Pending status. Refer to Customers - Call History

Project History

The Project History tile will direct you to the Project Listing for Customer screen where you can Add, Edit, Apply a Project Methodology or Adjust Project Baseline, as well as maintain the Employee and Project Time. Refer to Customers - Project History

History

The History tile will direct you to the History Listing for the Customer displaying a data grid of the **historical changes** made for the Customer. Refer to **Customers - History**



The Equipment tile will direct you to the Machine List screen where you can Add,View, Edit and Delete all serialised items (machines) that are linked to the customer. Refer to Customers - Equipment



Locations

The Contracts tile will direct you to the Contracts for Customer screen which will allow you to View the Contracts linked to the Customer. Refer to Customers - Contracts

The Locations tile will direct you to the Functional Loca-

tions for Customer screen where you can create a Main Location, Parent and Sub-Locations. Refer to Customers -Locations



The Hold History tile will direct you to the Hold Listing for Customer screen where you can be view hold information for the customer. Refer to **Customers - Hold History**

Invoice Delivery

The **Invoice Delivery tile** displays how invoices will be delivered for the Customer. From the Invoice Delivery



Methods for Customer screen you can **Add**, **Edit**, **View** and **Delete** an Invoice Delivery Method. Refer to Customers - Invoice Delivery Method

The Commercial Exceptions tile will display the Commercial Exceptions for the customer you have selected. You can Add, Edit and Delete the Commercial Exceptions for this customer. These are the parts, labour and/or services that are excluded from the commercial details set up on the customer. Refer to Customers - Commercial Exceptions

The Commercial Details tile will display the Commercial

Maintain information for the Customer. You will only be able to **view** the Commercial information and not changes or additions can be made. Refer to Customers - Commercial Details

Statement Run

mercial Details

The Statement Run tile will display the Statement Run for Customer screen to generate Customer Statements and/or Invoices. Refer to Customers - Statement Run

PROCESSING TILES

The Journals tile will direct you to the Accounts Journals

Journals

for Customer screen. From here you can **view** all transactional information on the Customer's account in Sage Evolution that has a transaction balance and an outstanding balance. Refer to **Customers - Journals**



Orders

The Quotes tile will direct you to the Sales Quotes for Customer screen. You have to option to create a sales order from a quote, raise a Quote against a Customer on Hold or Clone a quote. Refer to Customers - Quotes

The Orders tile will direct you to the Sales Orders for Customer screen where you will be able to convert a Sales



Quote into a Sales Order, or create a Sales Order. Refer to **Customers - Orders** The Invoices tile will direct you to the Sales Invoices for Invoices **Customer** screen, where you can view, add, edit and reprint invoices. Refer to Customers - Invoices The Contract Invoices tile will direct you to the Contract Contract Invoices Invoices for Customer screen will be displayed. Here, you can Add and View contract invoices for this customer. Refer to Customers - Contract Invoices The Credit Notes tile will direct you to the Sales Credit Credit Notes Notes for Customer screen. Refer to Customers - Credit Notes The Contract Credit Notes tile will direct you to the Contract Credit Notes for Customer screen. You will be able Contract Credit Notes to Add, View, Delete and Release or Remove or Reject a contract credit note for this customer with Auto Re-Invoice or without Auto Re-Invoice. Refer to Customers - Contract **Credit Notes**

Related Topics

• Customers - Credit Limit, Terms and Check

BPO.MNU.061