

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

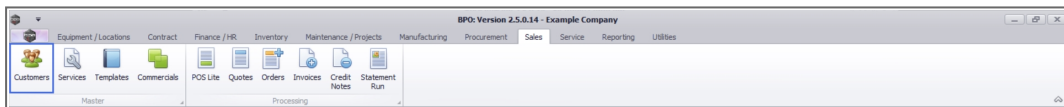
SALES

CUSTOMERS – DEACTIVATE CUSTOMER

Customers can only be deactivated if the customer does not have contracts, open part requests, return requests, internal assets issued against them; unprocessed credit notes (sales and contracts), unprocessed invoices, sales orders, quotes, purchase requisitions and purchase orders.

Deleting a Customer will change the status for the Customer to **(I) Inactive**. If BPO is integrated with Evolution, the customer will show as **On Hold=1**.

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.

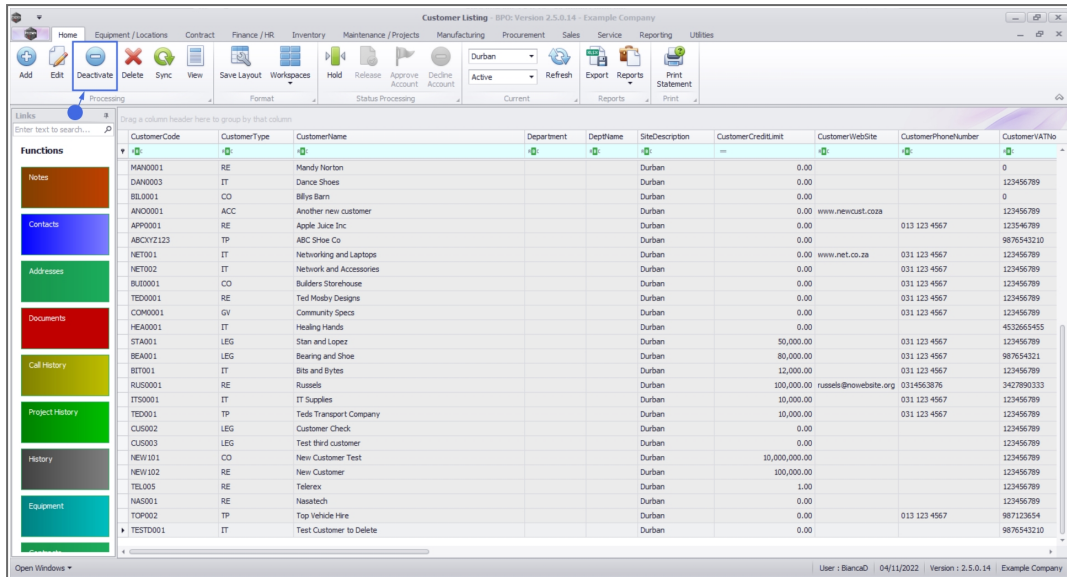
Upon opening, this screen will default to the **Active** status, listing all the **Active** contracts for the selected site.

CustomerCode	CustomerType	CustomerName	Department	DepName	SiteDescription	CustomerCreditLimit	CustomerWebSite	CustomerPhoneNumber	CustomerVATNo
HOP001	RE	Hope Works (Pty) Ltd			Durban	1,000,000.00	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	HILLCRESTP	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
APRXX717	TD	APR - Group Pty			Durban	0.00			6876543210

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

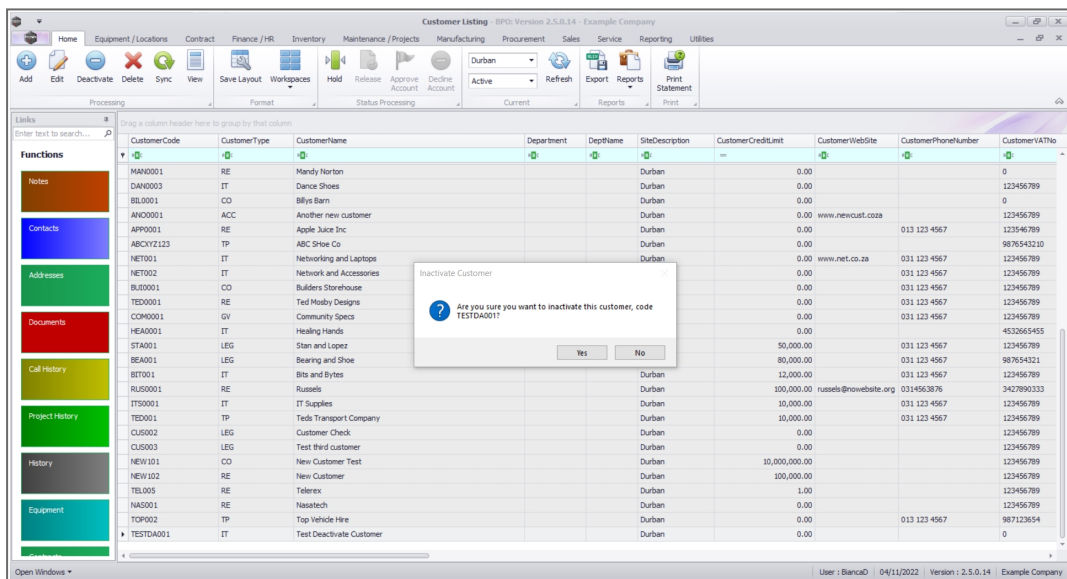
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DER001	RE	Derton / Technologies			Durban	250.00	www.dertonweb.co.za	031 123 4785	987654321
OFF001	RE	Office Supplies Unlimited			Durban	75,000.00	www.off.co.za	031 789 4561	987654321
YES001	CO	Young Electric			Durban	100,000.00	0825555555	2314687641	
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	HILLCRESTP	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
APRXX717	TD	APR - Group Pty			Durban	0.00			6876543210

- Click on the **Deactivate** button.



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

- Click on the **Yes** button.



The will be inactivated and can be found by selecting the **Inactive** status.

CustomerCode	CustomerType	CustomerName	Department	DepName	SiteDescription	CustomerCreditLimit	CustomerWebSite	CustomerPhoneNumber	CustomerVATNo
WIK	Account	Miles Networking			Durban	0.00			123654789
STR001	RE	Strictly Multifunctional			Durban	0.00			123654789
GIL00002	GILTTSPA	Doff Primary			Durban	50,000.00		083 559	00000
JCH0001	RE	John Mackenzie			Durban	0.00			0
HQP005	RE	Hope Works			Durban	100,000.00		031 123 4567	987654321
HQP015	RE	Hope Works			Durban	100,000.00		031 123 4567	987654321
HQP020	RE	Hope Works			Durban	100,000.00		031 123 4567	987654321
HQP025	RE	Hope Works			Durban	100,000.00		031 123 4567	987654321
SCR0001	RE	Scrapbooking Supplies Unlimited			Durban	0.00		031 123 4567	987654321
TESTDA001	IT	Test Deactivate Customer			Durban	0.00			0

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