

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.



Home	Equipment / Lo	rations	Contract	Finance / HR	Inventory	Maintenar	ve / Projects	Manuf	acturing	Procurement	Salee	Service	Reporting	Utiliti				- 8
		Q					P	0	Durban	•	A	1	3	-				
dd Edit D	eactivate Delete	Sync	View	Save Layout Worl	kspaces	Hold Release	Approve		Active		Refresh	Export Rep	orts Prin Statem					
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er text to search	Cus	tomerCode		CustomerType	Customer	Name				Depa	rtment	DeptName	SiteDescript	tion	CustomerCreditLimit	CustomerWebSite	CustomerPhoneNumber	CustomerVA
unctions	* (D)			* 0 :	×0:					100		* 0 ¢	1 0 4		-	4 0 4	(D)	1 0 0
	HORE	001		RE	Hope Wor	ks (Pty) Ltd							Durban		1,000,000,000.00	www.hopeworks.co.za	031 123 4567	987654321
Notes	DEP	.001		RE	Derton / 1	echnologies							Durban		250.00	www.dertorweb.co.za	031 123 4785	98/7654321
	OFF	001		RE	Office Su	plies Unlimited							Durban		75,000.00	www.cnn.co.za	031 789 4561	987456321
	YES	001		со	Young Ele	ctric							Durban		100,000.00	0	082555555	231468764
Contacts	WE	5001		RE	Westwoo	d Dynamic							Durban		100,000.00	www.web.co.za	031 789 4561	123456789
	TIA	001		RE	Titan Gro	ip .							Durban		100,000.00	www.web.co.za	031 852 9632	1232587413
	BOT	0001		IT	Bothas Ne	tworking inc							Durban		50,000.00	www.web.co.za	031 789 4563	9874563201
	SAM	1001		RE	Samantha	s Diner							Durban		45,000.00	www.samsdiner.co.za	031 123 4567	123456789
	DAI	1001		IT	Danny St	orm IT Cafe							Durban		75,000.00	0	031 785 4785	123654789
	STR	002		п	Stringfield	Internet Cafe							Durban		75,000.00	0	031 456 7894	123654789
Documents	HAG	:001		п	Hack PC -	IT Shop							Durban		0.0	0	031 789 4561	6654357155
	PIN	0001		GV	Pink Shoe	s							Durban		0.00	0	031 456 7894	1234
	HIL	000001		HILLCRESTP	Mary Con	trary							Durban		0.00	0	083 559	00000
	JUS	001		RE	Just In Tir	ne							Durban		50,000.00	www.justintime.co.za	031 123 4567	123456789
	LITE	001		RE	Little Bee	Honey							Durban		0.0	www.bee.co.za	031 123 4567	123456789
	GRE	001		RE	Green Tei	Supplies							Durban		75,000.00)	031 456 7891	123456789
	FIN	0001		RE	Fine Hair	Salon							Durban		0.00	www.finehair.co.za	031 123 4567	1234
Project History	BET	0001		RE	Betties Su	mmer Shop at	the Beach						Durban		0.00)		1234
	biar	biancad RE		North We	North West Branch							Durban		0.0	0		0	
	DAP	1002		п	Dancing S	hoes							Durban		10,000.00)	031 123 4567	123456789
History	BIG	0001		со	Big Barga	ns							Durban		10,000.00)	031 456 7897	123456789
	MAI	0001		RE	Mandy No	rton							Durban		0.0)		0
	DAM	10003		IT	Dance Sh	bes							Durban		0.0)		123456789
Equipment	BIL	001		co	Billys Barr								Durban		0.0)		0
	ANG	00001		ACC	Another r	ew customer							Durban		0.0	www.newcust.coza		123456789
	APP	0001		RE	Apple Juic	e Inc							Durban		0.0)	013 123 4567	123546789
	ΔR/	397173		TP	ARC SHor	Co							Durhan		0.00	1		9876543210

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

*			Castomer Listing - BPO: 1	Fersion 2.5.0.14	 Example Con 	npany				- 0
Hone Eals	ment / Locations Contra	t Finance /HR	Inventory Maintenance / Projects Manufacturing Proc	urement Sales	Service	Reporting Utili	les			- 0
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er text to search P	CustomerCode	CustomerType	CustomerName	Department	Depthane	SiteDescription	CustomerCreditLimit	CustomerWebSite	CustomerPhoneNumber	CustomerVATN
unctions	+ 0	•	•	-0	-0	-0	-	0	•	-0
	HOP001	RE	Hope Works (Pty) Ltd			Durban	1,000,000,000.00	www.hopeworks.co.za	031 123 4567	987654321
Notes	DER001	RE	Derton / Technologies			Durban	250.00	www.dertorweb.co.za	031 123 4785	98/7654321
	OFF001	RE	Office Supplies Unlimited			Durban	75,000.00	www.099.00.28	031 789 4561	987456321
	YE5001	00	Toung Electric			Durban	100,000.00		082555555	2314687641
Contacts	WE5001	RE	Westwood Dynamic			Durban	100,000.00	www.web.co.za	031 799 4561	123456789
	T5A001	RE	Titan Group			Durban	100,000.00	www.web.co.za	0318529632	123258741369
	8070001	п	Bothas Networking inc			Durban	50,000.00	www.web.co.za	031 789 4563	9874563201
Addresses	SAM001	RE	Samanthas Diner			Durban	45,000.00	www.sansdner.co.za	031 123 4567	123456789
	DAN001	Π	Danny Storm IT Cafe			Durban	75,000.00		031 785 4785	123654789
	STR002	Π	Stringfield Internet Cafe			Durban	75,000.00		031 456 7894	123654789
Documents	HAC001	п	Hack PC - IT Shop			Durban	0.00		031 789 4561	6654357155
	P0x0001	GY	Prk Shoes			Durban	0.00		031 456 7894	1234
	HEL000001	HELCRESTP	Mary Contrary			Durban	0.00		083 559	00000
	3./5001	RE	Just In Time			Durban	50,000.00	www.justintime.co.za	031 123 4967	123456789
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
	FIN0001	RE	Fine Hair Salon			Durban	0.00	www.finehair.co.za	031 123 4567	1234
Project Holory	BET0001	RE	Betties Summer Shop at the Beach			Durban	0.00			1234
	biancad	RE	North West Branch			Durban	0.00			0
	DAN002	Π	Dancing Shoes			Durban	10,000.00		031 123 4567	123456789
Hatory	8050001	CO	Big Bargains			Durban	10,000.00		031 456 7897	123456789
	MAN0001	RE	Mandy Norton			Durban	0.00			0
and the second	DAN0003	п	Dance Shoes			Durban	0.00			123456789
Ealement	88.0001	00	Bilys Barn			Durban	0.00			0
	AN00001	ACC	Another new customer			Durban	0.00	www.newcust.coza		123456789
	APP0001	RE	Apple Juice Inc			Durban	0.00		013 123 4567	123546789
	6A/1977173	19	AR" Seve Co			Durhan	0.00			9836541215

• Click on the **Deactivate** button.



	uipment / Locations Cont		Inventory Maintenance / Projects Manufacturing	1 45	-		ties			- 8
id Edit Deactive	ate Delete Sync View	v Save Layout Wo		Refresh	Export Repo					
	cessing	Format	Account Account Status Processing	Current	Reports	Statement				
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er text to search	CustomerCode	CustomerType	CustomerName	Department	DeptName	SiteDescription	CustomerCreditLimit	CustomerWebSite	CustomerPhoneNumber	CustomerVAT
unctions	* (D)	(D)	4 0 4	* 0 4	4 0 4	ADC .	-	* 0 *	 •••• 	* 0 0
	MAN0001	RE	Mandy Norton			Durban	0.00			0
Notes	DAN0003	Π	Dance Shoes			Durban	0.00			123456789
	BIL0001	co	Billys Barn			Durban	0.00			0
	ANO0001	ACC	Another new customer			Durban	0.00	www.newcust.coza		123456789
Contacts	APP0001	RE	Apple Juice Inc			Durban	0.00		013 123 4567	123546789
	ABCXYZ123	TP	ABC SHoe Co			Durban	0.00			9876543210
	NET001	Π	Networking and Laptops			Durban	0.00	www.net.co.za	031 123 4567	123456789
	NET002	Π	Network and Accessories			Durban	0.00		031 123 4567	123456789
	BUI0001	co	Builders Storehouse			Durban	0.00		031 123 4567	123456789
	TED0001	RE	Ted Mosby Designs			Durban	0.00		031 123 4567	123456789
Documents	COM0001	GV	Community Specs			Durban	0.00		031 123 4567	123456789
	HEA0001	Π	Healing Hands			Durban	0.00			4532665455
	STA001	LEG	Stan and Lopez			Durban	50,000.00		031 123 4567	123456789
Call History	BEA001	LEG	Bearing and Shoe			Durban	80,000.00		031 123 4567	987654321
	BIT001	Π	Bits and Bytes			Durban	12,000.00		031 123 4567	123456789
	RUS0001	RE	Russels			Durban	100,000.00	russels@nowebsite.org	0314563876	3427890333
	ITS0001	IT	IT Supplies			Durban	10,000.00		031 123 4567	123456789
Project History	TED001	TP	Teds Transport Company			Durban	10,000.00		031 123 4567	123456789
	CUS002	LEG	Customer Check			Durban	0.00			123456789
	CUS003	LEG	Test third customer			Durban	0.00			123456789
History	NEW101	co	New Customer Test			Durban	10,000,000.00			123456789
	NEW 102	RE	New Customer			Durban	100,000.00			123456789
	TEL005	RE	Telerex			Durban	1.00			123456789
Equipment	NAS001	RE	Nasatech			Durban	0.00			123456789
	TOP002	TP	Top Vehide Hire			Durban	0.00		013 123 4567	987123654
	 TESTD001 	Π	Test Customer to Delete			Durban	0.00			9876543210
C										

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

• Click on the **Yes** button.

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ter text to search P		CustomerType	CustomerName			Department	DeptName	SiteDescription	CustomerCreditLimit	CustomerWebSite	CustomerPhoneNumber	CustomerVATT
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uncuons	MAN0001	RE	Mandy Norton			10.	·u·	Durban	0.00	-	-u-	0
Notes	DAN0003	IT	Dance Shoes					Durban	0.00			123456789
	BIL0001	C0	Billys Barn					Durban	0.00			0
	ANO0001	ACC	Another new customer					Durban		www.pewo.ist.coza		123456789
Contacts	APP0001	RE	Apple Juice Inc					Durban	0.00		013 123 4567	123546789
	ABCXYZ123	TP	ABC SHoe Co			Durban	0.00			9876543210		
	NET001	п	Networking and Laptops					Durban		www.net.co.za	031 123 4567	123456789
Addresses	NET002	Π	Network and Accessories	Inactivate	Eustomer			×	0.00		031 123 4567	123456789
Nos casos	BUI0001	со	Builders Storehouse						0.00		031 123 4567	123456789
	TED0001	RE	Ted Mosby Designs		want to inactivate			0.00		031 123 4567	123456789	
Description	COM0001	GV	Community Specs	P Are you sure you TESTDA001?			e this customer,	code	0.00		031 123 4567	123456789
Documents	HEA0001	п	Healing Hands						0.00			4532665455
	STA001	LEG	Stan and Lopez						50,000.00		031 123 4567	123456789
	BEA001	LEG	Bearing and Shoe			· ·	les	No	80,000.00		031 123 4567	987654321
Call History	BIT001	Π	Bits and Bytes					Durban	12,000.00		031 123 4567	123456789
	RUS0001	RE	Russels			Durban	100,000.00	russels@nowebsite.org	0314563876	3427890333		
	ITS0001	π	IT Supplies					Durban	10,000.00		031 123 4567	123456789
Project History	TED001	TP	Teds Transport Company					Durban	10,000.00		031 123 4567	123456789
	CUS002	LEG	Customer Check					Durban	0.00			123456789
	CUS003	LEG	Test third customer					Durban	0.00			123456789
History	NEW101	со	New Customer Test					Durban	10,000,000.00			123456789
	NEW102	RE	New Customer					Durban	100,000.00			123456789
	TEL005	RE	Telerex					Durban	1.00			123456789
Equipment	NAS001	RE	Nasatech					Durban	0.00			123456789
	TOP002	TP	Top Vehicle Hire					Durban	0.00		013 123 4567	987123654
	TESTDA001	Π	Test Deactivate Customer					Durban	0.00			0

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



Customers - Deactivate Customer

Home Equip			Customer Listing - BPO:							- 8
dd Edit Reactivate		(1111)	paces Hold Release Approve Decline Inactive	Refresh	Export Reports	<u>ا</u>	8			
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	CustomerCode	CustomerType	CustomerName	Department	DeptName	SiteDescription	CustomerCreditLimit	CustomerWebSite	CustomerPhoneNumber	CustomerVATNo
unctions	▼ (D)	1 0 :	10:	1 0 1	* 0 ¢	AD:	-	4 0 4	(D)	×0:
Notes	► MIK	Account	Mikes Networking			Durban	0.00			123654789
Notes	STR001	RE	Strictly Multifunctional			Durban	0.00			123654789
	GIL000002	GILLITTSPA	Dolf Primary			Durban	50,000.00		083 559	00000
	JOH0001	RE	John MacKenzie			Durban	0.00			0
Contacts	HOP005	RE	Hope Works			Durban	100,000.00		031 123 4567	987654321
	HOP015	RE	Hope Works			Durban	100,000.00		031 123 4567	987654321
	HOP020	RE	Hope Works			Durban	100,000.00		031 123 4567	987654321
Addresses	HOP025	RE	Hope Works			Durban	100,000.00		031 123 4567	987654321
	SCR0001	RE	Scrapbooking Supplies Unlimited			Durban	0.00		031 123 4567	987654321
	TESTDA001	Π	Test Deactivate Customer			Durban	0.00			0
Call History Project History History Equipment										

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