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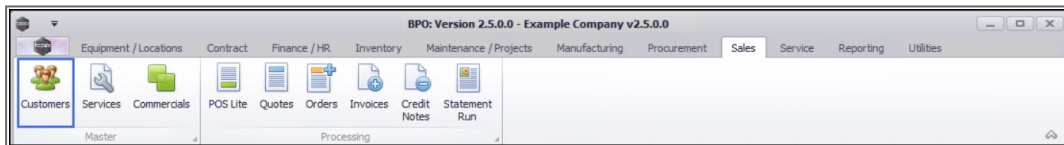
SALES

CUSTOMERS - EDIT CUSTOMER

The **Edit** customer functionality allows you to edit certain details on the Customer Maintenance screen.

> If you are using a **Customer Code Prefix** with the Customer Code - For a detailed handling of this topic refer to Add Customer with Customer Code Prefix.

Ribbon Access: Sales > Customers

1. The **Customer Listing** screen will be displayed.
2. Select the **Site** that you wish to work in.
   - The example has **Durban** selected.
3. Select the **Status** for the customer you wish to edit.
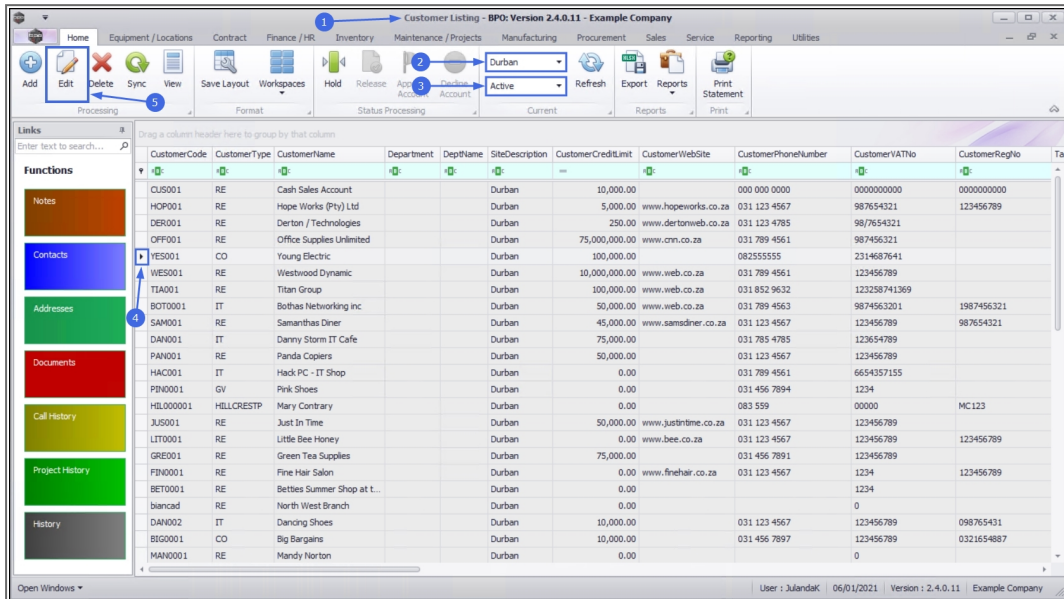
> ✏ Note that you can edit a customer in all States except for **New-CRM** and **Inactive**.

   - The example has **Active** selected.
4. Click on the **row** of the **customer** you wish to edit.

5. Click on **Edit**.

> (↗) Short cut key: **Right click** to display the **All groups** menu list. Click on **Edit**.

6. The **Customer Maintenance** screen will be displayed.
7. This screen will open with the **Detail** panel by default.
8. From the Detail panel you can now **edit** and **add** to the customer Details, as required.

EDIT COMMERCIAL TAB

9. Click on the **Commercial** tab to display the commercial details.
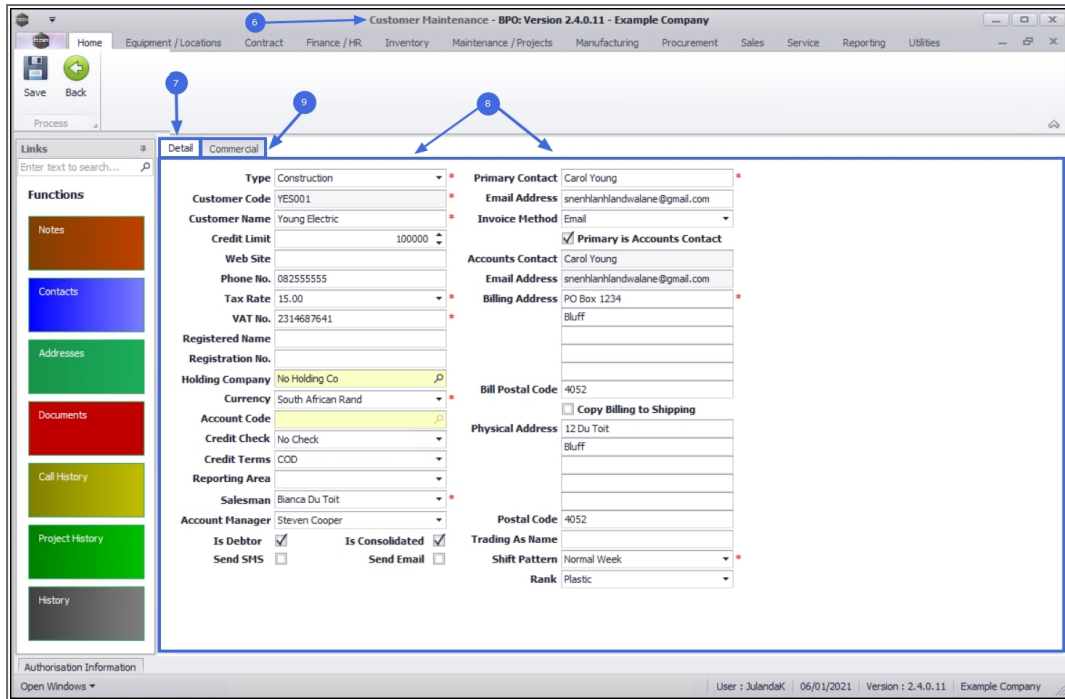
10. **Add** or **edit** the Sites and Salespersons linked to this customer, as well as the Customer Banking Details, the Payment Method, e.g. Debit Order and the Customer Commercial.

11. **Custom 1-10:** You can use these fields to add additional information not currently set up for the customer. The field names can be re-named according to your company requirements. Please contact your BPO specialist or CO3 Support for assistance.
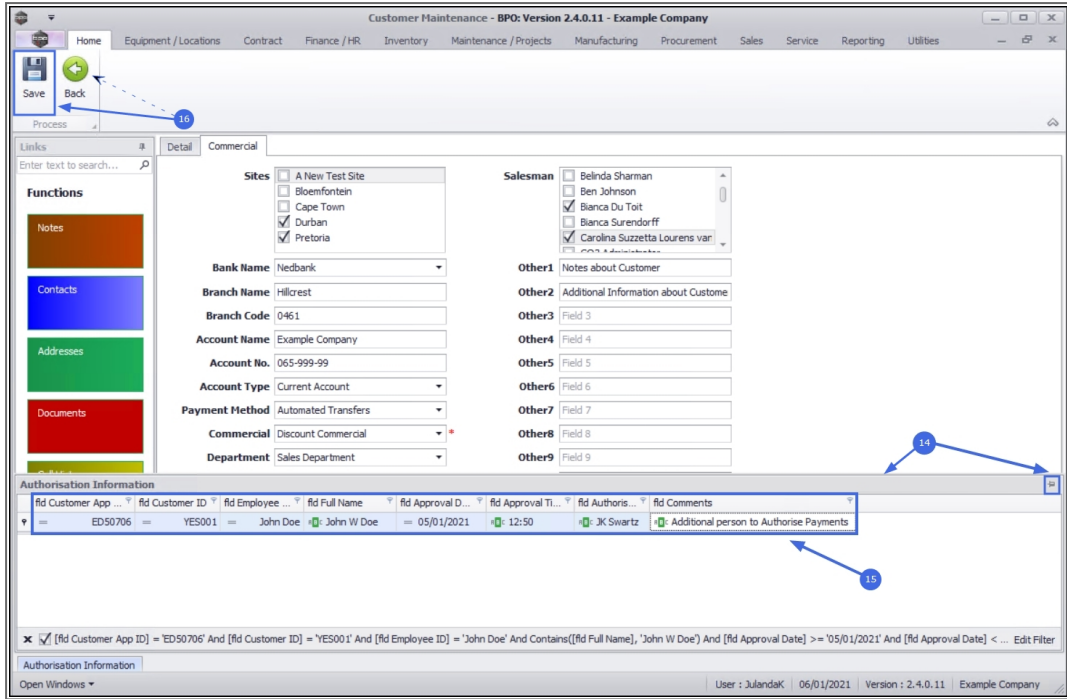
AUTHORISATION TAB

12. Click on the **Authorisation** tab.
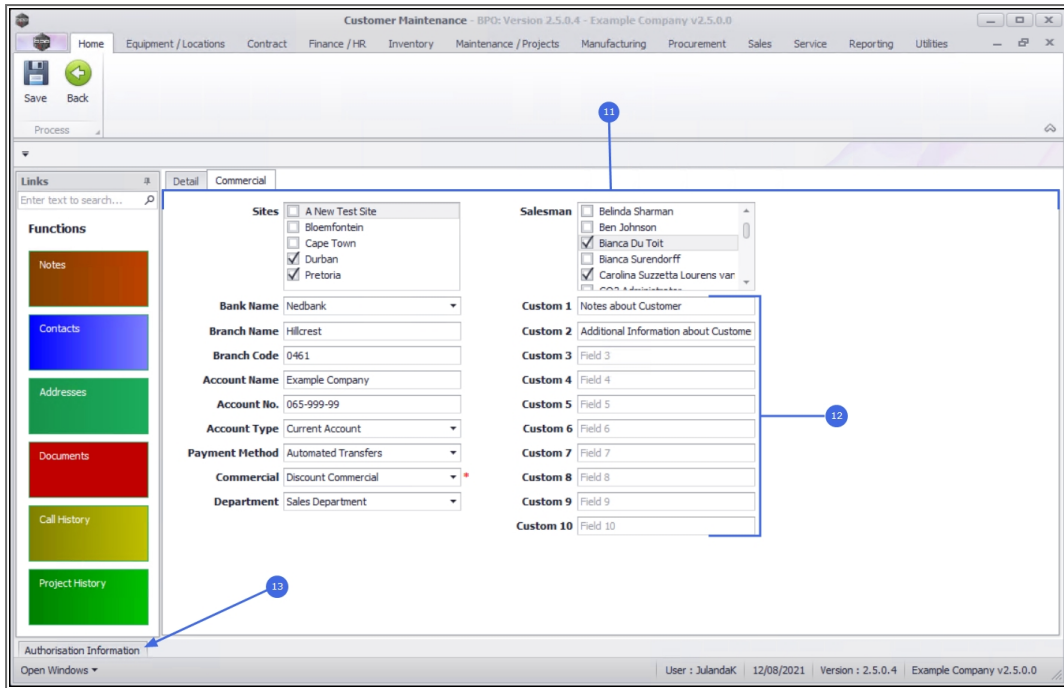
13. The **Authorisation Information** panel will be expanded. This panel cannot be edited from this screen. You can **dock** this panel to the screen.

14. Here you can <u>view</u> the **Approval Date** and **Time**, the **Name** of the person who authorised this customer with **Comments**, where applicable.

SAVE EDITS

15. Click on **Save** to update the Customer information and save any changes. **Close** this screen to return to the **Customer Listing** screen.

    - Click on **Back** if no changes are required or to discard any changes made.

MNU.061.009