

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

# **SALES**

## **CUSTOMERS - APPROVE 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**.



#### Customers - Approve CRM Customer

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- 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 you wish to **Approve**.
- 6. Click on Approve Account.

Short cut key: Right click to display the All groups menu list. Click on Approve.



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- 7. When you receive the **Customer Authorisation** message informing you that;
  - Authorisation for Customer, [customer name], has been successful.
- 8. Click on OK.



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

### **VIEW APPROVED CUSTOMER IN ACTIVE STATUS**

- 1. Change the Status to **Active** using the Status drop-down list.
- 2. You can now view the **approved customer** on the Customer Listing screen.



### Customers - Approve CRM Customer

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#### **Related Topics**

• Customers - Decline CRM Customer

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