

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

## **SALES**

## **CUSTOMERS - DECLINE 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**.



|  | (                           | 1            | Customer Li                             | isting - BPO: | Version 2.5  | i.0.3 - Exam      | ple Company | y v2.5.0.0            | 2            |                       |             | x   |
|--|-----------------------------|--------------|---|---------------|--------------|-------------------|-------------|-----------------------|--------------|-----------------------|-------------|-----|
| Home Equipm                                  | ment / Locations            | Contract Fi  | inance / HR Inventory                   | Maintenanc    | e / Projects | Manufact          | uring Proc  | curement Sales        | Service      | Reporting Utilities   | - 1         | 8 X |
| 🔂 🍃 😑  | ×Q                          |              |   |               |              | $\Theta$          | Durban      | · •                   |              |                       |             |     |
| Add Edit Deactivate                          | Delete Sync                 | View Save    | Layout Workspaces Ho                    | old Release   |              | Dedine<br>Account | Released    | - Refresh B           | Export Repor | ts Print<br>Statement |             |     |
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| Links #                                      | 1                           |              |   | 01010001      | , occurry    |                   | N<br>R      | New - CRM<br>Released | <            | 3                     |             |     |
| Enter text to search P                       |                             |              |   |               |              |                   | A           | Active                |              |                       |             |     |
|  |                             |              |   | Department    |              |                   | H<br>T      | Hold                  | -            | CustomerPhoneNumber   |             | Cu  |
| Functions                                    | <b>₽</b> # <b>□</b> ¢       | * <b>0</b> ¢ | 8 <b>0</b> 0                            | ۰ <b>۵</b> ۰  | * C          | 4 <b>0</b> 4      | x           | Deleted               |              | R C                   | REC         | -0  |
| Notes  | <ul> <li>CHR0001</li> </ul> | Π            | Chris Haynes Co.                        |               |              | Durban            | ×           |                       | _            |                       |             |     |
| THO LED                                      | ERN0001                     | LEG          | Ernser, White and Goyette               |               |              | Durban            | *           |                       | 11.          | 031 123 4567          | 01234567890 |     |
|  | NEW0001                     |              | New Customer                            |               |              | Durban            |             | 0.00                  |              | 031 123 4567          |             |     |
| Contacts                                     | MOS0001<br>CO30001          | IT<br>ACC    | Most Wonderful Customer<br>CO3 Test Co. |               |              | Durban<br>Durban  |             | 0.00                  |              | 123455                | 123456789   |     |
|  |                             |              |   |               |              |                   |             |                       |              |                       |             |     |
| Addresses<br>Documents                       |                             |              |   |               |              |                   |             |                       |              |                       |             |     |
|  |                             |              |   |               |              |                   |             |                       |              |                       |             |     |
| Documents<br>Call History<br>Project History |                             |              |   |               |              |                   |             |                       |              |                       |             |     |
| Documents<br>Call History                    | 1                           |              |   |               |              |                   |             |                       |              |                       |             | ×   |

- 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** that you wish to **decline** the account for.
- 6. Click on **Decline Account**.



|   |                    |            | Customer L                | isting - BPO: V | ersion 2.5 | .0.3 - Example  | Company v2.5.0.0    |                     |                     |               | X          |
|---|--------------------|------------|---------------------------|-----------------|------------|-----------------|---------------------|---------------------|---------------------|---------------|------------|
| Home Equipme  | ent / Locations    | Contract F | Finance / HR Inventory    | Maintenance     | / Projects | Manufacturin    | ng Procurement      | Sales Service       | Reporting Utilities | _             | 8 X        |
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| Links #   | trag a column hear |            |                           |                 |            |                 | 6                   |                     |                     |               |            |
| Enter text to search P                                  |                    |            |                           | Department      | DentName   | SiteDescription | CustomerCreditLimit | CustomerWebSite     | CustomerPhoneNumber | CustomerVATNo | Cu         |
| Functions   | + BC               | REC REC    | REC Stomer value          |                 | all:       |                 |                     | REC                 | RBC                 | REC           | -0         |
|   | -                  | п          | Chris Haynes Co.          |                 | -          | Durban          | 0.00                |                     |                     |               |            |
| Notes   | _                  | LEG        | Ernser, White and Goyette |                 |            | Durban          |                     | www.ewg.coza        | 031 123 4567        | 01234567890   |            |
|   | NEW0001            |            | New Customer              |                 |            | Durban          | 0.00                |                     | 031 123 4567        |               |            |
|   | MOS0001            | π          | Most Wonderful Customer   |                 |            | Durban          | 0.00                |                     |                     |               |            |
| Contacts  | CO30001            | ACC        | CO3 Test Co.              |                 |            | Durban          | 0.00                |                     | 123455              | 123456789     | 1          |
| Addresses   |                    |            |                           |                 |            |                 |                     |                     |                     |               |            |
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| Documents   |                    |            |                           |                 |            | •               |                     |                     |                     |               |            |
| Documents<br>Call History<br>Project History<br>History |                    |            |                           |                 |            |                 |                     |                     |                     |               |            |

- 7. The **Rejection Comments** text box will display.
- 8. Click in the text area to type in the rejection comment against the Customer.
- 9. Click on Save.

|  |                   | Customer                  | isting - BPO: Ve         | ersion 2.5. | 0.3 - Example   | e Company v2.5.0.0  |                    |                                    |                         | x          |
|--|-------------------|---------------------------|--------------------------|-------------|-----------------|---------------------|--------------------|------------------------------------|-------------------------|------------|
| Home Equipment / Location  | s Contract        | Finance / HR Inventory    | Maintenance /            | Projects    | Manufacturi     | ing Procurement     | Sales Service      | Reporting Utilities                | - 8                     | ×          |
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| Enter text to search 0   | Code CustomerType |                           | Department D             | entName     | SiteDescription | CustomerCreditLimit | CustomerWebSite    | CustomerPhoneNumber                | CustomerVATNo           | Cut        |
| Functions 9  | 8 <b>0</b> 0      | R C                       |                          |             | 4 <b>0</b> ¢    | =                   | REC.               | 800                                | 800                     | -0         |
| CHR0001  | Π                 | Chris Haynes Co.          |                          |             | Durban          | 0.00                |                    |                                    |                         |            |
| Notes ERN0001  | LEG               | Ernser, White and Goyette |                          |             | Durban          | 0.00                | www.ewg.coza       | 031 123 4567                       | 01234567890             |            |
| NEW000   |                   | New Customer              | ection Commen            | te d        | n               | 7                   |                    | 23 4567                            |                         |            |
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| Contacts CO30001   | ACC               | CO3 Test Co. Home         |                          |             |                 |                     |                    | 5                                  | 123456789               |            |
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- 10. When you receive the **Customer Authorisation** message to confirm that;
  - Authorisation for Customer, [customer code] has been rejected.
- 11. Click on **OK**.

| ф т  |            |          |        |              |             |              | Custon          | ner Li  | sting - BPO: | Version 2.         | i.0.3 - Exa       | mple     | Company v2.5.0.0   | )         |               |         |                  |                     |            |
|--|------------|----------|--------|--------------|-------------|--------------|-----------------|---------|--------------|--------------------|-------------------|----------|--------------------|-----------|---------------|---------|------------------|---------------------|------------|
|  | Home       | Equipm   | nent / | /Locations   | Contract    | Finance / H  | HR Invent       | ory     | Maintenand   | e / Projects       | Manufa            | acturing | Procurement        | Sal       | es Service    | Reporti | ng Utilities     | -                   | 8 ×        |
| <b>G</b>                                       |            | 0        | >      | < G          |             | 2            |                 | Þ       | 1 3          | -                  | 0                 | Dur      |                    | B         |               |         | P                |                     |            |
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| Links  |            | 4        |        |              |             |              |                 |         |              |                    |                   |          |                    |           |               |         |                  |                     | 10         |
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| Function                                       | 15         |          | ۰,     | 0:           | #Ec         | R <b>I</b> C |                 |         | • <b>O</b> c | *Ec                | * <b>0</b> ¢      |          | -                  | R C       |               | R C     |                  | R C                 | -0         |
|  |            |          | + 0    | CHR0001      | п           | Chris Ha     | aynes Co.       |         |              |                    | Durban            |          | 0.0                | 00        |               |         |                  |                     | 1.1        |
| Notes  |            |          | E      | ERN0001      | LEG         | Ernser,      | White and Goy   | ette    |              |                    | Durban            |          | 0.0                | 00 www    | .ewg.coza     | 031 12  | 3 4567           | 01234567890         |            |
|  |            |          |        | NEW0001      |             | New Cu       |                 |         |              |                    | Durban            |          | 0.0                |           |               | 031 12  | 3 4567           |                     |            |
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| Contacts                                       | •          |          |        | 030001       | ACC         | CO3 Te       | ist Co.         |         |              |                    | Durban            |          | 0.0                | 0         |               | 12345   | 5                | 123456789           | -          |
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| History  |            |          | 10     |              |             |              |                 | 0       |              |                    |                   |          |                    |           |               |         |                  |                     | b.         |
| Open Window                                    | ws 🕶       |          |        |              |             |              |                 |         |              |                    |                   |          | Us                 | er : Jula | ndaK 12/07/20 | 21 Ven  | sion : 2.5.0.3   | Example Company v2. | 5.0.0 //   |

## **VIEW DECLINED CUSTOMER**

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

- 1. Change the Status to **New CRM** using the Status drop-down list.
- 2. You can now view the declined Customer on the Customer Listing screen.



## Customers - Decline CRM Customer

| ф <del>т</del>                    |                             |              | Customer L                  | isting - BPO: | Version 2.5        | .0.3 - Exam      | ple Company                   | y v2.5.0.0             |               |                     |               |     |
|-----------------------------------|-----------------------------|--------------|-----------------------------|---------------|--------------------|------------------|-------------------------------|------------------------|---------------|---------------------|---------------|-----|
| Home Equipm                       | ent / Locations             | Contract F   | inance / HR. Inventory      | Maintenance   | e / Projects       | Manufact         | uring Prod                    | curement Sales         | Service       | Reporting Utilities | _             | ₽ X |
| Add Edit Deactivate               |                             |              | Layout Workspaces Ho        |               | Approve<br>Account | -                | Durban<br>New - CRM<br>Status | Refresh     StatusDesc | Export Report | Statement           |               |     |
| Processi                          | ng                          | 4            | Format 🖌                    | Status P      | n ssing            |                  | N                             | New - CRM              | ts            | a Print a           |               | ~   |
| Links #<br>Enter text to search P |                             |              |                             |               |                    |                  | R<br>A                        | Released<br>Active     |               |                     |               |     |
| Enter text to search P            | CustomerCode                | CustomerType | CustomerName                | Department    | DeptName           | SiteDescripti    | н                             | Hold                   | :             | CustomerPhoneNumber | CustomerVATNo | Cu  |
| Functions                         | ♥ #□:                       | a 🗖 c        | R C                         | 1 <b>0</b> 0  | s 🛛 c              | * <b>0</b> ¢     | X                             | Inactive<br>Deleted    |               | ABC .               | R <b>O</b> C  | -0  |
|                                   | TES0001                     | MF           | test                        |               |                    | Durban           |                               |                        |               |                     |               |     |
| Notes                             | JOE0001                     | TP           | Joes Carpentry Shop         |               |                    | Durban           | x                             |                        | 11.           | 031 123 4567        | 123456789     | _   |
|                                   | <ul> <li>CHR0001</li> </ul> | Π            | Chris Haynes Co.            |               |                    | Durban           |                               | 0.00                   |               |                     |               |     |
| Contacts                          | SPI0001<br>KIN0001          | RE           | Spice Works<br>King Copiers | ₹.,           |                    | Durban<br>Durban |                               | 0.00                   | .7            | 999888777           |               |     |
| Addresses<br>Documents            |                             |              |                             |               |                    |                  | 2                             |                        |               |                     |               |     |
| Call History<br>Project History   |                             |              |                             |               |                    |                  |                               |                        |               |                     |               |     |
| History                           |                             |              |                             |               |                    |                  |                               |                        |               |                     |               |     |

The customer will need to be re-checked and validated in CRM before they can be re-released.

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