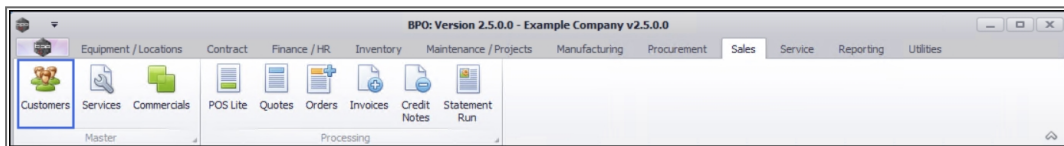


SALES

CUSTOMERS - VIEW CUSTOMER

The **View** button allows you to view more information linked to your customer.

Ribbon Access: *Sales > Customers*

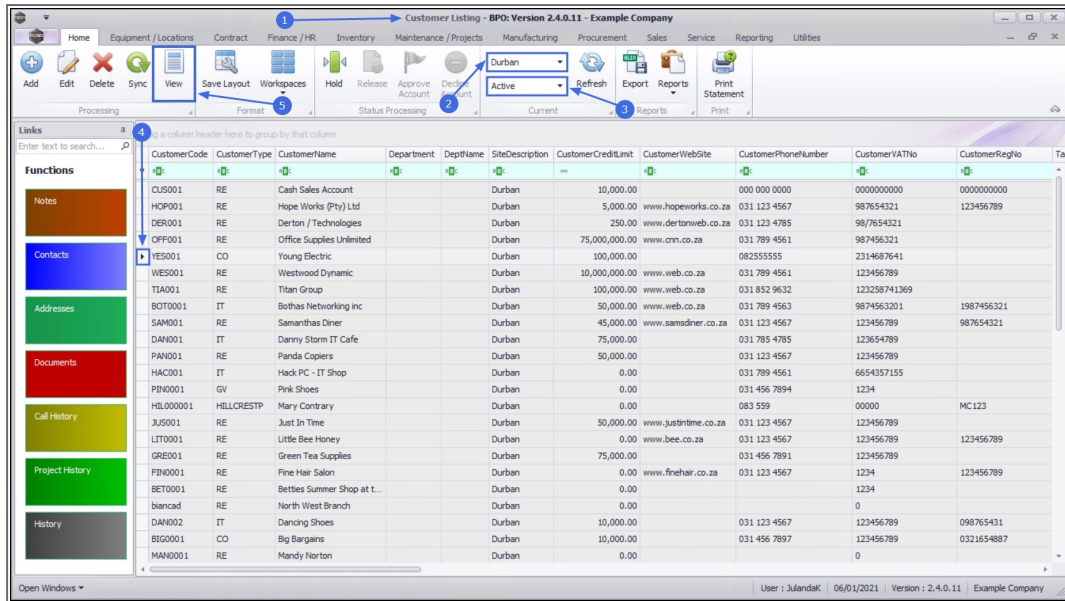


1. The **Customer Listing** screen will be displayed.
2. Select the **Site** where the customer can be located.
 - The example has Durban selected.
3. Select the **Status** for the customer.



Note that you can view customer information for a customer in any status.

- The example has **Active** selected.
4. Select the **row** of the **customer** you wish to view.
 5. Click on **View**.



CustomerCode	CustomerType	CustomerName	Department	DeptName	SiteDescription	CustomerCreditLimit	CustomerWebSite	CustomerPhoneNumber	CustomerVATNo	CustomerRegNo
CUS001	RE	Cash Sales Account			Durban	10,000.00		000 000 0000	0000000000	0000000000
HOP001	RE	Hope Works (Pty) Ltd			Durban	5,000.00	www.hopeworks.co.za	031 123 4567	987654321	123456789
DER001	RE	Derton / Technologies			Durban	250.00	www.dertonweb.co.za	031 123 4785	987654321	
OFF001	RE	Office Supplies Unlimited			Durban	75,000,000.00	www.cnn.co.za	031 789 4561	987456321	
YES001	CO	Young Electric			Durban	100,000.00		0825555555	2314687641	
WES001	RE	Westwood Dynamic			Durban	10,000,000.00	www.web.co.za	031 789 4561	123456789	
TIA001	RE	Titan Group			Durban	100,000.00	www.web.co.za	031 852 9632	123258741369	
BOT001	IT	Bothas Networking Inc			Durban	50,000.00	www.web.co.za	031 789 4563	9874563201	1987456321
SAM001	RE	Samanthas Diner			Durban	45,000.00	www.samsdiner.co.za	031 123 4567	123456789	987654321
DAN001	IT	Danny Storm IT Cafe			Durban	75,000.00		031 785 4785	123654789	
PAN001	RE	Panda Copiers			Durban	50,000.00		031 123 4567	123456789	
HAC001	IT	Hack PC - IT Shop			Durban	0.00		031 789 4561	6654357155	
PIN001	GV	Pink Shoes			Durban	0.00		031 456 7894	1234	
HIL000001	HILLCRESTP	Mary Contrary			Durban	0.00		083 559	00000	MC123
JUS001	RE	Just In Time			Durban	50,000.00	www.justintime.co.za	031 123 4567	123456789	
LIT001	RE	Little Bee Honey			Durban	0.00	www.bee.co.za	031 123 4567	123456789	123456789
GRE001	RE	Green Tea Supplies			Durban	75,000.00		031 456 7891	123456789	
FIN001	RE	Fine Hair Salon			Durban	0.00	www.finehair.co.za	031 123 4567	1234	123456789
BET001	RE	Betties Summer Shop at t...			Durban	0.00			1234	
blancad	RE	North West Branch			Durban	0.00			0	
DAN002	IT	Dancing Shoes			Durban	10,000.00		031 123 4567	123456789	098765431
BIG0001	CO	Big Bargains			Durban	10,000.00		031 456 7897	123456789	0321654887
MAN0001	RE	Mandy Norton			Durban	0.00			0	

6. The **View Customer** screen will be displayed.

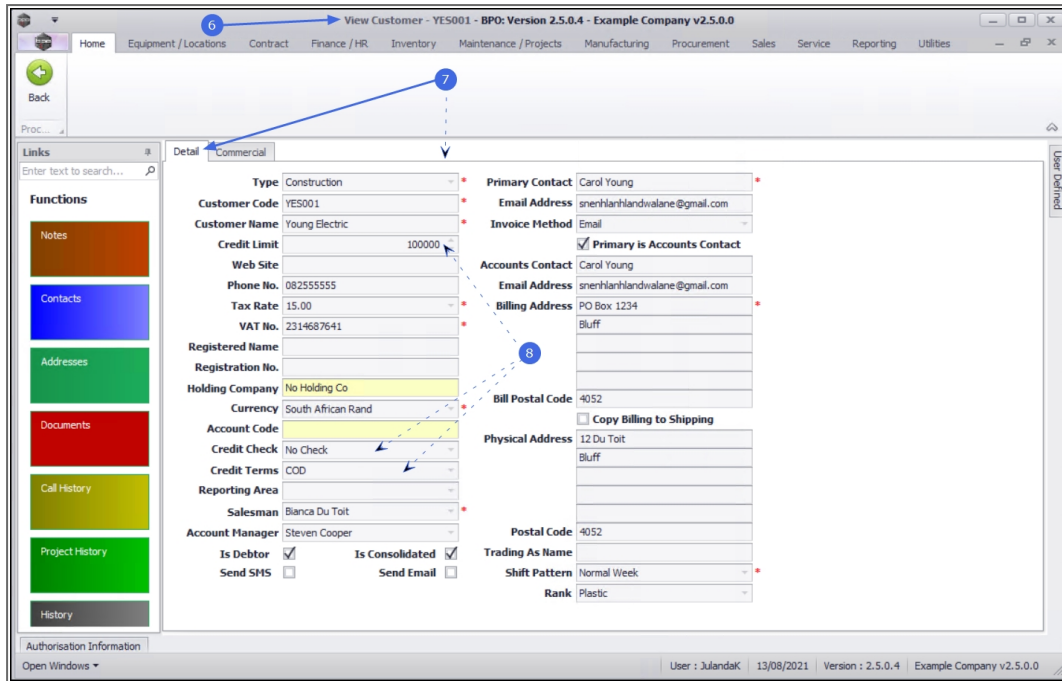


Note that this is for view only and no changes can be made or saved on this screen.

7. This screen will open with the **Detail** panel by default.

DETAIL PANEL

8. From the Detail panel you can view most of the customer details including Credit Limit, Credit Check and Credit Terms.



View Customer - YES001 - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Back

Proc...

Links

Enter text to search...

Functions

Notes

Contacts

Addresses

Documents

Call History

Project History

History

Detail Commercial

Type Construction

Customer Code YES001

Customer Name Young Electric

Credit Limit 100000

Web Site

Phone No. 082555555

Tax Rate 15.00

VAT No. 2314687641

Registered Name

Registration No.

Holding Company No Holding Co

Currency South African Rand

Account Code No Check

Credit Check No Check

Credit Terms COD

Reporting Area

Salesman Bianca Du Toit

Account Manager Steven Cooper

Is Debtor ☒

Is Consolidated ☒

Send SMS ☐

Send Email ☐

Primary Contact Carol Young

Email Address snerhanhandwalane@gmail.com

Invoice Method Email

☒ Primary is Accounts Contact

Accounts Contact Carol Young

Email Address snerhanhandwalane@gmail.com

Billing Address PO Box 1234 Bluff

Bill Postal Code 4052

☐ Copy Billing to Shipping

Physical Address 12 Du Toit Bluff

Postal Code 4052

Trading As Name

Shift Pattern Normal Week

Rank Plastic

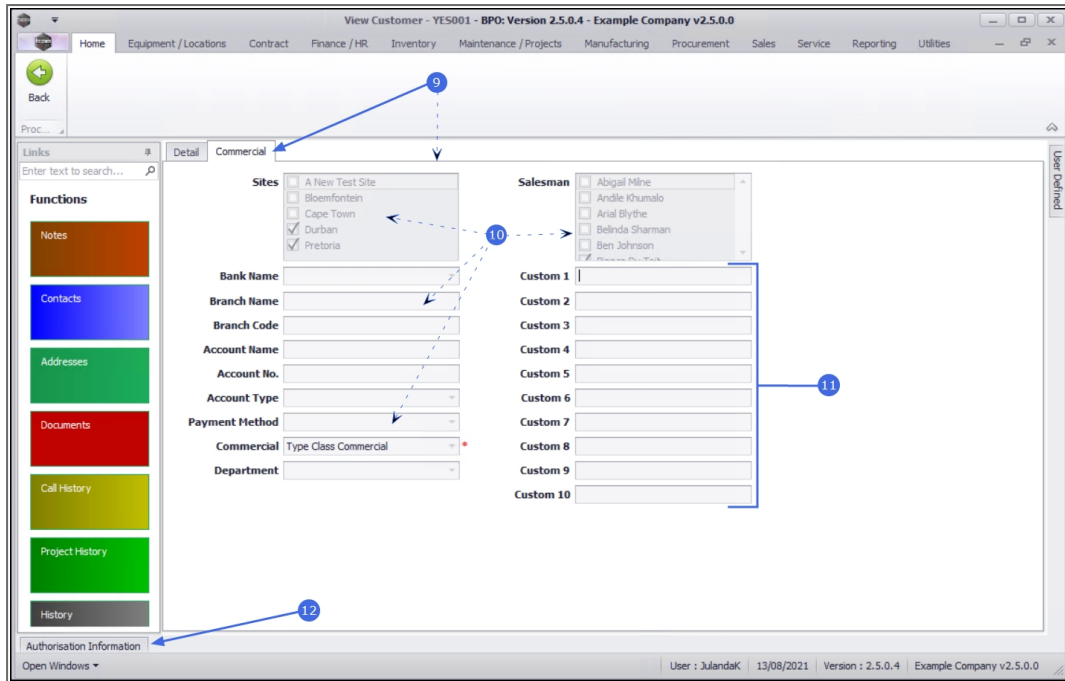
Authorisation Information

Open Windows

User : JulandaK | 13/08/2021 | Version : 2.5.0.4 | Example Company v2.5.0.0

COMMERCIAL PANEL

9. Click on the **Commercial** tab to display the **Commercial details** frame.
10. Here you can view the sites and salespersons linked to this customer, as well as the customer banking details, payment method e.g. Debit Order and the customer commercial.
11. **Custom 1 - 10:** Any additional data added e.g. alternative payment method can be viewed. These field names are configured according to your company requirements. Contact your BPO Specialist or CO3 Support for assistance.
12. Click on the **Authorisation Information** tab.



AUTHORISATION INFORMATION PANEL

13. The **Authorisation Information** panel will be expanded.
14. You can **dock** this screen to make it easier to work in.
15. Here you can view the **Approval Date** and **Time**, the **Name** of the person who authorised this customer as well as any **Comments**, where applicable.
16. Click on **Back** to return to the **Customer Listing** screen.

View Customer - YES001 - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Back 1.6

Links Enter text to search...

Functions

- Notes
- Contacts
- Addresses
- Documents

Detail Commercial

Sites

- ☐ A New Test Site
- ☐ Bloemfontein
- ☐ Cape Town
- ☒ Durban
- ☒ Pretoria

Bank Name

Branch Name

Branch Code

Account Name

Account No.

Account Type

Payment Method

Salesman

- ☐ Abigail Milne
- ☐ Andile Khumalo
- ☐ Aniel Blythe
- ☐ Belinda Shamman
- ☐ Ben Johnson
- ☒ Bruce Smith

Custom 1

Custom 2

Custom 3

Custom 4

Custom 5

Custom 6

Custom 7

Custom 8

1.4

1.3

1.5

Authorisation Information

fid Customer...	fid Customer...	fid Employee...	fid Full Name	fid Approval...	fid Approval...	fid Authorised	fid Comments
=	=	=	=	=	=	=	=

Authorisation Information

Open Windows *

User : JulandaK 13/08/2021 Version : 2.5.0.4 Example Company v2.5.0.0

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