

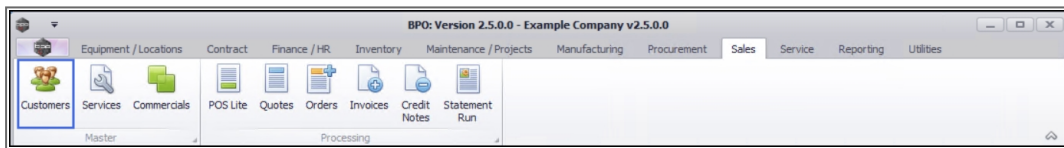
SALES

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.

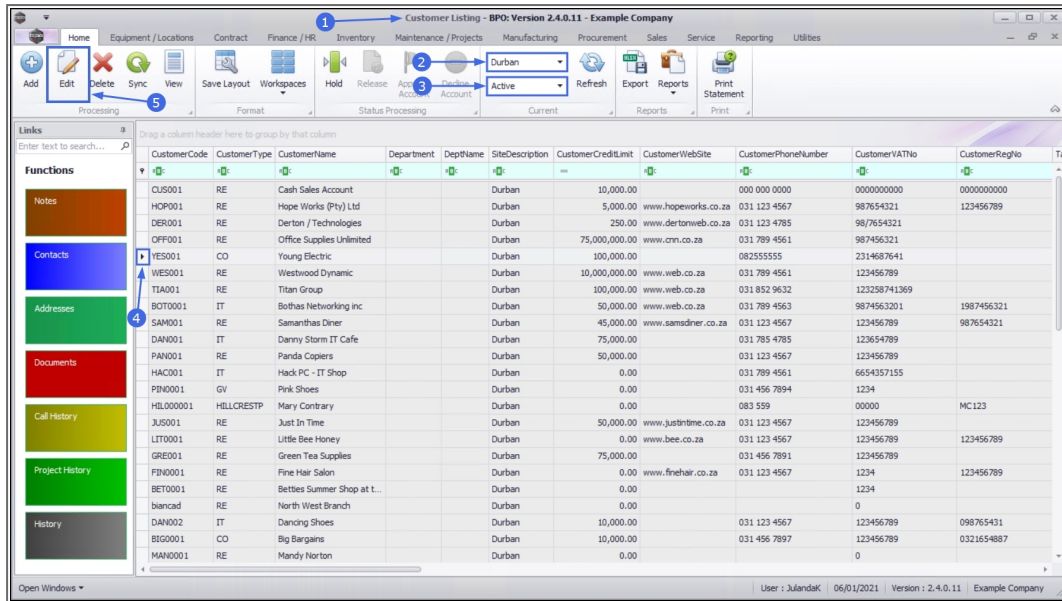


Note that you can edit a customer in all States except for **New-CRM** and **Inactive**.

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



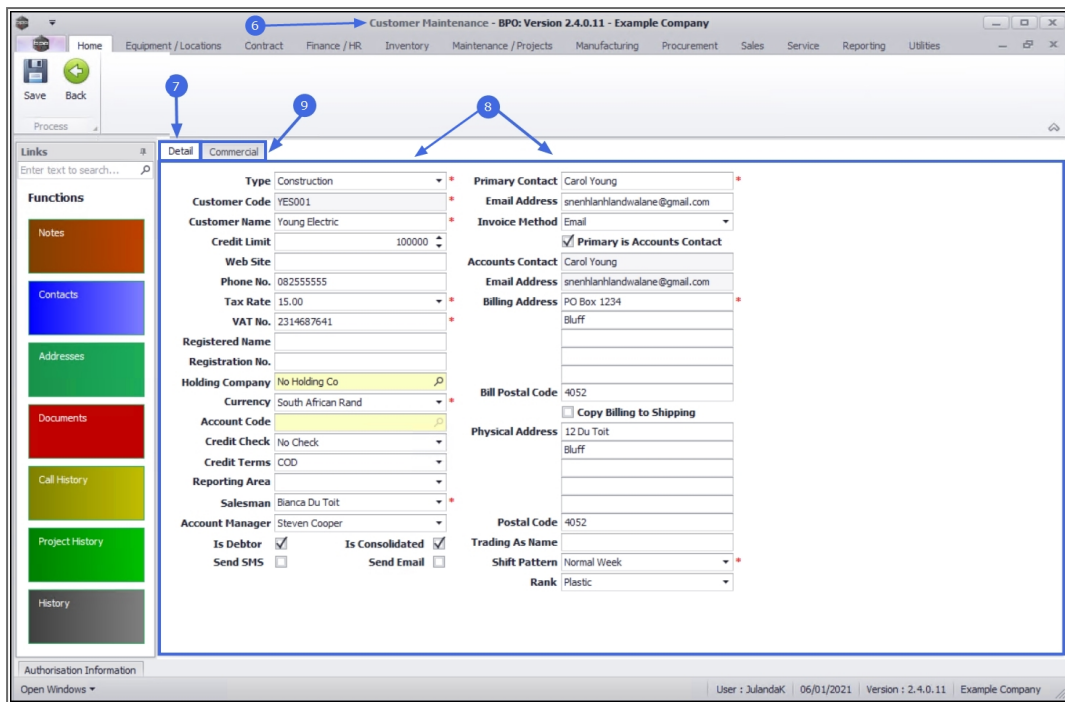
Short cut key: **Right click** to display the **All groups** menu list. Click on **Edit**.



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.



Customer Maintenance - BPO: Version 2.4.0.11 - Example Company

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

Save | Back

Process

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:

Credit Check: No Check

Credit Terms: COD

Reporting Area:

Salesman: Bianca Du Toit

Account Manager: Steven Cooper

Is Debtor:

Send SMS:

Is Consolidated:

Send Email:

Primary Contact: Carol Young

Email Address: snerhanhandvalane@gmail.com

Invoice Method: Email

Primary is Accounts Contact:

Accounts Contact: Carol Young

Email Address: snerhanhandvalane@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

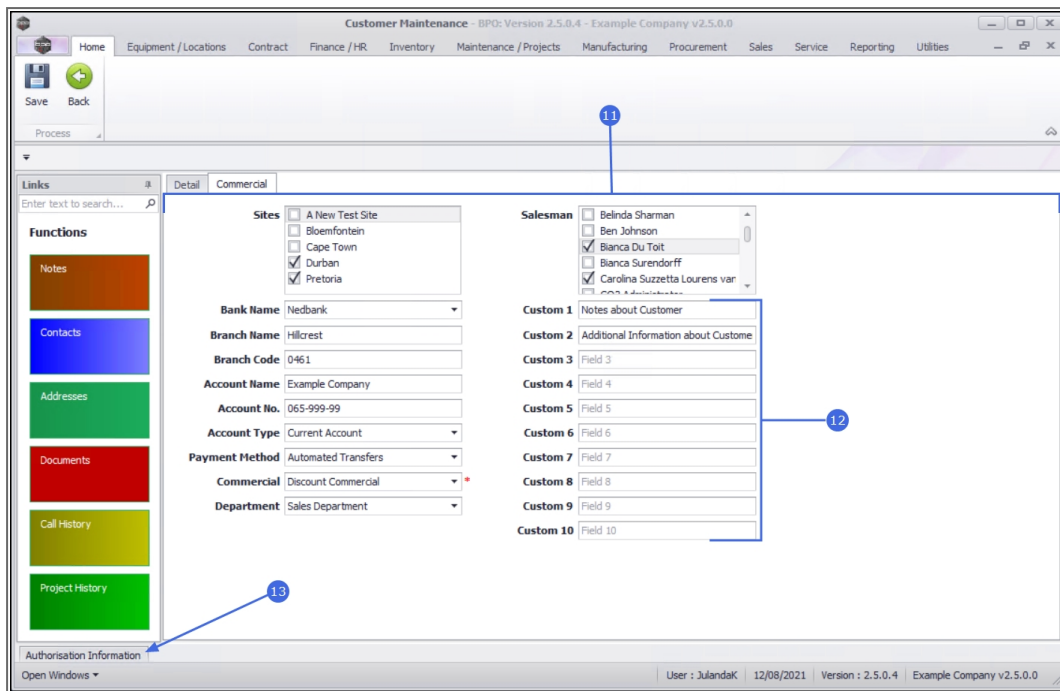
Open Windows

User: JulandaK | 06/01/2021 | Version: 2.4.0.11 | Example Company

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

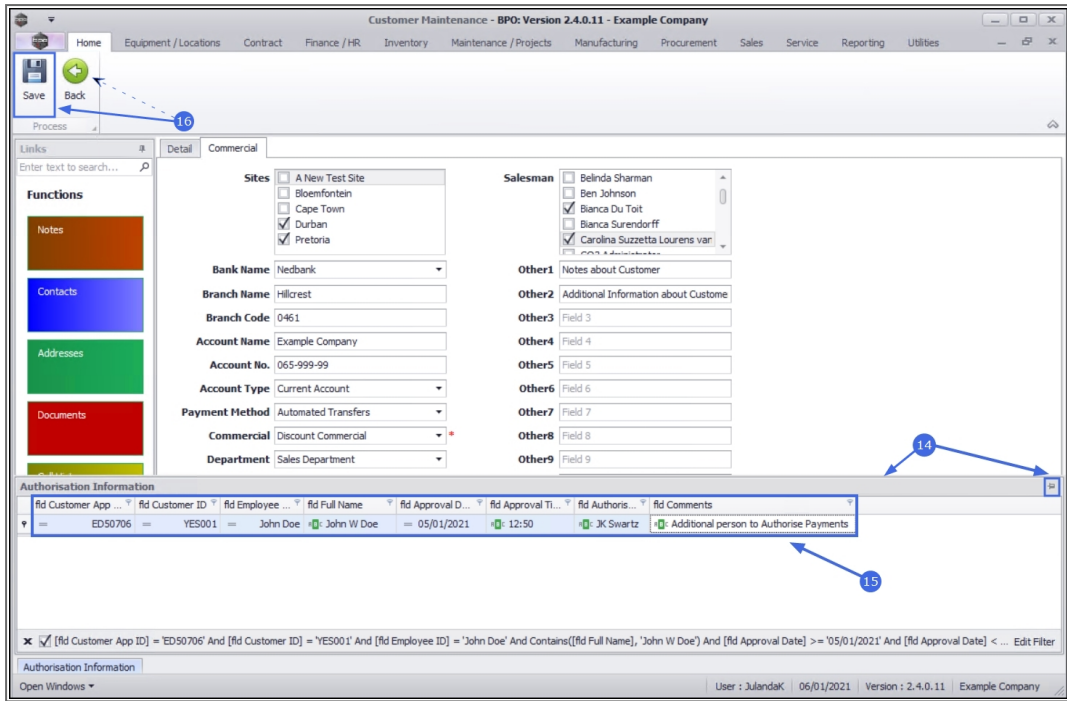
12. Click on the **Authorisation** tab.



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 view 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.



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