

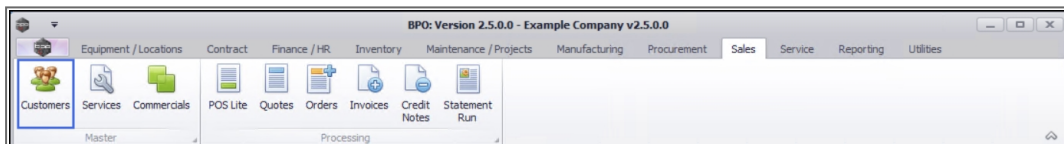
SALES

CUSTOMERS – APPROVE CRM CUSTOMER

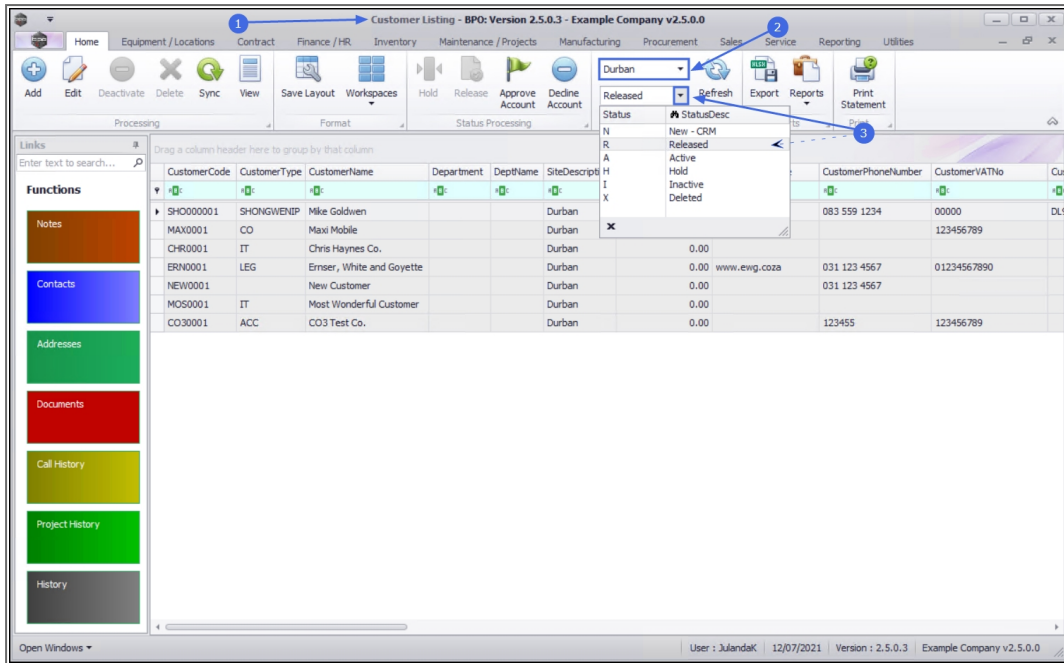
CRM customer details can only be *viewed* in the *New - CRM* status. The customer has to be *Released for approval* in *CRM* once the customer details and information have been checked and validated.

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*



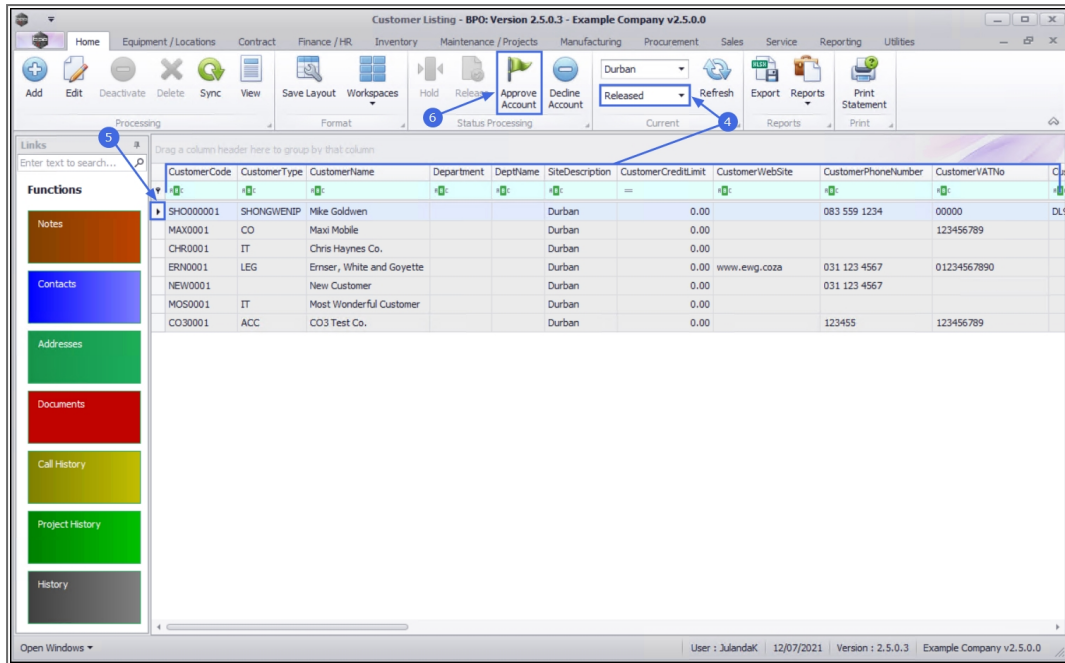
1. The *Customer Listing* screen will be displayed.
2. Select the *Site* where the Customer can be located.
 - The example has *Durban* selected.
3. Change the *Status* to **Released**.



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**.



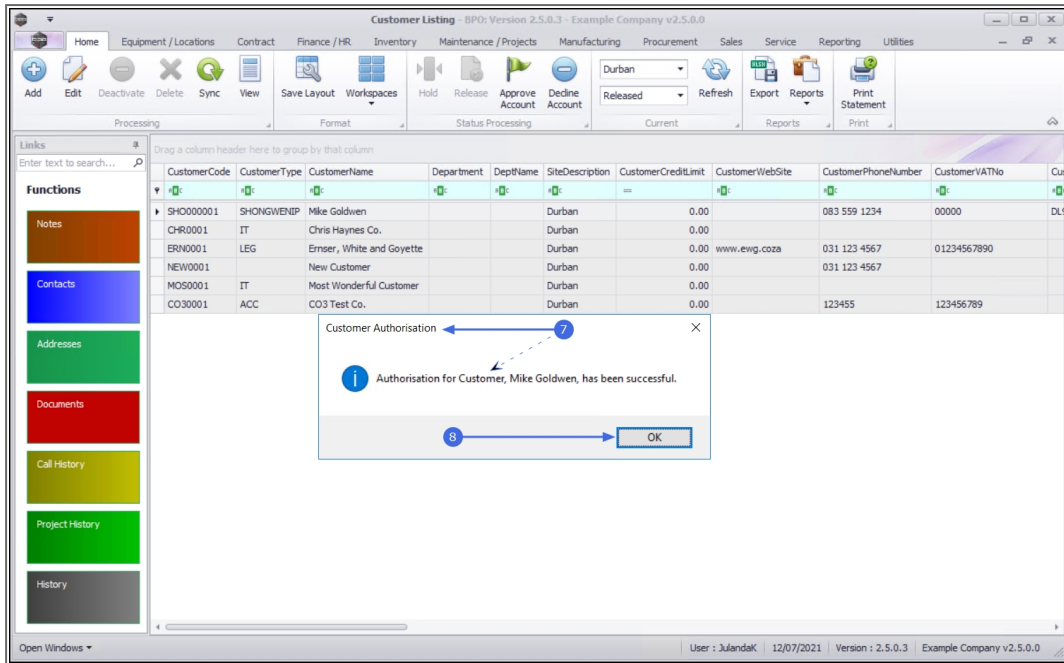
Short cut key: **Right click** to display the **All groups** menu list. Click on **Approve**.



7. When you receive the **Customer Authorisation** message informing you that;

- **Authorisation for Customer, [customer name], has been successful.**

8. Click on **OK**.



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.

Related Topics

- [Customers - Decline CRM Customer](#)

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