

End User Guide (Customer Status Management)



Microsoft Partner
Gold Gestion intégrée

Createch 365
1-844-202-6764
support@createch365.com

Version history

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Objective User guide

The objective of this user guide is to present the step to managing customer status by blocking from shipping, invoicing or all transactions

Here are the actions possible by status

1 SHIP

- This status blocks for creation of new sales order
- This status blocks the shipping of existing sales order
- This status allows invoicing sales order already shipped
- This status allows to create a customer invoice not related to a sale order but doesn't allow to post the invoice
- This status allows to create and post a credit note
- This status allows to create a RMA, to receive it and to generate the credit note

2 INVOICE

- This status blocks for creation of new sales order
- This status blocks the shipping of a sales order
- This status blocks the invoicing of a sale order already shipped
- This status blocks the invoicing process of the customer
- This status doesn't allow to create a customer invoice not related to a sale order
- This status allows to create and post a credit note
- This status allows to create a RMA, to receive it and to generate the credit note

3 ALL

- This status blocks for all types of transactions (Sales Order, Ship, Invoice, Credit Note, RMA)

4 BLANK

- This status allows any type of transactions (Sales Order, Ship, Invoice, Credit Note, RMA)

1. Managing the customer status

This section describes the steps to manage the customer status

1.1. Defining the right status of the customer

1. Go to the customer list.
2. Choose the customer in which the status needs to be modified.
3. From the **General Tabs**, select the **Blocked field** and choose from the 3 options (Ship, Invoice, All)
For this example, the Ship Status is selected

CUSTOMER CARD ✎ + 🗑

10000 · Adatum Corporation

✕ Reminder: your work date is 4/8/2019 Use today | Change to... | Turn off reminder

New Document Request Approval Navigate Customer | More options

General Show more

No.	10000 ...	Credit Limit (\$)	0.00
Name	Adatum Corporation	Blocked	▼
Balance (\$)	142,191.43	Total Sales	
Balance Due (\$)	0.00	Costs (\$)	

Ship

Invoice

All

2. Take action on all documents

This section describes the steps to take the action for all document. An action needs to be selected before the status can be changed.

2.1. Take action for all documents — delete documents

1. Click on the ... to select more than 1 document at the time

VIEW - SALES LIST

Document Type ↑	No. ↓	Sell-to Customer No. ↑	Sell-to Customer Name	Exte Doc No.
Quote	S-QUO1003	10000	Adatum Corporation	
Quote	S-QUO1004	10000	Adatum Corporation	
Order	S-ORD101...	10000	Adatum Corporation	
Order	S-ORD101...	10000	Adatum Corporation	
Order	S-ORD101...	10000	Adatum Corporation	
Invoice	S-INV1021...	10000	Adatum Corporation	
Invoice	S-INV1022...	10000	Adatum Corporation	
Invoice	S-INV1022...	10000	Adatum Corporation	
Invoice	S-INV1022...	10000	Adatum Corporation	
Invoice	S-INV1022...	10000	Adatum Corporation	

2. Click on the **Select More** fields

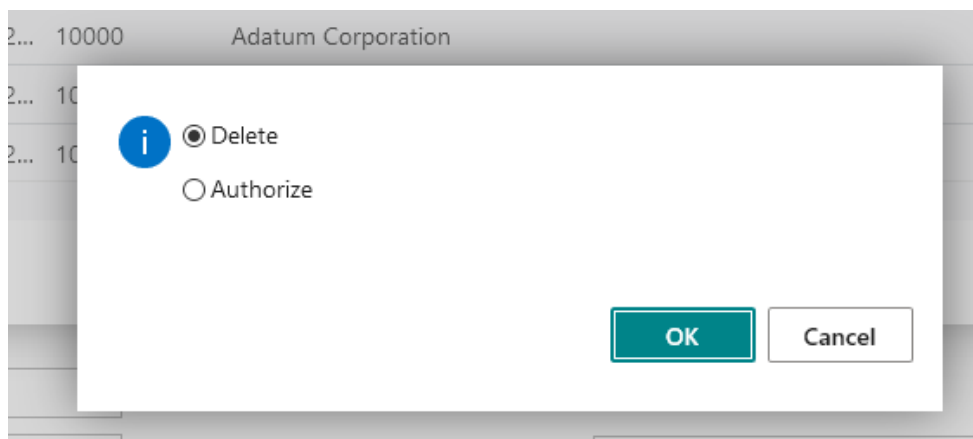
VIEW - SALES LIST

Document Type ↑	No.	Sell-to Customer No. ↑	Sell-to Customer Name
Quote	S-QUO1003	10000	Adatum Corporation
Quote		10000	Adatum Corporation
Order		10000	Adatum Corporation
Order		10000	Adatum Corporation
Order	S-ORD101...	10000	Adatum Corporation
Invoice	S-INV1021...	10000	Adatum Corporation
Invoice	S-INV1022...	10000	Adatum Corporation

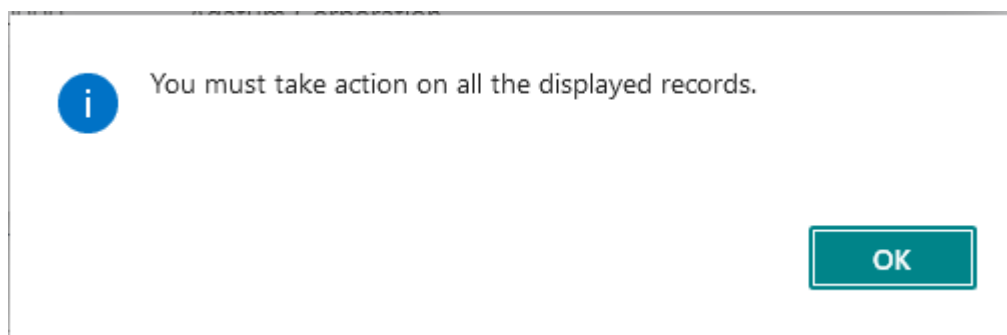
3. Use the check box to select the documents that need to be deleted
4. Click on **Delete/Authorise** button

Document Type ↑	No.	Sell-to Customer No. ↑	Sell-to Customer Name
<input checked="" type="checkbox"/> Quote	S-QUO1003	10000	Adatum Corporation
<input checked="" type="checkbox"/> Quote	S-QUO1004	10000	Adatum Corporation
<input checked="" type="checkbox"/> Order	S-ORD101...	10000	Adatum Corporation

5. Select the **Delete** option and click **OK**. As you can see, the selected orders have been deleted from the list

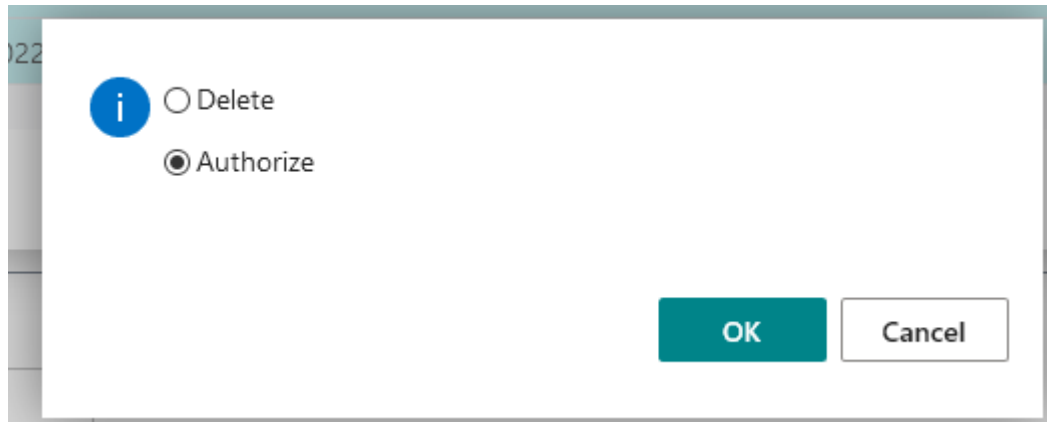


6. Click **close**.
If I try to close the list, the system won't let me do that because I didn't take action on all the documents of the list.
7. Click **OK**



2.2. Take action for all documents — authorise documents

1. Click on the ... to select more than 1 document at the time
2. Click on the **Select More** fields
3. Use the check box to select the documents that need to be authorized.
4. Click on **Delete/Authorise** button
5. Select the **Authorise** option and click **OK**.



6. Click **Close**. As soon as the **Close** button is clicked, the status of the customer has been updated. For this example, the **Ship** status is shown.

CUSTOMER CARD



10000 · Adatum Corporation

× Reminder: your work date is 4/8/2019 Use today | Change to... | Turn off reminder

New Document Request Approval Navigate Customer | More options

General

Show more

No.	10000 ...	Credit Limit (\$)	0.00
Name	Adatum Corporation	Blocked	Ship
Balance (\$)	142,191.43	Total Sales	258,785.91
Balance Due (\$)	0.00	Costs (\$)	84,434.20

3. Change the status of the customer

If the customer status needs to be updated, the user can change it by selecting the appropriate status. The whole process (**Take action on all document**) will need to be done again if the status **Invoice** or **All** is selected.