

Customer Inbox

Module Guide: Customer Inbox (Memorandum of Understanding Inbox)

Module Location

Sales > Customer > Customer Entry > Customer Inbox

Module Objective

The **Customer Inbox (Memorandum of Understanding Inbox)** module serves as the approval center for new customer data or MOUs that have been input. This module is used by a superior or manager who is authorized to conduct a final review and provide approval before the customer data becomes active and can be used for transactions.

1. Main View (MOU List)

The main page of this module is an "inbox" that displays all customer data or MOUs requiring your action.

Sales | Memorandum of Understanding | Memorandum of Understanding Inbox

MOU Number: [Any Part of Field] [NONE]

[Search] [Show All]

Item Category: FINISHED GOOD Status: All

Date From: 1 August 2025 Date To: 31 August 2025 [Search]

Document Filter Status Approval Filter Status

No.	MOU Number	MOU Date	Customer Name	Regional	Product	Target	Bank Guarantee	Credit Limit	Document Status	Approval Status	Attachment File	Status
...! No Record Found !...												

View Explanation & Filters

This page provides a summary of all customer data that is awaiting approval.

- **Filters:** You can search for specific data by **MOU Number**, **Goods/Services Category**, **Status**, or a **Start Date** and **End**

Date range.

- **Request List:** The table below will display all data awaiting action. The table currently shows "...No Data Available...".

Column Explanation

- **MOU Number:** The unique number of the customer registration document or MOU.
- **Customer Name:** The name of the submitted customer.
- **Credit Limit:** The proposed credit limit value for the customer, which needs to be reviewed carefully.
- **Document Status / Approval Status:** These columns indicate the status of the approval process.

2. Approval Process Steps

The following is the standard workflow for an approver.

Step 1: Access the Inbox

Open the **Customer Inbox** module to see the list of new customer registrations or MOUs that require approval.

Step 2: Review Customer/MOU Details

Click on one of the rows in the table to open its detail view. In the detail view, you can check all the information that has been input, such as the completeness of the customer data, the **Credit Limit** value, **Bank Guarantee**, and other important information.

Step 3: Provide Approval

After you open and review the customer registration details in Step 2, you will find the buttons to grant approval (e.g., "**Approve**" or "**Reject**" buttons) **within that detail page**. Click the appropriate button to complete the review process.

3. Workflow & Integrated Business Process

1. **Submission:** A user (e.g., a sales admin staff) creates new customer data in the **Customer Input** module and saves it.
2. **Entering the Queue:** The newly created customer data automatically enters the queue in this **Customer Inbox** module.
3. **Review & Approval:** A manager or approver opens this module, reviews, and provides approval.
4. **Customer Activation:** After approval, the customer data becomes fully active in the system and is ready to be used for creating sales transactions.

Tips & Important Notes

- This module is an important **control point** to ensure all new customer data and their credit terms have been validated by management before transactions begin.
- Pay close attention to the **Credit Limit** and **Bank Guarantee** columns during the review to manage the company's financial risk.