

SALES

CUSTOMERS - SYNCHRONISE CUSTOMERS

Customers loaded onto BPO are saved to Pastel when the **Post Accounts** option has been turned on. If your database is integrated with Pastel, a CO3 BPO Analyst will switch the option on before **Go Live**.

This option will synchronise your customers with your financial system. This is usually only required initially (after **Go-Live**).

The only time this will need to be done is when a customer is added to Pastel or to BPO while the **Post Accounts** option is switched off.

Ribbon Access: Sales > Customers



- 1. The *Customer Listing* screen will be displayed.
- 2. Select the *Site*.
 - In this image *Durban* has been selected.
- 3. Click on Sync.

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



• •				6	1	Customer Listing	- BPO: Versi	on 2.4.0.11	- Example Con	npany			
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	Contacts Addresses			DER001	RE	Derton / Technologies			Durban	250.00	www.dertonweb.co.za	031 123 4785	ç
				OFF001	RE	Office Supplies Unlimited			Durban	75,000,000.00	www.cnn.co.za	031 789 4561	č
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				WES001	RE	Westwood Dynamic			Durban	10,000,000.00	www.web.co.za	031 789 4561	1
				TIA001	RE	Titan Group			Durban	100,000.00	www.web.co.za	031 852 9632	1
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				HAC001	п	Hack PC - IT Shop			Durban	0.00		031 789 4561	£
				PIN0001	GV	Pink Shoes			Durban	0.00		031 456 7894	1
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				GRE001	RE	Green Tea Supplies			Durban	75,000.00		031 456 7891	1
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				MAN0001	RE	Mandy Norton			Durban	0.00			C
			4										+

SAVE SYNCHRONIZE

- 4. When you receive the message to confirm;
 - This action will write data to the accounting system. Are you sure that you want to synchronise the customers with the accounting system?
- 5. Click on Yes.



Customers - Synchronise Customers

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Notor				CUS001	RE	Cash Sales Account			Durban	10,000.00		000 000 0000
Notes			•	HOP001	RE	Hope Works (Pty) Ltd			Durban	5,000.00	www.hopeworks.co.za	031 123 4567
			DER001	RE	Derton / Technologies			Durban	250.00	www.dertonweb.co.za	031 123 4785	
	Contacts			OFF001	RE	Office Supplies Unlimited		4	Durban	75,000,000.00	www.cnn.co.za	031 789 4561
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				biancad	RE	North West Branch			Durban	0.00		
Histor				DAN002	Π	Dancing Shoes			Durban	10,000.00		031 123 4567
				BIG0001	со	Big Bargains			Durban	10,000.00		031 456 7897
				MAN0001	RE	Mandy Norton			Durban	0.00		
				DAN0003	п	Dance Shoes			Durban	0.00		

The synchronisation will be complete.

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