

COMPANY

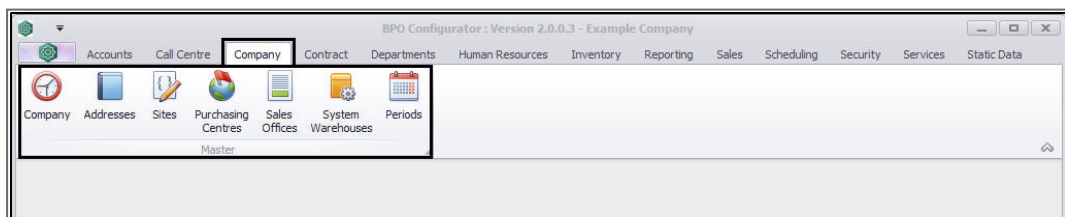
COMPANY CONFIGURATION OVERVIEW

Company configuration is set up during the implementation process, and is not usually amended down the line. The options selected are discussed with management and set up according to the company's requirements. Here is a brief overview of the screens that you will be introduced to during company set up in BPO. Refer to [Company Configuration Set Up Index](#) for the full process flow.

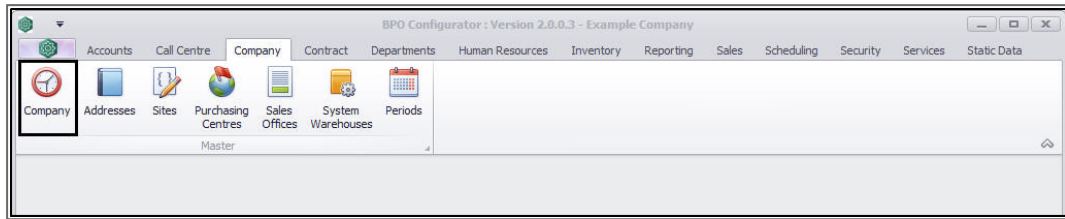
Ribbon Access: *Configurator > Company*

In BPO, the following details must be configured before **GO LIVE**:

- Company Main Details
- Company Addresses
- Company Sites
- Company Purchasing Centres
- Company Sales Offices
- Company System Warehouses
- Company Financial Periods




COMPANY MAIN DETAILS



- The **Company Maintenance** screen will be displayed.
- Click on the **Details** tab.





Here you can set up the **Company Configuration**:

- The Company Name
- Company Registration Information
- Tax Details
- Financial Details
- Base Currency
- Company Logo



Company Maintenance - BPO Configurator: Version 1.0.0.12 - Example Company

Home
Accounts
Call Centre
Company
Contract
Departments
Human Resources
Inventory
Reporting
Sales
Scheduling
Security
Services
Static Data

Save
Back
Save Layout
Workspaces

Process

Format

Details

Configuration

Company Details

Name

Example Company

Registration No

0000000asa4521

Other Reg. No


00

Base Currency

Currency

South African Rand

Company Logo



Tax Details

Tax No

0000000

Vat No

0000000

Financial Details

Start of Year

1

Mar

End of Year

28

Feb

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CONFIGURATION

- In the **Company Maintenance** screen, click on the **Configuration** tab.

Here you can set up:

- Process configuration settings
- Work Order Configuration settings
- Project Configuration settings
- New Asset Configuration settings
- Asset Numbering
- Tax Rates

Company Maintenance - BPO Configurator : Version 1.0.0.12 - Example Company

Home Accounts Call Centre Company Contract Departments Human Resources Inventory Reporting Sales Scheduling Security Services Static Data

Save Back Save Layout Workspaces

Process Format

Details Configuration

Settings

ConfigFlag	FlagDesc	Value
fdConc...	Allow concurrent open work orders	No
fdShow...	Allow the selling price to be shown on T...	Yes
fdShow...	Allow the work description to be shown l...	Yes
fdAuto...	Auto Accept Call Assignment	No
fdAuto...	Auto Apply Task Configuration to WO	No
fdAuto...	Auto Approve Asset Disposals	Yes
fdAuto...	Auto Call Status Change Email	Yes
fdAuto...	Auto Customer Code	Yes
fdAuto...	Auto Receipt Debit Order	No
fdAuto...	Auto Sale Stock Issue	Yes
fdAuto...	Auto Schedule	Yes
fdBClass...	B Class Part acts as Service	Yes
fdBatch...	Batch Tracking	Yes
fdCalC...	Call Centre Default Period (Days)	180
fdCalC...	Call Error Code Mandatory	No
fdChec...	Check Credit Limit	Yes
fdChec...	Check Credit Terms	Yes
fdCreat...	Contract Closure Call	No
fdAging...	Debtors Aging Method	STATEMENT
fdDocu...	Document Repository Path	\\SVC0001...
fdDRST...	DRS Template Repository Path	C:\ProgramD...
fdDRST...	DRS Template Repository Path	C:\ProgramD...
fdEnabl...	Enable Depreciation Calculations	Yes
fdEnabl...	Enable Yield Trading Automation	Yes

Work Order Configuration

Default WO Type: Default

Default Priority: 2

Project Configuration

Auto Ref: ☒

Ref Prefix: PRJ

Next Project No: 292

New Asset Configuration

Default Type: Default type for ne...

Default Class: Default class for ne...

Default Category: Default category for ...

Asset Numbering

Auto Ref: ☒

Ref Prefix: AREG

Next Asset Reg No: 329

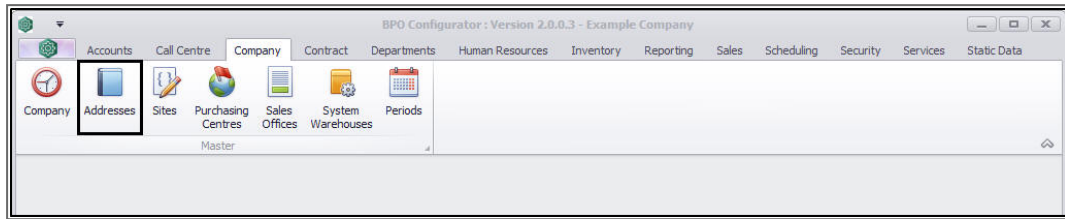
Tax Rates

TaxType	TaxTypeDesc	Code	TaxCodeDesc	Rate	Default	AccountSystemCode	AmendDate
VAT	Value Added Tax	1	Standard Rate	15.00	No	1	2018/05/03
VAT	Value Added Tax	2	Exempt	0.00	No	7	2018/05/03
VAT	Value Added Tax	5	Old Standard Rate	14.00	No	1	2018/05/03

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ADDRESSES



- The **Addresses for Company: []** screen will be displayed.
- Here you can **View**, **Add** and **Edit** the **addresses** linked to the company.

Address Listing for Company : Example Company - BPO Configurator : Version 1.0.0.12 - Example Company

Home Accounts Call Centre Company Contract Departments Human Resources Inventory Reporting Sales Scheduling Security Services Static Data

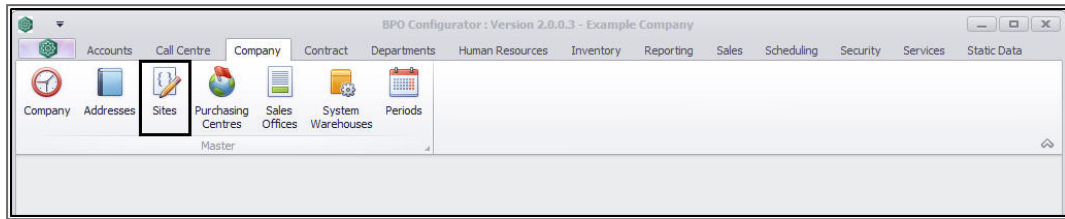
Add Edit Save Layout Workspaces Save Filter Refresh Export

Process Format Cur E

CodeDescription	AddressContactName	Address1	Address2	Address3	City	PostalCode	County	Country	TelNo	TelExt	FaxNo	EmailAddress
Postal	Jimmy Jones	PO Box 1234	New Town	Forest Hills	Durban	1234	KZN	South Africa	031 123 4567	147	031 12 4545	jimmy@company.c
Physical	Jimmy Jones	Street No and Road Name	Area		City	0000	Province	South Africa	000 000 0000	0000	000 000 0000	employeea@comp
Shipping	Jonathon James	Herald House	1 Main Road	Pinetown	Durban	3610	KZN	South Africa	123 4567 8910	123	098 765 4321	Jamesj@noemail.c
Billing	Jimmy Jones	Test Address 2										

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SITES (COMPANY BRANCHES)



- The **Site Listing for Company: []** screen will be displayed.
- Here you can **View, Add, Edit** and **Delete** the **sites** linked to the company.

Site Listing for Company : Example Company - BPO Configurator : Version 1.0.0.12 - Example Company

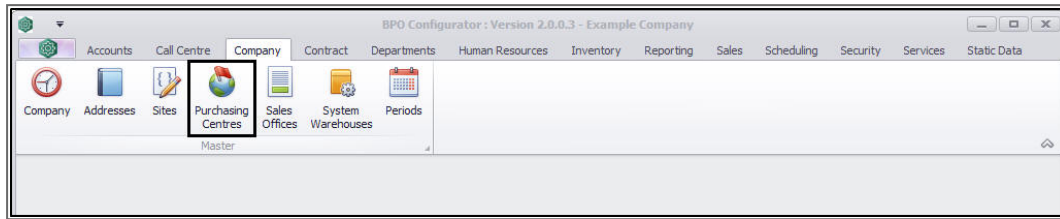
Home Accounts Call Centre Company Contract Departments Human Resources Inventory Reporting Sales Scheduling Security Services Static Data

Add Edit Delete Save Layout Workspaces Save Filter Refresh Export

SiteDescription	WorkOrderPrefix	NextWONo	WRPrefix	NextWRNo	CallPrefix	NextCallNo	EmployeeNumber	FullName	CallSerialNoReq	FinancialSystem	Database	Server
Durban	WO	1662	WR	51	CN	567	BEN	Ben Johnson	No	EVOLUTION	EVO2_LOCAL	NBO800
Pretoria	PWO	63	PWR	5	PON	26	DUT001	Bianca Du Toit	No	EVOLUTION	EVO2_LOCAL	NBO800
Cape Town	CWO	1	CWR	1	CON	1	BEN	Ben Johnson	No	EVOLUTION	EVO2_LOCAL	NBO800
Johannesburg	JWO	1	JWR	1	JON	1			Yes	EVOLUTION	EVO_COMP_PROD	Server1

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PURCHASING CENTRES



- The **Purchasing Centres for Company: []** screen will be displayed.
- Here you can **Add, Edit** and **View** the company **purchasing centres** and centre **addresses**.
- Within each purchasing centre, you can set up:
 - configuration settings and numbering conventions for procurement and stock management.

Purchasing Centres for Company : Example Company - BPO Configurator : Version 1.0.0.12 - Example Company

Home Accounts Call Centre Company Contract Departments Human Resources Inventory Reporting Sales Scheduling Security Services Static Data

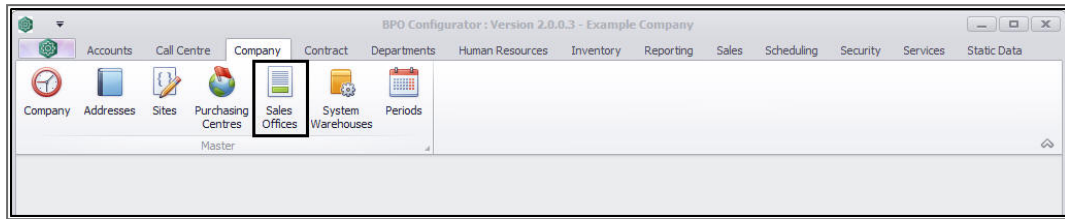
Add Edit Save Layout Workspaces Save Filter Refresh Export

Process Format Cur E

PurchasingCentreCode	Description	POPrefix	NextPONo	PRPrefix	NextPRNo	PQPrefix	NextPQNo	GRNPrefix	NextGRNNo	SRNPrefix	NextSRNNo	SRNPre
PC	Purchasing Centre	PO	446	PR	524	RQ	205	GR	423	SR	122	SI
CTPC	Cape Town Purchasing Centre	CPO	1	CPR	2	CREQ	1	CGRN	1	CSRN	1	CSIN
JPO	Johannesburg	JPO	1	JPR	1	JRR	1	JGR	1	JRE	1	JSI

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SALES OFFICES



- The ***Sales Office Listing for Company: []*** screen will be displayed.
- Here you can **Add**, **Edit** and **View** the company **sales office details** and **addresses**.
- Within each sales office, you can set up:
 - configuration settings and numbering conventions for sales.

Sales Office Listing for Company : Example Company - BPO Configurator : Version 1.0.0.12 - Example Company

Home Accounts Call Centre Company Contract Departments Human Resources Inventory Reporting Sales Scheduling Security Services Static Data

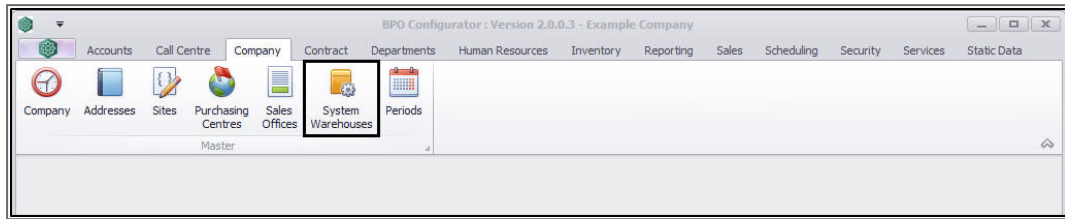
Add Edit Save Layout Workspaces Save Filter Refresh Export

Process Format Cur E

SalesOfficeCode	SalesOfficeName	InvoicePrefix	NextInvNo	QuotePrefix	NextQuoteNo	OrderPrefix	NextOrderNo	ClaimPrefix	NextClaimNo	NextRecl
SO	Sales Office	INV	426	QT	205	OR	114	WC	239	16
CSO	Cape Town Sales Office	CIN	1	CQT	1	CCR	1	CWC	1	1
JSO	Johannesburg Sales Office	JIN	1	JQT	1	JCR	1	JWC	1	1

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SYSTEM WAREHOUSES



- The **System Warehouses for Company: []** screen will be displayed.
- Here you can **View**, **Add** and **Edit** specific warehouse configuration e.g. **In-transit Warehousing** or **Quarantine Warehousing**

System Warehouses for Company : Example Company - BPO Configurator : Version 1.0.0.12 - Example Company

Home Accounts Call Centre Company Contract Departments Human Resources Inventory Reporting Sales Scheduling Security Services Static Data

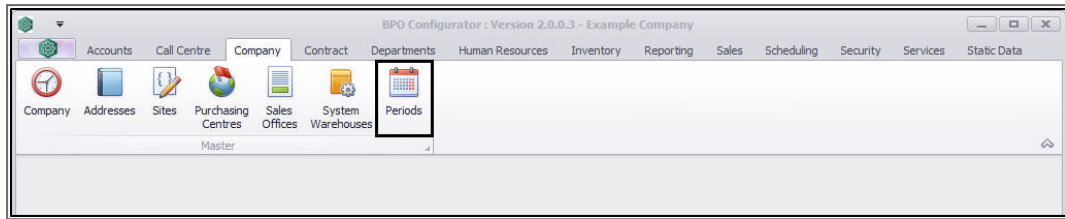
Add Edit Save Layout Workspaces Save Filter Refresh Export

Process Format Out...

Description	WhseName	BinName	SiteDescription	IsStock	IsQuarantine	IsDefault
In Transit Durban	DBN City Center	DBN City Center	Durban	No	No	No

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PERIODS



- The ***Periods for Company: []*** screen will be displayed.
- Here you can **View** and **Add** the **initial financial period configuration**.

Periods for Company : Example Company - BPO Configurator : Version 1.0.0.12 - Example Company

Home Accounts Call Centre Company Contract Departments Human Resources Inventory Reporting Sales Scheduling Security Services Static Data

Add Back Save Layout Workspaces Save Filter

Process Format

Period Definition				Month	Year	IsClosed
Period	Month	MonthName	FinPeriod			
				3	2017	No
1	3	March	1	4	2017	No
2	4	April	2	5	2017	No
3	5	May	3	6	2017	No
4	6	June	4	7	2017	No
5	7	July	5	8	2017	No
6	8	August	6	9	2017	No
7	9	September	7	10	2017	No
8	10	October	8	11	2017	No
9	11	November	9	12	2017	No
10	12	December	10	1	2018	No
11	1	January	11	2	2018	No
12	2	February	12	3	2018	No
				4	2018	No
				5	2018	No
				6	2018	Yes
				7	2018	Yes
				8	2018	Yes
				9	2018	Yes
				10	2018	Yes
				11	2018	Yes
				12	2018	Yes
				1	2019	Yes
				2	2019	Yes
				3	2019	Yes
				4	2019	Yes
				5	2019	Yes

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BPO.MNU.091

