

# COMPANY

## SALES OFFICES – ADD A SALES OFFICE

The Sales Office holds configuration and numbering conventions for sales transactions.

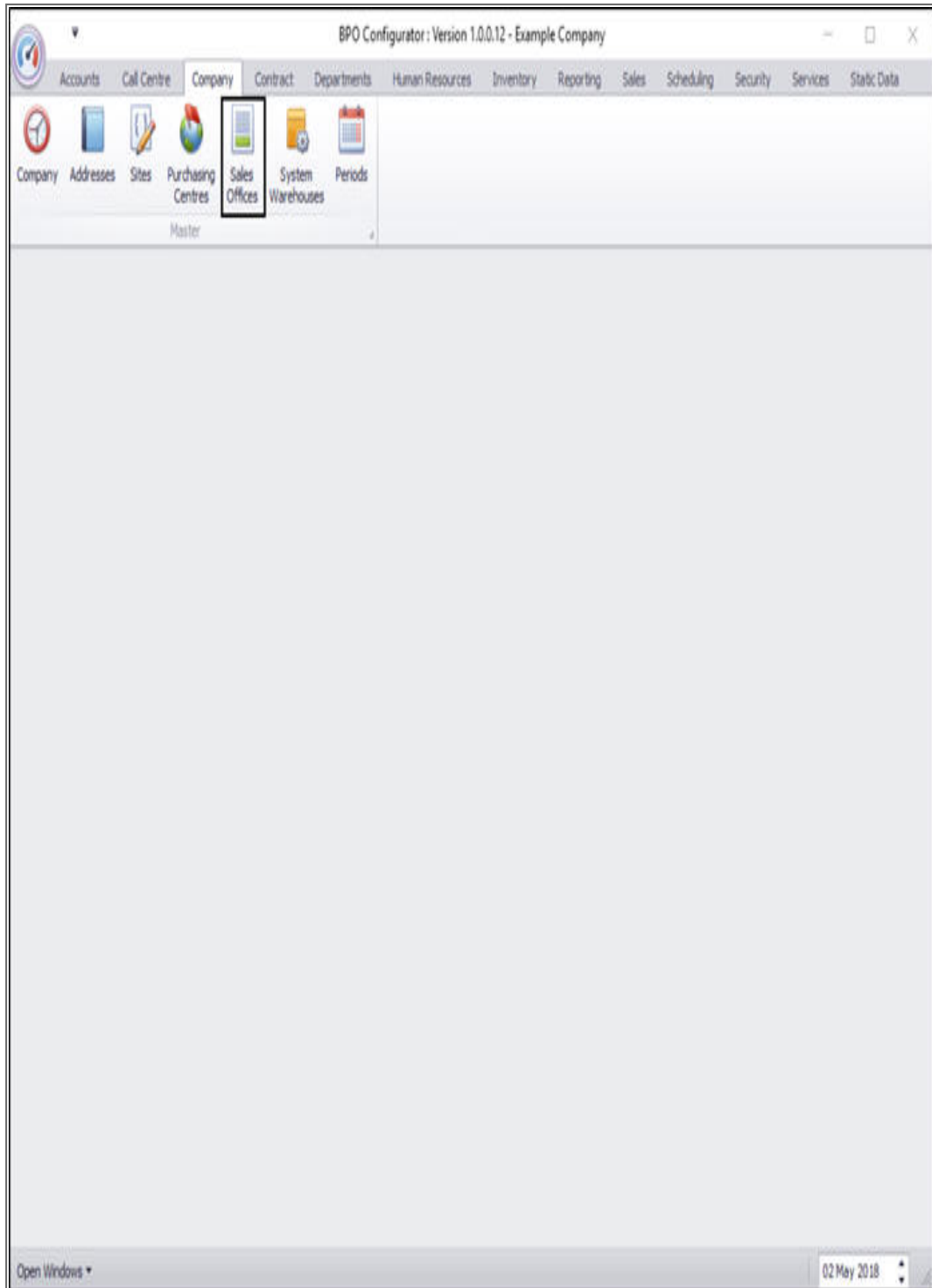
The Sales Office can be set up in two ways:

- One **global** sales office, linked to all branches, document prefix and numbering is globally sequential.
- One sales office **per branch** , each site will have its own prefix and numbering.

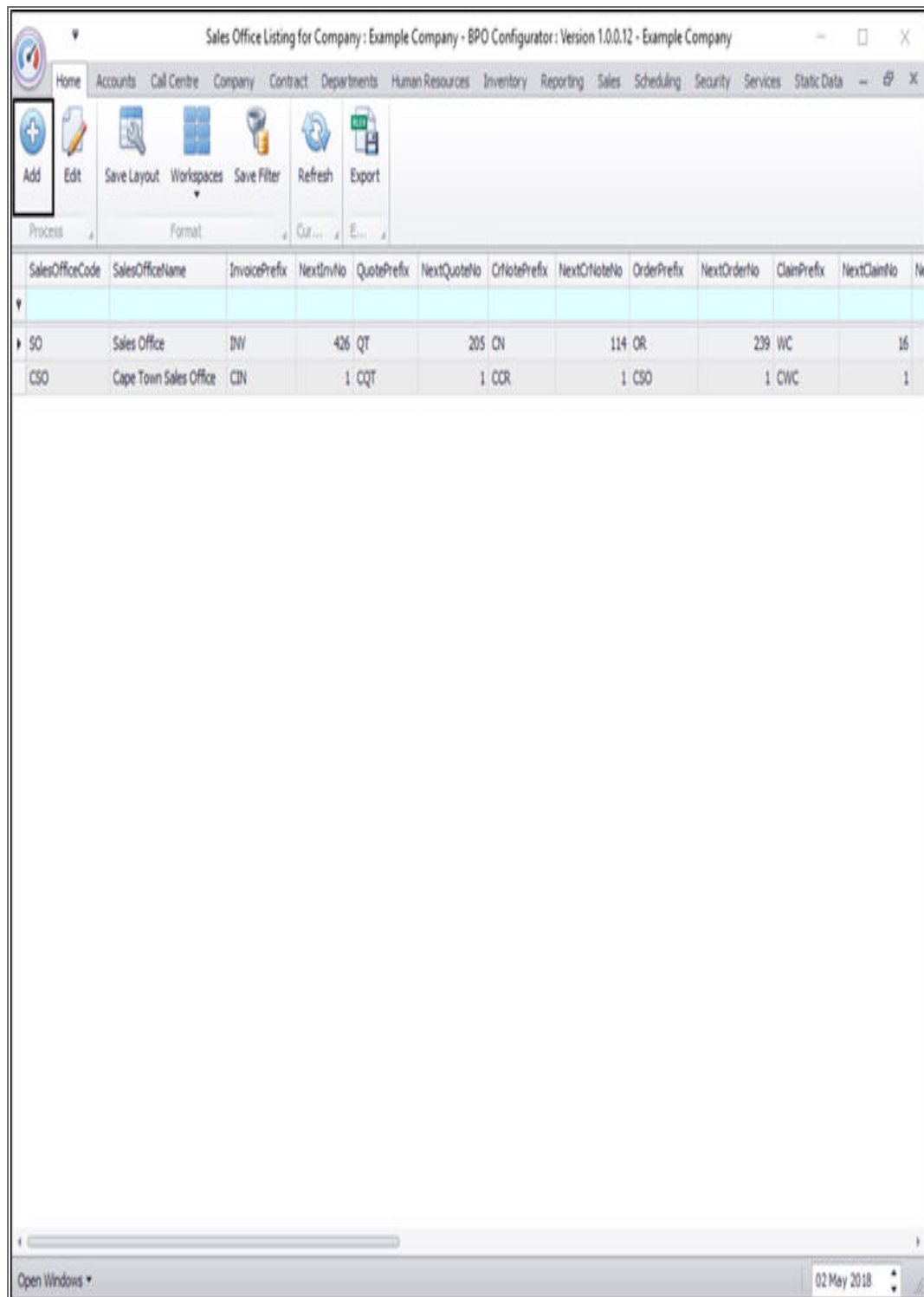
---

**Ribbon Access:** *Configurator > Company > Sales Offices*

---



- The **Sales Office Listing for Company: []** screen will be displayed.
- Click on **Add**.



- The **Add New Sales Office** screen will be displayed.

### **SALES OFFICE CONFIGURATION DETAILS FRAME**

---

- **Code:** Type in the code you wish to use for this new sales office.
- **Sales Office Name:** Type in the description for this new sales office.
- **Manager:** The site needs to be selected before you can search for the sales office manager. We will add this at the end.

Add New Sales Office - 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

Sales Office Configuration Details

Code

Sales Office Name

Manager

Default Commercial Markups

Assets

Inventory

Labour

Sub Contracts

References

Prefix

Next Invoice No.

Next Quote No.

Next Credit Note No.

Next Order No.

Next Claim No.

Banking

Bank Name

Account Name

Account Number

Branch Name

Sort Code

Sales

Invoice Header

Quote Validity

Default Cash Sales Account

Include Quote Cover Page ☐

Sites

| Select...                | SiteDescription | ContractSalesAccCode | PartsSalesAccCode |
|--------------------------|-----------------|----------------------|-------------------|
| <input type="checkbox"/> | Durban          |                      |                   |
| <input type="checkbox"/> | Johannesburg    |                      |                   |

Addresses

| AddressType | AddressContactName | Address1 | Address2 | Address3 |
|-------------|--------------------|----------|----------|----------|
|             |                    |          |          |          |
|             |                    |          |          |          |

Open Windows

02 May 2018

## REFERENCES FRAME

---

- **Sales Prefix:** Type in the *prefix* that you wish the system to use for sales documentation.
- Type in the next **Invoice No, Quote No, Credit Note No, Sales Order No** and **Warranty Claim No** that you wish the system to continue with at **Go Live** .

Add New Sales Office - 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

Sales Office Configuration Details

Code: J50

Sales Office Name: Johannesburg Sales office

Manager: [User Icon]

Default Commercial Markups

Assets: 0

Inventory: 0

Labour: 0

Sub Contracts: 0

References

Prefix

Next Invoice No. [0]

Next Quote No. [0]

Next Credit Note No. [0]

Next Order No. [0]

Next Claim No. [0]

Banking

Bank Name

Account Name

Account Number

Branch Name

Sort Code

Sales

Invoice Header

Quote Validity

Default Cash Sales Account: [User Icon]

Include Quote Cover Page ☐

Sites

| Select...                | SiteDescription | ContractSalesAccCode | PartsSalesAccCode |
|--------------------------|-----------------|----------------------|-------------------|
| <input type="checkbox"/> | Durban          |                      |                   |
| <input type="checkbox"/> | Johannesburg    |                      |                   |

Addresses

| AddressType | AddressContactName | Address1 | Address2 | Address3 |
|-------------|--------------------|----------|----------|----------|
|             |                    |          |          |          |
|             |                    |          |          |          |

Open Windows

02 May 2018

## SALES FRAME

---

- **Invoice Header:** This will be the *default* heading to be included on all sales invoices.
- **Quote Validity** This will be the number of days the quote is valid, this figure pulls through to quote covering letter.
- **Include Quote Cover Page:** Click on this check box if you want to use BPO's standard quote cover letter.
- **Default Cash Sales Account:** Click on the *search* button and select from the *Select the Cash Sales Account* pop up screen the default cash sales account if applicable.

### Cash Sales Account

Identification of a customer as a 'cash sales account' is used for the "Invoice Header" on page 2 process and the "POS Lite - Add Point of Sale (POS) Invoice" on page 1 process.



Add New Sales Office - 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

Sales Office Configuration Details

Code: JSO

Sales Office Name: Johannesburg Sales office

Manager: [User Icon]

Default Commercial Markups

Assets: 0

Inventory: 0

Labour: 0

Sub Contracts: 0

References

|                      | Prefix |   |
|----------------------|--------|---|
| Next Invoice No.     | JIN    | 1 |
| Next Quote No.       | JQT    | 1 |
| Next Credit Note No. | JCR    | 1 |
| Next Order No.       | JOR    | 1 |
| Next Claim No.       | JWC    | 1 |

Banking

Bank Name: [Text Box]

Account Name: [Text Box]

Account Number: [Text Box]

Branch Name: [Text Box]

Sort Code: [Text Box]

Sales

Invoice Header: [Text Box]

Quote Validity: [Text Box]

Default Cash Sales Account: [User Icon]

Include Quote Cover Page: ☐

Sites

| Select...                | SiteDescription | ContractSalesAccCode | PartsSalesAccCode |
|--------------------------|-----------------|----------------------|-------------------|
| <input type="checkbox"/> | Durban          |                      |                   |
| <input type="checkbox"/> | Johannesburg    |                      |                   |

Addresses

| AddressType | AddressContactName | Address1 | Address2 | Address3 |
|-------------|--------------------|----------|----------|----------|
|             |                    |          |          |          |
|             |                    |          |          |          |

Open Windows

02 May 2018

## DEFAULT COMMERCIAL MARKUPS FRAME

---

- **Assets:** Type in the default mark-up, in percentage value.
- **Inventory:** Type in the default mark-up, in percentage value.
- **Labour** Type in the default mark-up, in percentage value.
- **Sub Contracts** Type in the default mark-up, in percentage value.
  - **Note:** These will be the default markups, but they can be modified. The system will add these mark-ups to the cost of sale value to calculate the selling price to the customer.

Add New Sales Office - 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

Sales Office Configuration Details

Code: JSO

Sales Office Name: Johannesburg Sales office

Manager: [User Icon]

Default Commercial Markups

Assets: 0

Inventory: 0

Labour: 0

Sub Contracts: 0

Sites

| Select...                | SiteDescription | ContractSalesAccCode | PartsSalesAccCode |
|--------------------------|-----------------|----------------------|-------------------|
| <input type="checkbox"/> | Durban          |                      |                   |
| <input type="checkbox"/> | Johannesburg    |                      |                   |

References

|                      | Prefix |   |
|----------------------|--------|---|
| Next Invoice No.     | JIN    | 1 |
| Next Quote No.       | JQT    | 1 |
| Next Credit Note No. | JCR    | 1 |
| Next Order No.       | JOR    | 1 |
| Next Claim No.       | JWC    | 1 |

Banking

Bank Name: [Text Box]

Account Name: [Text Box]

Account Number: [Text Box]

Branch Name: [Text Box]

Sort Code: [Text Box]

Sales

Invoice Header: Thank you for your support.

Quote Validity: 14

Include Quote Cover Page: ☒

Default Cash Sales Account: [User Icon]

Addresses

| AddressType | AddressContactName | Address1 | Address2 | Address3 |
|-------------|--------------------|----------|----------|----------|
|             |                    |          |          |          |
|             |                    |          |          |          |

## **BANKING DETAILS FRAME**

---

- **Bank Name:** Type in the Company's bank name.
- **Account Name:** Type in the Company's bank account name.
- **Account Number:** Type in the Company's account number.
- **Branch Name:** Type in the branch name for the company's bank.
- **Sort Code:** Type in the sort code (branch number) for the company's bank.

Add New Sales Office - 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

Sales Office Configuration Details

Code: JSO

Sales Office Name: Johannesburg Sales office

Manager: [User Icon]

Default Commercial Markups

Assets: 10

Inventory: 15

Labour: 10

Sub Contracts: 5

References

|                      | Prefix |   |
|----------------------|--------|---|
| Next Invoice No.     | JIN    | 1 |
| Next Quote No.       | JQT    | 1 |
| Next Credit Note No. | JCR    | 1 |
| Next Order No.       | JOR    | 1 |
| Next Claim No.       | JWC    | 1 |

Banking

Bank Name: [Text Box]

Account Name: [Text Box]

Account Number: [Text Box]

Branch Name: [Text Box]

Sort Code: [Text Box]

Sales

Invoice Header: Thank you for your support.

Quote Validity: 14

Include Quote Cover Page: ☒

Default Cash Sales Account: [User Icon]

Sites

| Select...                | SiteDescription | ContractSalesAccCode | PartsSalesAccCode |
|--------------------------|-----------------|----------------------|-------------------|
| <input type="checkbox"/> | Durban          |                      |                   |
| <input type="checkbox"/> | Johannesburg    |                      |                   |

Addresses

| AddressType | AddressContactName | Address1 | Address2 | Address3 |
|-------------|--------------------|----------|----------|----------|
|             |                    |          |          |          |
|             |                    |          |          |          |

Open Windows

02 May 2018

## SITES FRAME

---

- **Select:** Click in the check box in front of the ***site*** that you wish to associate with this sales office.
- **Contract Sales Acc Code:** Type in the Contract Sales Pastel account code.
- **Part Sales Account Code:** Type in the Part Sales Pastel account code.

Add New Sales Office - 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

Sales Office Configuration Details

Code: JSO

Sales Office Name: Johannesburg Sales office

Manager: [Select]

Default Commercial Markups

Assets: 10

Inventory: 15

Labour: 10

Sub Contracts: 5

References

|                      | Prefix |   |
|----------------------|--------|---|
| Next Invoice No.     | JIN    | 1 |
| Next Quote No.       | JQT    | 1 |
| Next Credit Note No. | JCR    | 1 |
| Next Order No.       | JOR    | 1 |
| Next Claim No.       | JWC    | 1 |

Banking

Bank Name: ABC Bank

Account Name: Test Company CC

Account Number: 123456789

Branch Name: New Town

Sort Code: 0123

Sales

Invoice Header: Thank you for your support.

Quote Validity: 14

Default Cash Sales Account: [Select]

Include Quote Cover Page: ☒

Sites

| Select...                | SiteDescription | ContractSalesAccCode | PartsSalesAccCode |
|--------------------------|-----------------|----------------------|-------------------|
| <input type="checkbox"/> | Durban          |                      |                   |
| <input type="checkbox"/> | Johannesburg    |                      |                   |

Addresses

| AddressType | AddressContactName | Address1 | Address2 | Address3 |
|-------------|--------------------|----------|----------|----------|
|             |                    |          |          |          |
|             |                    |          |          |          |

Open Windows

02 May 2018

## SALES OFFICE MANAGER

---

- Now that you have selected the site for this new sales office, you can go back to the *Sales Office Configuration Details* frame and select the *Sales Office Manager* linked to this site.
- Click on the *search* button in the *Manager* text box.



Add New Sales Office - 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

Sales Office Configuration Details

Code: J50

Sales Office Name: Johannesburg Sales office

Manager: [User Icon]

Default Commercial Markups

Assets: 10

Inventory: 15

Labour: 10

Sub Contracts: 5

References

|                      | Prefix |   |
|----------------------|--------|---|
| Next Invoice No.     | JIN    | 1 |
| Next Quote No.       | JQT    | 1 |
| Next Credit Note No. | JCR    | 1 |
| Next Order No.       | JOR    | 1 |
| Next Claim No.       | JWC    | 1 |

Banking

Bank Name: ABC Bank

Account Name: Test Company CC

Account Number: 123456789

Branch Name: New Town

Sort Code: 0123

Sales

Invoice Header: Thank you for your support.

Quote Validity: 14

Include Quote Cover Page: ☒

Default Cash Sales Account: [User Icon]

Sites

| Select...                           | SiteDescription | ContractSalesAccCode | PartsSalesAccCode |
|-------------------------------------|-----------------|----------------------|-------------------|
| <input type="checkbox"/>            | Durban          |                      |                   |
| <input checked="" type="checkbox"/> | Johannesburg    |                      |                   |

Addresses

| AddressType | AddressContactName | Address1 | Address2 | Address3 |
|-------------|--------------------|----------|----------|----------|
|             |                    |          |          |          |
|             |                    |          |          |          |

Open Windows

02 May 2018

- The **Select an Employee** screen will pop up.
  - **Note:** If there are no items to select from here, you need to check that [Crafts are set up for the relevant site](#) and the [Sales Manager is linked to the craft for that site](#).
- Click on the **row selector** in front of the **employee** that you wish to **link** as the sales manager.
- Click on **Ok**.

Add New Sales Office - 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

Sales Office Configuration Details

Code: JSO

Sales Office Name: Johannesburg Sales office

Manager: [Select]

Default Commercial Markups

Assets: 10

Inventory: 15

Labour: 10

Sites

| Select...                           | SiteDescription | ContractSalesAccCode | PartsSalesAccCode |
|-------------------------------------|-----------------|----------------------|-------------------|
| <input type="checkbox"/>            | Durban          |                      |                   |
| <input checked="" type="checkbox"/> | Johannesburg    |                      |                   |

References

|                      | Prefix |   |
|----------------------|--------|---|
| Next Invoice No.     | JIN    | 1 |
| Next Quote No.       | JQT    | 1 |
| Next Credit Note No. | JCR    | 1 |
| Next Order No.       | JOR    | 1 |
| Next Claim No.       | JWC    | 1 |

Sales

Invoice Header: Thank you for your support.

Default Cash Sales Account: [Select]

Select an Employee

Home

Ok Back Save Layout

Process Format

Drag a column header here to group by that column

| EmployeeNumber | FullName        |
|----------------|-----------------|
| SHA001         | Belinda Sharman |
| DUT001         | Blanca Du Toit  |
| JOE001         | Joel James      |
| TAD009         | Theo Peterson   |

Addresses

| ContactName | Address1 | Address2 | Address3 |
|-------------|----------|----------|----------|
|             |          |          |          |
|             |          |          |          |
|             |          |          |          |

- The selected employee will populate the **Manager** text box.
- Click on **Save**.

Add New Sales Office - 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

Sales Office Configuration Details

Code: JSD

Sales Office Name: Johannesburg Sales office

Manager: Belinda Sharman

Default Commercial Markups

Assets: 10

Inventory: 15

Labour: 10

Sub Contracts: 5

References

|                      | Prefix |   |
|----------------------|--------|---|
| Next Invoice No.     | JIN    | 1 |
| Next Quote No.       | JQT    | 1 |
| Next Credit Note No. | JCR    | 1 |
| Next Order No.       | JOR    | 1 |
| Next Claim No.       | JWC    | 1 |

Banking

Bank Name: ABC Bank

Account Name: Test Company CC

Account Number: 123456789

Branch Name: New Town

Sort Code: 0123

Sales

Invoice Header: Thank you for your support.

Quote Validity: 14

Include Quote Cover Page: ☒

Default Cash Sales Account:

Sites

| Select...                           | SiteDescription | ContractSalesAccCode | PartsSalesAccCode |
|-------------------------------------|-----------------|----------------------|-------------------|
| <input type="checkbox"/>            | Durban          |                      |                   |
| <input checked="" type="checkbox"/> | Johannesburg    |                      |                   |

Addresses

| AddressType | AddressContactName | Address1 | Address2 | Address3 |
|-------------|--------------------|----------|----------|----------|
|             |                    |          |          |          |
|             |                    |          |          |          |

Open Windows

02 May 2018

- The new sales office details will be ***saved*** and you will return to the ***Sales Office Listing for Company: [ ]*** screen.
- Here you can now view the new sales office particulars.

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 Our E...

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

Open Windows 02 May 2018

MNU.091.014