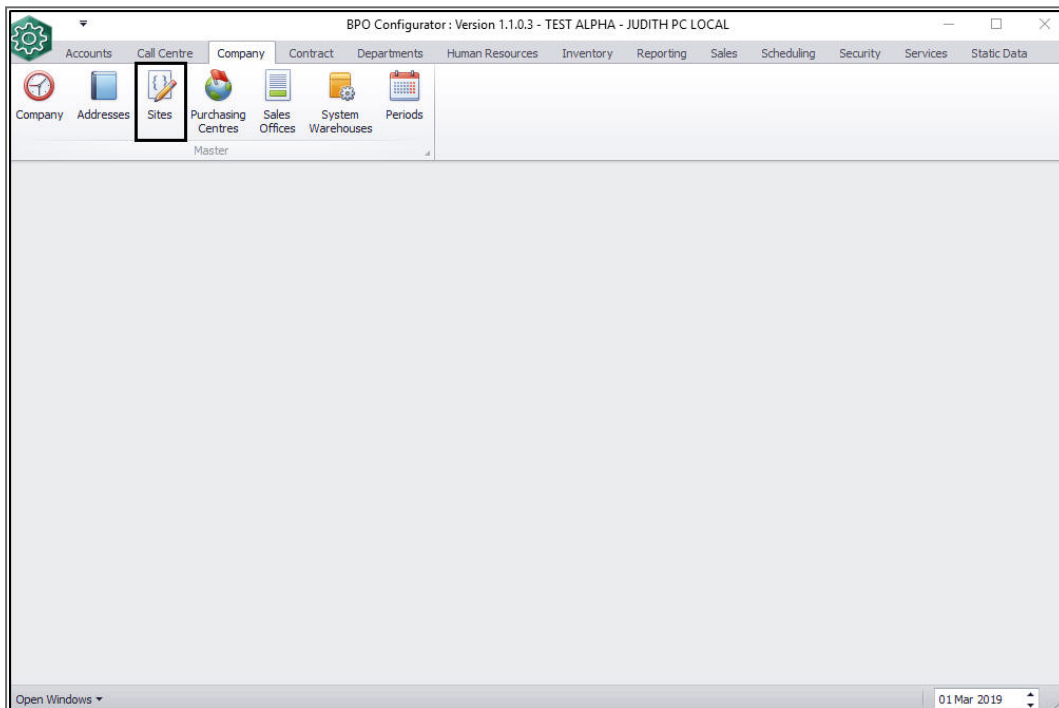


# COMPANY

## SITES - CONNECT BPO2 TO THE PASTEL DATABASE

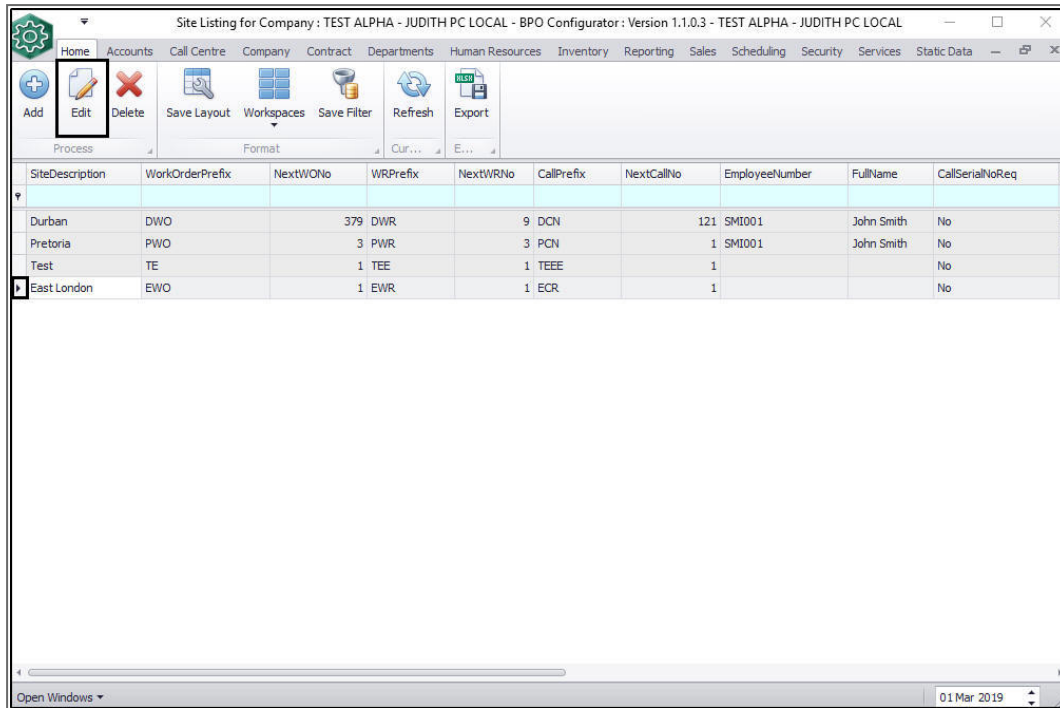
The BPO connection to the server is set during implementation.

Ribbon Access: *Configurator > Company > Sites*



The **Site Listing for Company** screen will be displayed.

- Select the site you want to link to the **Pastel** database.
  - In this image, **East London** has been selected.
- Click on **Edit**.



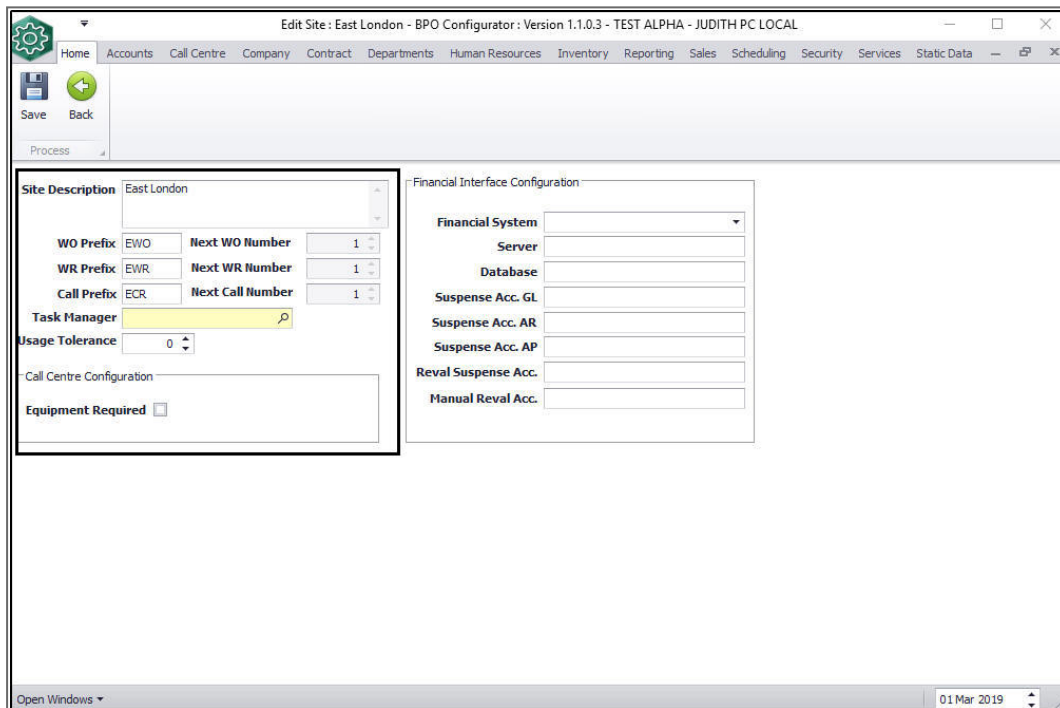
The **Edit Site** screen will be displayed.

## SITE AND CALL CENTRE CONFIGURATION

This will already have been set up during **site creation**.

- **Site Description:** This is the name of the selected site (branch).
- **WO Prefix:** This is the prefix the system will add to the site work order numbers.
- **Next WO Number:** This is the next site work order number the system will use.
- **WR Prefix:** This is the prefix the system will add to the site work request numbers.
- **Next WR Number:** This is the next site work request number the system will use.

- **Call Prefix:** This is the prefix the system will add to the site call numbers.
- **Next Call Number:** This is the next call number the system will use.
- **Task Manager:** This is the responsible *Service Controller* linked to the new site.
- **Usage Tolerance:** This is the percentage variation in meter readings allowed before a warning is raised.
- **Equipment Required:**
  - **Ticked:** This will ensure that calls cannot be saved without linking a serialised item.
  - **Un-ticked:** Calls can be saved without linking a serialised item.



The screenshot displays the 'Edit Site : East London - BPO Configurator: Version 1.1.0.3 - TEST ALPHA - JUDITH PC LOCAL' window. The interface includes a menu bar (Home, Accounts, Call Centre, Company, Contract, Departments, Human Resources, Inventory, Reporting, Sales, Scheduling, Security, Services, Static Data) and a toolbar with 'Save', 'Back', and 'Process' buttons. The main content area is divided into two panels:

- Site Description:**
  - Site: East London
  - WO Prefix: EWO, Next WO Number: 1
  - WR Prefix: EWR, Next WR Number: 1
  - Call Prefix: ECR, Next Call Number: 1
  - Task Manager: [Searchable field]
  - Usage Tolerance: 0
  - Call Centre Configuration: [Empty field]
  - Equipment Required: ☐
- Financial Interface Configuration:**
  - Financial System: [Dropdown menu]
  - Server: [Text field]
  - Database: [Text field]
  - Suspense Acc. GL: [Text field]
  - Suspense Acc. AR: [Text field]
  - Suspense Acc. AP: [Text field]
  - Reval Suspense Acc.: [Text field]
  - Manual Reval Acc.: [Text field]

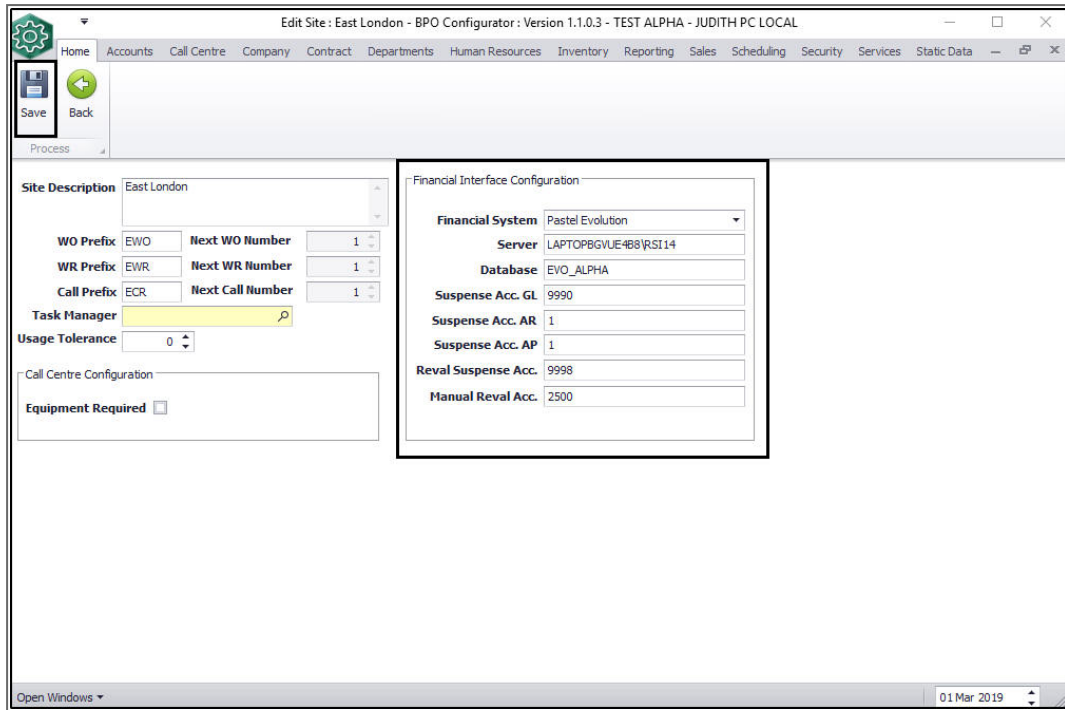
The status bar at the bottom shows 'Open Windows' and the date '01 Mar 2019'.

## FINANCIAL INTERFACE CONFIGURATION

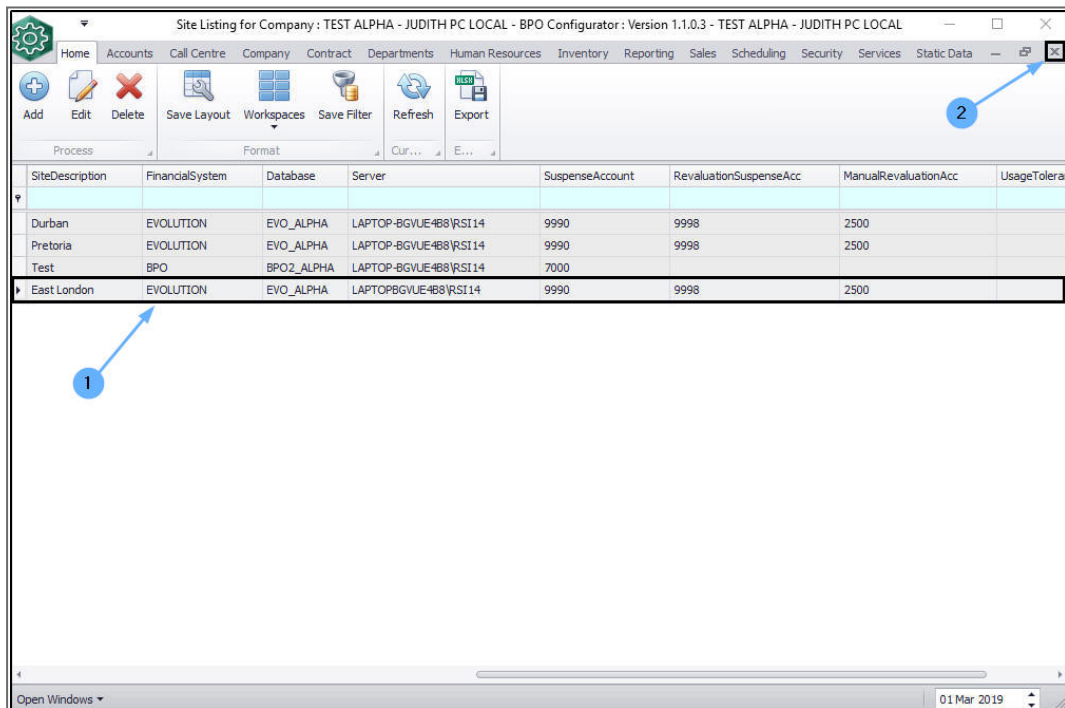
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Go to the *Financial Interface Configuration* section and complete the relevant information.

- **Financial System:** Click on the drop-down arrow and select **Evolution**.
  - **Server:** Type in the correct **SQL** server name e.g. **TEST\SQLEXPRESS**.
  - **Database:** Type in the **Pastel Evolution** database name e.g. **EVO\_TEST\_PROD**.
  - **Suspense Acc GL:** Type in the correct suspense accounts - general ledger code.
  - **Suspense Acc AR:** Type in the correct suspense accounts - accounts receivable code.
  - **Suspense Acc AP:** Type in the correct suspense accounts - accounts payable code.
  - **Reval Suspense Acc:** Type in the correct revaluation suspense account code.
  - **Manual Reval Acc:** Type in the correct manual revaluation account code.
- 
- Click on **Save**.



- The **Edit Site** screen will close and the updated details can be viewed in the **Site Listing for Company** screen.
- Click on **Close** to exit this screen.



| SiteDescription | FinancialSystem | Database   | Server                | SuspenseAccount | RevaluationSuspenseAcc | ManualRevaluationAcc | UsageTolerance |
|-----------------|-----------------|------------|-----------------------|-----------------|------------------------|----------------------|----------------|
| Durban          | EVOLUTION       | EVO_ALPHA  | LAPTOP-BGVUE4B8\RSI14 | 9990            | 9998                   | 2500                 |                |
| Pretoria        | EVOLUTION       | EVO_ALPHA  | LAPTOP-BGVUE4B8\RSI14 | 9990            | 9998                   | 2500                 |                |
| Test            | BPO             | BPO2_ALPHA | LAPTOP-BGVUE4B8\RSI14 | 7000            |                        |                      |                |
| East London     | EVOLUTION       | EVO_ALPHA  | LAPTOPBGVUE4B8\RSI14  | 9990            | 9998                   | 2500                 |                |

### Related Topics

- [Create a Site](#)

MNU.146.019