

SALES

CUSTOMERS - ADD CUSTOMER WITH CUSTOMER CODE PREFIX

The Customer Code Prefix provides the ability to have a unique Customer Code for each company/database in a group. The prefix is set up in the Company Configuration screen.

The prefix is appended to the Customer Code when the customer is saved on the Customer Maintain screen, where the Customer Code is blank.

COMPANY CONFIGURATION

Setting the Customer Code prefix will only affect new customers that will be added after the prefix has been set, therefore ensure that customers that already exist on the system, have been updated with the prefix by a CO3 BPO Analyst.

Please contact CO3 Support for more information or assistance in this regard.

Ribbon Access: Configurator > Company > Company

	Accounts	Call Cer	ten Com	pany	Contract I	Departments	Human Resources	Inventory	Reporting	Sales	Scheduling	Security	Services	Static Data
	Accounts	Call Cel	ue com		Conuact 1		Human Resources	inventory	Reporting	Dales	Scheduling	security	Ser vices	Stauc Data
A		130	<u>_</u>											
ompany			-		_									
Company	Addresses	Sites	Purchasing	Sales	System	Periods								
			Centres	Offices	Warehouses									
			Master											(

- 1. The *Company Maintenance* screen will be displayed.
- 2. Click on the *Configuration* tab to display the Settings panel.

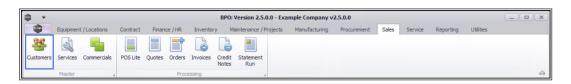


- 3. Type "customer" in the Flag Description to display the Auto Customer Code and Customer Code Prefix flag values.
- The Auto Customer Code flag has been set to Yes and the preferred Customer Code Prefix has been set to HO-.nd this code will added as a prefix to all new Customer Codes.
- 5. Click on *Back*.

© = 1-	Company	Maintenance - BPO Configurator	r:Ve	rsion 2.4.0.2 -	Example Compa	any v2.5.0.0			
Home Account	ts Call Centre Company Co	ontract Departments Human Re	sourc	es Inventory	/ Reporting	Sales Se	curity Services Static Data		₽ X
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				1 VAT	Value Adde	1	Standard Rate	15.00	Yes
				1 VAT	Value Adde	2	Exempt	0.00	No
				1 VAT	Value Adde	3	Standard Rate Procurement	15.00	No
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x √ Contains([FlagDesc], 'c	ustomer')	Edit Filter	4 0						
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SALES CUSTOMERS IN BPO

Ribbon Access: Sales > Customers





- 1. The *Customer Listing* screen will be displayed.
- 2. Select the *Site* where you need to create the Customer.

Note the Customer Code prefix as HO-

3. Click on *Add*, *Edit* or *View* to display the Customer Maintenance screen.

Home Equipm	ent / Locations	Contract Fir	Customer Listing	Maintenance		Manufacturing		Sales Service R	eporting Utilities	
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	HO-DER001	RE	Derton / Technologies			Durban		www.dertonweb.co.za		98/7654321
	HO-OFF001	RE	Office Supplies Unlimited			Durban		www.cnn.co.za	031 789 4561	987456321
Contacts	HO-YES001	CO	Young Electric			Durban	100,000.00		082555555	2314687641
	HO-WES001	RE	Westwood Dynamic			Durban		www.web.co.za	031 789 4561	123456789
	HO-TIA001	RE	Titan Group			Durban		www.web.co.za	031 852 9632	12325874136
Addresses	HO-BOT0001	Π	Bothas Networking inc			Durban		www.web.co.za	031 789 4563	9874563201
	HO-SAM001	RE	Samanthas Diner			Durban	45,000.00	www.samsdiner.co.za	031 123 4567	123456789
	HO-DAN001	Π	Danny Storm IT Cafe			Durban	75,000.00		031 785 4785	123654789
Documents	HO-PAN001	RE	Panda Copiers			Durban	50,000.00		031 123 4567	123456789
	HO-HAC001	Π	Hack PC - IT Shop			Durban	0.00		031 789 4561	6654357155
	HO-PIN0001	GV	Pink Shoes			Durban	0.00		031 456 7894	1234
Call History	HO-HIL000001	HILLCRESTP	Mary Contrary			Durban	0.00		083 559	00000
Call history	HO-SHO0000	SHONGWENIP	Mike Goldwen			Durban	0.00		083 559 1234	00000
	HO-JUS001	RE	Just In Time			Durban	50,000.00	www.justintime.co.za	031 123 4567	123456789
	HO-LIT0001	RE	Little Bee Honey			Durban	0.00	www.bee.co.za	031 123 4567	123456789
Project History	HO-GRE001	RE	Green Tea Supplies			Durban	75,000.00		031 456 7891	123456789
	HO-FIN0001	RE	Fine Hair Salon			Durban	0.00	www.finehair.co.za	031 123 4567	1234
	HO-BET0001	RE	Betties Summer Shop at t			Durban	0.00			1234
History	HO-biancad	RE	North West Branch			Durban	0.00			0
	HO-DAN002	Π	Dancing Shoes			Durban	10.000.00		031 123 4567	123456789

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