

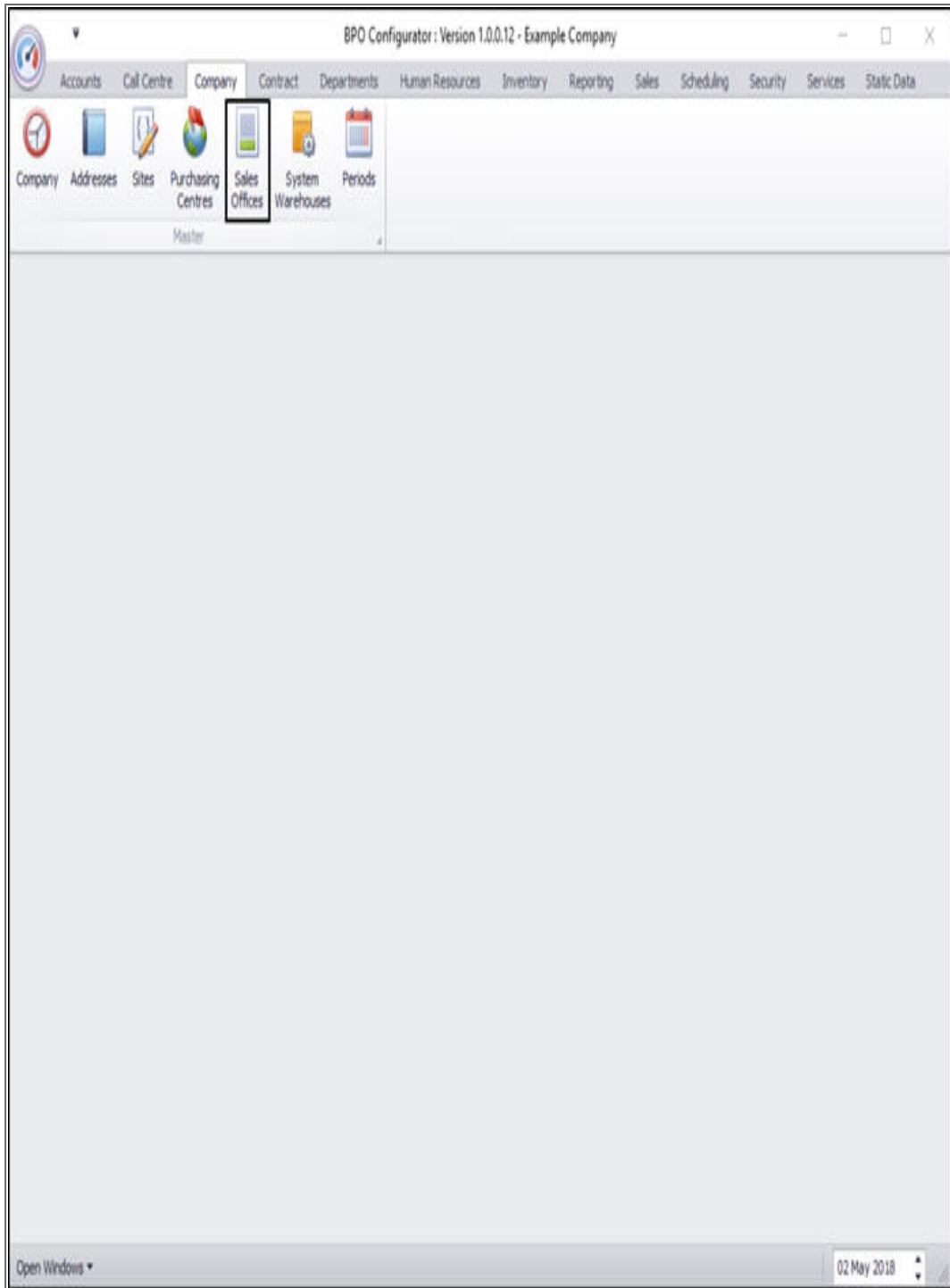
COMPANY

SALES OFFICES – ADDRESS

When configuring Sales Office addresses, it is important to note that a **Billing** address type must be set up, as this address will pull through on the Sales Invoice.

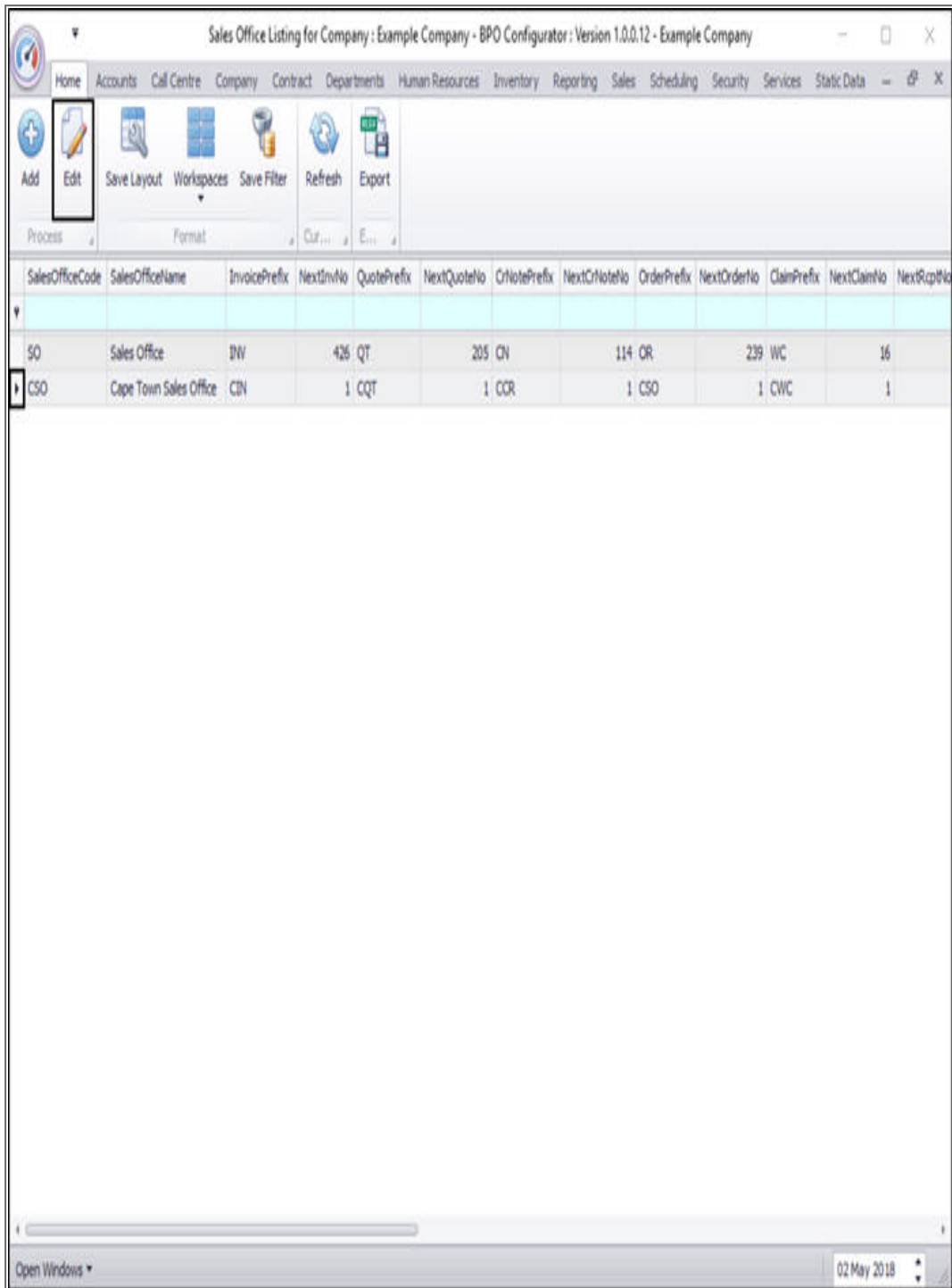
You can also set up **Physical**, **Postal** and **Shipping** addresses.

Ribbon Access: *Configurator > Company > Sales Offices*



The ***Sales Office Listing for Company: []*** screen will be displayed.

- Click on the **row selector** in front of the **sales office** that you wish to **add** an address to.
- Click on **Edit**.



SalesOfficeCode	SalesOfficeName	InvoicePrefix	NextInvNo	QuotePrefix	NextQuoteNo	CrNotePrefix	NextCrNoteNo	OrderPrefix	NextOrderNo	ClaimPrefix	NextClaimNo	NextReceiptNo
SO	Sales Office	IN	426	QT	205	CN	114	OR	239	WC	16	
CSO	Cape Town Sales Office	CN	1	CQT	1	CCR	1	CSO	1	CWC	1	

The **Edit Sales Office: []** screen will be displayed.

Either

- **Right click** anywhere in a **new row** of the **Addresses** frame.

The screenshot displays the 'Edit Sales Office' configuration window for 'Cape Town Sales Office'. The interface is divided into several sections:

- Sales Office Configuration Details:** Includes fields for Code (CSO), Sales Office Name (Cape Town Sales Office), and Manager (Bianca Du Toit).
- Default Commercial Markups:** Lists Assets, Inventory, Labour, and Sub Contracts, each with a value of 10.
- References:** A table for setting prefixes and values for Next Invoice No., Next Quote No., Next Credit Note No., Next Order No., and Next Claim No.
- Banking:** Fields for Bank Name (FNB), Account Name (Company Name), Account Number (123456789), Branch Name (FNB), and Sort Code (12345).
- Sales:** Fields for Invoice Header (Cape Town Sales), Quote Validity (14), and Default Cash Sales Account (CUS001 - Cash Sales Account).
- Sites:** A table listing available sites: Cape Town (selected), Durban, and Johannesburg.
- Addresses:** A table showing address details for a 'BILL' type, including Mark Sanders, PO Box 1233, New Town, and Forest Hills.

- A **Maintain** menu will pop up.
- Click on **Add** - Add New Address

Edit Sales Office : Cape Town 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: CSO

Sales Office Name: Cape Town Sales Office

Manager: Bianca Du Toit

Default Commercial Markups

Assets: 10

Inventory: 10

Labour: 10

Sub Contracts: 10

Sites

Select...	SiteDescription	ContractSalesAccCode	PartsSalesAccCode
<input checked="" type="checkbox"/>	Cape Town	1100	1000
<input type="checkbox"/>	Durban		
<input type="checkbox"/>	Johannesburg		

References

	Prefix	
Next Invoice No.	CIN	1
Next Quote No.	CQT	1
Next Credit Note No.	CCR	1
Next Order No.	CSO	1
Next Claim No.	CWC	1

Banking

Bank Name: FNB

Account Name: Company Name

Account Number: 123456789

Branch Name: FNB

Sort Code: 12345

Sales

Invoice Header: Cape Town Sales

Quote Validity: 14

Default Cash Sales Account: CLUS001 - Cash Sales Account

Include Quote Cover Page:

Addresses

AddressType	AddressContactName	Address1	Address2	Address3
BLL	Mark Sanders	PO Box 1233	New Town	Forest Hills

Add New Address

Or

- Click in the **Address Type** text box in the **Addresses** frame.
- An **ellipsis** button will be revealed.
- Click on this button.

The screenshot displays the 'Edit Sales Office: Cape Town Sales Office - BPO Configurator: Version 1.0.0.12 - Example Company' window. The interface is divided into several sections:

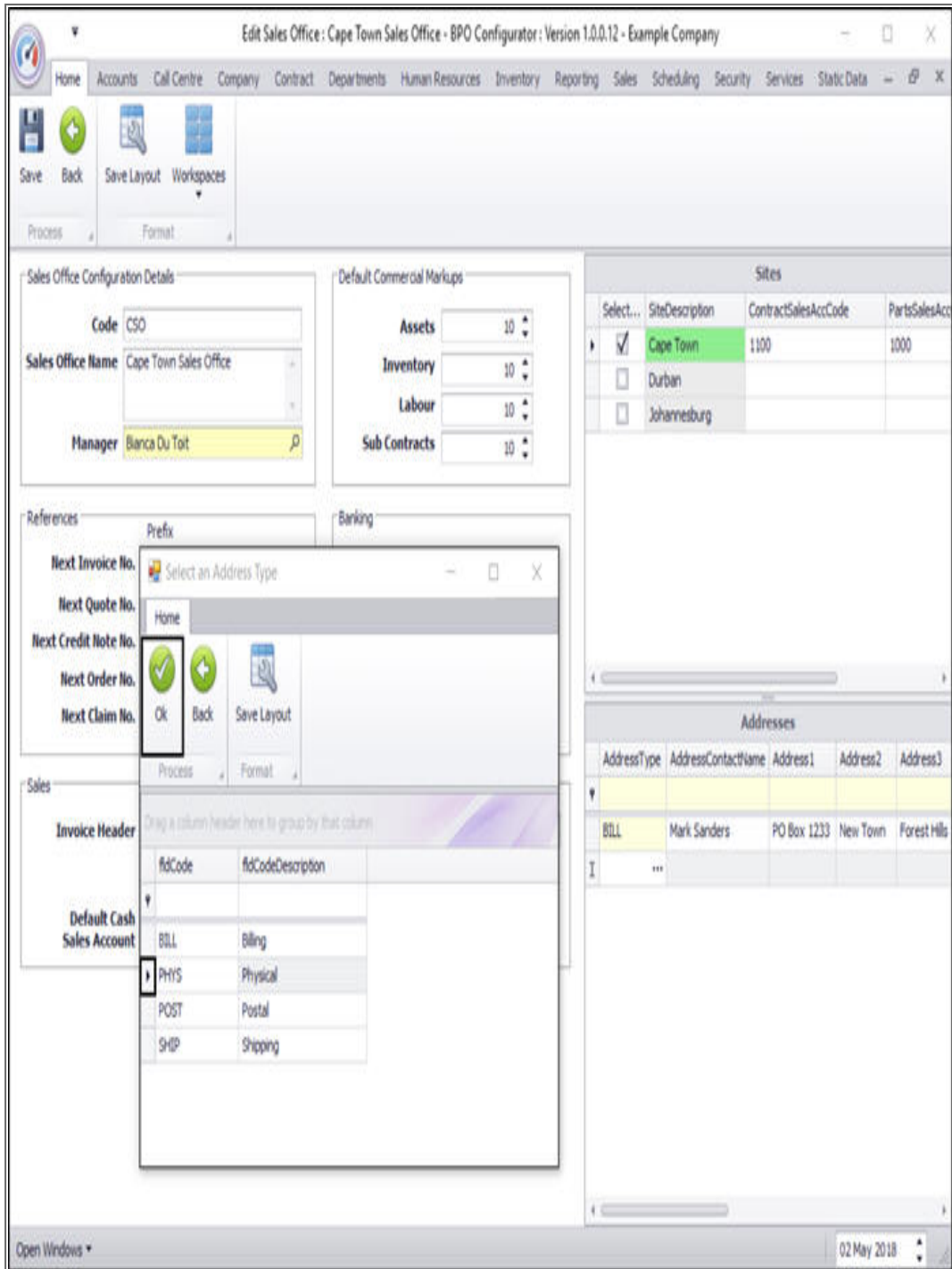
- Sales Office Configuration Details:** Includes fields for Code (CSO), Sales Office Name (Cape Town Sales Office), and Manager (Banca Du Toit).
- Default Commercial Markups:** Includes sliders for Assets, Inventory, Labour, and Sub Contracts, all set to 10.
- References:** Includes a table for Prefixes with columns for Next Invoice No., Next Quote No., Next Credit Note No., Next Order No., and Next Claim No., each with a dropdown and a value of 1.
- Banking:** Includes fields for Bank Name (FNB), Account Name (Company Name), Account Number (123456789), Branch Name (FNB), and Sort Code (12345).
- Sales:** Includes fields for Invoice Header (Cape Town Sales), Quote Validity (14), Include Quote Cover Page (checked), and Default Cash Sales Account (CUS001 - Cash Sales Account).
- Sites:** A table with columns: Select..., SiteDescription, ContractSalesAccCode, and PartsSalesAccCode. The 'Cape Town' site is selected.
- Addresses:** A table with columns: AddressType, AddressContactName, Address1, Address2, and Address3. The 'BLL' address type is selected, and an ellipsis button is visible next to it.

Both methods will bring up the **Select an Address Type** screen.

- Click on the **row selector** in front of the **address type** that you wish to **add** to this sales office.

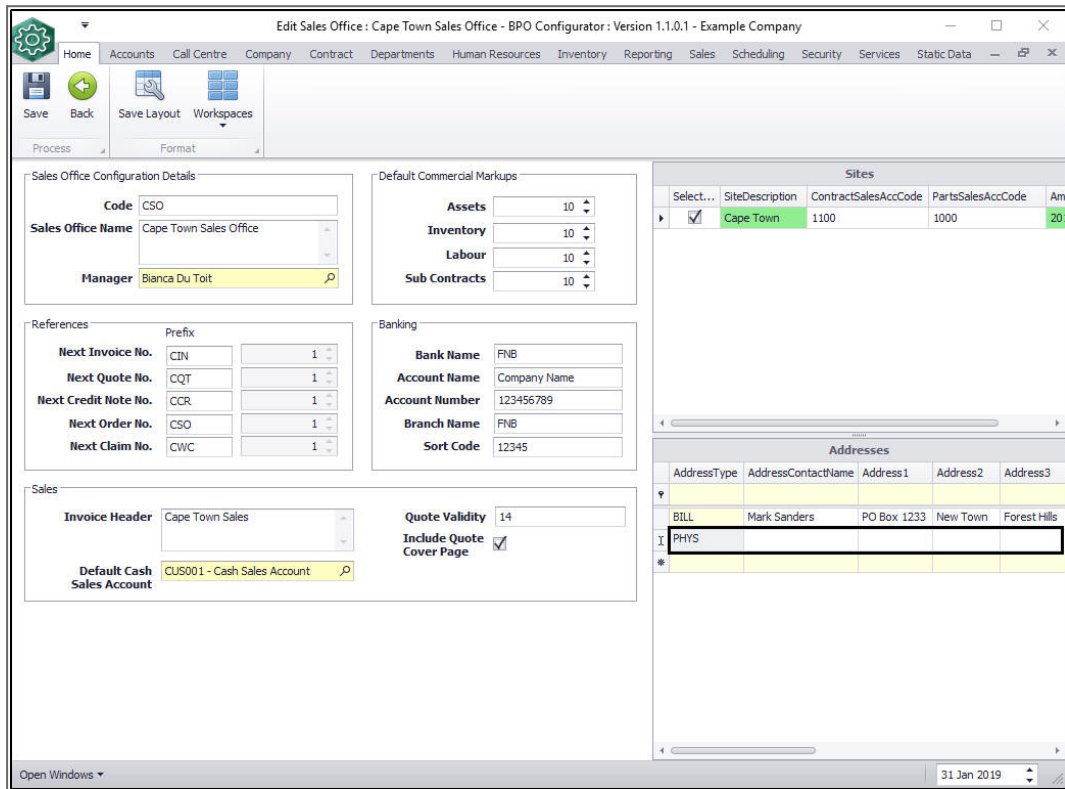
Note: As a billing address has already been set up on this sales office, a **Physical** address has been selected in this example.

- Click on **Ok**.



- **Address Type:** This will now be populated with the address type selected in the previous step.

- **Address Contact Name:** Type in the address contact name.
- **Address 1:** Type in the first line of the address.
- **Address 2:** Type in the second line of the address.
- **Address 3:** Type in the third line of the address.



- **Scroll right** if necessary, to view the next columns in the row.

Edit Sales Office : Cape Town Sales Office - BPO Configurator : Version 1.1.0.1 - 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: CSO

Sales Office Name: Cape Town Sales Office

Manager: Bianca Du Toit

Default Commercial Markups

Assets: 10

Inventory: 10

Labour: 10

Sub Contracts: 10

Sites

Select...	SiteDescription	ContractSalesAccCode	PartsSalesAccCode	Am
<input checked="" type="checkbox"/>	Cape Town	1100	1000	203

References

Prefix

Next Invoice No.: CIN 1

Next Quote No.: CQT 1

Next Credit Note No.: CCR 1

Next Order No.: CSO 1

Next Claim No.: CWC 1

Banking

Bank Name: FNB

Account Name: Company Name

Account Number: 123456789

Branch Name: FNB

Sort Code: 12345

Sales

Invoice Header: Cape Town Sales

Quote Validity: 14

Default Cash Sales Account: CUS001 - Cash Sales Account

Include Quote Cover Page:

Addresses

AddressType	AddressContactName	Address1	Address2	Address3
BILL	Mark Sanders	PO Box 1233	New Town	Forest Hills
PHYS	James Rowe	1 New Road	New Town	Hillcrest

- **City:** Type in the city name.
- **Postal Code:** Type in the postal code.
- **County:** Type in the county name.
- **Country:** Type in the country name.
- **Tel No:** Type in the telephone number.

Edit Sales Office : Cape Town Sales Office - BPO Configurator : Version 1.1.0.1 - 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: CSO

Sales Office Name: Cape Town Sales Office

Manager: Bianca Du Toit

References

Prefix

Next Invoice No.: CIN 1

Next Quote No.: CQT 1

Next Credit Note No.: CCR 1

Next Order No.: CSO 1

Next Claim No.: CWC 1

Sales

Invoice Header: Cape Town Sales

Quote Validity: 14

Default Cash Sales Account: CUS001 - Cash Sales Account

Include Quote Cover Page:

Default Commercial Markups

Assets: 10

Inventory: 10

Labour: 10

Sub Contracts: 10

Banking

Bank Name: FNB

Account Name: Company Name

Account Number: 123456789

Branch Name: FNB

Sort Code: 12345

Sites

Select...	SiteDescription	ContractSalesAccCode	PartsSalesAccCode	Am
<input checked="" type="checkbox"/>	Cape Town	1100	1000	203

Addresses

Address3	City	PostalCode	County	Country	TelNo
Forest Hills	Durban	1234	KZN	South Africa	031 123 4567
Hillcrest					

- **Scroll right**, if necessary, to view the remaining columns in the row.

CO3 TECHNOLOGIES

CO3 Edit Sales Office : Cape Town Sales Office - BPO Configurator : Version 1.1.0.1 - 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: CSO

Sales Office Name: Cape Town Sales Office

Manager: Bianca Du Toit

Default Commercial Markups

Assets: 10

Inventory: 10

Labour: 10

Sub Contracts: 10

References

Prefix

Next Invoice No.: CIN 1

Next Quote No.: CQT 1

Next Credit Note No.: CCR 1

Next Order No.: CSO 1

Next Claim No.: CWC 1

Banking

Bank Name: FNB

Account Name: Company Name

Account Number: 123456789

Branch Name: FNB

Sort Code: 12345

Sales

Invoice Header: Cape Town Sales

Quote Validity: 14

Default Cash Sales Account: CUS001 - Cash Sales Account

Include Quote Cover Page:

Sites

Select...	SiteDescription	ContractSalesAccCode	PartsSalesAccCode	Am
<input checked="" type="checkbox"/>	Cape Town	1100	1000	203

Addresses

Address3	City	PostalCode	County	Country	TelNo
Forest Hills	Durban	1234	KZN	South Africa	031 123 4567
Hillcrest	Durban	1234	KZN	South Africa	010 200 3000

Open Windows

31 Jan 2019

- **Tel Ext:** Type in the extension number.
- **Fax No:** Type in the fax number.
- **Email Address:** Type in the email address.

The screenshot shows the 'Edit Sales Office' configuration window for 'Cape Town Sales Office'. The interface includes a menu bar, a toolbar with 'Save', 'Back', 'Save Layout', and 'Workspaces', and several configuration panels:

- Sales Office Configuration Details:** Code (CSO), Sales Office Name (Cape Town Sales Office), Manager (Bianca Du Toit).
- Default Commercial Markups:** Assets (10), Inventory (10), Labour (10), Sub Contracts (10).
- References:** Prefix (CIN), Next Invoice No. (1), Next Quote No. (CQT, 1), Next Credit Note No. (CCR, 1), Next Order No. (CSO, 1), Next Claim No. (CWC, 1).
- Banking:** Bank Name (FNB), Account Name (Company Name), Account Number (123456789), Branch Name (FNB), Sort Code (12345).
- Sales:** Invoice Header (Cape Town Sales), Quote Validity (14), Include Quote Cover Page (checked), Default Cash Sales Account (CUS001 - Cash Sales Account).

On the right side, there are two tables:

Sites				
Select...	SiteDescription	ContractSalesAccCode	PartsSalesAccCode	Am
<input checked="" type="checkbox"/>	Cape Town	1100	1000	203

Addresses					
Address3	City	PostalCode	County	Country	TelNo
Forest Hills	Durban	1234	KZN	South Africa	031 123 4567
Hillcrest					

- The last column is the **Default Address** column.
- As the **Billing** address must be the default address and there can only be one default address, **NO** has been selected for this new Physical address.

Edit Sales Office : Cape Town 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: CSO

Sales Office Name: Cape Town Sales Office

Manager: Bianca Du Toit

Default Commercial Markups

Assets: 10

Inventory: 10

Labour: 10

Sub Contracts: 10

Sites

Select...	SiteDescription	ContractSalesAccCode	PartsSalesAcc
<input checked="" type="checkbox"/>	Cape Town	1100	1000
<input type="checkbox"/>	Durban		
<input type="checkbox"/>	Johannesburg		

References

Next Invoice No.	Prefix	
Next Invoice No.	CDN	1
Next Quote No.	CQT	1
Next Credit Note No.	CCR	1
Next Order No.	CSO	1
Next Claim No.	CWC	1

Banking

Bank Name: FNB

Account Name: Company Name

Account Number: 123456789

Branch Name: FNB

Sort Code: 12345

Sales

Invoice Header: Cape Town Sales

Quote Validity: 14

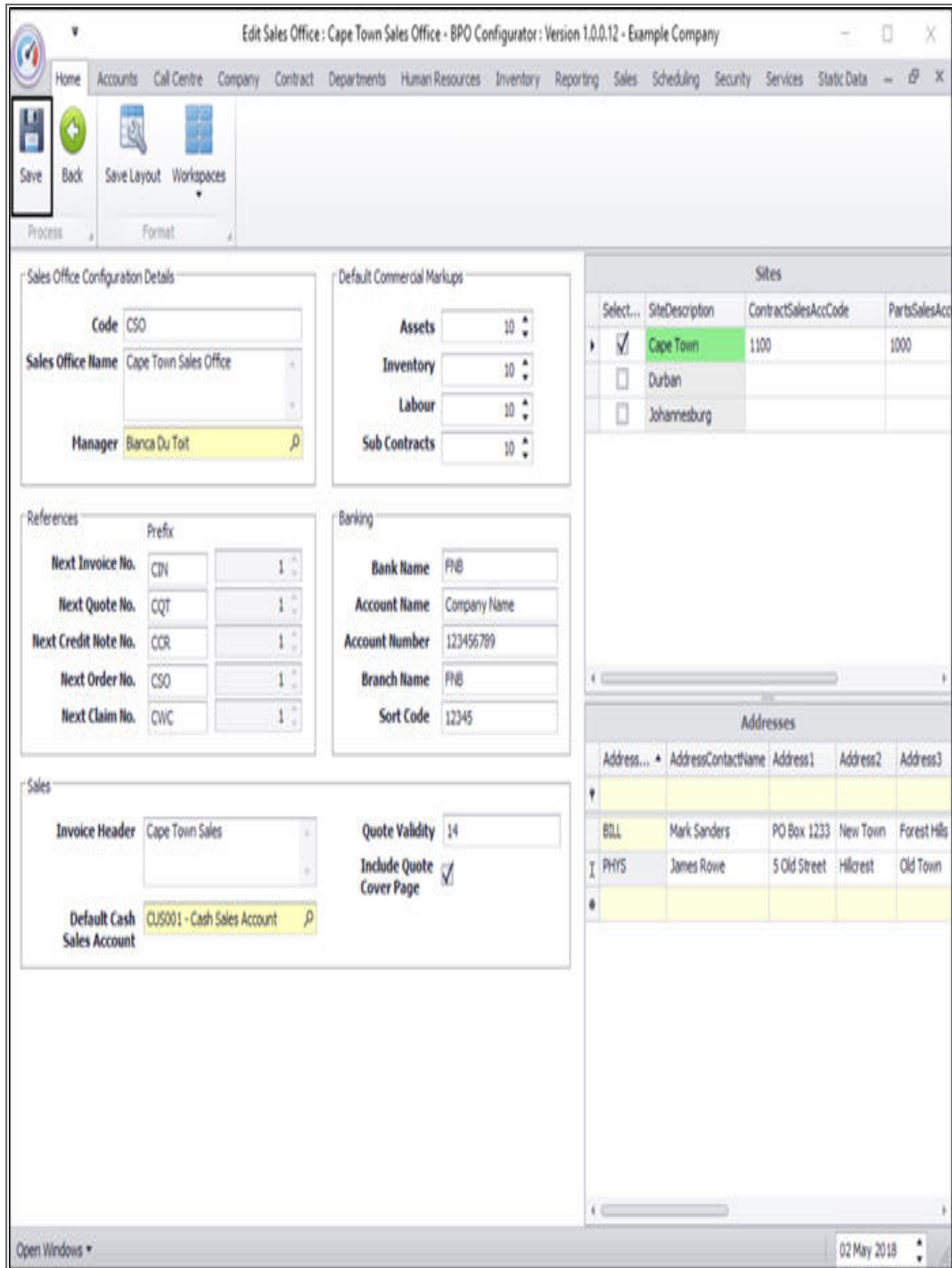
Include Quote Cover Page:

Default Cash Sales Account: CUS001 - Cash Sales Account

Addresses

TelNo	TelExt	FaxNo	EmailAddress	DefaultAddress
031 123 4567	147	031 123 4545	ms@noemail.com	Yes
031 123 9876	101	031 123 3322	y@noemail.com	No

- When you have finished adding the new sales office address details, click on **Save**.



- The new address details will be **saved** and you will return to the **Sales Office Listing for Company: []** screen.

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