

COMPANY

SALES OFFICES - ADD A SALES OFFICE

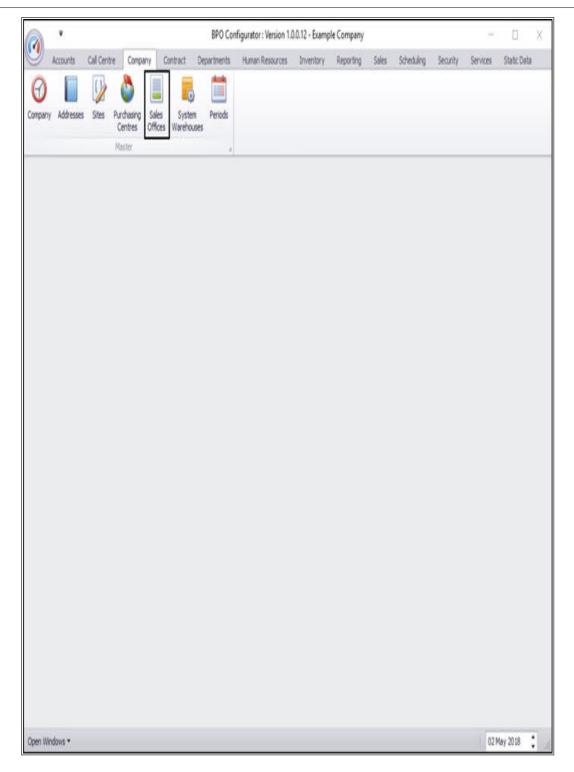
The Sales Office holds configuration and numbering conventions for sales transactions.

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**.



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SalesOfficeCode SalesOfficeName InvoicePrefix NextInvito QuotePrefix NextQuoteNo ONotePrefix NextOrNateNo OrderPrefix NextOrNateNo Orde		dd Ex	Edt		Works	spaces			Refresh										
SO Sales Office IIW 426 QT 205 CN 114 OR 239 WC 1														-				lassares	
		SalesOffic	foeCode	SalesOffice	Name		Invoice	Prefix	NextInvi	0	QuotePrefix	NextQuoteNo	CrivotePrefix	NextCrNoteNo	OrderPrefix	NextOrderNo	ClaimPrefix	NextClaim	No
C30 Cape Town Sales Office CIN 1 CQT 1.00R 1.050 1.0WC		\$0		Sales Office			DW		4	26	QT	205	CN	114	OR	239	WC		1
		CSO		Cape Town	Sales Of	fice	CIN			1	CQT	1	COR	1	C\$0	1	CWC		

• 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.



Sales Office Configuration	on Details		Default Commercial Ma	rkups	-1			Site			
Code			Assets	0 ‡			SiteDescription	Contract	SalesAccCode	PartsSalesA	ccCode
Sales Office Name		ð.	Inventory		'		Durban Johannesburg				
		9	Labour			ш	Jonamesourg				
Manager		٩	Sub Contracts								
References	Prefix		Banking								
Next Invoice No.		0 \$	Bank Name								
Next Quote No.		0 \$	Account Name								
Next Credit Note No.		0 0	Account Number								
Next Order No.		0 ‡	Branch Name			<u></u>				_	
Next Claim No.		0 🗘	Sort Code					Addre	5585		
10.5					-	Address ¹	Type AddressCo	ntactName	Address 1	Address2	Addre
Sales				12	•						
Invoice Header	1		Quote Validity								
			Include Quote Cover Page								
Default Cash Sales Account		ρ									



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*.



Sales Office Configur	ation Details		Default Commercial Markup	8	٦				Sib			
Code	350		Assets	0 🗘				teDescription urban	Contract	SalesAccCode	PartssalesA	CODE
Sales Office Name	Johannesburg	Sales office	Inventory	0 ‡		1	1.40	hannesburg				
		4	Labour	0 🗘								
Manager		<i>۾</i>	Sub Contracts	0 ‡								
References	Prefix		Banking		-1							
Next Invoice		0 \$	Bank Name		ill							
Next Quote	No.	0 🗘	Account Name		i II							
Next Credit Note	No.	0 🛟	Account Number		1							
Next Order	No.	0 ‡	Branch Name			-						
Next Claim	No.	0 🗘	Sort Code] [Addre	sses		
-					-1	Add	ressType	AddressCo	ntactName	Address1	Address2	Addres
Sales	600 D											
Invoice Hea	der		Quote Validity									
			Include Quote									
Default C	ush unt	p										



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.



Sales Office Configura	ition Details		Default Commercial Markups	- 	٦		Calant	SiteDescription	Site		DarteCalast	
Code			Assets	0 ‡		,		Durban	COURACE	SBESACCLODE	Parabaresay	.ccode
Sales Office Name	Johannesburg Sa	les office	Inventory	0 🗘				Johannesburg				
		1	Labour	0 🌲								
Manager		Q	Sub Contracts	0 ‡								
References	Prefix		Banking									
Next Invoice I		1:	Bank Name									
Next Quote I		10	Account Name									
Next Credit Note I	10	1 \$	Account Number									
Next Order 1	IO. JOR	1 \$	Branch Name			Đ	<u></u>				_	
Next Claim I	io. JWC	1\$	Sort Code			Ē			Addre	5585		
							AddressT	ype AddressCo			Address2	Addres
Sales					-	۲						
Invoice Head	er		Quote Validity									
		*	Include Quote			1						
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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.



Sales once hance 20101	esburg Sales office	Assets	0 ‡	,		SiteDescription Durban	Contracti	SalesAccCode	PartsSalesA	:cCode
Manager	p	Inventory Labour Sub Contracts	0 : 0 :			Johannesburg				
	efix	Banking								
Next Invoice No.		Bank Name								
	QT 1 \$ QR 1 \$	Account Name								
		Branch Name							_	
	08 1 \$							-	_	
Next Claim No. 3	WC 1 🕻	Sort Code		1			Addre			
Sales					Address ^T)	pe AddressCo	ntactName	Address I	Address2	Addre
			62	1		_				
Invoice Header Th	ank you for your support.	Quote Validity		•						
	7	Include Quote Cover Page	\checkmark							
Default Cash Sales Account	Q									



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.



Sales Office Configura		tals			-Default Commercial Ma			Select	SiteDescription	Site	is alesAccCode	PartsSalesA	cCode
Code Sales Office Name		ach en Cala	office		Assets	10 🛟	,		Durban				
Sales Onice name	Mar	coury soc	P ONINE		Inventory	15 ‡		۵	Johannesburg				
Manager				P	Sub Contracts	** *							
. mining et						·							
References	Pr	efix			Banking								
Next Invoice I		N	<u> </u>	1 🗘	Bank Name								
Next Quote I		QT		1 \$	Account Name								
Next Credit Note I	No.)	DR .		10	Account Number								
Next Order I	No.)	OR		1 🗘	Branch Name		¢	-				_	
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Sales						9640	 ۲						
Invoice Head	ler Th	ank you for	your suppor	t, e	Quote Validity		•						
				3	Include Quote Cover Page	\checkmark	1						
Default Ca	ish 🗌			p	State State State								



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.



Sales Office Configurat Code Sales Office Name	190	s office 🔹	- Default Commercial Ma Assets Inventory	10 \$,		eDescription Irban hannesburg	Site		PartsSalesA	ccCode
Manager		p	Labour Sub Contracts	10 ‡ 5 ‡							
References	Prefix		Banking								
Next Invoice N	2013	1 🗘	Bank Name	ABC Bank							
Next Quote No		1 0	Account Name	Test Company CC							
Next Credit Note No		1 \$	Account Number	123456789							
Next Order N		1 🗘	Branch Name	New Town							
Next Claim N	o, JWC	1 🗘	Sort Code	0123				Addre	95C5		
					Ad	káressType	AddressCor	ntactName	Address1	Address2	Addres
Sales				140	*						
Invoice Heade	er Thank you for	your support.	Quote Validity		•						
			Include Quote Cover Page	V							
Default Cas Sales Accour		م									



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.



Sales Office Configuratio			Default Commercial Ma	rkups		0	elart	SiteDescription	Sib		DarteCalast	ortoda
Code 25			Assets	10 🌲		9		Durban	Contract	SBESACCLODE	ParissalesA	cc.ooe
Sales Office Name 30	phannesburg Sales	office	Inventory	15 🗘		,	-	Johannesburg				
		4	Labour	10 🌲								
Manager		٩	Sub Contracts	5 🗘								
References	Prefix		Banking									
Next Invoice No.		1 🗘	Bank Name	ABC Bank	11							
Next Quote No.	LUX I	1 \$	Account Name	Test Company CC	1							
Next Credit Note No.	JCR	10	Account Number	123456789	11							
Next Order No.	JOR	1 \$	Branch Name	New Town	1	10	_				_	
Next Claim No.	JWC	1 🗘	Sort Code	0123					Addre	5565		
Sec. o.					-	A	ddressT	pe AddressCo	ntactName	Address 1	Address2	Addre
Sales			Contraction and the second	5. UL		۲						
Invoice Header	Thank you for y	your support,	Quote Validity	14		•						
			Include Quote Cover Page	V								
Default Cash		P	Cover Page									



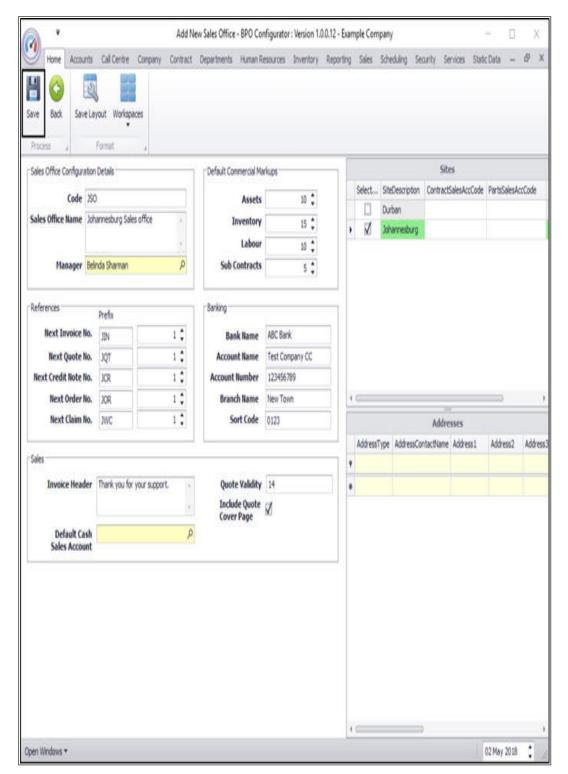
- The *Select an Employee* screen will pop up.
 - Note: If there are no items to select from here, you need to check that Crafts are set up for the relevant site and the Sales Manager is linked to the craft for that site.
- Click on the *row selector* in front of the *employee* that you wish to *link*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



Sales Office Configurat Code 3 Sales Office Name 3 Manager		P	- Default Commercial Ma Assets Inventory Labour	10 \$ 15 \$ 10 \$,	SteDescription Durban Johannesburg	Site		PartsSalesAc	cCode
References Next Invoice No Next Quote No Next Credit Note No Next Order No	4 JQT	1 \$ 1 \$ 1 \$ 1 \$	Home Wome Ck Back Sav Process , Ro	e Layout mat				-		
Next Claim No Sales	MC	1:	EmployeeNumber	FulName		c	Addre ontactName		Address2	Addre
	r Thank you for your supp	port.	 9HA001 DUT001 JOE001 TAD009 	Beinda Sharman Bianca Du Toit Joel James Theo Peterson						



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





- 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.



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	salesOfficeName				NextQuoteNo	CrNotePrefix	NextOrNoteNo	OrderPrefix	NextOrderNo	ClainPrefix	NextO	ClaimN
\$0	Sales Office	INV	426	QT	205	CN	114	OR	239	WC		
CSO	Cape Town Sales Office	CIN	1	CQT	1	CCR	1	CSO	1	CWC		
150	Johannesburg Sales Office	JIN	1	JQT	1	XX	1	JOR .	1	3WC		

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