

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.

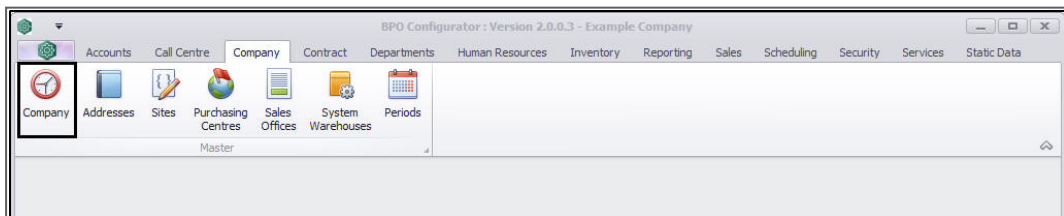
The prefix is appended to the Customer Code when the customer is saved on the Customer Maintain screen, where the Customer Code is blank.

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.

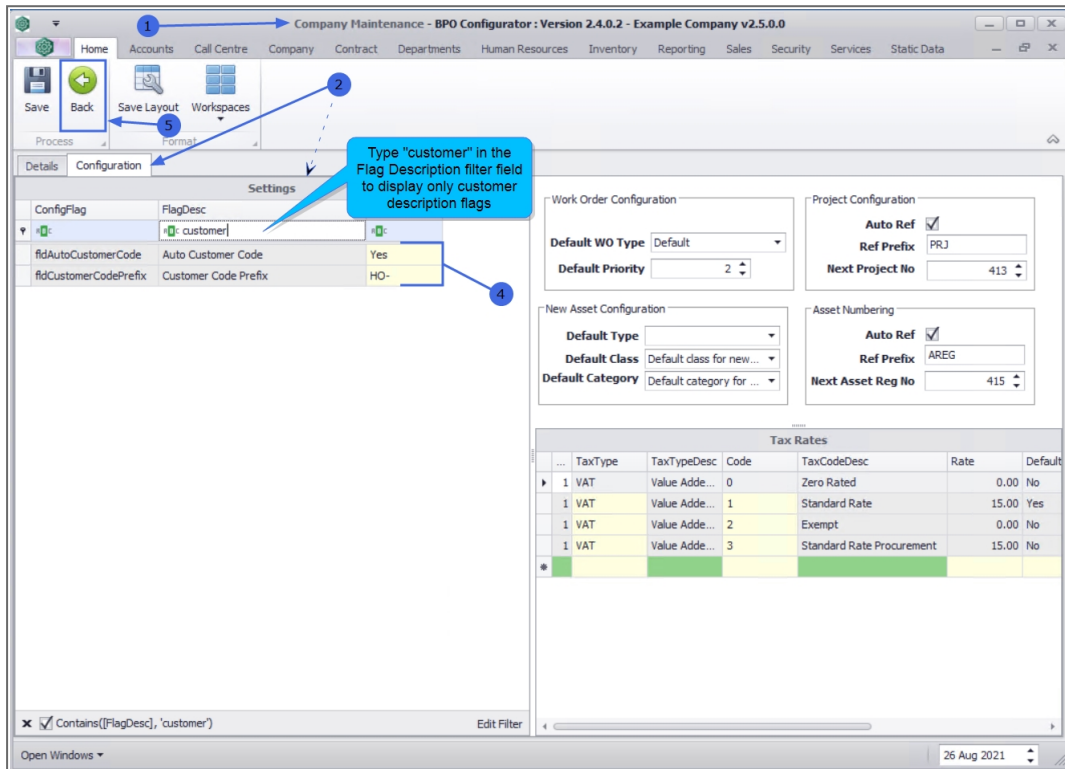
Please contact CO3 Support for more information or assistance in this regard.

Ribbon Access: *Configurator > Company > Company*



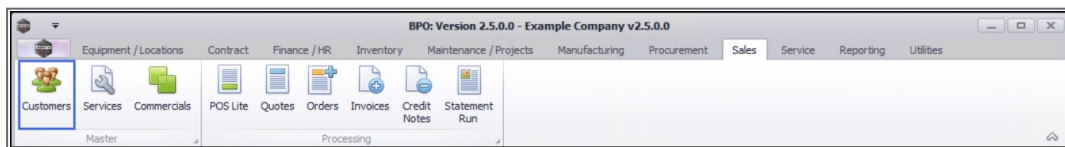
1. The **Company Maintenance** screen will be displayed.
2. Click on the **Configuration** tab to display the Settings panel.

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



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.

CustomerCode	CustomerType	CustomerName	Department	DeptName	SiteDescription	CustomerCreditLimit	CustomerWebSite	CustomerPhoneNumber	CustomerVATNo
HO-CUS001	RE	Cash Sales Account			Durban	10,000.00		000 000 0000	0000000000
HO-HOP001	RE	Hope Works (Pty) Ltd			Durban	5,000.00	www.hopeworks.co.za	031 123 4567	987654321
HO-DER001	RE	Derton / Technologies			Durban	250.00	www.dertonweb.co.za	031 123 4785	98/7654321
HO-OFF001	RE	Office Supplies Unlimited			Durban	75,000,000.00	www.crn.co.za	031 789 4561	987456321
HO-YES001	CO	Young Electric			Durban	100,000.00		082555555	2314687641
HO-WES001	RE	Westwood Dynamic			Durban	10,000,000.00	www.web.co.za	031 789 4561	123456789
HO-TIA001	RE	Titan Group			Durban	100,000.00	www.web.co.za	031 852 9632	12325874136
HO-BOT0001	IT	Bothas Networking inc			Durban	50,000.00	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	IT	Danny Storm IT Cafe			Durban	75,000.00		031 785 4785	123654789
HO-PAN001	RE	Panda Copiers			Durban	50,000.00		031 123 4567	123456789
HO-HAC001	IT	Hack PC - IT Shop			Durban	0.00		031 789 4561	6654357155
HO-PIN0001	GV	Pink Shoes			Durban	0.00		031 456 7894	1234
HO-HIL000001	HILLCRESTP	Mary Contrary			Durban	0.00		083 559	00000
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
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
HO-biancad	RE	North West Branch			Durban	0.00			0
HO-DAN002	IT	Dancino Shoes			Durban	10,000.00		031 123 4567	123456789

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