

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 Centre | Company | Contract | Departments | Human Resources | Inventory | Reporting | Sales | Scheduling | Security | Services | Static Data |
|---------|-----------|-------------|-------------|----------|-------------|-----------------|-----------|-----------|-------|------------|----------|----------|-------------|
| Company | Addresses | Sites Purc | asing Sales | | Periods | | | | | | | | |
| | | Ma | ter | | | | | | | | | | |

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

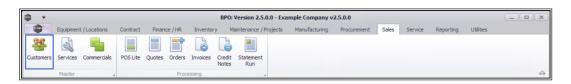


- 3. Type "customer" in the Flag Description to display the Auto Customer Code and Customer Code Prefix flag values.
- The Auto Customer Code flag has been set to Yes and the preferred Customer Code Prefix has been set to HO-.nd this code will added as a prefix to all new Customer Codes.
- 5. Click on *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 |
| Process F Details Configuration ConfigFlag F I II: | Aut Workspaces Settings HagDesc C customer Customer Code Prefix | Type "customer" in the Flag Description filter field to display only customer description flags -0: Yes HO- 4 | C | Vork Order Conf Default WO Tyş Default Priori ew Asset Configu Default Type | Default ty uration | • 2 • | Project Configuration Auto Ref Ref Prefix Next Project No 413 Asset Numbering Auto Ref | | |
| | | | De | | Default class for Default catego | | Ref Prefix AR | EG 415 🛟 | |
| | | | | | | Ta | x Rates | | |
| | | | | TaxType | TaxTypeDesc | | TaxCodeDesc | Rate | Default |
| | | | | 1 VAT | Value Adde | | Zero Rated | 0.00 | No |
| | | | | 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 |
| | | | * | | | | | | |
| | | | | | | | | | |
| x √ Contains([FlagDesc], 'c | ustomer') | Edit Filter | 4 0 | | | | | | |
| Open Windows 🕶 | | | | | | | 1 | 26 Aug 2021 | ÷ //. |

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 | |
|-----------------------|--------------------|--------------|---------------------------|--------------|------------|---------------|---------------------|----------------------|---------------------|-------------|
| dd Edit Deactivate | XQ | | | old Release | P | | irban 🔹 🧹 | fresh Export Repor | | |
| Proces | 3 | Note th | e prefix HO- in front | Status P | Processing | 2 | Current | Reports | Print | |
| nks a | Drag a column head | A of th | e Customer Code | | | | | | | |
| iter text to search P | | | | | | - | | | | 1 |
| | CustomerCode | | CustomerName | | | | CustomerCreditLimit | | CustomerPhoneNumber | CustomerVAT |
| Functions | P 10: | *Oc | 1 0 0 | 1 0 0 | n∎c' | n∎c | - | R O C | 1 0 4 | n 🗖 c |
| Notes | HO-CUS001 | RE | Cash Sales Account | | | Durban | 10,000.00 | | 000 000 0000 | 000000000 |
| 110 CLU | HO-HOP001 | RE | Hope Works (Pty) Ltd | | | Durban | | www.hopeworks.co.za | | 987654321 |
| | 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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