

We are currently updating our site; thank you for your patience.

SALES

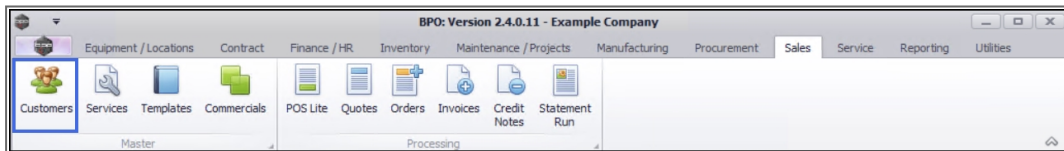
CUSTOMERS – SYNCHRONISE CUSTOMERS

Customers loaded onto BPO are saved to Pastel when the **Post Accounts** option has been turned on. If your database is integrated with Pastel, a CO3 BPO Analyst will switch the option on before **Go Live**.

This option will synchronise your customers with your financial system. This is usually only required initially (after **Go-Live**).

The only time this will need to be done is when a customer is added to Pastel or to BPO while the **Post Accounts** option is switched off.

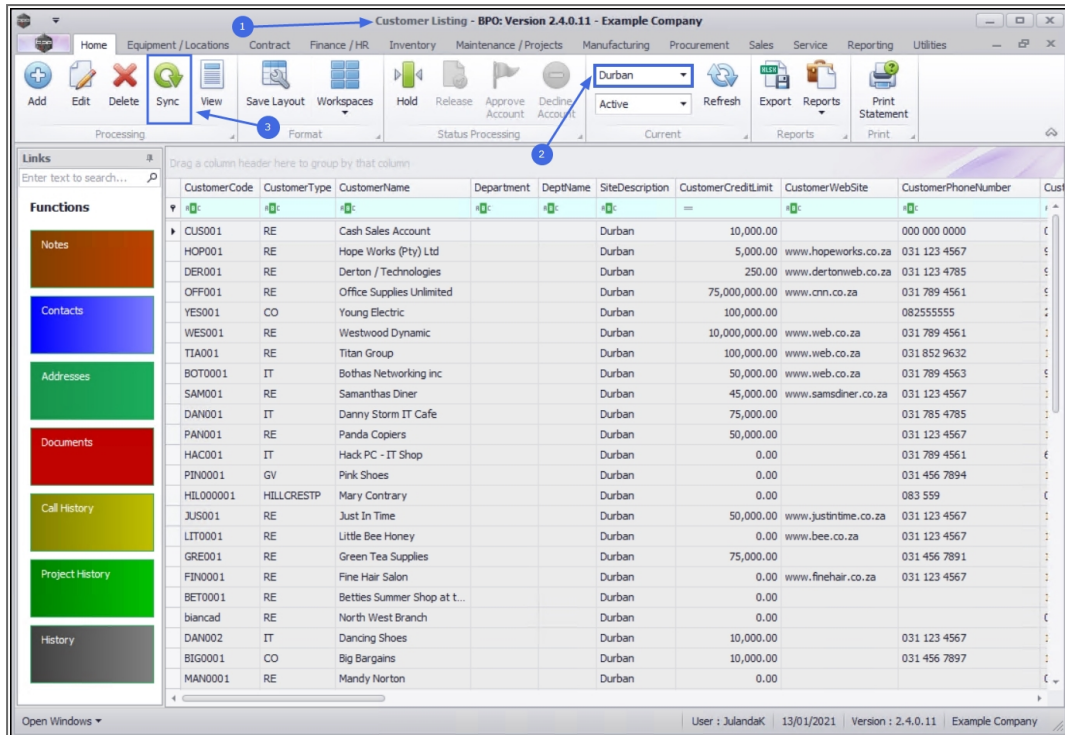
Ribbon Access: Sales > Customers



1. The **Customer Listing** screen will be displayed.
2. Select the **Site**.
 - In this image **Durban** has been selected.
3. Click on **Sync**.



Short cut key: Right click to display the **All groups** menu list. Click on **Sync**.



SAVE SYNCHRONIZE

4. When you receive the message to confirm;
 - **This action will write data to the accounting system. Are you sure that you want to synchronise the customers with the accounting system?**
5. Click on **Yes**.

The screenshot shows the 'Customer Listing' window in the CO3 system. The window title is 'Customer Listing - BPO: Version 2.4.0.11 - Example Company'. The interface includes a menu bar with options like Home, Equipment / Locations, Contract, Finance / HR, Inventory, Maintenance / Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu is a toolbar with icons for Add, Edit, Delete, Sync, View, Save Layout, Workspaces, Hold, Release, Approve Account, Decline Account, Refresh, Export, Reports, and Print Statement. A 'Links' section on the left contains a search bar and several function buttons: Notes, Contacts, Addresses, Documents, Call History, Project History, and History. The main area is a table with columns: CustomerCode, CustomerType, CustomerName, Department, DeptName, SiteDescription, CustomerCreditLimit, CustomerWebSite, and CustomerPhoneNumber. A dialog box is overlaid on the table, asking: 'This action will write data to the accounting system. Are you sure that you want to synchronise the customers with the accounting system?'. The dialog has 'Yes' and 'No' buttons. A blue arrow points from the dialog to the 'CustomerCode' column header, and another blue arrow points from the dialog to the 'Yes' button.

CustomerCode	CustomerType	CustomerName	Department	DeptName	SiteDescription	CustomerCreditLimit	CustomerWebSite	CustomerPhoneNumber
CUS001	RE	Cash Sales Account			Durban	10,000.00		000 000 0000
HOP001	RE	Hope Works (Pty) Ltd			Durban	5,000.00	www.hopeworks.co.za	031 123 4567
DER001	RE	Derton / Technologies			Durban	250.00	www.dertonweb.co.za	031 123 4785
OFF001	RE	Office Supplies Unlimited			Durban	75,000,000.00	www.cnn.co.za	031 789 4561
YES001	CO	Young Electric			Durban	100,000.00		082555555
WES001	RE	Westwood Dynamic			Durban	10,000,000.00	www.web.co.za	031 789 4561
TIA001	RE	Titan Group			Durban	100,000.00	www.web.co.za	031 852 9632
BOT001	IT						www.web.co.za	031 789 4563
SAM001	RE						www.samsdiner.co.za	031 123 4567
DAN001	IT							031 785 4785
PAN001	RE							031 123 4567
HAC001	IT							031 789 4561
PIN001	GV							031 456 7894
HIL000001	HILLCRESTP							083 559
JUS001	RE						www.justintime.co.za	031 123 4567
LIT0001	RE	Little Bee Honey			Durban	0.00	www.bee.co.za	031 123 4567
GRE001	RE	Green Tea Supplies			Durban	75,000.00		031 456 7891
FIN0001	RE	Fine Hair Salon			Durban	0.00	www.finehair.co.za	031 123 4567
BET0001	RE	Bettes Summer Shop at t...			Durban	0.00		
biancad	RE	North West Branch			Durban	0.00		
DAN002	IT	Dancing Shoes			Durban	10,000.00		031 123 4567
BIG0001	CO	Big Bargains			Durban	10,000.00		031 456 7897
MAN0001	RE	Mandy Norton			Durban	0.00		
DAN0003	IT	Dance Shoes			Durban	0.00		

The synchronisation will be complete.

MNU.061.011

