

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

# COMPANY

## SALES OFFICES - ADD A SALES OFFICE

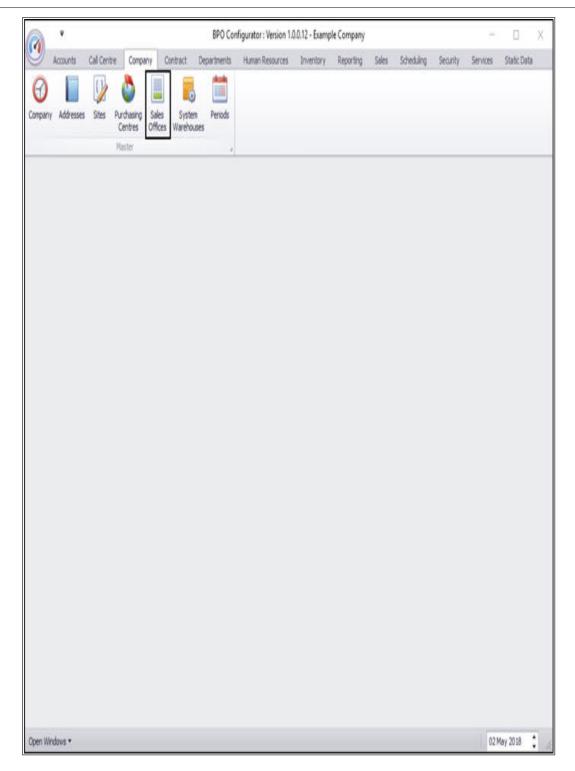
The Sales Office holds configuration and numbering conventions for sales transactions.

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 NextOnteNo OrderPrefix NextOrderNo ClamPrefix NextClamNo Soles Office INV 426 QT 205 CN 114 CR 239 WC 1	d	50	Edt	1		ut W	Works	space	8			Refr	resh													
50 Sales Office DW 426 QT 205 CN 114 OR 239 WC 1	1	_	_		1. 477			dî.												3					-	0.442
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230 Cape Town Sales Office CIN 1 CQT 1 COR 1 CSO 1 CWC	9	50		Sa	ales Off	fice			D	W			426	QT		20	CN		3	.14	OR .		239	WC		1
	C	30		Ca	ape Tor	wn Sale	ales O	Office.		IN				CQT			COR			1	CSO		1	CWC		
								Unite																		

• The Add New Sales Office screen will be displayed.

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#### 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.

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Sales Office Configuration	on Details		Default Commercial Ma	rkups				Site			
Code			Assets	0 ‡			SteDescription	Contract	SalesAccCode	PartsSalesA	ccCode
Sales Office Name		6	Inventory	0 ‡	,		Durban Johannesburg				
		4	Labour			ш	Marieway				
Manager		P	Sub Contracts								
eferences	Prefix		Banking								
Next Invoice No.	115400	0 🛟	Bank Name								
Next Quote No.		0 ‡	Account Name								
Next Credit Note No.		0 0	Account Number								
Next Order No.		0 \$	Branch Name		4	G				_	
Next Claim No.		0 ‡	Sort Code					Addre	5565		
1112 FG					-	Address	Type AddressCo	ntactName	Address 1	Address2	Addr
Sales				1.2							
Invoice Header	1		Quote Validity		•						
			Include Quote Cover Page	0							
Default Cash		P									

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#### **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	ration Det	als			Default Commercial Mar	liups					Sib			
Code	350				Assets	0 ‡		,		SiteDescription Durban	Contract	SalesAccCode	PartsSalesA	ccCode
Sales Office Name	Johanne	sburg Sales o	office	*	Inventory	0 ‡			-	Johannesburg				
				7	Labour	0 \$			141	mannay				
Manager				ρ	Sub Contracts	0 ‡								
References	Pre	6v			Banking									
Next Invoice				0 0	Bank Name		ήII							
Next Quote	No.	-i		0 \$	Account Name		-11							
Next Credit Note	No.		1	0 ‡	Account Number									
Next Order	No.		1	0 ‡	Branch Name			1.					_	
Next Claim	No.			0 ‡	Sort Code						Addre	sses		
gapan.							-1		AddressT	ype AddressCo	ntactName	Address1	Address2	Addr
Sales					. NORTH AND A DESCRIPTION			۲						
Invoice Hea	der			ð	Quote Validity		-11	•						
				1	Include Quote Cover Page									
Default C	ash 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				6.1. A		Sib			
Code			Assets	0 ‡		,	Select	SiteDescription Durban	Contract	SalesAccLode	PartsSalesA	ccCode
Sales Office Name	Johannesburg S	ales office	Inventory	0 🛟			D	Johannesburg				
		1	Labour	0 🌲		٢	Page 1					
Manager		P	Sub Contracts	0 \$								
References	Prefix		Banking		=							
Next Invoice N		1:	Bank Name									
Next Quote N		1 \$	Account Name									
Next Credit Note N	IO. JCR	1 🗘	Account Number									
Next Order N	IO. JOR	1 🗘	Branch Name			ŧ	G				_	
Next Claim N	No. JWC	1 🗘	Sort Code			ſ			Addre	5585		
							Address <sup>†</sup>	ype AddressCo	ntactName	Address I	Address2	Addre
Sales	10.8 T I		· · · · · · · · · · · · · · · · · · ·			۲						
Invoice Head	ler		Quote Validity									
		*	Include Quote Cover Page									
	sh	م										

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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 Office Configura Code Sales Office Name Manager	190	s office	Assets Inventory Labour Sub Contracts	0 <b>:</b> 0 <b>:</b> 0 <b>:</b>	,		SiteDescription Durban Johannesburg	Contract	ialesAccCode	PartsSalesA	xCode
References Next Invoice N Next Quote N Next Credit Note N	o. JQT o. JCR	1: 1: 1:	Banking Bank Name Account Name Account Number								
Next Order N Next Claim N		1 🗘	Branch Name Sort Code		•	<u></u>		Addre	sses	_	
Sales						AddressTy	pe AddressCo	ntactName	Address I	Address2	Addres
Invoice Head	er Thank you for	your support.	Quote Validity Include Quote Cover Page		•						

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#### **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 Office name	Mar	coury soc	P DI INE		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		¢	-				_	
Next Claim I	No. J	NC		1:	Sort Code					Addre	sses		
Sum -					-			Address 1	Type AddressCo	ntactName	Address1	Address2	Addre
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								

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#### 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.

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Banking         Next Invoice No.       JIN       1          Next Invoice No.       JIN       1          Next Quote No.       JQT       1          Next Quote No.       JQT       1          Next Credit Note No.       JQR       1          Next Order No.       JQR       1          Next Claim No.       JWC       1          Sales       AddressType
Next Claim No. JWC 1 \$ Sort Code 0123 AddressContactName Address1 Address2 Sales
Sales *
Invoice Header Thank you for your support. Quote Validity 14
Default Cash Default Cash Sales Account

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### **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.

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Sales Office Configuratio		1	- Default Commercial Ma Assets	10 ‡				SiteDescription	Sib Contract		PartsSalesA	ccCode
Sales Office Name	phannesburg Sales	office	Inventory	15 🗘				Durban				
		4	Labour	10 🗘		)	V	Johannesburg				
Manager		٩	Sub Contracts	5								
References	Prefix		Banking									
Next Invoice No.	1940	1 🗘	Bank Name	ABC Bank								
Next Quote No.	JQT	1 \$	Account Name	Test Company CC	1							
Next Credit Note No.	JOR	1 \$	Account Number	123456789	1							
Next Order No.	JOR	1 🗘	Branch Name	New Town	1	1	2				_	
Next Claim No.	JWC	1 🗘	Sort Code	0123		1			Addre	5565		
Sec. 10							Address1	Type AddressC	ontactName	Address 1	Address2	Addre
Sales			Contract restrictions	5, 710		۲						
Invoice Header	Thank you for yo	our support, +	Quote Validity	14		٠						
			Include Quote Cover Page	V								
Default Cash		P	Cover Page									

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- 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.

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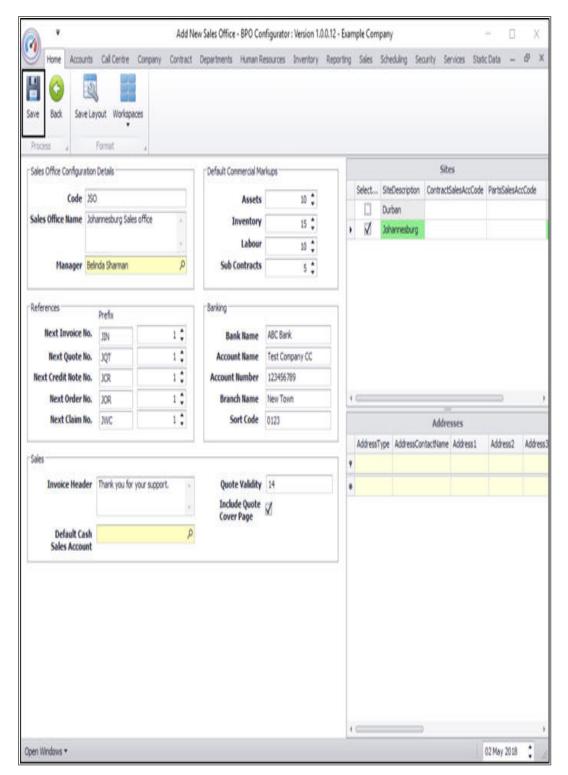
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Sales Office Configuration		Oefault Commercial M     Assets     Inventory     Labour	10 \$ 15 \$ 10 \$	,	2	SteDescription Durban Johannesburg	Site		PartsSalesAc	cCode
References Next Invoice No Next Quote No Next Credit Note No Next Order No Next Claim No	JQT         1 \$           JQR         1 \$           JOR         1 \$	Process a F	ve Layout				Addre	stes		
Sales	. pros	Employeetkumber	FulNane			c	ontactName		Address2	Addre
Invoice Header Default Cash Sales Account		<ul> <li>HA001</li> <li>DUT001</li> <li>J0E001</li> <li>TAD009</li> </ul>	Belinda Sharman Bianca Du Toit Joel James Theo Peterson							



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



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- 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.



Home Ac	counts Call Centre Con	-	1.1.1		Resources In	rentory Repo	rong Sales S	cheduling	Security Services	Static Data		a
Add Edit S	ave Layout Workspaces	Save Filter		port								
SalesOfficeCode					NextQuoteNo	CrNotePrefix	NextOrNoteNo	OrderPrefix	NextOrderNo	ClaimPrefix	Next	ClaimNo
\$0	Sales Office	IN	426	QT	205	CN	114	OR	239	WC		
CSO	Cape Town Sales Office	CIN		CQT		CCR		CSO		CWC		
150	Johannesburg Sales Office	JIN	_	JQT	1	XX	1	JOR	1	JWC		

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