

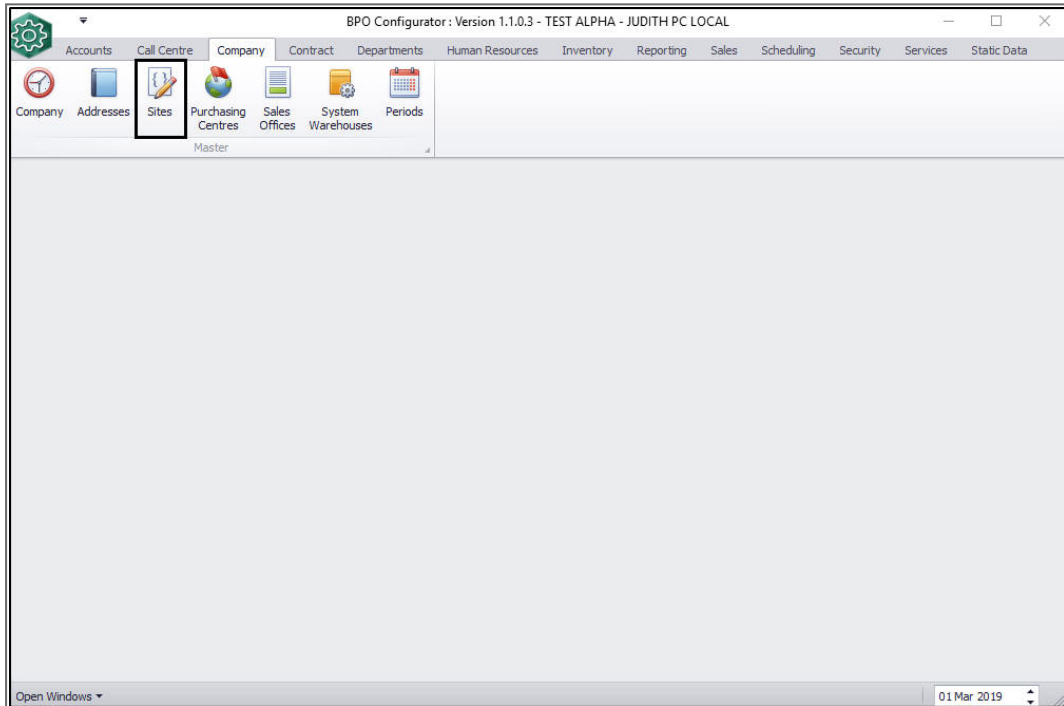
We are currently updating our site; thank you for your patience.

COMPANY

SITES – CONNECT BPO2 TO THE PASTEL DATABASE

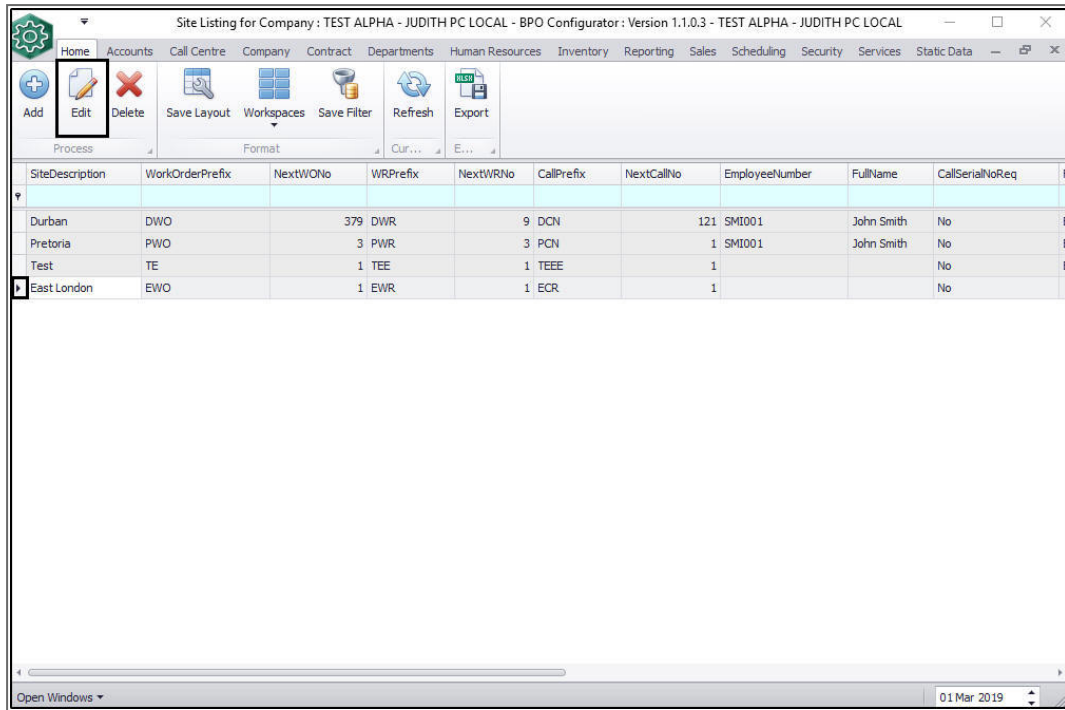
The BPO connection to the server is set during implementation.

Ribbon Access: Configurator > Company > Sites



The **Site Listing for Company** screen will be displayed.

- Select the site you want to link to the **Pastel** database.
 - In this image, **East London** has been selected.
- Click on **Edit**.



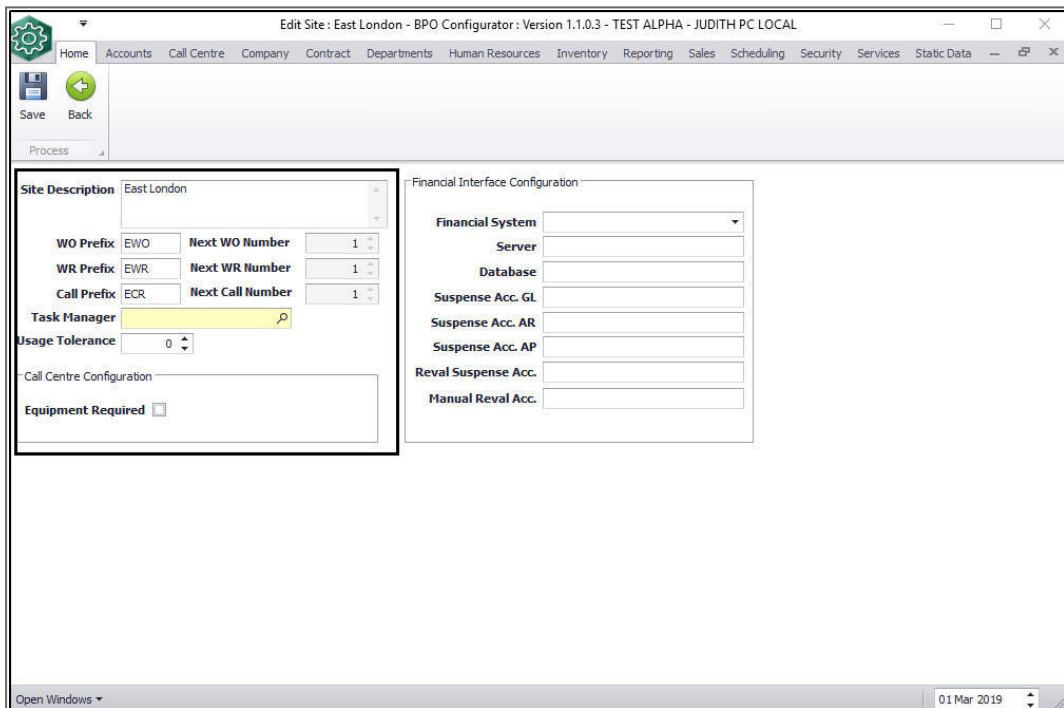
The **Edit Site** screen will be displayed.

SITE AND CALL CENTRE CONFIGURATION

This will already have been set up during **site creation**.

- **Site Description:** This is the name of the selected site (branch).
- **WO Prefix:** This is the prefix the system will add to the site work order numbers.
- **Next WO Number:** This is the next site work order number the system will use.
- **WR Prefix:** This is the prefix the system will add to the site work request numbers.
- **Next WR Number:** This is the next site work request number the system will use.

- **Call Prefix:** This is the prefix the system will add to the site call numbers.
- **Next Call Number:** This is the next call number the system will use.
- **Task Manager:** This is the responsible **Service Controller** linked to the new site.
- **Usage Tolerance:** This is the percentage variation in meter readings allowed before a warning is raised.
- **Equipment Required:**
 - **Ticked:** This will ensure that calls cannot be saved without linking a serialised item.
 - **Un-ticked:** Calls can be saved without linking a serialised item.

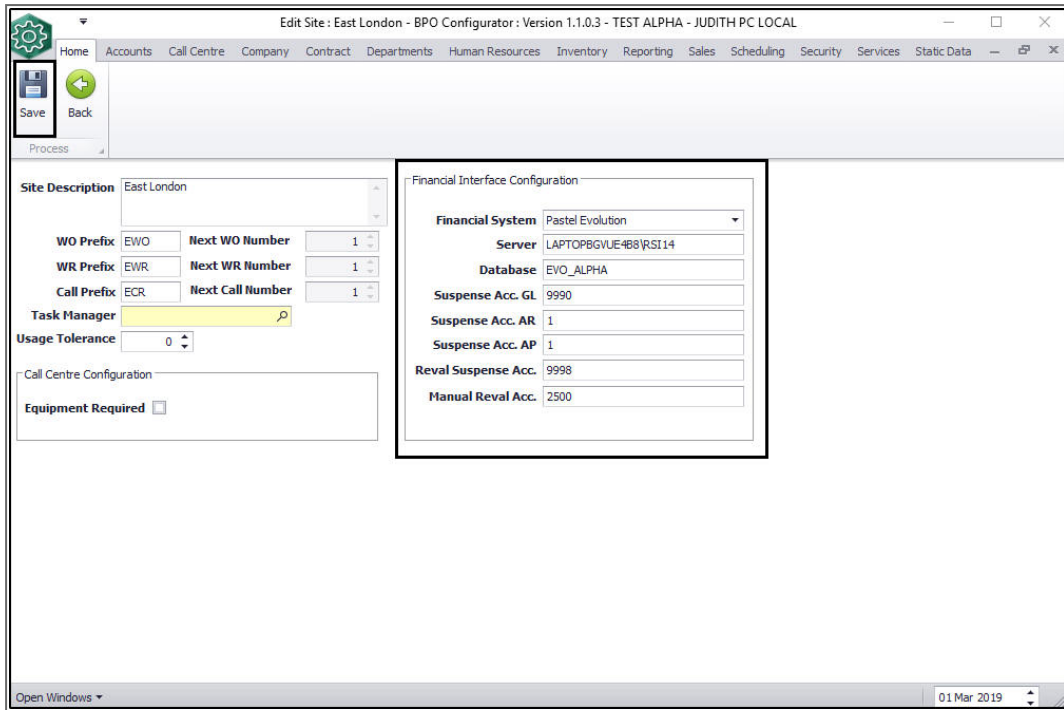


The screenshot displays the 'Edit Site: East London - BPO Configurator' window. The interface includes a menu bar with options like Home, Accounts, Call Centre, Company, Contract, Departments, Human Resources, Inventory, Reporting, Sales, Scheduling, Security, Services, and Static Data. Below the menu bar are 'Save' and 'Back' buttons, and a 'Process' button. The main configuration area is divided into two panels. The left panel, titled 'Site Description', shows 'East London' as the site name. It contains fields for 'WO Prefix' (EWO), 'Next WO Number' (1), 'WR Prefix' (EWR), 'Next WR Number' (1), 'Call Prefix' (ECR), and 'Next Call Number' (1). There is a 'Task Manager' field with a search icon, a 'Usage Tolerance' dropdown set to 0, and an 'Equipment Required' checkbox. The right panel, titled 'Financial Interface Configuration', includes a 'Financial System' dropdown, a 'Server' field, a 'Database' field, and several 'Suspense Acc.' fields (GL, AR, AP) and 'Manual Reval Acc.' fields. The bottom status bar shows 'Open Windows' and the date '01 Mar 2019'.

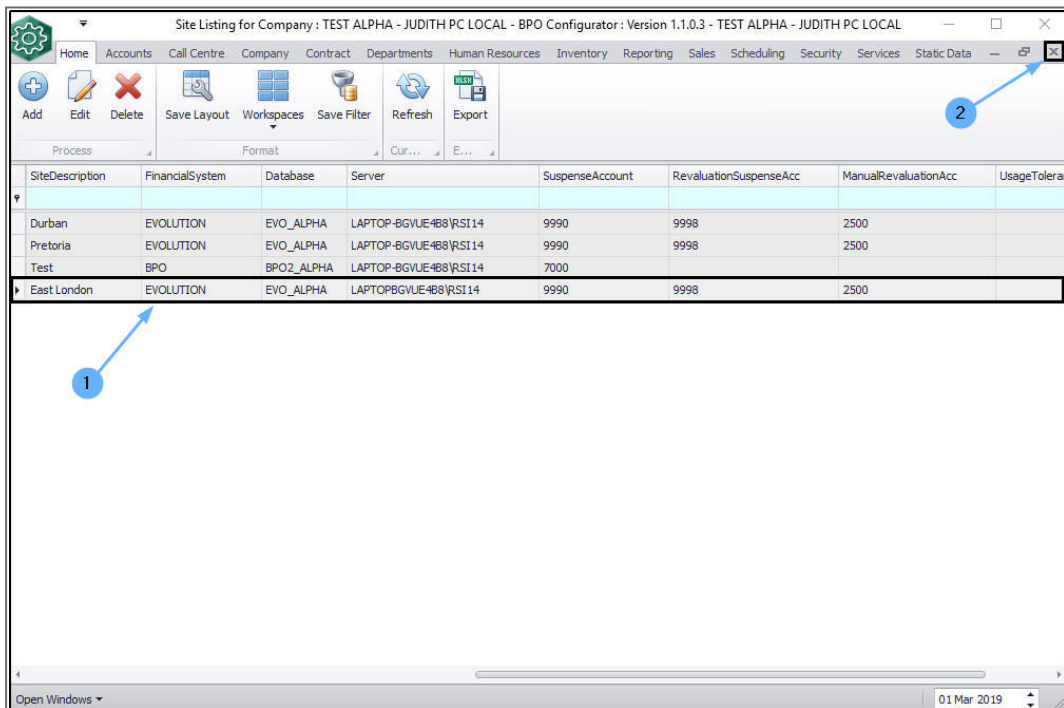
FINANCIAL INTERFACE CONFIGURATION

Go to the **Financial Interface Configuration** section and complete the relevant information.

- **Financial System:** Click on the drop-down arrow and select **Evolution**.
 - **Server:** Type in the correct **SQL** server name e.g. **TEST\SQLEXPRESS**.
 - **Database:** Type in the **Pastel Evolution** database name e.g. **EVO_TEST_PROD**.
 - **Suspense Acc GL:** Type in the correct suspense accounts - general ledger code.
 - **Suspense Acc AR:** Type in the correct suspense accounts - accounts receivable code.
 - **Suspense Acc AP:** Type in the correct suspense accounts - accounts payable code.
 - **Reval Suspense Acc:** Type in the correct revaluation suspense account code.
 - **Manual Reval Acc:** Type in the correct manual revaluation account code.
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- Click on **Save**.



- The **Edit Site** screen will close and the updated details can be viewed in the **Site Listing for Company** screen.
- Click on **Close** to exit this screen.



Related Topics

- [Create a Site](#)

MNU.146.019