

# CONFIGURATION

## **COMPANY ADDITIONAL CONFIGURATION**

**Company Configuration** refers to the process of setting up and adjusting the system's global parameters to align with the specific needs and work flows of your specific business.

Company configuration is set up during the implementation process, and is not usually amended down the line. Implementation of new functionality post implementation, may require additional configuration.

The options selected are discussed with management and set up according to the company's requirements.

**Configuration Flags** are settings (or options) that enable or disable certain features or functionalities that tailor the system to meet your business requirements.

## COMPANY MAINTENANCE SCREEN

Open the **Company Maintenance** screen, if not already open.

**Ribbon** Select Configuration - Company



- The **Company Maintenance** maintain screen will be displayed.
- This screen is divided into a Links panel, Details tab and Configuration tab.



п •	Company Maintenance - Nucleus Accounts: Version 2024.5.0.7 - All Things Example Company											æ	- 0	×
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• Select the **Configuration** tab, if not already selected.

## CONFIGURATION

#### WORK ORDER CONFIGURATION

- Default WO Type: When raising a work order, this will be the default work order type. These codes are set up in <u>Nucleus Con-</u> <u>figurator</u> > Static Data module.
- **Default Priority:** When raising a work order, this will be the default work order priority.



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### **PROJECT CONFIGURATION**

- Auto Ref: The system will auto-generate project numbers.
- **Ref Prefix**: Type in the project number prefix, if required.
- Next Project No: Type in the project number you want Nucleus Service to continue with at go-live.

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	fldShowTechDesc	Allow the work description to be shown in final report	Yes		- Protocol Com						
	fidAutoAssignment	Auto Accept Call Assignment	No		Project Con	nguration	_				
	fidAutoApplyTask	Auto Apply Task Configuration to WO	No		· · ·	Auto Ref 🔽					
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	fidBulkRelease	Bulk release to billing from Meters Processing	No								
	fldBatchCalculatedLimit	Calculated value of the total contracts multiplied by the total machines div	700								
	fidCallCentrePeriod	Call Centre Default Period (Days)	30								
	fidCallCompleteErrorCode	Call Complete Error Code Mandatory	Yes								
	fidCallClosureErrorCode	Call Error Code Mandatory	No								
	RdCertiBrateName	Certificate Name									



#### **NEW ASSET CONFIGURATION**

- Default Type: Click on the drop-down arrow and select from the list, the default asset type when procuring or adding a new asset. These codes are set up in <u>Nucleus Configurator</u> > Static Data module.
- Default Class: Click on the drop-down arrow and select from the list, the default asset class when procuring or adding a new asset. These codes are set up in <u>Nucleus Configurator</u> > Static Data module.
- Default Category: Click on the drop-down arrow and select from the list, the default asset category when procuring or adding a new asset. These codes are set up in <u>Nucleus Configurator</u> > Static Data module.

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	fldAutoCloseActivities	Auto Close Activities created in BPO Accounts	Yes										
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	fidAutoSaleIssue	Auto Sale Stock Issue	Yes										
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	fidBatchTracking	Batch Tracking	No										
	fldIsVersionBPO2	BPO Version check	No										
	fidBulkRelease	Bulk release to billing from Meters Processing	No										
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	fidCallCentrePeriod	Call Centre Default Period (Days)	30										
	fidCallCompleteErrorCode	Call Complete Error Code Mandatory	Yes										
	fidCallClosureErrorCode	Call Error Code Mandatory	No										
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Open Windows ~							Us	er : Bianca 13 Aug 2024	Version : 2024.	i.0.7 /	d Things Exc	ample Cor	npany

### **ASSET NUMBERING**

• Auto Ref: The system will auto-generate asset registration numbers. This is not the same as the serial number.



- **Ref Prefix**: Type in an asset registration number prefix, if required.
- Next Asset Reg No: Type in the next asset registration number you want Nucleus Service to continue with at go-live.

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	fldShow/TechDesc	Allow the work description to be shown in final report	Yes		Design Conference								
	fidAutoAssignment	Auto Accept Call Assignment	No		Project Connguration	_							
	fidAutoApplyTask	Auto Apply Task Configuration to WO	No		Auto Rel								
	fldAutoDispose	Auto Approve Asset Disposals	No		Ref Prefix	PRJ							
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	fldAutoCloseActivities	Auto Close Activities created in BPO Accounts	Yes										
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	fidAutoSaleIssue	Auto Sale Stock Issue	Yes										
	fldAutoScheduling	Auto Schedule	No		Asset Numbering								
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	fidCallCentrePeriod	Call Centre Default Period (Days)	30										
	fldCallCompleteErrorCode	Call Complete Error Code Mandatory	Yes										
	fidCallClosureErrorCode	Call Error Code Mandatory	No										
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• Click on the **Save** button or continue on to **Bank Accounts**.



#### **Related Topics**

- Introduction to Company Configuration
- Company Details
- Configuration Flags
- Additional Configuration
- Bank Accounts

ACCT.CNFG.COMP.Config