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

SALES

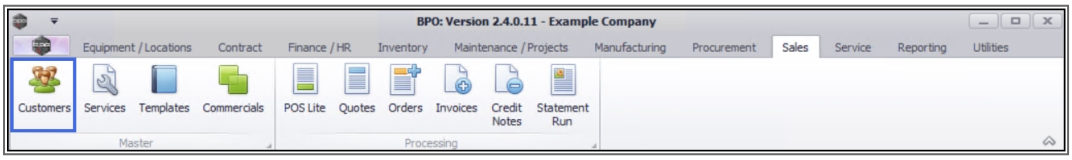
CUSTOMERS – SYNCHRONISE CUSTOMERS

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**).

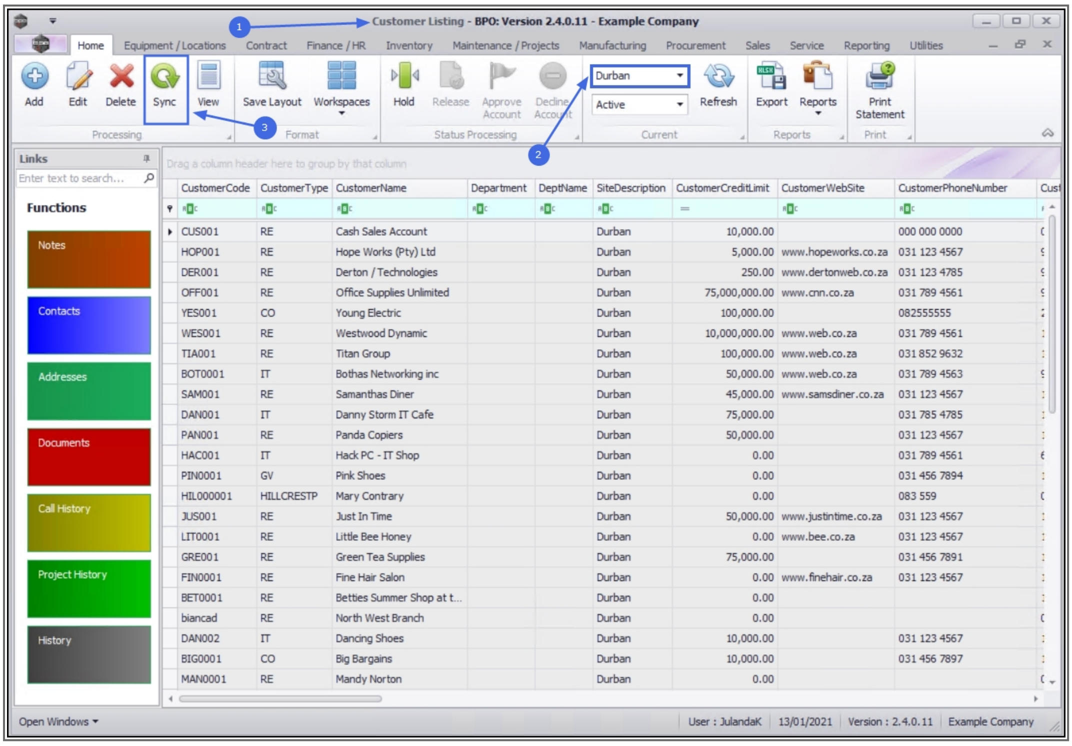
The only time this will need to be done is when a customer is added to Pastel or to BPO while the **Post Accounts** option is switched off.

Ribbon Access: Sales > Customers



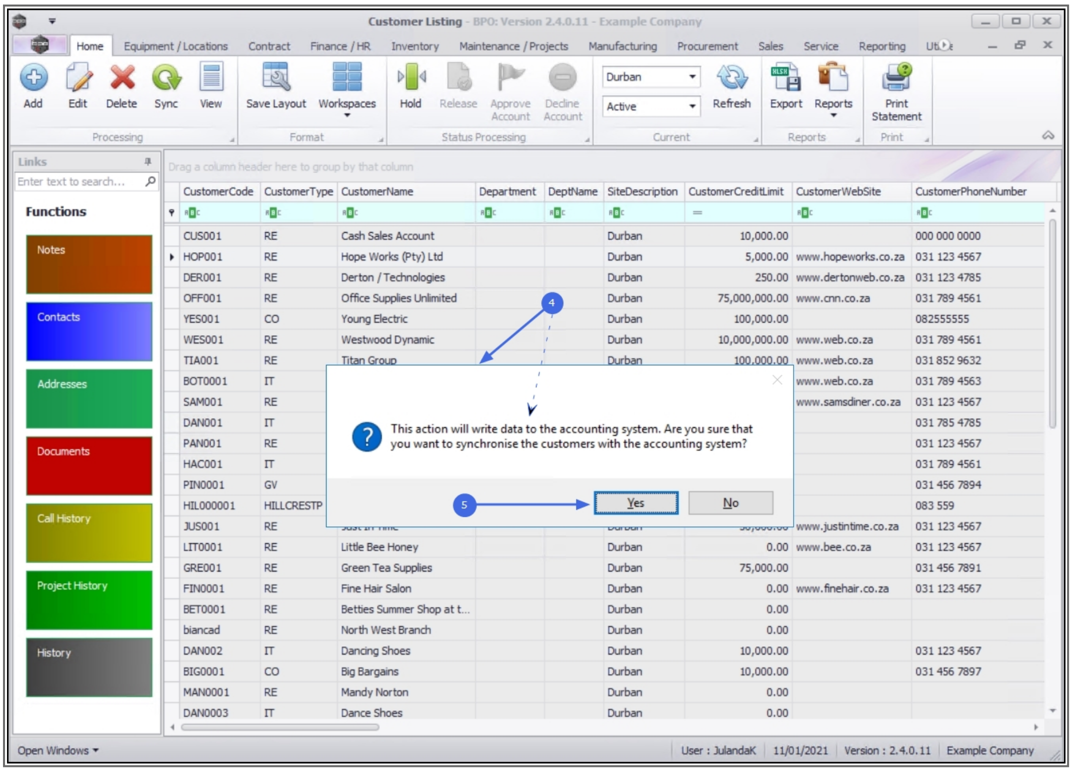
1. The **Customer Listing** screen will be displayed.
2. Select the **Site**.
    - In this image **Durban** has been selected.
3. Click on **Sync**.

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 synchronisation will be complete.

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