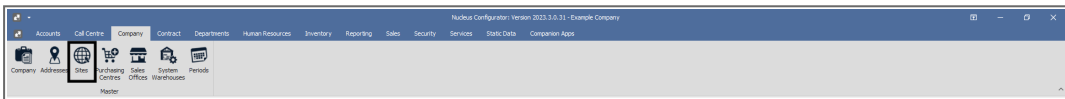We are currently updating our site; thank you for your patience.

COMPANY

SITES – SITE MANAGEMENT
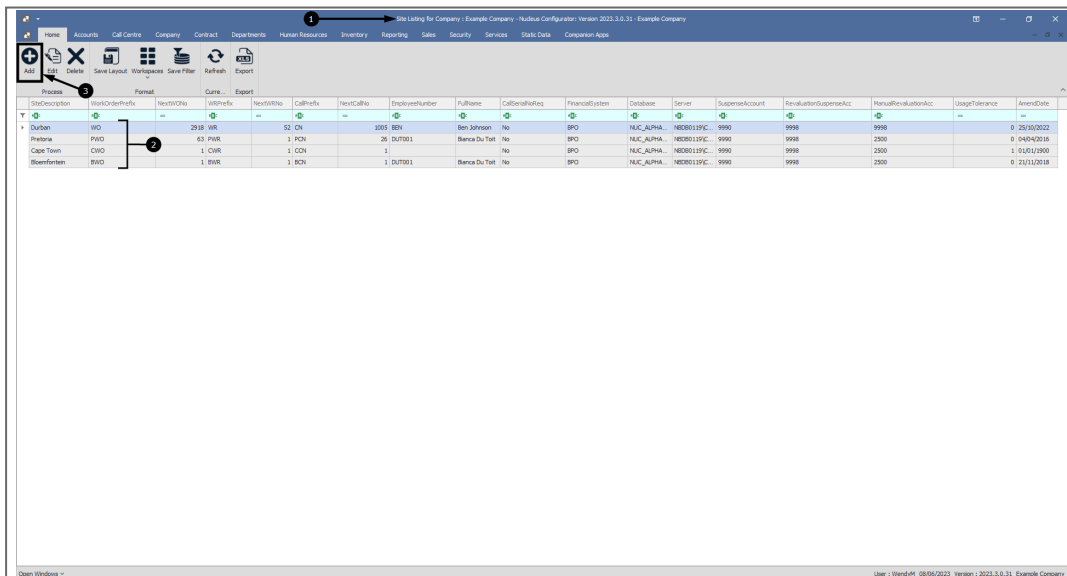
Ribbon Access: Company > Sites

1. The **Site Listing for Company : [**Company Name**]** screen will be displayed.
2. For multi sited companies any sites already created will be listed in the data grid.

ADD A SITE

3. Click on **Add**.

4. The **Add New Site** screen will be displayed.

- **Site Configuration:**

    - **Site Description:** Click to type in the name of the site or branch you are creating.

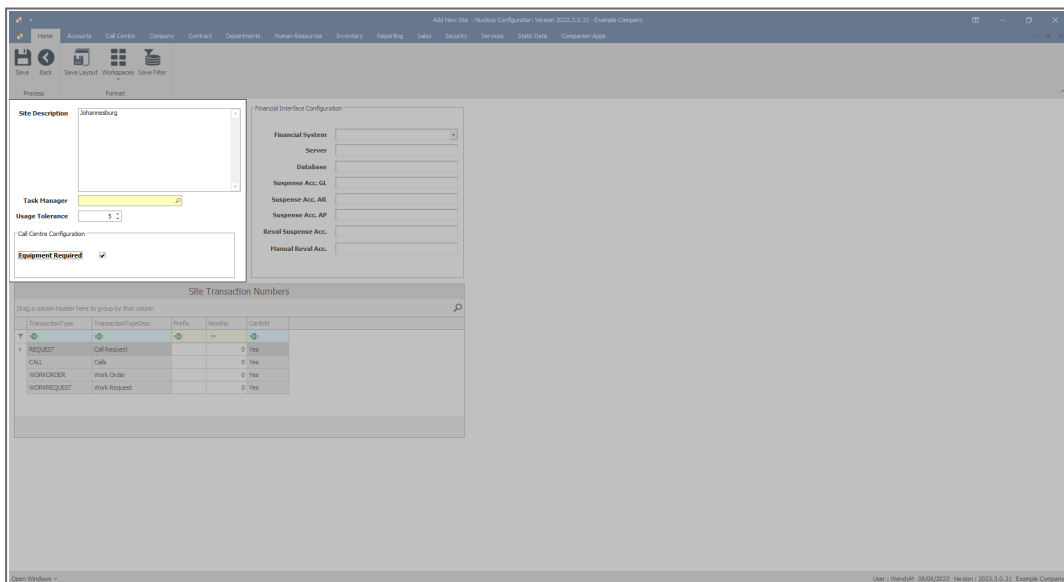   - **Task Manager:** Click on the **search** button to auto populate the task manager for the site.

    > ✎ **Note** that you will need to edit the site and then link the responsible **Service Controller** to the new site.
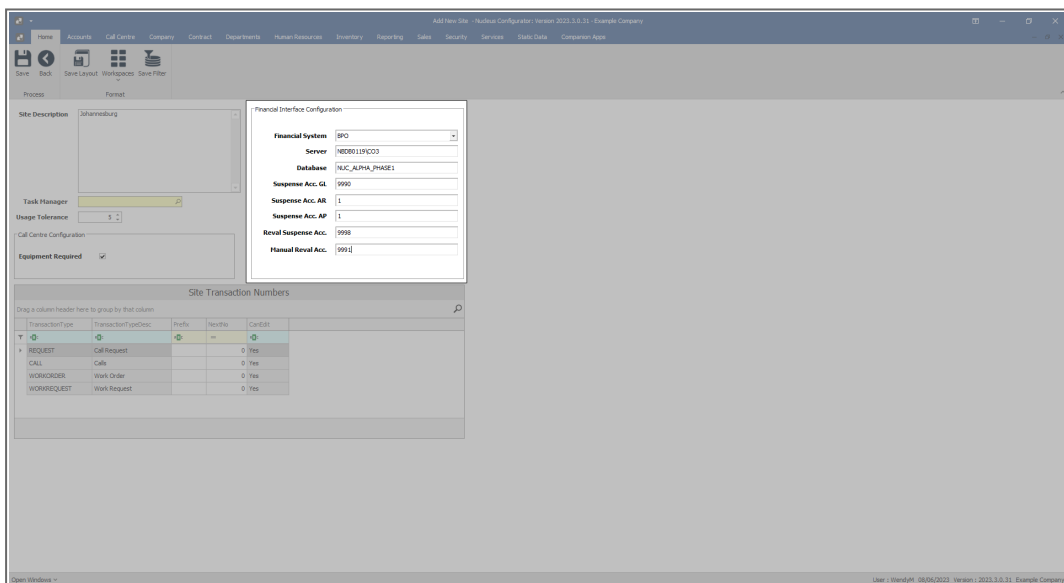
    - **Usage Tolerance:** Click to type in or use the **arrow** indicators to select the percentage variation in meter readings allowed before a warning is raised, for the site.

- **Call Centre Configuration:**

    - **Equipment Required:** Click to select the check box to ensure that calls cannot be saved without linking a serialised item.
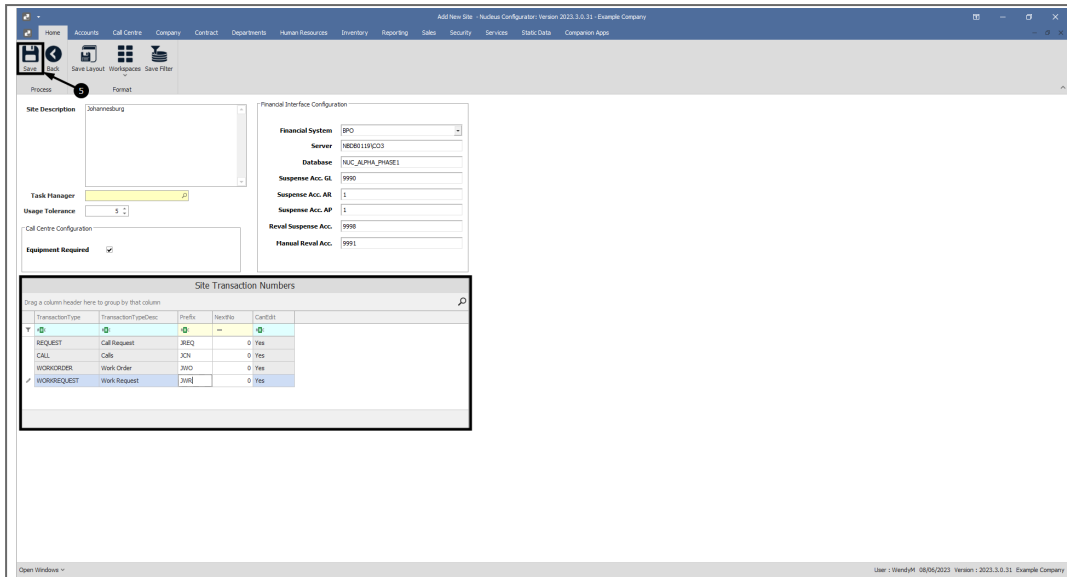
- **Financial Interface Configuration:**
    - **Financial System:** Click on the down **arrow** to select the system you wish to integrate with BPO.
    - **Server:** Click to type in the **server name** where the financial system database is held.
    - **Database:** Click to type in the financial server database name.
    - **Suspense Acc. GL:** Click to type in the GL suspense account for the current site.
    - **Suspense Acc. AR:** Click to type in the AR suspense account for the current site.
    - **Suspense Acc. AP:** Click to type in the AP suspense account for the current site.
    - **Reval Suspense Acc.:** Click to type in the revaluation account for the current site.
    - **Manual Reval Acc.:** Click to type in the manual revaluation account for the current site.

- **Site Transaction Numbers**
    - **Site ID:** Specify the Site ID position in the Site drop-down list. When the Site ID is set to the number 6, then the site will appear 6th on the list.
    - **Transaction Type:** The transaction types have been auto populated **REQUEST**, **CALL**, **WORKORDER** and **WORKREQUEST**. Click in the relevant field to modify the transaction type, if required.
    - **Transaction Type Desc:** The description for the transaction type has been auto populated. Click in the relevant field to modify the transaction description, if required.
    - **Prefix:** Click to type in a **transactional reference prefix** for the site. These prefixes will be appended to the transaction type document specified.
    - **Next No:** If the next prefix number is NOT zero for each transaction type, will only allow the prefix code to be edited.
    - **Can Edit:** Click to specify **Yes** or **No** in the relevant field for the transaction type to be edited or not.
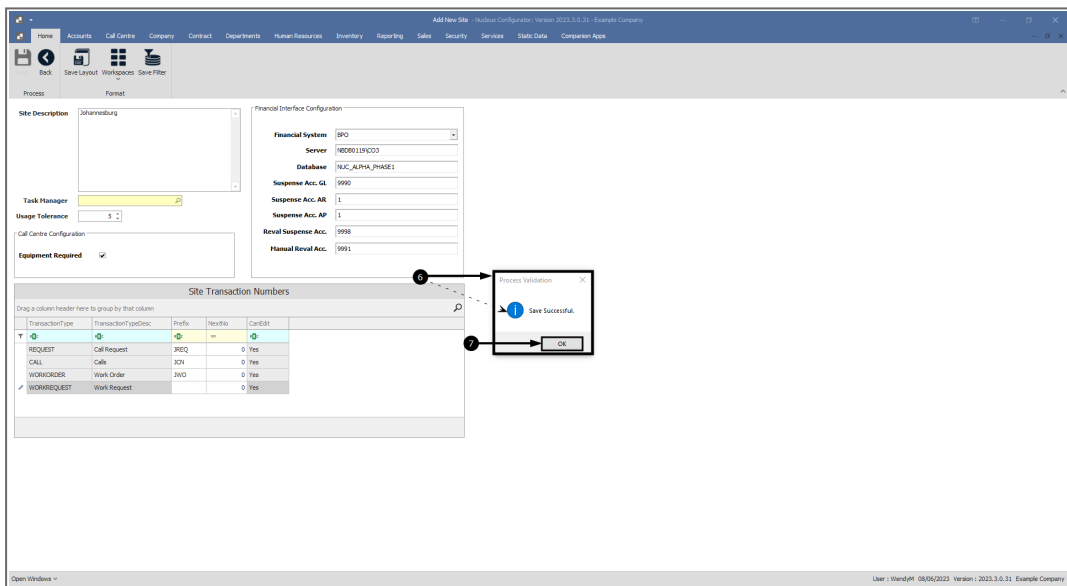
5. When you have finished adding the site description, call centre configuration and financial configuration details, click on **Save**.

6. When you receive the **Process Validation** message to confirm;
   - **Save Successful.**
7. Click on **OK**.

8. You will return to the updated **Site Listing for Company** screen where you can view the new site details.
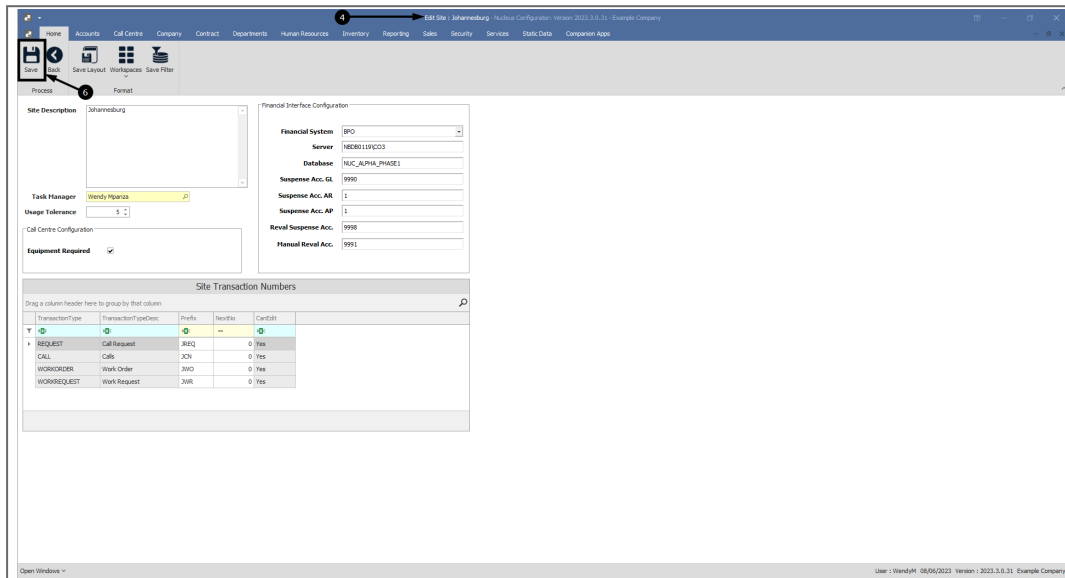
EDIT SITE

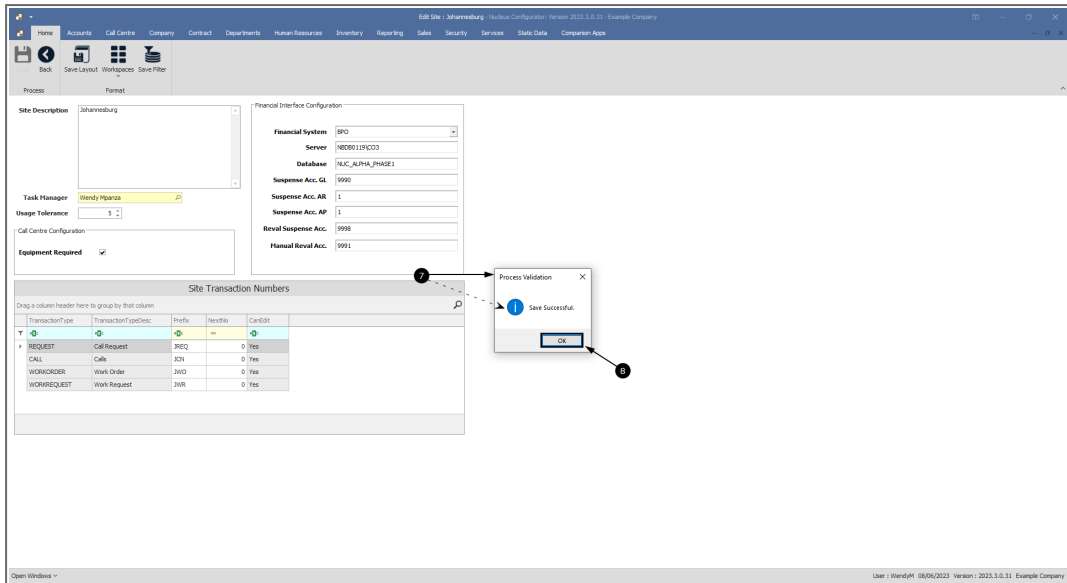1. From the **Site Listing for Company : [**Company Name**]** screen,
2. Click on the **row** of the site you wish to edit.
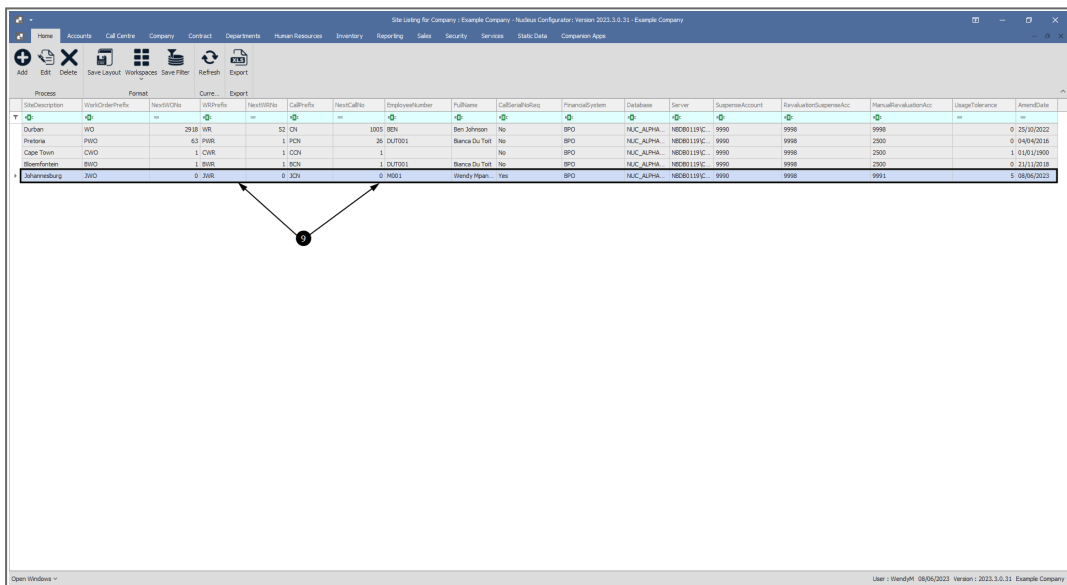3. Click on **Edit**.

4. The **Edit Site : [**Site Name**]** screen will be displayed.

5. Make the changes as required to the **Site**, **Call Centre Configuration**, **Financial Interface Configuration** or the **Site Transaction** numbers as required.

6. Click on **Save**.

7. When you receive the **Process Validation** message to confirm;

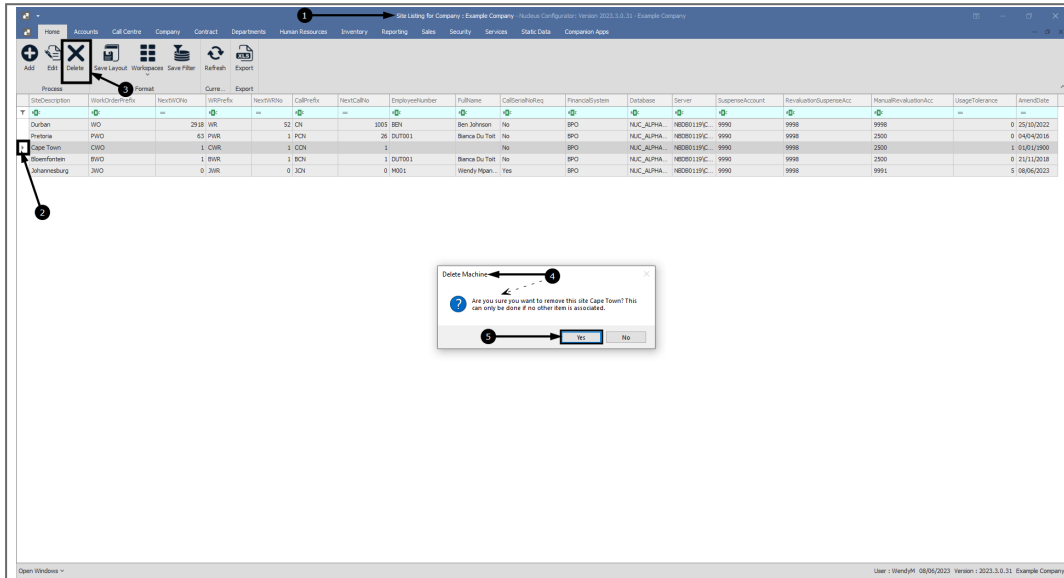   -   **Save Successful.**

8. Click on **OK**.

9. You will return to the updated **Site Listing for Company** screen where you can view the updated site details.
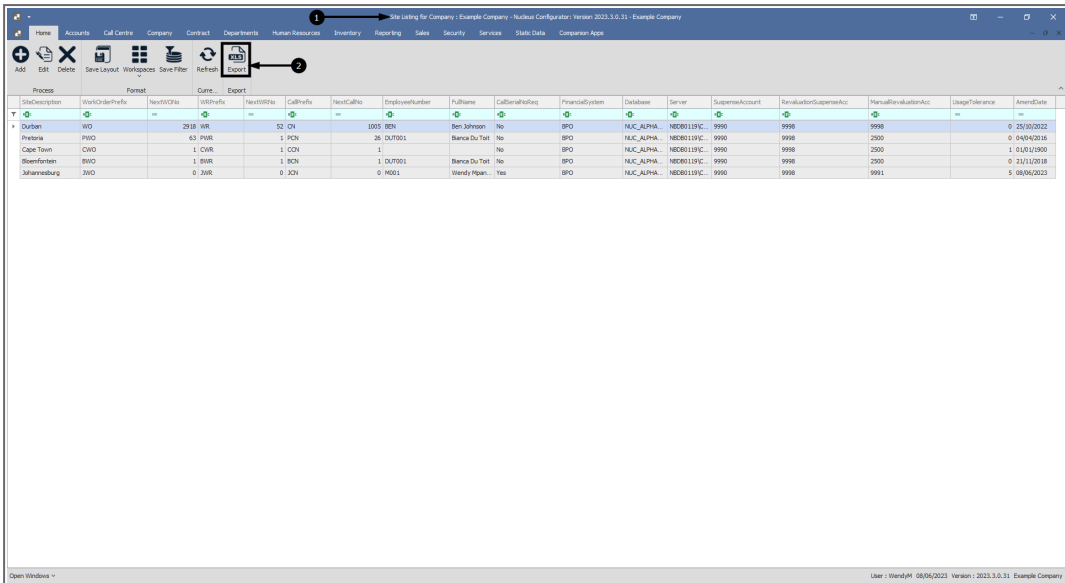

DELETE SITE

1. From the **Site Listing for Company : [**Company Name**]** screen,
2. Click on the **row** of the site you with to remove.

3. Click on **Delete**.

4. When you receive the **Delete Machine** message to confirm;

- **Are you sure you want to remove this site [**Site Name**]? This can only be done if no other item is associated.**
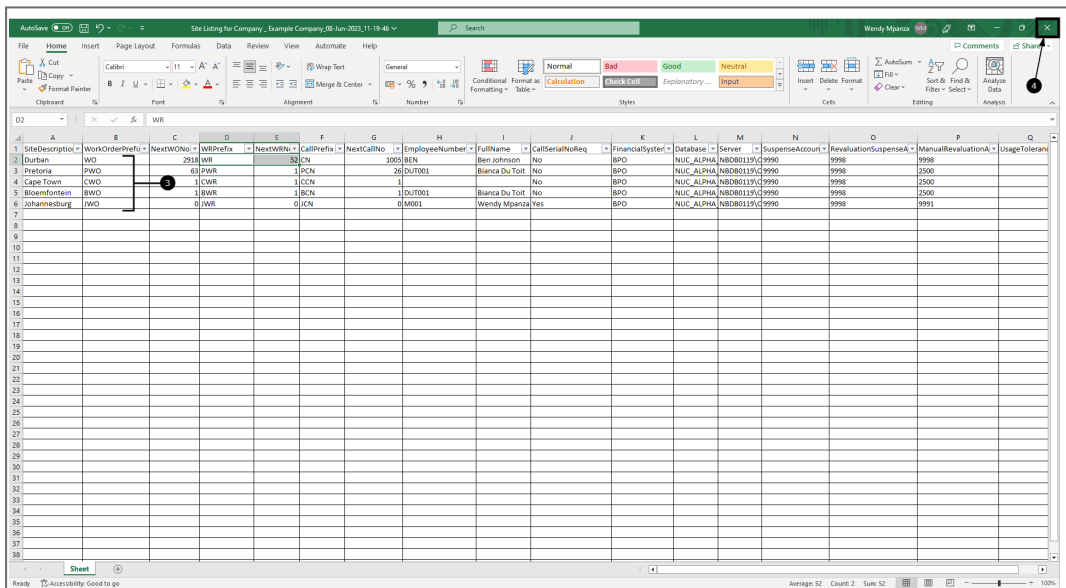
5. Click on **Yes**.

EXPORT

1. From the **Site Listing for Company : [**Company Name**]** screen,

2. Click on **Export**.

3. A list of all the Sites for the company is listed in an Excel Spreadsheet where it can be maintained using the standard Excel features.
4. **Close** the screen to return to the Site Listing for Company screen.

MNU.091.002