

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

## BPO2

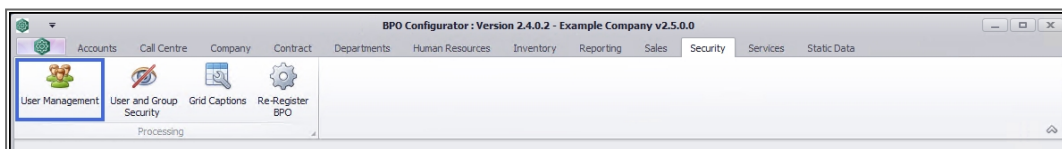
### SITE SELECTION

There are many screens in BPO which require **Site selection** before proceeding with a process. Not selecting a Site in these scenarios will cause an 'error' message either when trying to move on to the next screen or when attempting to save information.

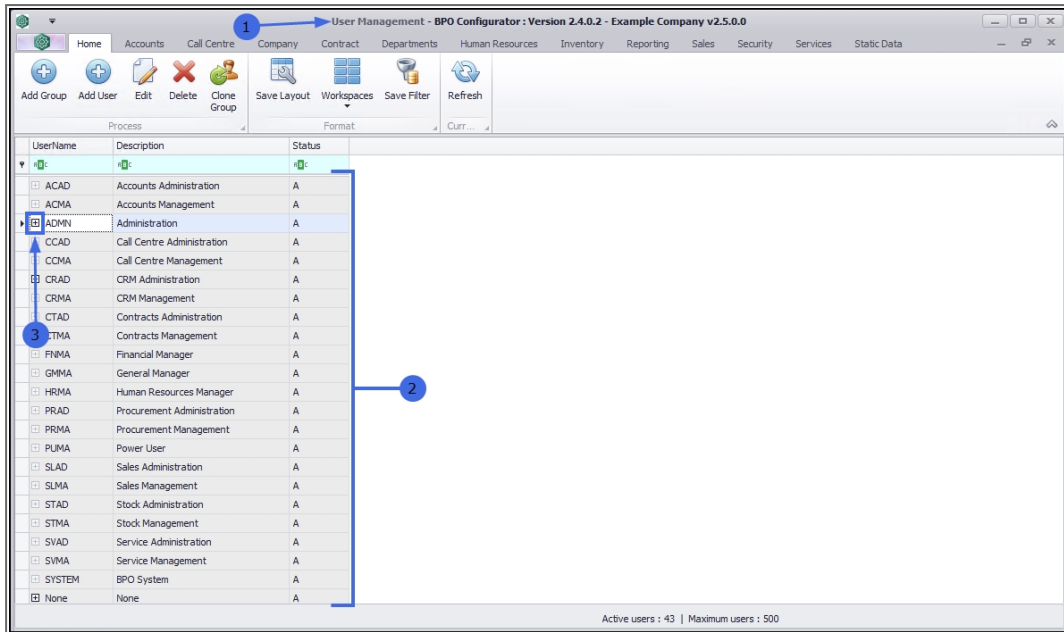
### DEFAULT SITE CONFIGURATION

The default Site displayed in the **Site filter** is dependant on what is configured on the user.

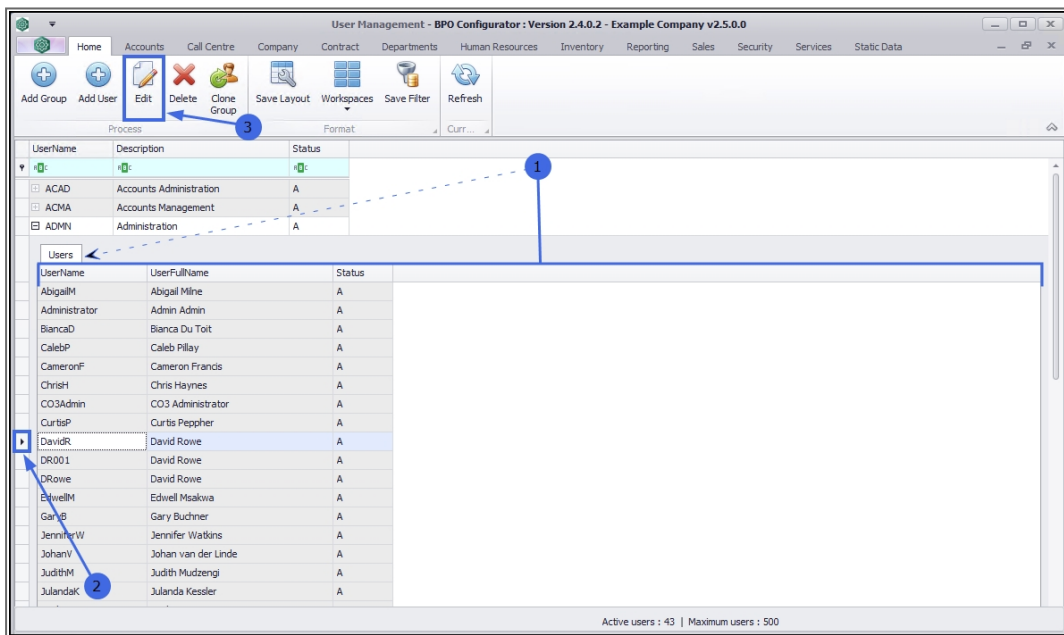
**Ribbon Access:** Configurator > Security > User Management



1. The **User Management** screen will display.
2. Expand the **User Group** that contains the user where you wish to check the set up details.
3. In this example, the user is in the **Administration** group.



1. The **Users** frame will expand.
2. Select the **row** of the user you wish to view. (This will be the user linked to the system where you are testing the Site filter.)
3. Click on **Edit**.



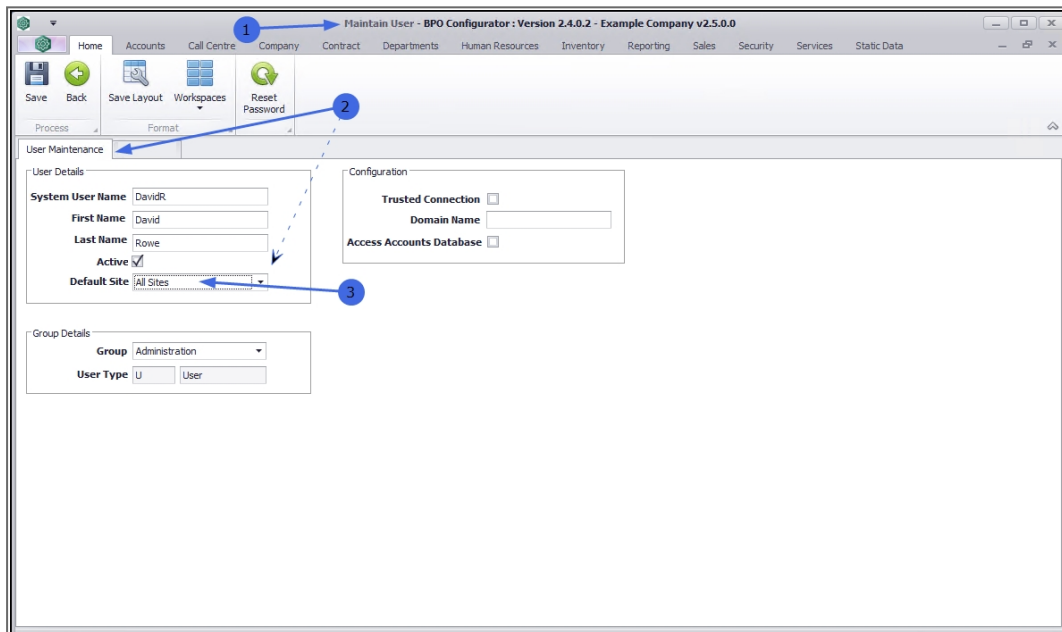
1. The **Maintain User** screen will open.
2. In the **User Maintenance** frame, look for the **Default Site** field.
  - Whatever is set in this field will be the default site that displays in the **Site filter** in BPO.

## 'ALL SITES' SET AS THE DEFAULT SITE

### Example 1

3. In this example, the Default Site is set to **All Sites**.

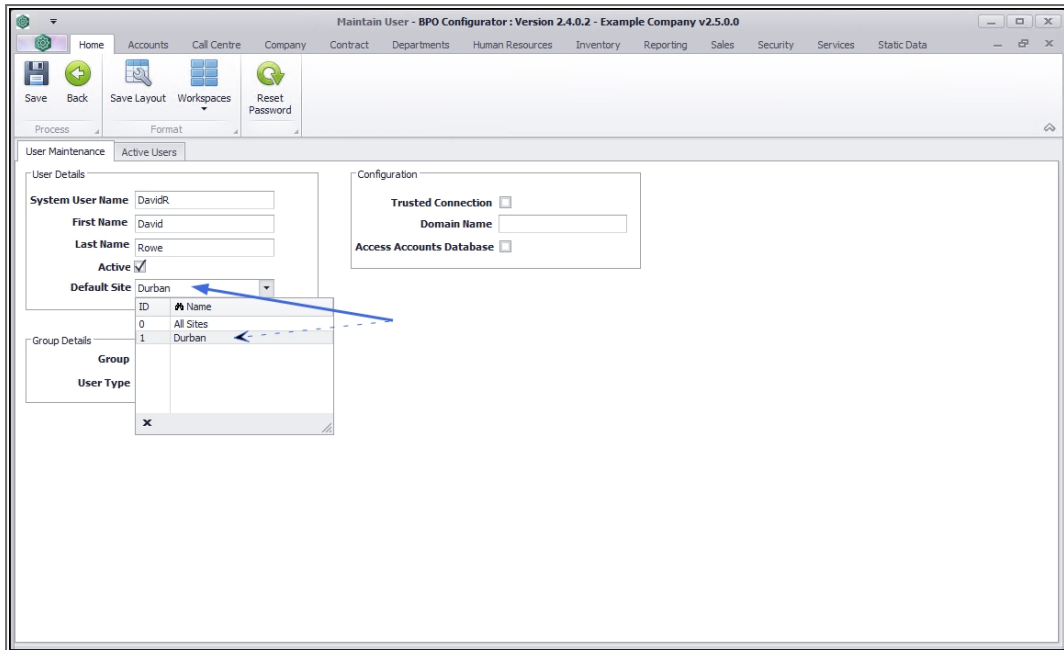
This means that in BPO, the user will need to select the correct Site each time they are actioning a screen that includes a Site filter.



## SINGULAR SITE SET AS THE DEFAULT SITE

### Example 2

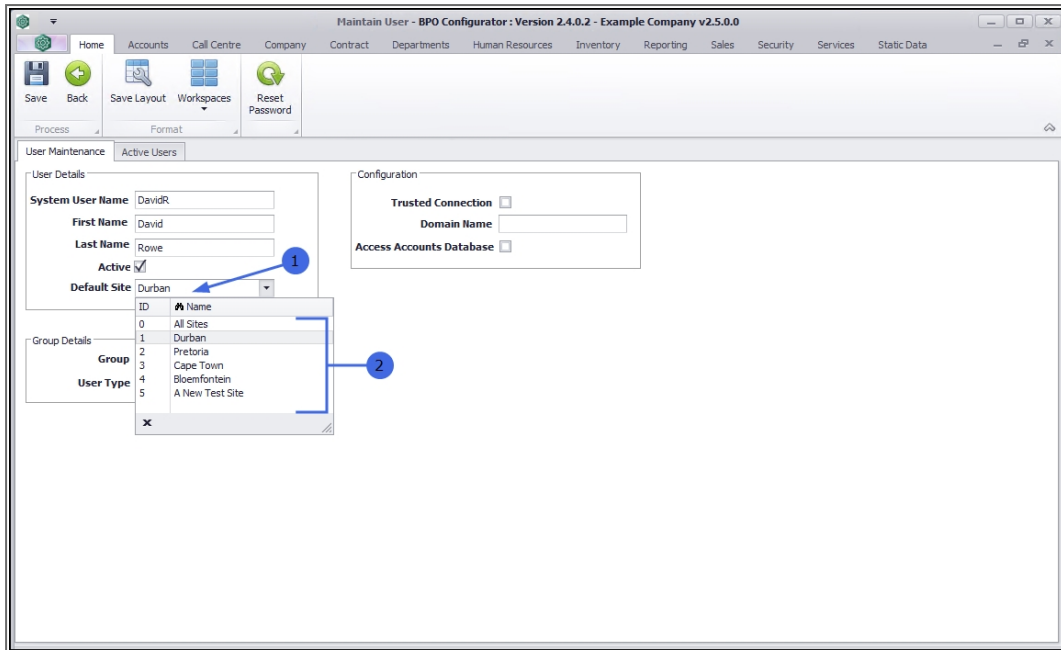
If the company has only one Site (branch) the Default Site field may be set to that singular Site. The user will not need to select a Site when they are working in screens that contain a Site filter.



## MULTIPLE SITES, MOST COMMON SITE SET AS THE DEFAULT SITE

### Example 3

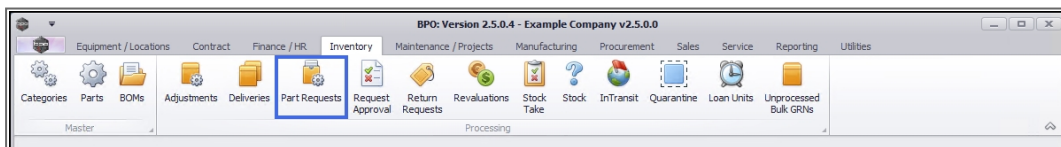
1. If the company has more than one Site, the Default Site will often be set to the most commonly used Site.
2. If the user needs to work in a different Site, this alternative Site will need to be selected from the drop-down list in BPO.



## SITE FILTER SELECTION IN BPO

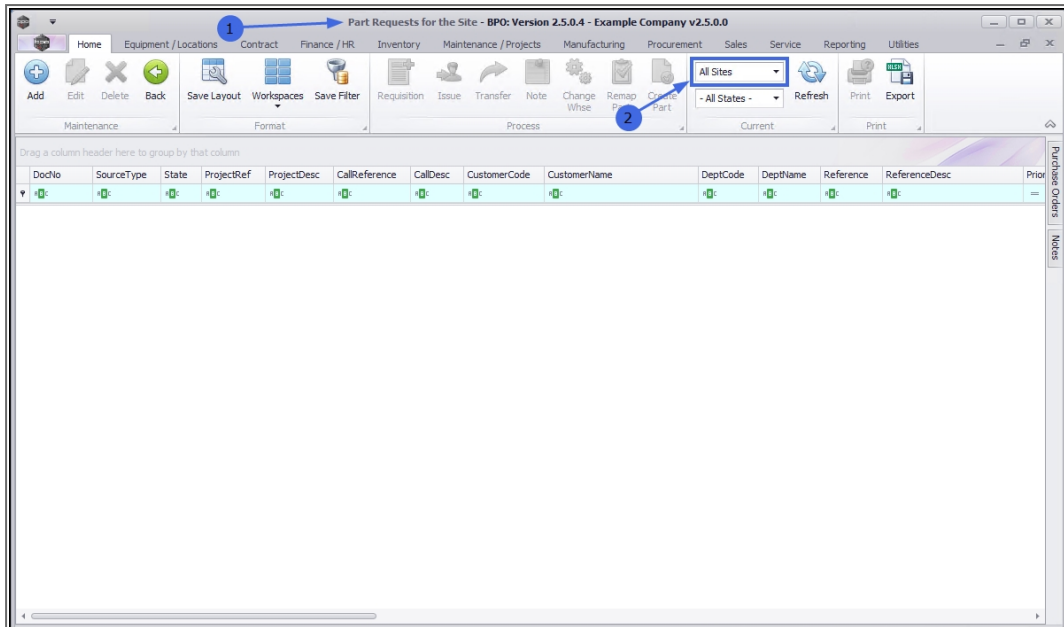
In BPO, the **Site filter** would display as shown in the images below. In this process, the **Inventory** module has been selected as an example.

**Ribbon Access:** BPO > Inventory > Part Requests



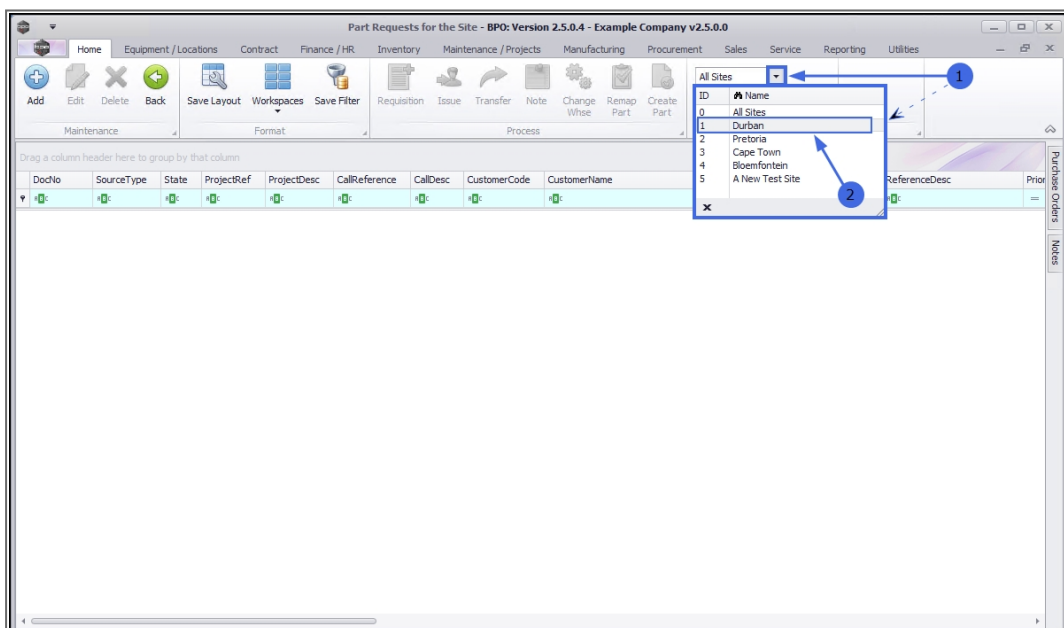
## 'ALL SITES' SET AS THE DEFAULT SITE

1. The **Part Requests for the Site** listing screen will open.
2. Note that the Site filter is set to **All Sites** (Example 1 above).

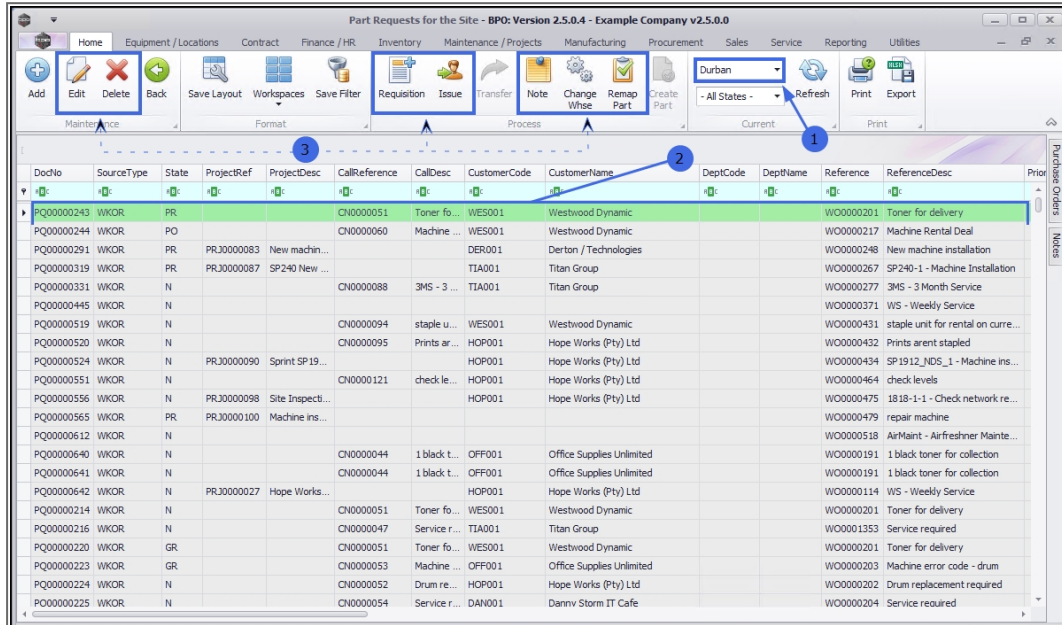


The user will need to manually select the Site.

1. Click on the **drop-down arrow** in the Site field and select the relevant Site from the drop-down list.
2. In this example, **Durban** is selected.



1. The selected Site will popular the **Site filter** field.
2. The screen will **refresh** to display the data relevant to the selected Site.
3. Now that there is data in the grid, certain **Action buttons** will activate according to the auto-selected first row and the **State/Type Selection**.



## SINGULAR SITE SET AS THE DEFAULT SITE

1. In the **Part Requests for the Site** screen, note that the Site filter is set to a named Site (**Example 2** above).
2. The screen opens with the data grid populated with the data linked to the Site.
3. The Actions buttons are activated (dependant on both the Site and **State/Type Selection**).

Part Requests for the Site - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete Back Save Layout Workspaces Save Filter Requisition Issue Transfer Note Change Whse Remap Part Create Part

Maintenance Format Process

Print 1

Print Export

Drag a column header here to group by that column

DoNo	SourceType	State	ProjectRef	ProjectDesc	CallReference	CallDesc	CustomerCode	CustomerName	DeptCode	DeptName	Reference	ReferenceDesc
PQ00000243	WKOR	PR			CN0000051	Toner fo...	WES001	Westwood Dynamic			WO0000201	Toner for delivery
PQ00000244	WKOR	PO			CN0000060	Machine ...	WES001	Westwood Dynamic			WO0000217	Machine Rental Deal
PQ00000291	WKOR	PR	PRJ0000083	New machin...			DER001	Derton / Technologies			WO0000248	New machine installation
PQ00000319	WKOR	PR	PRJ0000087	SP240 New ...			TIA001	Titan Group			WO0000267	SP240-1 - Machine Insta
PQ00000331	WKOR	N			CN0000088	3MS - 3 ...	TIA001	Titan Group			WO0000277	3MS - 3 Month Service
PQ00000445	WKOR	N									WO0000371	WS - Weekly Service
PQ00000519	WKOR	N			CN0000094	staple u...	WES001	Westwood Dynamic			WO0000431	staple unit for rental on
PQ00000520	WKOR	N			CN0000095	Prints ar...	HOP001	Hope Works (Pty) Ltd			WO0000432	Prints arent stapled
PQ00000524	WKOR	N	PRJ0000090	Sprint SP19...			HOP001	Hope Works (Pty) Ltd			WO0000434	SP1912_NDS_1 - Machin
PQ00000551	WKOR	N			CN0000121	check le...	HOP001	Hope Works (Pty) Ltd			WO0000464	check levels
PQ00000556	WKOR	N	PRJ0000098	Site Inspect...			HOP001	Hope Works (Pty) Ltd			WO0000475	1818-1-1 - Check netwo
PQ00000565	WKOR	PR	PRJ0000100	Machine ins...							WO0000479	repair machine
PQ00000612	WKOR	N									WO0000518	AirMaint - Airfreshner M
PQ00000640	WKOR	N			CN0000044	1 black t...	OFF001	Office Supplies Unlimited			WO0000191	1 black toner for collect
PQ00000641	WKOR	N			CN0000044	1 black t...	OFF001	Office Supplies Unlimited			WO0000191	1 black toner for collect
PQ00000642	WKOR	N	PRJ0000027	Hope Works...			HOP001	Hope Works (Pty) Ltd			WO0000114	WS - Weekly Service
PQ00000214	WKOR	N			CN0000051	Toner fo...	WES001	Westwood Dynamic			WO0000201	Toner for delivery
PQ00000216	WKOR	N			CN0000047	Service r...	TIA001	Titan Group			WO0001353	Service required
PQ00000220	WKOR	GR			CN0000051	Toner fo...	WES001	Westwood Dynamic			WO0000201	Toner for delivery
PQ00000223	WKOR	GR			CN0000053	Machine ...	OFF001	Office Supplies Unlimited			WO0000203	Machine error code - dru
PQ00000224	WKOR	N			CN0000052	Drum re...	HOP001	Hope Works (Pty) Ltd			WO0000202	Drum replacement requir
PO00000225	WKOR	N			CN0000054	Service r...	DAN001	Dannv Storm IT Cafe			WO0000204	Service required

There will be no other Site available for selection in the drop-down list.

Part Requests for the Site - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete Back Save Layout Workspaces Save Filter Requisition Issue Transfer Note Change Whse Remap Part Create Part

Maintenance Format Process

Print 1

Print Export

Drag a column header here to group by that column

DoNo	SourceType	State	ProjectRef	ProjectDesc	CallReference	CallDesc	CustomerCode	CustomerName	DeptCode	DeptName	Reference	ReferenceDesc
PQ00000243	WKOR	PR			CN0000051	Toner fo...	WES001	Westwood Dynamic			WO0000201	Toner for delivery
PQ00000244	WKOR	PO			CN0000060	Machine ...	WES001	Westwood Dynamic			WO0000217	Machine Rental Deal
PQ00000291	WKOR	PR	PRJ0000083	New machin...			DER001	Derton / Technologies			WO0000248	New machine installation
PQ00000319	WKOR	PR	PRJ0000087	SP240 New ...			TIA001	Titan Group			WO0000267	SP240-1 - Machine Insta
PQ00000331	WKOR	N			CN0000088	3MS - 3 ...	TIA001	Titan Group			WO0000277	3MS - 3 Month Service
PQ00000445	WKOR	N									WO0000371	WS - Weekly Service
PQ00000519	WKOR	N			CN0000094	staple u...	WES001	Westwood Dynamic			WO0000431	staple unit for rental on
PQ00000520	WKOR	N			CN0000095	Prints ar...	HOP001	Hope Works (Pty) Ltd			WO0000432	Prints arent stapled
PQ00000524	WKOR	N	PRJ0000090	Sprint SP19...			HOP001	Hope Works (Pty) Ltd			WO0000434	SP1912_NDS_1 - Machin
PQ00000551	WKOR	N			CN0000121	check le...	HOP001	Hope Works (Pty) Ltd			WO0000464	check levels
PQ00000556	WKOR	N	PRJ0000098	Site Inspect...			HOP001	Hope Works (Pty) Ltd			WO0000475	1818-1-1 - Check netwo
PQ00000565	WKOR	PR	PRJ0000100	Machine ins...							WO0000479	repair machine
PQ00000612	WKOR	N									WO0000518	AirMaint - Airfreshner M
PQ00000640	WKOR	N			CN0000044	1 black t...	OFF001	Office Supplies Unlimited			WO0000191	1 black toner for collect
PQ00000641	WKOR	N			CN0000044	1 black t...	OFF001	Office Supplies Unlimited			WO0000191	1 black toner for collect
PQ00000642	WKOR	N	PRJ0000027	Hope Works...			HOP001	Hope Works (Pty) Ltd			WO0000114	WS - Weekly Service
PQ00000214	WKOR	N			CN0000051	Toner fo...	WES001	Westwood Dynamic			WO0000201	Toner for delivery
PQ00000216	WKOR	N			CN0000047	Service r...	TIA001	Titan Group			WO0001353	Service required
PQ00000220	WKOR	GR			CN0000051	Toner fo...	WES001	Westwood Dynamic			WO0000201	Toner for delivery
PQ00000223	WKOR	GR			CN0000053	Machine ...	OFF001	Office Supplies Unlimited			WO0000203	Machine error code - dru
PQ00000224	WKOR	N			CN0000052	Drum re...	HOP001	Hope Works (Pty) Ltd			WO0000202	Drum replacement requir
PO00000225	WKOR	N			CN0000054	Service r...	DAN001	Dannv Storm IT Cafe			WO0000204	Service required

Drop-down menu:

ID	Name
0	All Sites
1	Durban



## MULTIPLE SITES, MOST COMMON SITE SET AS THE DEFAULT SITE

1. In the **Part Requests for the Site** screen, note that the Site filter is set to a named Site (**Example 3** above).
2. The screen opens with the data grid populated with the data linked to the Site.
3. The Actions buttons are activated (dependant on both the Site and **State/Type Selection**).

DodNo	SourceType	State	ProjectRef	ProjectDesc	CallReference	CallDesc	CustomerCode	CustomerName	DeptCode	DeptName	Reference	ReferenceDesc
PQ00000243	WKOR	PR			CN0000051	Toner fo...	WES001	Westwood Dynamic			WO0000201	Toner for delivery
PQ00000244	WKOR	PO			CN0000060	Machine ...	WES001	Westwood Dynamic			WO0000217	Machine Rental Deal
PQ00000291	WKOR	PR	PRJ0000083	New machin...			DER001	Derton / Technologies			WO0000248	New machine installation
PQ00000319	WKOR	PR	PRJ0000087	SP240 New ...			TIA001	Titan Group			WO0000267	SP240-1 - Machine Insta
PQ00000331	WKOR	N			CN0000088	3MS - 3 ...	TIA001	Titan Group			WO0000277	3MS - 3 Month Service
PQ00000445	WKOR	N									WO0000371	WS - Weekly Service
PQ00000519	WKOR	N			CN0000094	staple u...	WES001	Westwood Dynamic			WO0000431	staple unit for rental on
PQ00000520	WKOR	N			CN0000095	Prints ar...	HOP001	Hope Works (Pty) Ltd			WO0000432	Prints arent stapled
PQ00000524	WKOR	N	PRJ0000090	Sprint SP19...			HOP001	Hope Works (Pty) Ltd			WO0000434	SP1912_NDS_1 - Machin
PQ00000551	WKOR	N			CN0000121	check.le...	HOP001	Hope Works (Pty) Ltd			WO0000464	check levels
PQ00000556	WKOR	N	PRJ0000098	Site Inspect...			HOP001	Hope Works (Pty) Ltd			WO0000475	1818-1-1 - Check netwo
PQ00000565	WKOR	PR	PRJ0000100	Machine ins...							WO0000479	repair machine
PQ00000612	WKOR	N									WO0000518	AirMaint - Airfreshner Me
PQ00000640	WKOR	N			CN0000044	1 black t...	OFF001	Office Supplies Unlimited			WO0000191	1 black toner for collect
PQ00000641	WKOR	N			CN0000044	1 black t...	OFF001	Office Supplies Unlimited			WO0000191	1 black toner for collect
PQ00000642	WKOR	N	PRJ0000027	Hope Works...			HOP001	Hope Works (Pty) Ltd			WO0000114	WS - Weekly Service
PQ00000214	WKOR	N			CN0000051	Toner fo...	WES001	Westwood Dynamic			WO0000201	Toner for delivery
PQ00000216	WKOR	N			CN0000047	Service r...	TIA001	Titan Group			WO0001353	Service required
PQ00000220	WKOR	GR			CN0000051	Toner fo...	WES001	Westwood Dynamic			WO0000201	Toner for delivery
PQ00000223	WKOR	GR			CN0000053	Machine ...	OFF001	Office Supplies Unlimited			WO0000203	Machine error code - dru
PQ00000224	WKOR	N			CN0000052	Drum re...	HOP001	Hope Works (Pty) Ltd			WO0000202	Drum replacement requir
PO00000225	WKOR	N			CN0000054	Service r...	DAN001	Dannv Storm IT Cafe			WO0000204	Service required

There are multiple Sites available for selection in the drop-down list. If the user wishes to work in a Site other than the default one, this must be selected from the list.

Part Requests for the Site - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete Back Save Layout Workspaces Save Filter Requisition Issue Transfer Note Change Whse Remap Part Create Part

Maintenance Format Process

Drag a column header here to group by that column

DocNo	SourceType	State	ProjectRef	ProjectDesc	CallReference	CallDesc	CustomerCode	CustomerName	ReferenceDesc
PQ00000243	WKOR	PR			CN0000051	Toner fo...	WES001	Westwood Dynamic	WO0000243 Toner for delivery
PQ00000244	WKOR	PO			CN0000060	Machine ...	WES001	Westwood Dynamic	WO0000217 Machine Rental Deal
PQ00000291	WKOR	PR	PRJ0000083	New machin...			DER001	Derton / Technologies	WO0000248 New machine installation
PQ00000319	WKOR	PR	PRJ0000087	SP240 New ...			TIA001	Titan Group	WO0000267 SP240-1 - Machine Insta
PQ00000331	WKOR	N			CN0000088	3MS - 3 ...	TIA001	Titan Group	WO0000277 3MS - 3 Month Service
PQ00000445	WKOR	N							WO0000371 WS - Weekly Service
PQ00000519	WKOR	N			CN0000094	staple u...	WES001	Westwood Dynamic	WO0000431 staple unit for rental on
PQ00000520	WKOR	N			CN0000095	Prints ar...	HOP001	Hope Works (Pty) Ltd	WO0000432 Prints arent stapled
PQ00000524	WKOR	N							WO0000434 SP1912_NDS_1 - Machin
PQ00000551	WKOR	N	PRJ0000090	Sprint SP19 ...	CN0000121	check.le...	HOP001	Hope Works (Pty) Ltd	WO0000464 check levels
PQ00000556	WKOR	N							WO0000475 1818-1-1 - Check netwo
PQ00000565	WKOR	PR	PRJ0000100	Machine ins...					WO0000479 repair machine
PQ00000612	WKOR	N							WO0000518 AirMaint - Airfreshner M
PQ00000640	WKOR	N			CN0000044	1 black t...	OFF001	Office Supplies Unlimited	WO0000191 1 black toner for collect
PQ00000641	WKOR	N			CN0000044	1 black t...	OFF001	Office Supplies Unlimited	WO0000191 1 black toner for collect
PQ00000642	WKOR	N							WO0000114 WS - Weekly Service
PQ00000642	WKOR	N	PRJ0000027	Hope Works...			HOP001	Hope Works (Pty) Ltd	WO0000114 WS - Weekly Service
PQ00000214	WKOR	N			CN0000051	Toner fo...	WES001	Westwood Dynamic	WO0000201 Toner for delivery
PQ00000216	WKOR	N			CN0000047	Service r...	TIA001	Titan Group	WO0001353 Service required
PQ00000220	WKOR	GR			CN0000051	Toner fo...	WES001	Westwood Dynamic	WO0000201 Toner for delivery
PQ00000223	WKOR	GR			CN0000053	Machine ...	OFF001	Office Supplies Unlimited	WO0000203 Machine error code - dru
PQ00000224	WKOR	N			CN0000052	Drum re...	HOP001	Hope Works (Pty) Ltd	WO0000202 Drum replacement requir
PO00000225	WKOR	N			CN0000054	Service r...	DAN001	Dannv Storm IT Cafe	WO0000204 Service required

Notes

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