

Configuring Your Database Guide - BPMNow

BPM Login Link: <https://app.bellwethercorp.com/login>

To setup your database, go to the Setup & Config area and then into each area listed below.

Custom Fields for Order Lines – Determine what custom fields you will need and create them here. Ex: If you'd like to track things like; Location, Department, Quote #, etc... you can set them up here.

User Roles – Create User Roles and set permissions for each role. User Roles can be assigned to multiple users.

Users – Create Users and assign the appropriate User Role to each user. Determine if you want to send out notifications to new users or wait and send them later. *Use the *Send Registration Emails* link to do this.

Taxes – Create tax code/codes.

Terms – Some standard terms have been auto created. You can create additional term code/codes.

Addresses – Create your ship to/bill to addresses.

Document Settings – Set starting numbers for your Requisitions and PO's. Ex: REQ00100, PO00100, INV00100. If applicable, add your Company Logo, Terms and Conditions and set PDF Customizable Options.

Global Settings – Set up your default *Bill To & Ship To Addresses* here. Set Notification Settings as needed. Determine if you want to allow users to Auto Approve via Email.

Vendors – Create vendors.

Accounts – *This area is found directly in the blue menu tree and not under Setup & Config. Determine if you will be using G/L Accounts and if so, either enter them here.

Items – Create Item Categories (if needed) and Items.

Budgets – Determine if you want to use budgets and if so, create a budget interval and then add dollar amounts to each applicable GL Account.

Approvals – Determine how you want to set up your approval process and create approval rules here.

Required Fields – Set your required fields for each module.

Please note:

If you need help, there are [Training Videos](#) located under the [Support](#) link (top right) or you can click on the [Need Help?](#) icon (lower right-hand side of page). This link allows you to view documentation related to the page you're on. You will also see Interactive Tours and Training Videos on most pages as well.