

STATIC DATA

STATIC DATA - CALLS: HOLD REASON CODES

Ribbon Access: Static Data> Static Data



- 1. The *Static Data* listing screen will be displayed.
- Use the *filter row* or *scroll down* the list until you find the *Calls: Hold Reason Codes* row.
- 3. Click on the *expand* icon to expand the *Codes* frame.
- Here you can view a list of the *hold reason codes* currently on the system.



Home Accounts Call Cent		Static Data - BPO Config ny Contract Department	jurator : Version 2 s Human Resourc					Cocurity	Samisas	Static Data	 -	1
ave Layout Workspaces Save Filter	Refresh	ny contract Deparament	s numan Resourc	es invent	UIY K	eporang	Jaies	Security	Services	State Data		
Description	curr a	TableName	FieldName		ParentF	ieldName	Size		UserDefina	able		-
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		tblSALSCalls	fldCallType					10	Yes			
E Calls : Data Refresh Rate		GENERIC	fldCallRefreshRat	e				5	Yes			
🛛 Calls : Hold Reason Codes		tblSALSCallHoldEvents	fldHoldReasonCo	de				10	Yes			
Codes <	3											
Code	Codel	Description	CodeType	SortOrder		Status						1
AC		ing Client Confirmation	None		1		1					1
AD		ing Details	None		1	A						
AG	Await	ing Scheduled Date	None		1	A						
DQ	Devel	opment Queue	None		1	A	1					
QA	Quote	e Acceptance	None		2	A	<u> </u>	-4				
SL	Servio	e limit reached	None		5	Α						
CQC	Await	ing Client quote confirmation	None		1	Α						
APS	Await	ing Parts	None		2	A						
ATPS	Await	ing Third Party Service	None		1	A						
											 	J
Calls : Pending Reason Codes		tblSALSCallPendingEvents	fldPendingReasor	Code				10	Yes			
Categories : Entity Category		GENERIC	fldCategory					50	Yes			
E Categories : Entity Class		GENERIC	fldClass					4	Yes			
E Categories : Entity Type		GENERIC	fldType					2	Yes			
Company : Tax Codes		GENERIC	fldSysTaxCode						Yes			
Company : Tax Types		GENERIC	fldTaxType						Yes			
Configuration : Action Types		tblMTRMDefinition	fldActionType						No			
Configuration : Address Types		GENERIC	fldAddressType					4	No			

ADD HOLD REASON CODE

5. Right click in a row in the Codes data grid to display the Process

menu.

6. Click on *Add* - Add New Code.



9 (nts Call Centre	Con	Static Data - BPO Config npany Contract Departments							Services	Static Data		-	
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D	escription			TableName	FieldName		Parent	ieldName	Size		UserDefin	able			
-	0c			4 0 4	A D C		REC		-		a 🛛 c				
Đ	Calls : Call Types			tblSALSCalls	fldCallType					10	Yes				
ŧ	Calls : Data Refresh R	ate		GENERIC	fldCallRefreshRat	te				5	Yes				
Ε	Calls : Hold Reason Co	odes		tblSALSCallHoldEvents	fldHoldReasonCo	de				10	Yes				
h	Codes		C -	deDescription	CodeType	SortOrd		Status							-
	AC			vaiting Client Confirmation	None	SortOrd		A							
	AD			raiting Details	None			A							
	AG	5		raiting Scheduled Date	None			A							
	DQ			velopment Queue	None		-	A							
	QA /			iote Acceptance	None		-	A							
	SL	1		rvice limit reached	None		5	A							
11	coc	¥	Av	aiting Client guote confirmation	None		1	A							
	APS	Process	^	aiting Parts	None		2	A							
	ATPS 6	Add New Code		aiting Third Party Service	None		1	A							
Œ	Calls : Pending Reaso	Delete Code	~	tblSALSCallPendingEvents	fldPendingReasor	nCode				10	Yes				
Œ	Categories : Entity Ca		-	GENERIC	fldCategory					50	Yes				
Đ	Categories : Entity Cla	355		GENERIC	fldClass					4	Yes				
Đ	Categories : Entity Ty	pe		GENERIC	fldType					2	Yes				
Œ	Company : Tax Codes			GENERIC	fldSysTaxCode					4	Yes				
Đ	Company : Tax Types			GENERIC	fldTaxType					3	Yes				
	Configuration : Action	Types		tblMTRMDefinition	fldActionType					50	No				
Đ	Configuration : Addre	ss Types		GENERIC	fldAddressType					4	No				
-	n Windows 🕶		-										25 Jan 2022	÷	1

- An available row for adding the new hold reason code will display in the Codes data grid.
 - **Code:** Click in the text box to type in a code specific to the new call hold reason.
 - **Code Description:** Click in the text box to type in a description for the call hold reason code.
 - Code Type: This field will auto populate as *None* and may remain as is.
 - **Status:** The status field will auto populate with an **A** Active status.



- Sort Order¹: Click in the text box to type in or use the *arrow* indicators to select the sort order for the new hold reason code.
- 8. When you have finished adding the new call hold reason code details, press *Enter*.

Home Accounts Call	Centre Compa	Static Data - BPO Config any Contract Departments						Services Stat	ic Data	 (
ave Layout Workspaces Save Filt	er Refresh										
Description		TableName	FieldName		Parent	ieldName	Size	UserDefinable			
x C c		R C	a 🛛 c		REC		=	a 🗖 c			
Calls : Call Types		tblSALSCalls	fldCallType				10	Yes			
E Calls : Data Refresh Rate		GENERIC	fldCallRefreshRat	e			5	Yes			
Calls : Hold Reason Codes		tblSALSCallHoldEvents	fldHoldReasonCod	de			10	Yes			
Code AC AD AG DQ Q QA SL CQC APS ATPS ATPS	Await Await Deve Quot Servi Await Await	Description ing Client Confirmation ing Details ing Scheduled Date lopment Queue e Acceptance the limit reached ing Client quote confirmation ing Parts ing Third Party Service	CodeType None None None None None None None Non	SortOrde	1 1 1 2 5 1 2	A A A A A A A A A A	Press Enter when done	1			
AW	Await	ing Warranty to be processed	None		0	A					
Calls : Pending Reason Codes		tblSALSCallPendingEvents	fldPendingReason	Code			10	Yes			
E Categories : Entity Category		GENERIC	fldCategory				50	Yes			
Categories : Entity Class		GENERIC	fldClass				4	Yes			
Categories : Entity Type		GENERIC	fldType				2	Yes			
		GENERIC	fldSysTaxCode				4	Yes			
Company : Tax Types		GENERIC	fldTaxType					Yes			
Configuration : Action Types		tblMTRMDefinition	fldActionType				50	No			
Configuration : Address Types		GENERIC	fldAddressType				4	No			

9. When you receive the *Update* message to confirm;

• Are you sure you want to save changes to this code?

- 10. Click on Yes to save the code, or
 - Click on *No* to remove the information from the row, enabling you to add new hold reason code information.

¹The sort order is the order in which the hold reason code will appear in the dropdown list. If each call hold reason code has the same number, e.g 0 or 1, then the drop-down list will default to an alphabetic order. If the sort order is numbered, for example number 5, then the reason code will appear 5th in the drop-down list.



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	Format _ Cur	r					Update			9			\times	
	Description		TableName	FieldName	P	aren				1.				
	4 0 0		1 0 1	a∎c	R	0 ¢	2			want to say	e changes t	o this code?		
E	E Calls : Call Types		tblSALSCalls	fldCallType				Areyou	sure you	want to sav	e changes e	o this coue.		
E	E Calls : Data Refresh Rate		GENERIC	fldCallRefreshRat	e									
E	∃ Calls : Hold Reason Codes		tblSALSCallHoldEvents	fldHoldReasonCo	de				Yes	N		Cancel		
	Codes								Tes		0	Cancel		
	Code	Code	Description	CodeType	SortOrder	-	Status			,				1
	AC		ing Client Confirmation	None			1 A							
	AD	Await	ing Details	None			1 A			1				
	AG	Await	ing Scheduled Date	None			1 A			10				
	DQ	Devel	opment Queue	None			1 A							
	QA	Quote	e Acceptance	None			2 A							
	SL	Servio	e limit reached	None			5 A							
	CQC	Await	ing Client quote confirmation	None			1 A							
	APS	Await	ing Parts	None			2 A							
	ATPS	Await	ing Third Party Service	None			1 A							
	AW	Await	ing Warranty to be processed	None			0 A							
E			tblSALSCallPendingEvents	fldPendingReasor	Code				10) Yes				
E	∃ Categories : Entity Category		GENERIC	fldCategory					50) Yes				
E	∃ Categories : Entity Class		GENERIC	fldClass						4 Yes				
E	Categories : Entity Type		GENERIC	fldType						2 Yes				
E	∃ Company : Tax Codes		GENERIC	fldSysTaxCode						4 Yes				
E	Company : Tax Types		GENERIC	fldTaxType					3	3 Yes				
	Configuration : Action Types		tblMTRMDefinition	fldActionType					50) No				
E	① Configuration : Address Types		GENERIC	fldAddressType						4 No				
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- The new call hold reason code will be *saved* and a *new row* will be added to the *Codes* data grid.
- 12. *Collapse* the Codes frame.
- 13. *Close* the screen when done.



1	Home Accounts Call Centre	Compa	ny Contract Departments	Human Re	sources Inve	entory F	Reporting	Sales Security	Services Static D	ata —	8
Sav	Ŧ	Refresh								13	/
1	Description		TableName	FieldName		Parent	ieldName	Size	UserDefinable		
2	0:		* 0 ¢	a 🖬 c		REC		-	4 0 0		
E	E Calls : Call Types		tblSALSCalls	fldCallType				10	Yes		
1	Calls : Data Refresh Rate		GENERIC	fldCallRefre	shRate			5	Yes		
E	Calls : Hold Reason Codes		tblSALSCallHoldEvents	fldHoldRea	onCode			10	Yes		
	Codes										
	Code	Code	Description	Code	Type SortOr	der	Status				
	AC		ing Client Confirmation	None	.,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,		A				
	AD		ing Details	None		1	A				
	AG	Await	ing Scheduled Date	None		1	A				
	DQ	Devel	opment Queue	None		1	A				
	QA	Quote	Acceptance	None		2	A				
	SL	Servio	e limit reached	None		5	A				
	CQC	Await	ing Client quote confirmation	None		1	A				
	APS	Await	ing Parts	None		2	A				
	ATPS	Await	ing Third Party Service	None		1	A				
	AW	Await	ing Warranty to be processed	None		0	A <		-11		
2							< -		•		
B	E Calls : Pending Reason Codes		tblSALSCallPendingEvents	fidPendingF	easonCode			10	Yes		
B	E Categories : Entity Category		GENERIC	fldCategor				50	Yes		
E	E Categories : Entity Class		GENERIC	fldClass				4	Yes		
E	E Categories : Entity Type		GENERIC	fldType				2	Yes		
	E Company : Tax Codes		GENERIC	fldSysTaxC					Yes		
B	E Company : Tax Types		GENERIC	fldTaxType					Yes		
	Configuration : Action Types		tblMTRMDefinition Capture so	fldActionTy	pe			50	No		

REMOVE A HOLD REASON CODE

You may need to remove a Hold Reason Code that is no longer required.

1. Right click in the row of the Hold Reason Code that is no longer

required, to display the *Process* menu.

2. Click on *Delete* - Delete Code.



•			Static Data - BPO Config									_		
Save La	Home Accounts Call Cent	Refresh	ny Contract Departments	: Human Resou	rces Inven	itory F	Reporting	Sales	Security	Services	Static Data	_	8	
Descr	iption		TableName	FieldName		ParentF	ieldName	Size		UserDefina	able			-
-			AD C	R C		REC		-		8 0 0				
⊞ Ca	ils : Call Types		tblSALSCalls	fidCallType					10	Yes				
⊕ Ca	ills : Data Refresh Rate		GENERIC	fldCallRefreshR	ate				5	Yes				
🖂 Ca	ils : Hold Reason Codes		tblSALSCallHoldEvents	fldHoldReason	ode				10	Yes				
AC AD AG DQ QA SL CQ APS ATF AW	Process Add New Code Delete Code	Awaii Awaii Deve Quot Servi Awaii Awaii	Description Descri	CodeTyp None None None None None None None None	e SortOrde	1 1 1 2 5 1 2 1 2	Status A A A A A A A A A A A A A A							
	Ils : Pending Reason Codes		tblSALSCallPendingEvents	fidPendingReas	onCode					Yes				
	tegories : Entity Category		GENERIC	fldCategory fldClass						Yes				
	itegories : Entity Type		GENERIC	fidType						Yes				
	mpany : Tax Codes		GENERIC	fldSvsTaxCode						Yes				
	mpany : Tax Types		GENERIC	fldTaxType						Yes				
	nfiguration : Action Types		tblMTRMDefinition	fldActionType					50	No				

3. When you receive the *Delete Code* message to confirm;

• Are you sure you want to delete this static data code?

- 4. Click on **Yes** to remove the code, or
 - Click on *No* to ignore the request and to leave the code in the Hold Reason Code list.



()	Home Accounts Call Centre	Static Data - BPO Co							Constant Challen		-	12
Sav		Company Contract Department	ents Hu	iman kesource	is invent	ory H	Leporting	sales security	Services Static	Data —	- Cr	
1	Description	TableName	Fiel	dName		ParentF	ieldName	Size	UserDefinable			-
	0:	-O:	8 0 0			R I C		-	4 0 4			
8	Calls : Call Types	tblSALSCalls	fldC	allType				10) Yes			
	Calls : Data Refresh Rate	GENERIC		allRefreshRate					5 Yes			
E	Calls : Hold Reason Codes	tblSALSCallHoldEvents	fidH	oldReasonCod	le			10) Yes			
	Codes Code AC AD AG DQ QA SL CQC	CodeDescription Awaiting Client Confirmation Awaiting Details Awaiting Scheduled Date Development Queue Quote Acceptance Service limit reached Awaiting Client quote confirmation	1	CodeType None None None None None None	SortOrder	1 1 1	ete Code	e you sure you wan	3 t to delete this stat	ic data code?	×	
	APS	Awaiting Parts		None								
	ATPS AW	Awaiting Third Party Service Awaiting Warranty to be processe		None		_			Yes	No		
ŀ	AW	Awaiting warranty to be processe	20	None					res	INO		
										, 1		
	E Calls : Pending Reason Codes	tblSALSCallPendingEvents GENERIC		endingReason	Code			-) Yes	1		
	Categories : Entity Category Categories : Entity Class	GENERIC		ategory lass) Yes 1 Yes	1		
	Categories : Entity Type	GENERIC		ype					2 Yes			
	E Company : Tax Codes	GENERIC		vsTaxCode					1 Yes			
	Company : Tax Types	GENERIC		axType					3 Yes			
	Configuration : Action Types	tblMTRMDefinition		ctionType) No			

- 5. The *Call Error Code* will be removed from the list.
- 6. *Collapse* the Codes frame.
- 7. *Close* the screen when done.



		Static Data - BPO Config Company Contract Department					Services Static	Data — d
Sa	ve Layout Workspaces Save Filter	sh						7
;)	Description	TableName	FieldName		ParentFieldNam	Size	UserDefinable	
Ń	4 0 ¢	#BC	* 0 ¢		RBC	=	n 🖬 c	
1	Calls : Call Types	tblSALSCalls	fldCallType			10	Yes	
	Calls : Data Refresh Rate	GENERIC	fldCallRefreshRat	e		5	Yes	
[Calls : Hold Reason Codes	tblSALSCallHoldEvents	fldHoldReasonCo	de		10	Yes	
	Codes							
	J	CodeDescription	CodeType	SortOrde	r Status			
		Awaiting Client Confirmation	None	Jortorde	1 A	-		
		Awaiting Scheduled Date	None		1 A	5		
	1	Development Queue	None		1 A			
	QA	Quote Acceptance	None		2 A			
	SL	Service limit reached	None		5 A			
	CQC	Awaiting Client quote confirmation	None		1 A			
	APS	Awaiting Parts	None		2 A			
	ATPS	Awaiting Third Party Service	None		1 A			
	AW	Awaiting Warranty to be processed	None		0 A			
*								
[E Calls : Pending Reason Codes	tblSALSCallPendingEvents	fldPendingReasor	nCode		10	Yes	
[GENERIC	fldCategory			50	Yes	
[Categories : Entity Class	GENERIC	fldClass			4	Yes	
[E Categories : Entity Type	GENERIC	fldType			2	Yes	
I	E Company : Tax Codes	GENERIC	fldSysTaxCode			4	Yes	
[E Company : Tax Types	GENERIC	fldTaxType			-	Yes	
	Configuration : Action Types	tblMTRMDefinition	fldActionType				No	
[① Configuration : Address Types	GENERIC	fldAddressType			4	No	

EDIT HOLD REASON CODE

You can make changes to the *Code Description, Code Type* or the *Sort Order* for a Hold Reason Code.

- **Code Description:** Click in the field and replace the existing description with the new description, if required.
- **Code Type:** Click in the field to replace the existing code type with a new code type, if required.
- **Sort Order:** Click in the field to type in or use the arrow indicators to select a new sort order, if required.
- 1. When you have made the required changes, click anywhere on the Codes frame.
- 2. You will receive an *Update* message to confirm,
 - Are you sure you want to save changes to this code?



- 3. Click on **Yes** to save the changes, or
 - Click on *No* to ignore the change and leave the code as is.
- 4. *Collapse* the Codes frame.
- 5. *Close* the screen when done.

		ompany Contract Departments	s Human Resource	es Invent	tory Reporting	Sales Security	Services	Static Data	- 1	8
av	Ve Layout Workspaces Save Filter								5	/
C	Description	TableName	FieldName		ParentFieldName	Size	UserDefinal	ble		
	0:	A D C	* 0 ¢		a l ic	-	* 0 ¢			
B	El Calls : Call Types	tblSALSCalls	fldCallType			10	Yes			
Đ	El Calls : Data Refresh Rate	GENERIC	fldCallRefreshRat	e		5	Yes			
E	리 - Calls : Hold Reason Codes	tblSALSCallHoldEvents	fldHoldReasonCod	de		10	Yes			
	Codes									
		CodeDescription	CodeType	SortOrde	r Status					_
		Awaiting Client Confirmation	None		1					
		-			Updat	e 🚽	2			>
	AG AG	Awaiting Scheduled Date	None		1		· · · ·			
		Awaiting Scheduled Date Development Queue	None		1		1			
	DQ	-			-	Are you sure you	لل u want to sa	ave changes to	this code?	?
	DQ C	Development Queue	None		1	Are you sure you	L u want to sa	ave changes to	this code?	?
	DQ 00 QA 00 SL 55	Development Queue Quote Acceptance	None		1 2	Are you sure you	لد u want to sa	ave changes to	this code?	?
	DQ 00 QA 00 SL 55 CQC 4	Development Queue Quote Acceptance Service limit reached	None None None		1 2 5	Are you sure you	_	ave changes to	this code? Cancel	?
	DQ DQ CQA CQA CQA CQA CQA CQA CQA CQA CQA CQ	Development Queue Quote Acceptance Service limit reached Awaiting Client quote confirmation	None None None None		1 2 5 1		_			?
	DQ D	Development Queue Quote Acceptance Service limit reached Awaiting Client quote confirmation Awaiting Parts Awaiting Third Party Service Awaiting Warranty to be processed	None None None None None		1 2 5 1 2		_			?
	DQ D	Development Queue Quote Acceptance Service limit reached Awaiting Client quote confirmation Awaiting Parts Awaiting Third Party Service	None None None None None None		1 2 5 1 2 1		_			?
	DQ D	Development Queue Quote Acceptance Service limit reached Awaiting Client quote confirmation Awaiting Parts Awaiting Third Party Service Awaiting Warranty to be processed	None None None None None None None None		1 2 5 1 2 1 0 A			No	Cancel	?
	DQ D	Development Queue Quote Acceptance Service limit reached Awaiting Client quote confirmation Awaiting Parts Awaiting Third Party Service Awaiting Warranty to be processed	None None None None None None None None	Code	1 2 5 1 2 1 0 A	Yes		No lick here after making the	Cancel	?
	DQ CQA CQA CQA CQA CQA CQA CQA CQA CQA CQ	Development Queue Quote Acceptance Service limit reached Awaiting Client quote confirmation Awaiting Parts Awaiting Third Party Service Awaiting Warranty to be processed Awaiting Call Details	None None None None None None None None	Code	1 2 5 1 2 1 0 A	Yes 3		No	Cancel	?
•	DQ DQ QA QC SL SC CQC A APS A ATPS A AU A D A El Calls : Pending Reason Codes	Development Queue Quote Acceptance Service limit reached Awaiting Client quote confirmation Awaiting Parts Awaiting Third Party Service Awaiting Waranty to be processed Awaiting Call Details tblSALSCallPendingEvents	None None None None None None None None	Code	1 2 5 1 2 1 0 A	Yes 3 10 50	Tres Cl	No lick here after making the	Cancel	?
•	DQ DQ QA CQ SL SS CQC A APS A ATPS A AW A D A El Calls : Pending Reason Codes El Categories : Entity Category	Development Queue Quote Acceptance Service limit reached Awaiting Client quote confirmation Awaiting Parts Awaiting Parts Service Awaiting Varanty to be processed Awaiting Call Details tblSALSCallPendingEvents GENERIC	None None None None None None None None	Code	1 2 5 1 2 1 0 A	Ves 3 10 50 4	Yes C	No lick here after making the	Cancel	?
•	DQ DQ QA CQ SL SS CQC A APS A AW A B Calls : Pending Reason Codes B Categories : Entity Category B Categories : Entity Class	Development Queue Quote Acceptance Service limit reached Awaiting Client quote confirmation Awaiting Party Service Awaiting Third Party Service Awaiting Call Details USALSCallPendingEvents GENERIC GENERIC	None None None None None None None None	Code	1 2 5 1 2 1 0 A	Yes 3 10 50 4 2	Yes Yes Yes	No lick here after making the	Cancel	?
9 9 9	DQ DQ QA CQ SL SC CQC A APS A ATPS A AW A D D El Calls : Pending Reason Codes B B Categories : Entity Category El Categories : Entity Category B Categories : Entity Type El Categories : Entity Type	Development Queue Quote Acceptance Service limit reached Awaiting Client quote confirmation Awaiting Client quote confirmation Awaiting Third Party Service Awaiting Third Party Service Awaiting Call Details tblSALSCallPendingEvents GENERIC GENERIC GENERIC	None None None None None None None RidPendingResson RidZetegory RidCategory RidCategory	NCode	1 2 5 1 2 1 0 A	Ves 3 10 50 4 2 4	Yes Yes Yes Yes	No lick here after making the	Cancel	?

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