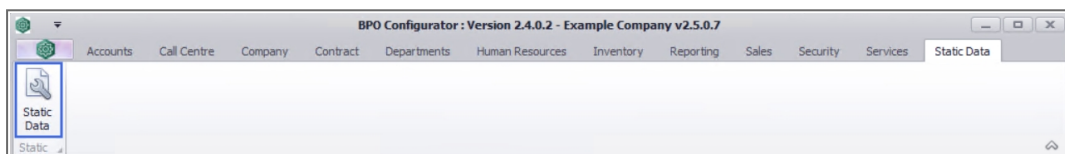


STATIC DATA

STATIC DATA – CALLS: HOLD REASON CODES

Ribbon Access: Static Data > Static Data



1. The **Static Data** listing screen will be displayed.
2. 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.
4. Here you can view a list of the **hold reason codes** currently on the system.

Static Data - BPO Configurator : Version 2.4.0.2 - Example Company v2.5.0.7

Home Accounts Call Centre Company Contract Departments Human Resources Inventory Reporting Sales Security Services Static Data

Save Layout Workspaces Save Filter Refresh

Format Curr...

Description	TableName	FieldName	ParentFieldName	Size	UserDefinable
Calls : Call Types	tbISALSCalls	fidCallType		10	Yes
Calls : Data Refresh Rate	GENERIC	fidCallRefreshRate		5	Yes
Calls : Hold Reason Codes	tbISALSCallHoldEvents	fidHoldReasonCode		10	Yes

Codes


Code	CodeDescription	CodeType	SortOrder	Status
AC	Awaiting Client Confirmation	None	1	A
AD	Awaiting Details	None	1	A
AG	Awaiting Scheduled Date	None	1	A
DQ	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

Calls : Pending Reason Codes	tbISALSCallPendingEvents	fidPendingReasonCode		10	Yes
Categories : Entity Category	GENERIC	fidCategory		50	Yes
Categories : Entity Class	GENERIC	fidClass		4	Yes
Categories : Entity Type	GENERIC	fidType		2	Yes
Company : Tax Codes	GENERIC	fidSysTaxCode		4	Yes
Company : Tax Types	GENERIC	fidTaxType		3	Yes
Configuration : Action Types	tbIMTRMDefinition	fidActionType		50	No
Configuration : Address Types	GENERIC	fidAddressType		4	No

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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.

Static Data - BPO Configurator : Version 2.4.0.2 - Example Company v2.5.0.7

Home Accounts Call Centre Company Contract Departments Human Resources Inventory Reporting Sales Security Services Static Data

Save Layout Workspaces Save Filter Refresh

Format Curr...

Description	TableName	FieldName	ParentFieldName	Size	UserDefinable
Calls : Call Types	tbISALSCalls	fldCallType		10	Yes
Calls : Data Refresh Rate	GENERIC	fldCallRefreshRate		5	Yes
Calls : Hold Reason Codes	tbISALSCallHoldEvents	fldHoldReasonCode		10	Yes

Codes

Code	CodeDescription	CodeType	SortOrder	Status
AC	Awaiting Client Confirmation	None	1	A
AD	Awaiting Details	None	1	A
AG	Awaiting Scheduled Date	None	1	A
DQ	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	Waiting Parts	None	2	A
ATPS	Waiting Third Party Service	None	1	A

Process Add New Code Add Delete Code

Code	CodeDescription	CodeType	SortOrder	Status
tbISALSCallPendingEvents	fldPendingReasonCode		10	Yes
GENERIC	fldCategory		50	Yes
GENERIC	fldClass		4	Yes
GENERIC	fldType		2	Yes
GENERIC	fldSysTaxCode		4	Yes
GENERIC	fldTaxType		3	Yes
tbIMTRMDefinition	fldActionType		50	No
GENERIC	fldAddressType		4	No

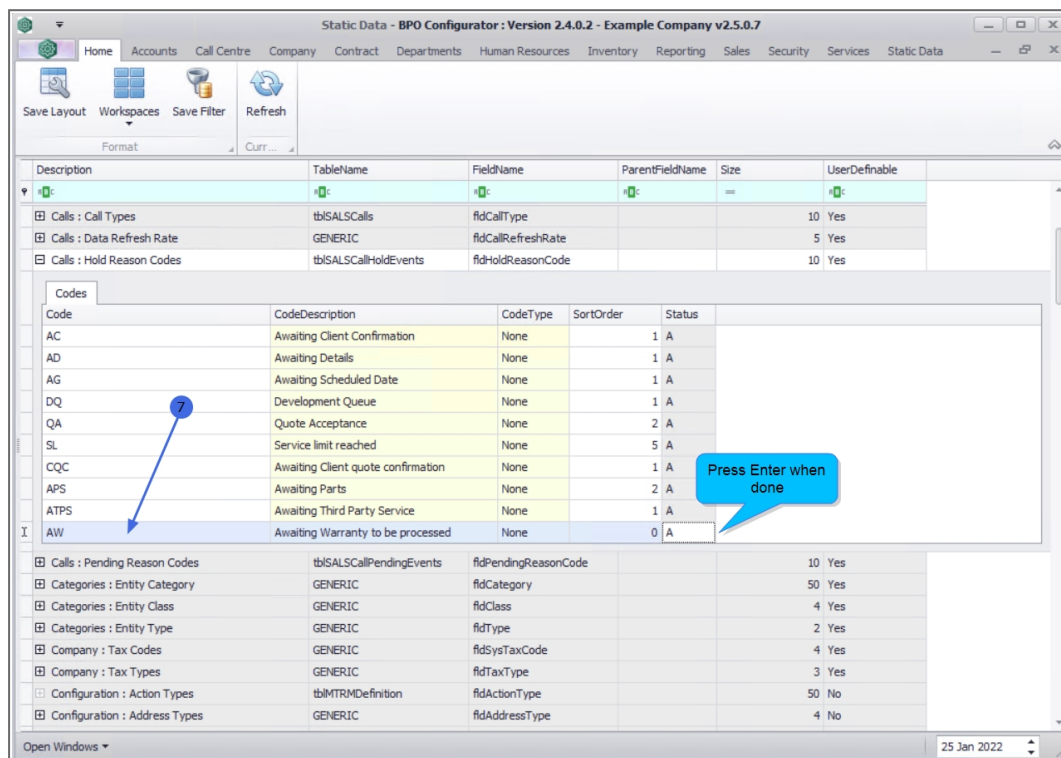
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7. An available row for adding the new hold reason code will display in the **Codes** data grid.

- **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**.



Description	TableName	FieldName	ParentFieldName	Size	UserDefinable
Calls : Call Types	tbISALSCalls	fldCallType		10	Yes
Calls : Data Refresh Rate	GENERIC	fldCallRefreshRate		5	Yes
Calls : Hold Reason Codes	tbISALSCallHoldEvents	fldHoldReasonCode		10	Yes

Code	CodeDescription	CodeType	SortOrder	Status
AC	Awaiting Client Confirmation	None	1	A
AD	Awaiting Details	None	1	A
AG	Awaiting Scheduled Date	None	1	A
DQ	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

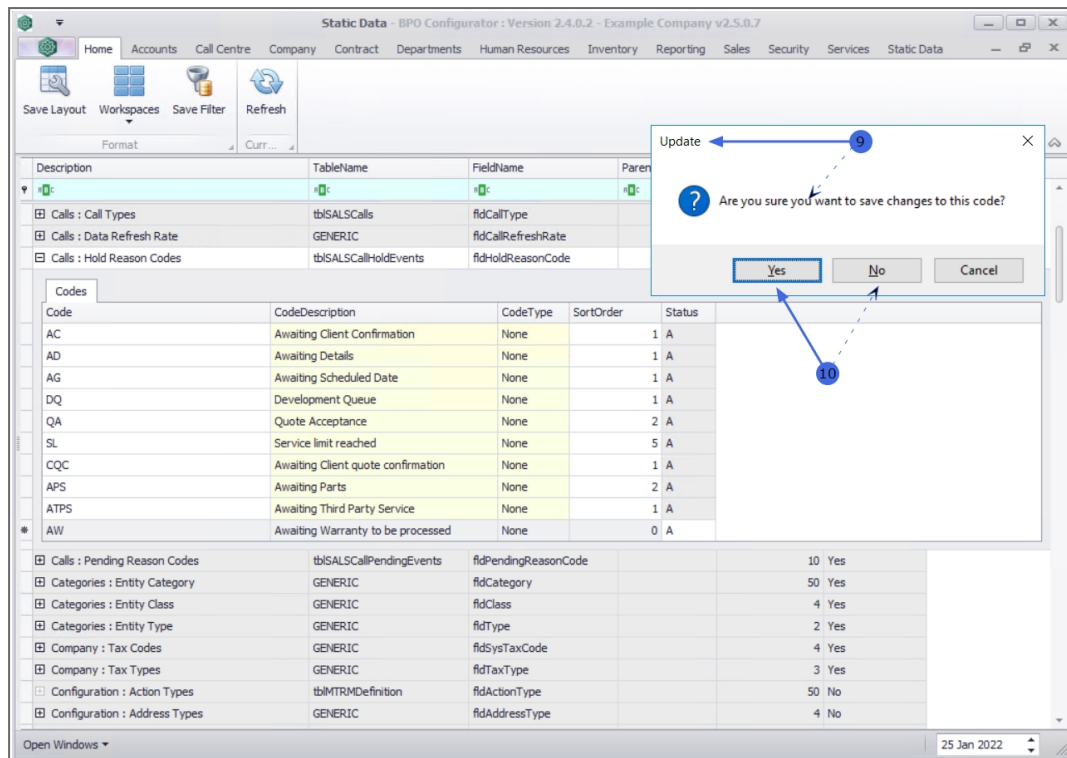
9. When you receive the **Update** message to confirm;

- **Are you sure you want to save changes to this code?**

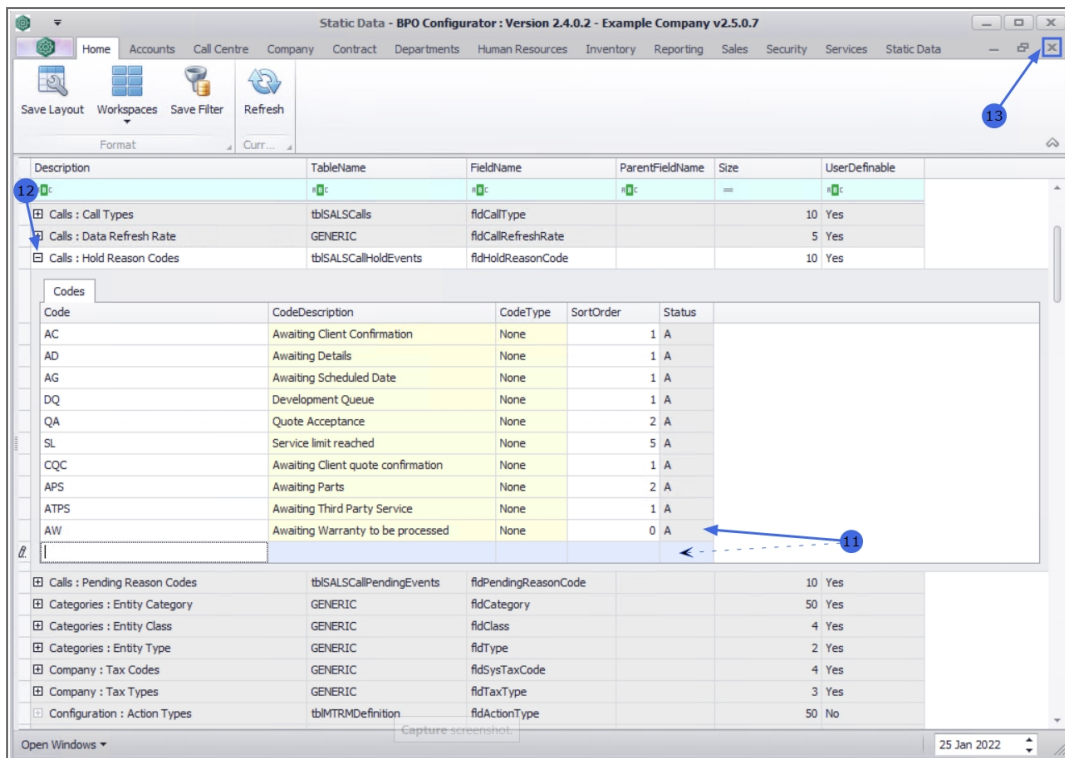
10. Click on **Yes** to save the code, or

- 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 drop-down 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.




11. 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.



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 Configurator : Version 2.4.0.2 - Example Company v2.5.0.7

Home Accounts Call Centre Company Contract Departments Human Resources Inventory Reporting Sales Security Services Static Data

Save Layout Workspaces Save Filter Refresh

Format Curr...

Description	TableName	FieldName	ParentFieldName	Size	UserDefinable
Calls : Call Types	tbISALSCalls	fldCallType		10	Yes
Calls : Data Refresh Rate	GENERIC	fldCallRefreshRate		5	Yes
Calls : Hold Reason Codes	tbISALSCallHoldEvents	fldHoldReasonCode		10	Yes

Codes

Code

AC Awaiting Client Confirmation

AD Awaiting Details

AG Awaiting Scheduled Date

DQ Development Queue

QA Quote Acceptance

SL Service limit reached

CQC Awaiting Client quote confirmation

APS Awaiting Parts

ATPS Awaiting Third Party Service

AW Awaiting Warranty to be processed

Process

Add Add New Code

Delete Delete Code

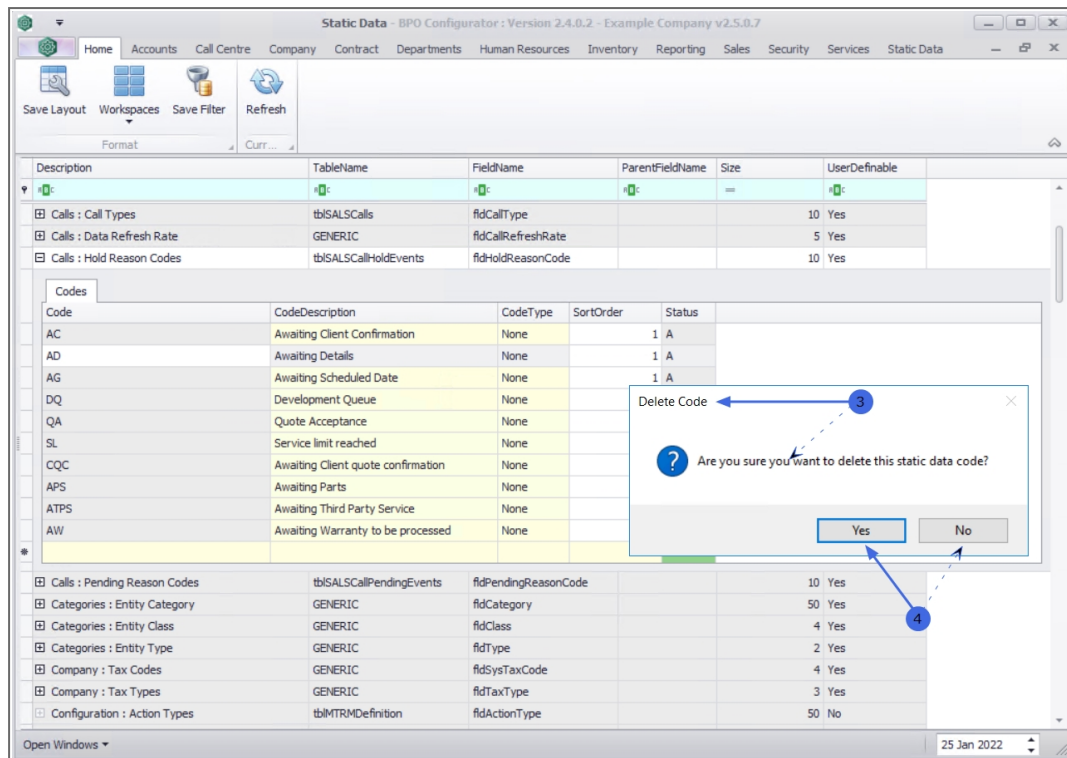
Code	CodeDescription	CodeType	SortOrder	Status
AC	Awaiting Client Confirmation	None	1	A
AD	Awaiting Details	None	1	A
AG	Awaiting Scheduled Date	None	1	A
DQ	Development Queue	None	1	A
QA	Quote Acceptance	None	2	A
SL	Service limit reached	None	5	A
CQC	Awaiting Client quote confirmation	None	1	A
APS	Awaiting Parts	None	2	A
ATPS	Awaiting Third Party Service	None	1	A
AW	Awaiting Warranty to be processed	None	0	A

Description	TableName	FieldName	ParentFieldName	Size	UserDefinable
Calls : Pending Reason Codes	tbISALSCallPendingEvents	fldPendingReasonCode		10	Yes
Categories : Entity Category	GENERIC	fldCategory		50	Yes
Categories : Entity Class	GENERIC	fldClass		4	Yes
Categories : Entity Type	GENERIC	fldType		2	Yes
Company : Tax Codes	GENERIC	fldSysTaxCode		4	Yes
Company : Tax Types	GENERIC	fldTaxType		3	Yes
Configuration : Action Types	tbIMTRMDefinition	fldActionType		50	No

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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.



The screenshot shows the 'Static Data - BPO Configurator' application. The 'Codes' table is expanded, showing a list of codes with columns: Code, CodeDescription, CodeType, SortOrder, and Status. A 'Delete Code' dialog box is open, asking 'Are you sure you want to delete this static data code?'. The dialog has 'Yes' and 'No' buttons. Arrows indicate the flow: from the 'Delete Code' button in the table to the dialog, and from the 'Yes' button in the dialog back to the table.

Description	TableName	FieldName	ParentFieldName	Size	UserDefinable
Calls : Call Types	tbISALSCalls	fldCallType		10	Yes
Calls : Data Refresh Rate	GENERIC	fldCallRefreshRate		5	Yes
Calls : Hold Reason Codes	tbISALSCallHoldEvents	fldHoldReasonCode		10	Yes

Code	CodeDescription	CodeType	SortOrder	Status
AC	Awaiting Client Confirmation	None	1	A
AD	Awaiting Details	None	1	A
AG	Awaiting Scheduled Date	None	1	A
DQ	Development Queue	None		
QA	Quote Acceptance	None		
SL	Service limit reached	None		
CQC	Awaiting Client quote confirmation	None		
APS	Awaiting Parts	None		
ATPS	Awaiting Third Party Service	None		
AW	Awaiting Warranty to be processed	None		

Description	TableName	FieldName	Size	UserDefinable
Calls : Pending Reason Codes	tbISALSCallPendingEvents	fldPendingReasonCode	10	Yes
Categories : Entity Category	GENERIC	fldCategory	50	Yes
Categories : Entity Class	GENERIC	fldClass	4	Yes
Categories : Entity Type	GENERIC	fldType	2	Yes
Company : Tax Codes	GENERIC	fldSysTaxCode	4	Yes
Company : Tax Types	GENERIC	fldTaxType	3	Yes
Configuration : Action Types	tbIMTRMDefinition	fldActionType	50	No

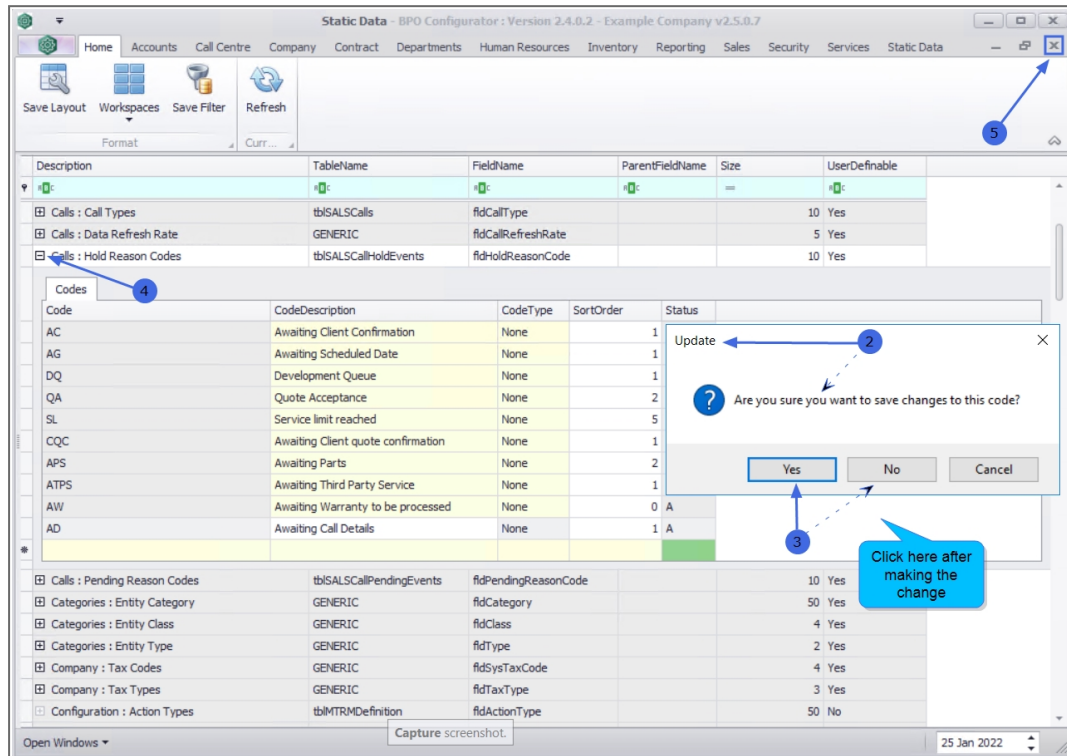
5. The **Call Error Code** will be removed from the list.
6. **Collapse** the Codes frame.
7. **Close** the screen when done.

EDIT 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.

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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.



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