

STATIC DATA

STATIC DATA - SALES: CREDIT TERMS

Ribbon Access: Configurator > Static Data > Static Data

Help v2.5.0.14 - Pg 1 - Printed: 25/06/2024



2	Ψ.				BPO Con	figurator : Version 1.0	0.0.12 - Examp	le Company						X
9	Accounts	Call Centre	Company	Contract	Departments	Human Resources	Inventory	Reporting	Sales	5cheduling	Security	Services	Static Data	
2														
Static Data														
L. 4														
	ndows *											101	Aay 2018	•

Help v2.5.0.14 - Pg 2 - Printed: 25/06/2024



FIND THE SALES: CREDIT TERMS ROW

- The *Static Data* listing screen will be displayed.
- Use the *filter row* or *scroll down* the list until you find the *Sales: Credit Terms* row.
- Click on the *expand* icon in this row.



eve Layout Workspaces Save Filter							
Description	TableName	FieldName	Sze	UserDefnabl	ė		
E Reporting : Report Sub Types	tbRPTSSavedReports	fidReportSubType	50	Yes			
E Reporting : Report Types	tbRPTSSavedReports	fdReportType	50	ĭes			
E Sales : Credit Note Reason Codes	tblSALSCrNoteRelatedRefs	fdReferenceID	4	Yes			
E Sales : Customer addresses	tb/SALSAddresses	fidAddressType	4	Yes			
Sales : Document Status	tblSALSInvoices	fidStatus	1	No			
E Sales : Quote detail types	tblSALSQuotesDetails	fdQuoteDetalType	50	Yes			
E Sales : Quote payment terms	tblSALSQuoteConfig	fdQuoteTermsCode	10	Yes			
E Sales : Quote Status	(b)SALSQuotes	fidQuoteStatus	50	Yes			
E Sales : Quote Unit Types	tblSALSQuotesDetails	fdQuoteUnitType	50	Yes			
Sales : Quotes Other Costs	tblSALSQuotes	fdQuoteCostType	50	Yes			
E Sales : Service Class	GENERIC	fdServiceClass	50	ĭs			
El Sales : Service Type	GENERIC	fidServiceType	50	Yes			
E Sales : Service Unit of Measure	GENERIC	fdUnitofMeasure	50	Yes			
E Sales: Credit Terms	tblSALSCustomers	fidCreditTerms	20	Yes			
E Stock Adjustments : Reason Code	tb/DWNAdjustmentRequest	fdReasonCode	10	Yes			
E Task: Day Of Week	tblASMNTaskSchedule	fidDayOfWeek	10	No			
E Task: Week Of Month	tblASMNTaskSchedule	fidWeekOfMonth	10	No			
E Warranties : Warranty Type	tblWARRWarranty	fdType	10	Yes			
Work Orders : Class	tbWKORWorkOrder	fdWOClass	50	Yes			
E Work Orders : Rectification Codes	tb/WKORWorkSchedule	fdRectificationCode	10	Yes			
Work Orders : Type	tblWKORWorkOrder	fdWOType	50	Yes			
E Work Orders: Work Order Status	tblWKORWorkOrder	fidStatus	1	No			



- The Sales: Credit Terms *Codes* frame will be expanded.
- Here you can view a list of *sales credit terms types* currently on the system.



Home	Accounts Call Centre	Company		atic Data - BPO Departments						Chad dos	Canaltu	Easterna	Challer Data			X
ave Layout	Workspaces Save Filter	Refresh	Lane det	Ada meno	riunili rite	over the second s	fundament.	veterini	A Neo	ACTURATY.	JOINT IN	201005	Jak Ula	-		
Description			TableNar	ne		FieldNam	i.	Sze	UserDefinab	le						
E Reporting	: Report Sub Types		BIRPTSS	avedReports		MReport	SubType	50	Yes							
Reporting	: Report Types			avedReports		fdReport	Type	50	Yes							
	edit Note Reason Codes		tbISALSC	WoteRelatedRe	fs	fdRefere	nceID	4	Yes							
E Sales : Cu	stomer addresses		tb/SALSA	ddresses		fidAddres	sType	4	Yes							
	cument Status		BISALS			AdStatus			No							
1000000	ote detail types		1.1.1.1.1.1	uotesDetails		Same	DetalType	100	Yes							
	ote payment terms		-(-(-))-	uoteConfig		100534	TermsCode		Yes							
E Sales : Qu			BISALSQ			fdQuotes			Yes							
	ote Unit Types			uotesDetails			hitType		Yes							
141-1	otes Other Costs		thisalso				CostType		Yes							
El Sales : Se	and south a		GENERIC			fdService			Yes							
E Sales : Se			GENERIC			AdService			Yes							
	rvice Unit of Measure		GENERIC			fdUnito#			Yes							
Sales: Cre	-		tb/SALSC	lustomers	1	fdCredit	erms	20	Yes					_	_	
Codes		0	odeType	Status	SortOrder									-	-	1
¥.			one i fine	curver.												1
. 0	C00	0		A		0										
1	30 Days	3		A		1										
2	60 Days	6		A		2										
3	90 Days	9	3	A		3										
4	120 Days		20	A		4										
5	150 Days		50	A		5										
•	0.000 Mile 2		or hi													
E Stock Adju	ustments : Reason Code		BONNA	djustmentReque	st	fdReasor	Code	10	ĭs.							•
E Task: Day	Of Week		th/ASMIN	TaskSchedule		fdDayOf	Neek	10	No							



ADD A CREDIT TERM

- *Right click* anywhere in a *row* of the *Codes* data grid.
- A *Process* menu will pop up.
- Click on **Add** Add New Code.

Help v2.5.0.14 - Pg 7 - Printed: 25/06/2024



9	Home	Accounts Call C	entre Compan				tor : Version 1.0.0 sources Invents			Scheduling	Security	Services	Static Data	-	Ø
avela	e vout V	Vorkspaces Save P	Fiter Refresh												
Desc	ription			TableNa	ne		FjeldName	Sze	UserDefinad	xie					
🖻 R/	eporting	Report Sub Types		BRPTS:	SavedReports		fdReportSubType	5	0 Yes						
E R	eporting	Report Types		BRPTS	SavedReports		fdReportType	5) Yes						
₿ 5t	ales : Cre	dit Note Reason Co	des .	BISALS	CNoteRelatedRel	6	fdReferenceID		4 Yes						
0 5	ales : Cus	tomer addresses		BSALS	Addresses		fdAddressType		4 Yes						
	10.00	ument Status		tbiSALSI			fdStatus		1 No						
	100	ote detail types			QuotesDetails		fdQuoteDetalTyp		0 Yes						
	and the	xte payment terms			QuoteConfig		fdQuoteTermsCo) Yes						
	And in case of	ote Status		tb/SALS(1000		fdQuoteStatus		0 Yes						
		ote Unit Types		BSALS	QuotesDetails		fdQuoteUnitType	-	0 Yes						
	100	otes Other Costs		B SALS(fdQuoteCostType) Yes						
404.6		vice Class		GENERIC	1		fdServiceClass	100	0 Yes						
		vice Type		GENERU			fdServiceType	5) Yes						
		vice Unit of Measure		GENERIC	20		fdUnitofMeasure		0 Yes						
BS	ales: Crea	át Terms		tbISALSC	Customers		fdCreditTerms	2) Yes						
	Codes			() - C - C		-									_
	4 Code	CodeDescrip	notion	CodeType	Status	SortOrde									
	1						_								
	0	COD		0	A		0								
	1	30 Days		30	A		1								
	2	60 Days		60	A		2								
	3	90 Days		90	A		3								
	• 4	120 Days		120	A		4								
	5	150 Days		150	A	Process	+								
	•					Add	New Code							_	
🗉 St	tock Adju	stments : Reason C	ode	60MM	AdjustmentReque			1) Yes						
E D	ask: Day	Of Week		THASMIN	TaskSchedule	Dele	ete	1	0 No						



- The *final row* in the Codes data grid will now be 'activated'.
- The *Code Type*, *Status* and *Sort Order* columns will now be populated.



à .		Sta	tic Data - BPC) Configura	tor : Version 1.0.0.1	2 - Exampl	e Company			25	0	X
Home Ac	counts Call Centre Comp	any Contract	Departments	Human Re	ources Inventor	Reporti	ng Sales Sch	reduling Security	Services	Static Data		Ø
2	8 8	,										
Save Layout Work	spaces Save Filter Refres											
-	•											
Form	et " Or			_	e la la constancia de la c		11. Balanda				-	_
Description		TableNarr	e		FieldName	Size	UserDefinable					
E Reporting : Re	ovt Sh Tuner	HIPPTCC	evedReports		fdReportSubType		Yes					
E Reporting : Re			wedReports		fdReportType		Yes					
	Note Reason Codes		NoteRelatedRe		fidReferenceID		Yes					
E Sales : Custom		tb/SALSA			fdAddressType		Yes					
Sales : Docume	ent Status	thisALSIn	voices		fdStatus	1	No					
E Sales : Quote o	detail types	BISALSQ	otesDetals		fdQuoteDetalType	50	Yes					
E Sales : Quote ;	payment terms	tblSALSQ	uoteConfig		fdQuoteTermsCode	10	Yes					
E Sales : Quote !	Status	I BISALSQ	uotes		fdQuoteStatus	50	Yes					
Sales : Quote I	Unit Types	I bisal.sq	otesDetails		fdQuoteUnitType	50	Yes					
Sales : Quotes	Other Costs	BISALSQ	uotes		fdQuoteCostType	50	Yes					
E Sales : Service		GENERIC			fdServiceClass		ĭes					
E Sales : Service		GENERIC			fdServiceType		Yes					
E Sales : Service		GENERIC			fdUnitofMeasure	-	Yes					
Sales: Credit T	ems	(b)SALSO	ustomers		fdCreditTerms	20	Yes					_
Codes		10.10										
9 Code	CodeDescription	CodeType	Status	SortOrde	*							_
*		10										
0	C00	0	A		0							
1	30 Days	30	A		1							
2	60 Days	60			1							
3	90 Days 120 Days	90 120	2		4							
	150 Days	150	2									
Ĭ	and mala	None	A		0							
(I) Churk Address	ante i Danana Cada	Yanara	2		fdReasonCode		Yes				-	_
	ents : Reason Code		ljustmentRequ askSchedule									
Task: Day Of V Open Windows *	NCD.	DIASMINI	associedue	-	fdDayOfWeek	10	No	-		08 May		

• **Code:** Click in this text box and type in a *code* specific for this new sales credit terms.



• Code Description: Click in this text box and type in a *descrip-tion* for this new sales credit terms code.

0	H	v Acc	ounts Call Centre (Company				tor : Version 1.0.0. sources Invento			Scheduling Security	Services	Static Data	-	0	ş
Save	Layo	kut Works	paces Save Filter R	lefresh												
De	scrip				TableNam	e		FieldName	Sze	UserDefnab	le					
			ort Sub Types			svedReports		fdReportSubType) Yes						
		orting : Rep				avedReports		fdReportType) Yes						
						NoteRelatedRefs		fidReferenceID		4 Yes						
•	Sales	s : Custome	r addresses		thSALSAd			fidAddressType		4 Yes						
			Quote payment terms Quote Status Quote Unit Types Quotes Other Costs Service Class		thisALSIn			fidStatus		1 No						
					1990 3.6	otesDetals		fdQuoteDetaiType) Yes						
		: Document Status : Quote detal types : Quote payment terms : Quote Status : Quote Status : Quote Unit Types : Quotes Other Costs : Service Class			all states in the	uoteConfig		fdQuoteTermsCod) Yes						
					this also	iotes		fdQuoteStatus	50) Yes						
		-			Ibisal.squ	otesDetals		fdQuoteUnitType) Yes						
	Sales	s : Quotes (Other Costs		(b)SALSQL	uotes		fdQuoteCostType	50) Yes						
•	Sales	s : Service (Ilass		GENERIC			fdServiceClass	5) Yes						
•	Sales	s : Service 1	lype		GENERIC			fidServiceType	50) Yes						
Œ	Sales	s : Service l	hit of Measure		GENERIC			fdUnitofMeasure	50) Yes						
8	Sales	s: Credit Te	ms		thisALSOU	ustomers		fdCreditTerms	2) Yes						
	¢	odes														
	٩	Code	CodeDescription	C	odeType	Status	SortOrde	•								
	۲															
		0	C00	0		A		0								
		1	30 Days	3	0	A		1								
		2	60 Days	6	0	A		2								
		3	90 Days	9	0	A		3								
		4	120 Days	1	20	A		4								
		5	150 Days	1	50	A		5								
	I			N	one	A		Ó								
Ð	Stod	k Adjustmer	its : Reason Code		totownad	ljustmentReques	t I	fdReasonCode	1) Yes						
		: Day Of W				askSchedule		fdDayOfWeek) No						



- Code Type: This can remain as None.
- **Status:** This will auto populate with **A** Active.
- **Sort Order:** Click in this text box and either type in or use the arrow indicators to select the sort order for this new sales credit terms code.
 - Note: The sort order is the order in which this new Credit Term will appear in the Credit Terms dropdown list in BPO2. If each Credit Term has the same number e.g. 0 or 1, then the drop-down list will usually default to an alphabetical order in BPO2. If you wish the Credit Terms to be listed in a certain order then number each one in the order that you wish to view them.



1					Sta	itic Data - BPC) Configura	tor : Vers	ion 1.0.0.12	Example	Company				20		X
y	Hom	e Accounts	Call Centre	Company	Contract	Departments	Human Res	lources	Inventory	Reportin	g Sales	Scheduling	Security	Services	Static Data	-	8
ave L	ayout	Workspaces Format		Refresh													
Des	criptor				TableNam	e .		FieldNam	¢	Sze	UserDefinal	xle					
1																	
	leporti	ng : Report Sub	Types		BIRPTSS	avedReports		fdRepor	ISubType	50	Yes						
	leportr	ng : Report Typ	xes		BRPTSS	avedReports		fdRepor	tType	50	ĭes						
⊞ 5	iales : (Credit Note Re	ason Codes		tbisALSO	NoteRelatedRe	fs	fdRefere	nceID	4	Yes						
œ 5	iales : (Customer addr	esses		BISALSA	ddresses		fdAddre	ssType	4	Yes						
0.5	lales : (Document Stab	5		tbisALSIn	woices		fidStatus	6	1	No						
Œ S	ales : (Quote detail ty	pes		BISALSQ	uotesDetals		fdQuote	DetalType	50	Yes						
⊞ 5	iales : (Quote payment	t terms		tbisalsQ	uoteConfig		fdQuote	TermsCode	10	Yes						
⊞ 5	iales ; (Quote Status			BISALSQ	uotes		fdQuote	Status	50	Yes						
Ð 9	lales : (Quote Unit Typ	es		I bisal.sq	uotesDetails		fdQuote	UnitType	50	Yes						
0.5	iales : (Quotes Other (losts		tbisALSQ	uotes		1000	CostType	50	Yes						
124	-	Service Class			GENERIC			fdServic		50	Yes						
		Service Type			GENERIC			fidService		50	Yes						
		Service Unit of	Measure		GENERIC				Measure	-	Yes						
8	ales: C	Credit Terms			BISALSO	ustomers		fdCredit	Terms	20	Yes						
	Cod	es			_	_											_
	4 Co	de Cod	eDescription	(odeType	Status	SortOrde	(* 1									
	٢																
	0	COL)	()	A		0									
	1	30 0	Jays	1	0	A		1									
	2	60 0	λaγs	(0	A		2									
	3	90 0	Jays	4	0	A		3									
	4	120	Days	1	20	A		4									
	5	150	Days		50	A	_	5									
	I 6	180	Days	(Å		0. 🛟									
•	tock A	djustments : Ri	eason Code		BUNNA	djustmentRequ	est	fdReaso	nCode	10	ĭes						
E 1	Task: D	ay Of Week			BIASMIT	asiSchedule		fdDayOf	Week	10	No						



SAVE CREDIT TERM DETAILS

- When you have finished adding the new sales credit terms code details, either press *Tab* or *Enter* on your keyboard or *click outside* of the data grid.
- An *Update* message box will appear, asking;
 - Are you sure you want to save changes to this code?
- Click on Yes.



1		•		1977-107 - 1				tor : Version 1.0.0.12					14-50/23	7	0	-	X
avel		out Wo	vispaces Save Filter	Color Refresh	Contract	Departments	Maman Res	ources Inventory	Reportin	ig Sales 1	cheduling	Security	Services	Static Data	-	0	
Des	aip	ition			TableNam	e		FieldName	Sze	UserDefinabl	ė						
(II) of	lan	arline - E	Senart G & Tunar		Aporec	avedReports		fdReportSubType	- 60	Yes							
						1.11				Yes							
						avedReports NoteRelatedRef		fdReportType fdReferenceID		Yes							
					this also	and the second second	2)	fdAddressType		Yes							
					tosalsa			fdStatus		No							
24						uotesDetails		fdQuoteDetalType		Yes							
		10.0			-Pastrick	uoteConfig		fdQuoteTermsCode	- 65	Yes							
					BISALSQ	No. Contraction		fdQuoteStatus		Yes							
		1.1.1.1.1.1	ting : Report Sub Types ting : Report Types : Credit Note Reason Codes : Customer addresses : Customer addresses : Quote detail types : Quote detail types : Quote detail types : Quote Status : Quote Status : Quote Cote Costs : Service Class : Service Unit of Measure : Credit Terms : Service Unit of Measure : Credit Terms : Service Unit of Measure : Credit Terms : Service Unit of Measure : Code : CodeDescription : COD		-	uotesDetails		fdQuoteUnitType		Yes							
					tblSALSQuotes			fdQuoteCostType		Yes							
					GENERIC			fdServiceClass	100	Yes							
•	ale	s : Servi	ce Type		GENERIC			AdServiceType	50	Yes							
					GENERIC			fdUnitofMeasure	50	Yes							
8	ale	s: Credit	Terms		tb/SALSO	ustomers		fdCredtTerms	20	Yes							
	(Codes															
	4	Code	CodeDescription	C	odeType	Status	SortOrde		-						_		1
	9								Updat	të					×		
		0	C00	0		A		0	1 20								
		1	30 Days	3	0	A		1		Are you	sure you v	vant to sav	e changes	to this code?			
		2	60 Days	6	0	A		2									
		3	90 Days	9	0	A		3									
		4	120 Days	1	20	A		4			yes		No	Cancel			
		5	150 Days	1	50	A		5				_			_		
	Ĭ	6	180 Days	0		A		6 🗘									
• 5	itoc	k Adjust	ments : Reason Code		BONNA	djustmentReques	st	fdReasonCode	10	Yes							
1 1	M	c Day O	fWeek			asiSchedule		fdDayOfWeek	10	No							

 The new sales credit terms code will be *saved* and a *new row* will be added to the *Codes* data grid.



• *Collapse* the Codes frame when you are done.

-			Sta	itic Data - BP	O Configura	tor : Versio	on 1.0.0.12 ·	Example	Company				1	۵		X
9		ccounts Call Centre Cor	npany Contract	Departments	Human Res	sources	Inventory	Reporting	g Sales	Scheduling	Security	Services	Static Data		Ð	
	21		3													
ave	Layout Work	ispaces Save Filter Ref														
	-	•														
	Form	ut 4 Cir.														
D	escription		TableNan	ie .		FieldName		Size	UserDefinal	ke						
-		PL-1	dire en	-					H							
	Sales : Quote		tbISALSQ			fdQuoteSt		- 50	Yes							
	Sales : Quote		10000	uotesDetails		fdQuoteU			Yes							
	Sales : Quotes Sales : Service		ENERUC			fdQuoteO fdServiceO			Yes Yes							
	Sales : Service		GENERIC			fdService1			Yes							
		: Unit of Measure	GENERIC			fdUnito#4			Yes							
	Sales: Credit 1		tbisALSO			fdCreditTe			Yes							
1	Codes		100.000					1.075						-	-	
	4 Code	CodeDescription	CodeType	Status	SortOrde									-		1
	•	Annosing Association	A SALUATION													1
	0	C00	0	A		0										
	1	30 Days	30	A		1										
	2	60 Days	60	A		2										
	3	90 Days	90	A		3										
	4	120 Days	120	A		4										
	5	150 Days	150	A		5										
	6	180 Days	None	A		6										
	8															
Ð	Stock Adjustm	ents : Reason Code	BUNNA	djustmentReq.	est	fdReasoni	Code	10	Yes							
•	Task: Day Of	Week	BIASMIT	askSchedule		fdDayOfW	/eek	10	No							
Ð	Task: Week O	f Month	BIASMINT	askSchedule		fdWeekOf	Month	10	No							
Ð	Warranties : V	Task: Week Of Month Warranties : Warranty Type		Warranty		fdType		10	Yes							
	Work Orders :	Class	tb/wkor	WorkOrder		fdWOClas	\$	50	Yes							
•	Work Orders :	Rectification Codes	15/WKOR	WorkSchedule		fdRectifica	tionCode	10	Yes							
Đ	Work Orders :	Туре	th/WKOR	WorkOrder		fdWOType	1	50	Yes							
Ð	Work Orders:	Work Order Status	tb/WKOR	WorkOrder		fidStatus		1	No							

MNU.108.036