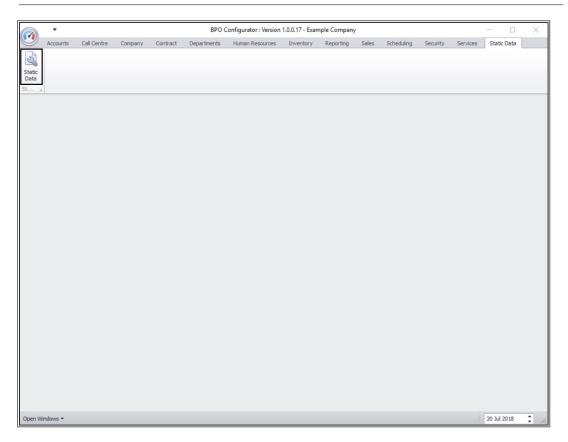


STATIC DATA

STATIC DATA - CRM: CONTACT ROLE

Customer Contact Roles <u>must</u> be configured for use in BPO CRM, when creating a new customer contact, e.g. 'Buying Officer', 'Technical Manager', etc.

Ribbon Access: Configurator > Static Data > Static Data



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



Home Accounts Call Centre Compan	v Contract Departments Hun	an Resources Invento	rv Re	porting Sales	Scheduling	Security	Services	Static Data	_	8
ve Layout Workspaces Save Filter Format				percent source		Judany				
Description	TableName	FieldName	Size	UserDefinable						
E CRM: Activity Type	tblCRMActivities	fldActivityType	10	Yes						
E CRM: Case Source Types	tblCRMCases	fldSourceType	10							
E CRM: Case State	tblCRMCases	fldCaseState		Yes						
E CRM: Case Types	tblCRMCases	fldCaseType	10							
T CRM: Contact Roles	tblCRMContactsRole	fidRole	10	10000						
CRM: Customer Type	tblSALSCustomers	fldCustomerType	10	Yes						
CRM: General Settings	GENERIC	fidCRMSettings	50	Yes						
CRM: Opportunity Stage Gates	tblSALSCRMOpportunities	fidProbability	50	Yes						
CRM: Salesman Target Type	tblCRMSalesmanTargets	fldTargetType	10	Yes						
CRM: Sync Services	tblCRMSyncServices	fldService	20	Yes						
E Currency	GENERIC	fldCurrency	50	Yes						
Customer: Areas	tblSALSCustomers	fldReportingArea	10	Yes						
Customer: Contact Type	tblSALSContacts	fldContactType	20	Yes						
Customer: Payment Method	tblSALSCustomers	fldPaymentMethod	10	Yes						
Customers : Invoice Methods	tblSALSCustomerInvoiceMethod	fldInvoiceMethod	10	No						
Document types	GENERIC	fldDocType	50	Yes						
E Employee : Dependant Relationship	GENERIC	fidRelation	50	Yes						
Employee : Marital Status	GENERIC	fidMaritalStatus	50	Yes						
Employee Occupation Code	GENERIC	fldOccupationCode	50	Yes						
Human Resources : Courses	tblEMPLTrainingMaster	fldTrainCode	50	Yes						
Human Resources : Crafts	tblEMPLCrafts	fldCraftName	50	Yes						
Human Resources : Leave types	tblEMPLShiftExceptions	fldExceptionCategory	50	Yes						
Human Resources: Expense Codes	GENERIC	fldExpenseType	50	Yes						
Instruction Class	tblINSTInstructions	fldInstClass	50	Yes						
Maintenance : Task Class	tbITASKTasks	fldTaskClass	50	Yes						
Manufacturer Class	tblINVNManufacturers	fldClass	50	Yes						
Manufacturer Type	tblINVNManufacturers	fldManufacturerType	50	Yes						
Meter Units	tblMTRMDefinition	fldUnit	50	Yes						

- The CRM: Contact Roles *Codes* frame will be expanded.
- Here you can view a list of *CRM: Contact Roles codes* currently on the system.
- *Right click* anywhere in a *row* of this *Codes* data grid.



	-						Static Data - B	PO Cont	figurator : Ver	sion 1.0.0.1	7 - Exa	mple C	ompany				-			×
9	Home	Accounts	Call C	Centre	Company	Contra	ct Departments	Huma	in Resources	Inventor	Re	porting	Sales	Scheduling	Security	Services	Static Data	-	₽	
ave La	ayout Wor	+	Save Fil		Refresh															
Desc	ription					TableN	ame		FieldName		Size	UserDe	efinable							-
E CF	RM: Activity	y Type				tblCRM	Activities		fldActivityTy	pe	10	Yes								
E CF	RM: Case S	ource Type	s			tblCRM	Cases		fldSourceTyp	e	10	Yes								
E CF	RM: Case S	tate				tblCRM	Cases		fldCaseState		1	Yes								
E CF	RM: Case T	ypes				tblCRM	Cases		fldCaseType		10	Yes								
E CF	RM: Contac	t Roles				tblCRM	ContactsRole		fldRole		10	Yes								
- [Codes																			
- 1	۹ Code		Cod	eDesa	ription		CodeType	Status	s S	ortOrder										1
	9																			
	CEO		Chie	efExed	utive Officer		None	A			1									
	CFO	CFO Chief Financial Of BUY Buying Officer EU End user	ncial Officer		None	A			1											
	BUY		ficer		None	A			1											
	EU		End	user			None	A			1									
	TM		Ted	hnical I	Manager		None	Α			1									
	ACC		Acco	ounts l	Manager		None	A			1									
	SAL		Sale	esman			None	A			1									
	*																			
E CF	RM: Custom	ner Type				tblSALS	Customers		fldCustomerT	Type	10	Yes								
E CF	RM: Genera	al Settings				GENER	IC		fldCRMSettin	gs	50	Yes								
E CF	RM: Opport	unity Stage	e Gates			tblSALS	CRMOpportunities		fldProbability		50	Yes								
E CF	RM: Salesm	an Target	Туре			thICRM	SalesmanTargets		fldTargetTyp	e	10	Yes								
	RM: Sync Se	ervices				tblCRM	SyncServices		fldService		20	Yes								
E C	urrency					GENER	IC		fldCurrency		50	Yes								
Ð CL	ustomer: Ar	reas				tblSALS	Customers		fldReporting	Area	10	Yes								
E CL	ustomer: Co	ontact Type	e			tblSALS	Contacts		fldContactTy	pe	20	Yes								
9 C.	ustomer: Pa	ayment Met	thod			tblSALS	Customers		fidPaymentM	ethod	10	Yes								
E CL	ustomers : I	Invoice Me	thods			tblSALS	CustomerInvoiceM	ethod	fldInvoiceMe	thod	10	No								
E Do	ocument typ	pes				GENER	IC		fldDocType		50	Yes								
Fr	/indows *	ependant (Delations	chin		CENER	IC.		fidD.elation		50	Vec					20 Jul 2			

- A *Process* menu will pop up.
- Click on Add Add New Code.



	Ŧ					Static Data - B	PO Con	figurator : Versio	on 1.0.0.17	- Exa	mple Co	mpany				-			×
2	Home	Accounts	Call Centre	Company	Contrac	t Departments	Hum	an Resources	Inventory	Rej	porting	Sales	Scheduling	Security	Services	Static Data	-	8	10
ave La	yout Wor	rkspaces Sa	ve Filter	Refresh															
		•																	
_	For	mat	*	Cur 4									1						_
Descr	ription				TableNa	me		FieldName	S	ize	UserDe	finable							
	M: Activity	Туре			tbiCRMA	ctivities		fldActivityType		10	Yes								
		ource Types			tblCRMC			fldSourceType		10	Yes								
	M: Case St				tblCRMC			fldCaseState			Yes								
	M: Case T)				tblCRMC			fldCaseType			Yes								
	M: Contact	t Roles			tblCRMC	ontactsRole		fldRole		10	Yes								
	Codes																		
4	R Code		CodeDesc	ription		CodeType	Statu	s Sort	Order										
	٩																		
	CEO		Chief Exe	cutive Officer		None	A		1										
	CFO		Chief Fina	ncial Officer		None	A		1										
	BUY		Buying Of	ficer		None	A		1										
-	EU		End user			None	А		1										
-	TM		Technical	Manager		None	A		1										
	ACC		Accounts	Manager		None	A												
	SAL		Salesman			None	A	Process											
								Add New	Code										
	M: Custom	er Type			thisai so	Customers	_			10	Yes								
	M: General				GENERIO	2		Delete Co	de 🚽	50	Yes								
		unity Stage G	ates		thisalso	RMOpportunities		fldProbability		1000	Yes								
		an Target Typ				alesmanTargets		fldTargetType		10	Yes								
	M: Sync Se					yncServices		fidService		20	Yes								
	irrency				GENERIO			fldCurrency		50	Yes								
	stomer: An	Pas			thisal so	Customers		fidReportingAre	a	10	Yes								
E Cu	stomer: Co	ontact Type			thisalso			fldContactType		20	Yes								
		yment Metho	d		thisal so	Customers		fidPaymentMet		10	Yes								
		Invoice Metho				CustomerInvoiceMe	thod	fldInvoiceMetho			No								
	cument typ				GENERIO			fldDocType			Yes								
		enendant Del	ationship		GENEDI	-		fidDelation			Yer								

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

now be populated.



2	Ŧ			Static Data - E	PO Con	figurator : Version 1.	0.0.17 - Exa	mple Co	mpany				-			×
9	Home Account	ts Call Centre Compan	y Contract	Departments	Huma	an Resources Inve	ntory Re	porting	Sales	Scheduling	Security	Services	Static Data	-	8	3
ave La	ayout Workspaces	s Save Filter Refresh														
Desc	ription		TableNam	e		FieldName	Size	UserDe	finable	1						-
E C	RM: Activity Type		tblCRMAc	tivities		fldActivityType	10	Yes								
	RM: Case Source Ty	pes	tblCRMCa	ses		fldSourceType	10	Yes								
Đ C	RM: Case State		tblCRMCa	ses		fldCaseState	1	Yes								
∃ C	RM: Case Types		tblCRMCa	ses		fldCaseType	10	Yes								
ΞC	RM: Contact Roles		tblCRMCo	ntactsRole		fldRole	10	Yes								
	Codes															-
ſ	۹ Code	CodeDescription	C	odeType	Statu	s SortOrde	r									1
	9															
	CEO	Chief Executive Office	er N	one	A		1									
	CFO	Chief Financial Officer	N	one	A		1									
	BUY	Buying Officer	N	one	A		1									
	EU	End user	N	None			1									
	TM	Technical Manager	N	one	A		1									
	ACC	Accounts Manager	N	one	А		1									
	SAL	Salesman	N	one	A		1									
	I		N	one	A		0									
E C	RM: Customer Type	1	tblSALSCu	istomers		fldCustomerType	10	Yes								
	RM: General Setting		GENERIC			fldCRMSettings	50	Yes								
Ð C	RM: Opportunity St	age Gates	tblSALSCR	MOpportunities		fldProbability	50	Yes								
E C	RM: Salesman Targe	et Type	tblCRMSal	esmanTargets		fldTargetType	10	Yes								
Đ C	RM: Sync Services		tblCRMSy	ncServices		fldService	20	Yes								
€ C	urrency		GENERIC			fldCurrency	50	Yes								
Ð C	ustomer: Areas		tblSALSCu	stomers		fldReportingArea	10	Yes								
ÐO	ustomer: Contact T	ype	tblSALSCo	intacts		fldContactType	20	Yes								
Ð C	ustomer: Payment M	Method	tblSALSCu	stomers		fldPaymentMethod	10	Yes								
Ð C	ustomers : Invoice I	Methods	tblSALSCu	stomerInvoiceM	ethod	fldInvoiceMethod	10	No								
Ð 🗄	ocument types		GENERIC			fldDocType	50	Yes								
FI Fr	molovee · Depender	nt Delationchin	CENEDIC			fidDalation	50	Vec					-			

- **Code:** Click in this text box and type in a *code* specific for this new CRM: Contact Role.
- Code Description: Click in this text box and type in a *description* for this new CRM: Contact Role code.



	-			Static Data - B	PO Con	figurator : Vers	ion 1.0.0.1	7 - Exa	mple Co	mpany				-)	×
9	Home Accounts	Call Centre Compar	ny Contra	ict Departments	Hum	an Resources	Inventory	Re	porting	Sales	Scheduling	Security	Services	Static Data	-	8	>
ave Lay	out Workspaces	Save Filter															
Descrip			TableN	ame		FieldName		Size	UserDe	finable	1						-
	M: Activity Type		tblCRM	Activities		fldActivityTyp	e	10	Yes								
	4: Case Source Typ	es	tblCRM	ICases		fldSourceType		10	Yes								
	4: Case State		thiCRM			fldCaseState		1	Yes								
	M: Case Types		tblCRM	ICases		fldCaseType		10	Yes								
	M: Contact Roles		thiCRM	ContactsRole		fldRole		10	Yes								
	Codes																٦
a	Code	CodeDescription		CodeType	Statu	s So	rtOrder										1
9																	1
	CEO	Chief Executive Office	er	None	A		3	1									
	CFO	Chief Financial Officer	pic .	None	A			1									
	BUY	Buying Officer		None	A			1									
	EU	End user		None	A			1									
	TM	Technical Manager		None	Α			1									
	ACC	Accounts Manager		None	А			1									
	SAL	Salesman		None	Α			1									
I				None	A		(0									
	M: Customer Type		tblSALS	SCustomers		fldCustomerT	vpe	10	Yes								-
	4: General Settings		GENER	IC		fldCRMSetting		50	Yes								
	4: Opportunity Stag	e Gates	tblSALS	SCRMOpportunities		fidProbability		50	Yes								
	4: Salesman Target	Туре	tblCRM	SalesmanTargets		fldTargetType		10	Yes								
	M: Sync Services		tHCRM	SyncServices		fldService		20	Yes								
E Curr	rency		GENER	IC		fldCurrency		50	Yes								
E Cus	tomer: Areas		tblSALS	SCustomers		fidReportingA	rea	10	Yes								
E Cus	tomer: Contact Typ	e	tblSALS	SContacts		fldContactTyp	e	20	Yes								
E Cus	tomer: Payment Me	thod	thISALS	SCustomers		fldPaymentMe	thod	10	Yes								
E Cus	tomers : Invoice Me	thods	tblSALS	SCustomerInvoiceM	ethod	fldInvoiceMet	hod	10	No								
	ument types		GENER	IC		fldDocType		50	Yes								
-	Novee · Dependant	Pelationship	CENED	IC		fidDelation		50	Vor								

- 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 CRM: Contact Role code.
 - Note: The sort order is the order in which this will appear in the CRM: Contact Role code drop-down list in BPO. If each CRM: Contact Role code has the number 1, then the drop-down list will usually default to an alphabetical order in BPO. If, for example, it is numbered 2, then it will appear 2nd in the drop-down list in BPO.



	-					Static Data - B	PO Con	figurator : Vers	ion 1.0.0.1	7 - Exa	mple Co	ompany				-			×
9	Home Ad	ccounts Cal	Centre	Company	Contract	Departments	Huma	an Resources	Inventory	Re	porting	Sales	Scheduling	Security	Services	Static Data	-	8)
ave La	yout Works	•		Refresh															
Descr	ription				TableNam	ne		FieldName		Size	UserDe	finable							_
	RM: Activity T	Гуре			tblCRMAd	tivities		fldActivityTyp	e	10	Yes								
	RM: Case Sou	urce Types			tblCRMCa	ases		fldSourceType		10	Yes								
	RM: Case Stat	te			tblCRMCa	ases		fldCaseState		1	Yes								
	RM: Case Typ	bes			tblCRMCa	ases		fldCaseType		10	Yes								
	RM: Contact P	Roles			tbiCRMCo	ontactsRole		fidRole		10	Yes								
1 1	Codes																		٦
	۹ Code	C	odeDescri	ption	C	CodeType	Statu	s So	rtOrder										1
	9																		1
	CEO	ci	hiefExecu	utive Officer	N	lone	A			1									
	CFO	ci	hief Finan	cial Officer	N	lone	Α			1									
	BUY	Bu	uying Offic	cer	N	lone	Α			1									
	EU	Er	nd user		N	lone	A			1									
	TM	Te	echnical M	lanager	N	lone	Α			1									
	ACC	A	ccounts M	lanager	N	lone	Α			1									
	SAL	Sa	alesman		N	lone	Α		1	1									
	I PRA	Pr	oduct Ad	visor	N	lone	Α) (D									
	RM: Customer	r Type			thISALSCI	ustomers		fldCustomerTy	/pe	10	Yes								
	RM: General S	PRA Product Advisor 1: Customer Type 1: General Settings			GENERIC			fldCRMSetting	s	50	Yes								
	RM: Opportun	nity Stage Gate	s		tblSALSCI	RMOpportunities		fldProbability		50	Yes								
	RM: Salesman	n Target Type			tblCRMSa	alesmanTargets		fldTargetType		10	Yes								
	RM: Sync Serv	vices			tblCRMSy	IncServices		fldService		20	Yes								
E C	urrency				GENERIC			fldCurrency		50	Yes								
E C.	ustomer: Area	as			tblSALSC	ustomers		fidReportingA	rea	10	Yes								
E CL	ustomer: Con	tact Type			tbiSALSC	ontacts		fldContactTyp	e	20	Yes								
⊞ a	ustomer: Payr	ment Method			tblSALSC	ustomers		fldPaymentMe	thod	10	Yes								
⊞ Cu	ustomers : Inv	voice Methods			tblSALSC	ustomerInvoiceMe	thod	fldInvoiceMet	bor	10	No								
⊞ Do	ocument type	s			GENERIC			fldDocType		50	Yes								
Fr.	nolovee · Der	nendant Relatio	nchin		GENERIC			AdDelation		50	Vec		-			20 Jul 2			-

- When you have finished adding the new CRM: Contact Role code details, press *Enter*.
- An *Update* message box will appear, asking;
 - Are you sure you want to save changes to this code?
- Click on Yes.



	Ŧ			Static Data -	BPO Con	figurator : Version 1.0.0	.17 - Exa	mple C	Company							×
9	Home Accounts	Call Centre Company	y Contrac	ct Department	s Huma	an Resources Invento	ry Re	porting	Sales	Scheduling	Security	Services	Static Data	-	8	
Ive La	yout Workspaces	Save Filter Refresh														
Descr	iption	-	TableNa	ame		FieldName	Size	UserD	efinable						_	-
	•															
E CR	M: Activity Type		thickm	Activities		fldActivityType	10	Yes								
	M: Case Source Typ	Des	thickme	Cases		fldSourceType	10	Yes								
	M: Case State		tblCRM	Cases		fldCaseState	1	Yes								
	M: Case Types		thickme	Cases		fldCaseType	10	Yes								
	M: Contact Roles		thiCRM	ContactsRole		fidRole	10	Yes								
Г	Codes															
G	Code	CodeDescription		CodeType	Statu	s SortOrder										1
9	,															
	CEO	Chief Executive Office	r	None	Α		1	Up	odate					\times		
	CFO	Chief Financial Officer		None	A		1		-							
	BUY	Buying Officer		None	A		1		?	are you sure yo	u want to	save change	s to this code	?		
	EU	End user		None	A		1									
	TM	Technical Manager		None	A		1									
	ACC	Accounts Manager		None	Α		1			1	(es	No	Cancel			
	SAL	Salesman		None	Α		1									
)	(PRA	Product Advisor		None	Α	1	\$									
E CR	M: Customer Type		tblSALS	Customers		fldCustomerType	10	Yes								
	M: General Settings	1	GENERI	c		fldCRMSettings	50	Yes								
E CR	M: Opportunity Sta	ge Gates	tblSALS	CRMOpportunities		fidProbability	50	Yes								
	M: Salesman Target	t Туре	tblCRMS	SalesmanTargets		fldTargetType	10	Yes								
	M: Sync Services		thickms	SyncServices		fldService	20	Yes								
🕀 Cu	rrency		GENERI	C		fldCurrency	50	Yes								
🗄 Cu	stomer: Areas		tblSALS	Customers		fldReportingArea	10	Yes								
E Cu	stomer: Contact Ty	pe	tblSALS	Contacts		fldContactType	20	Yes								
E Cu	stomer: Payment M	ethod	tblSALS	Customers		fldPaymentMethod	10	Yes								
Ð Cu	stomers : Invoice M	ethods	tblSALS	CustomerInvoice	1ethod	fldInvoiceMethod	10	No								
Đ Do	cument types		GENERI	C		fldDocType	50	Yes								
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- The new CRM: Contact Role code will be *saved* and a *new row* will be added to the *Codes* data grid.
- *Collapse* the Codes frame when you are done.



Static Data - CRM Contact Role

	Ŧ			Static Data - B	PO Con	figurator : Version	1.0.0.17 - 1	Exan	nple Company				-			\times
9	Home Accounts	Call Centre Company	Contrac	t Departments	Huma	an Resources Inv	ventory	Rep	orting Sales	Scheduling	Security	Services	Static Data	-	₽	
we Lay	out Workspaces	Save Filter														
Descrip		3 0000 2	TableNa	ime		FieldName	Size		UserDefinable	1						-
	1: Activity Type		tblCRMA	Activities		fldActivityType		10	Yes							
	1: Case Source Typ	es	tblCRMC	Cases		fldSourceType		10	Yes							
	1: Case State		thickmo	Cases		fldCaseState		1	Yes							
	1: Case Types		thicRMC	Cases		fldCaseType		10	Yes							
	1: Contact Roles		tblCRMC	ContactsRole		fldRole		10	Yes							
	Codes															
a	Code	CodeDescription		CodeType	Statu	s SortOr	der									
۴	tion Activity Type Case Source Types Case State Case State Case Types Code Code Code CodeDescription CCO Chef Financial Of BUY Buying Officer EU End user TM Technical Manage SAL Salesman PRA Product Advisor Customer Type Cus															
	CEO	Chief Executive Officer		None	Α		1									
	CFO	Chief Financial Officer		None	Α		1									
	CFO Chief Financial Off BUY Buying Officer EU End user			None	Α		1									
	EU			None	A		1									
		Technical Manager		None	A		1									
			None		A		1									
				None	A		1									
R	PRA	Product Advisor		None	A		1									
	1: Customer Type		HUSALS	Customers	-	fldCustomerType		10	Yes							_
	ß		GENERI			fldCRMSettings			Yes							
		e Gates		CRMOpportunities		fldProbability			Yes							
	CRM: Opportunity Stage Gates			SalesmanTargets		fldTargetType		_	Yes							
	CRM: Salesman Target Type CRM: Sync Services			SyncServices		fldService			Yes							
	CRM: Sync Services Currency			c		fldCurrency		50	Yes							
E Cus	Customer: Areas			Customers		fldReportingArea		10	Yes							
E Cus	Customer: Contact Type					fldContactType		20	Yes							
E Cus	tomer: Payment Me	thod	tblSALS	Customers		fidPaymentMethod	ł	10	Yes							
E Cus	tomers : Invoice Me	thods	tblSALS	CustomerInvoiceMe	thod	fldInvoiceMethod		10	No							
	ment timer		GENERI	c		RdDocTupe		50	Vec						_	

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