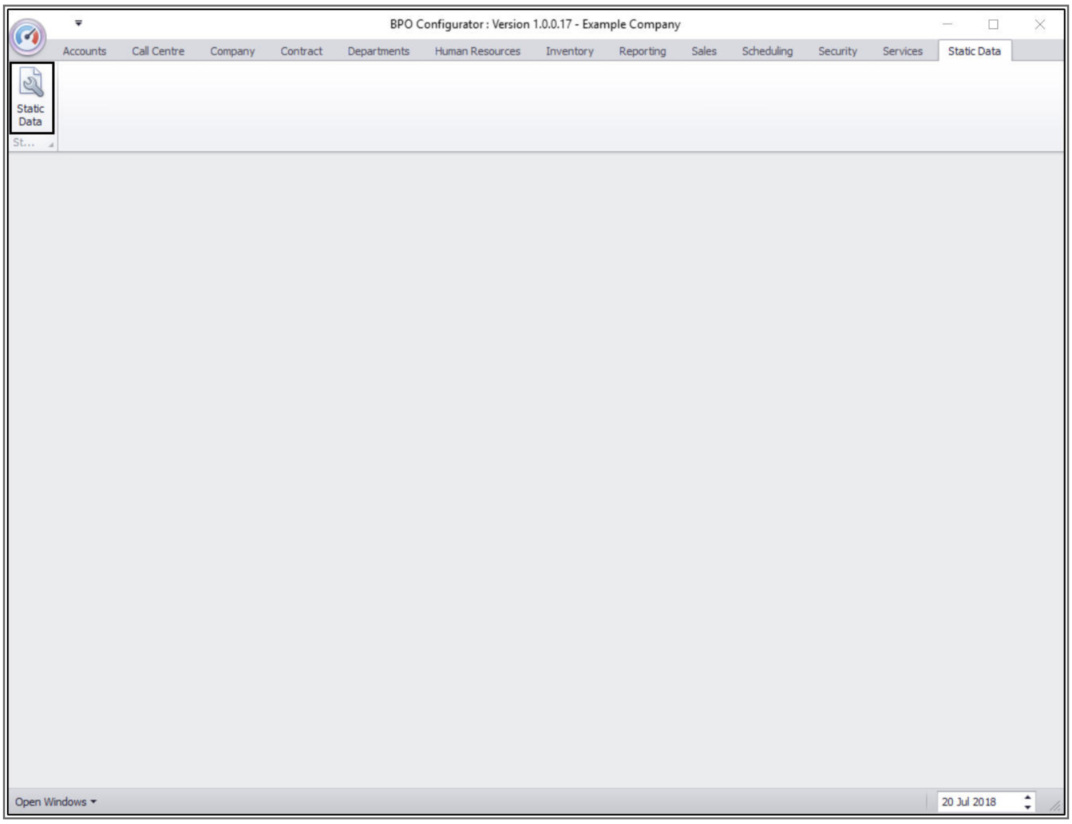
STATIC DATA

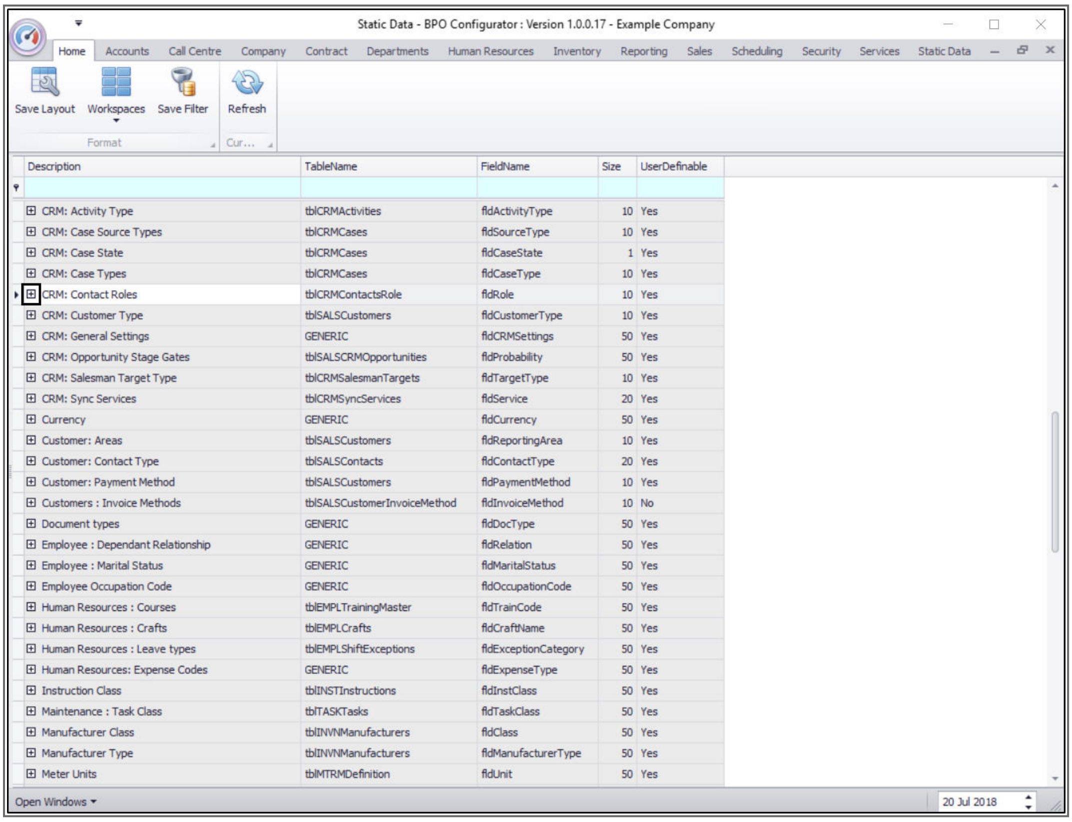
STATIC DATA - CRM: CONTACT ROLE

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

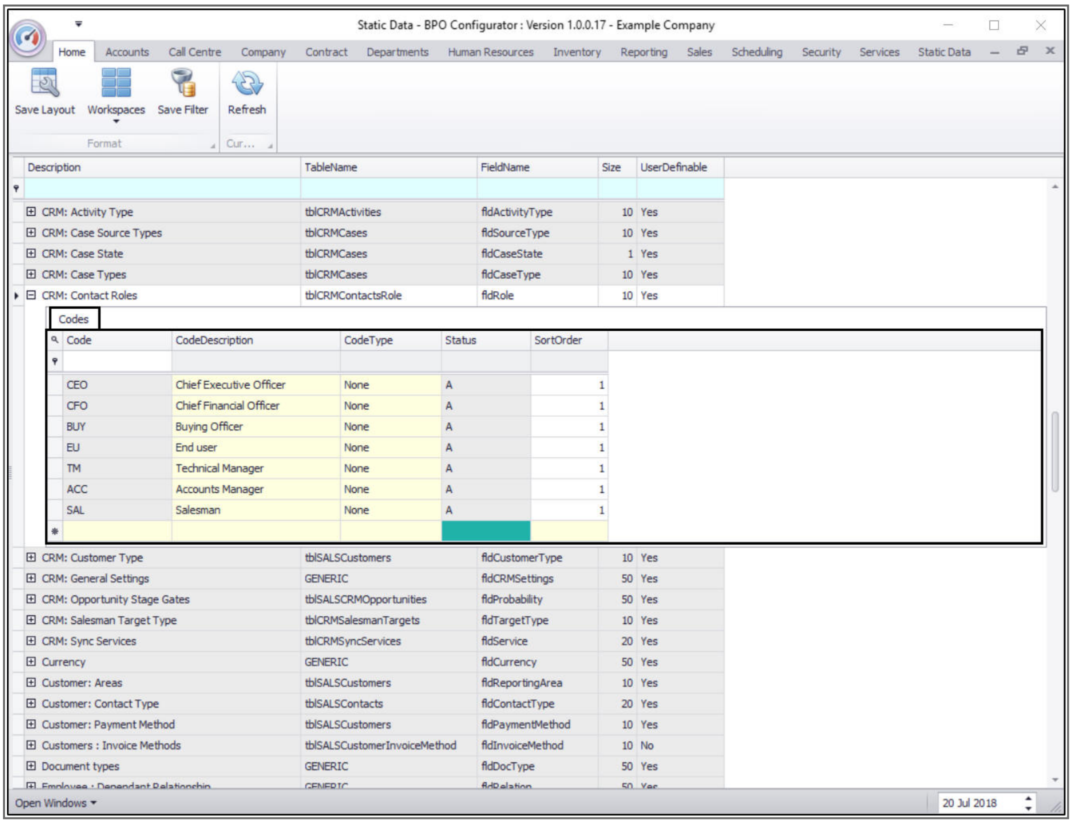
Ribbon Access: *Configurator > Static Data > Static Data*



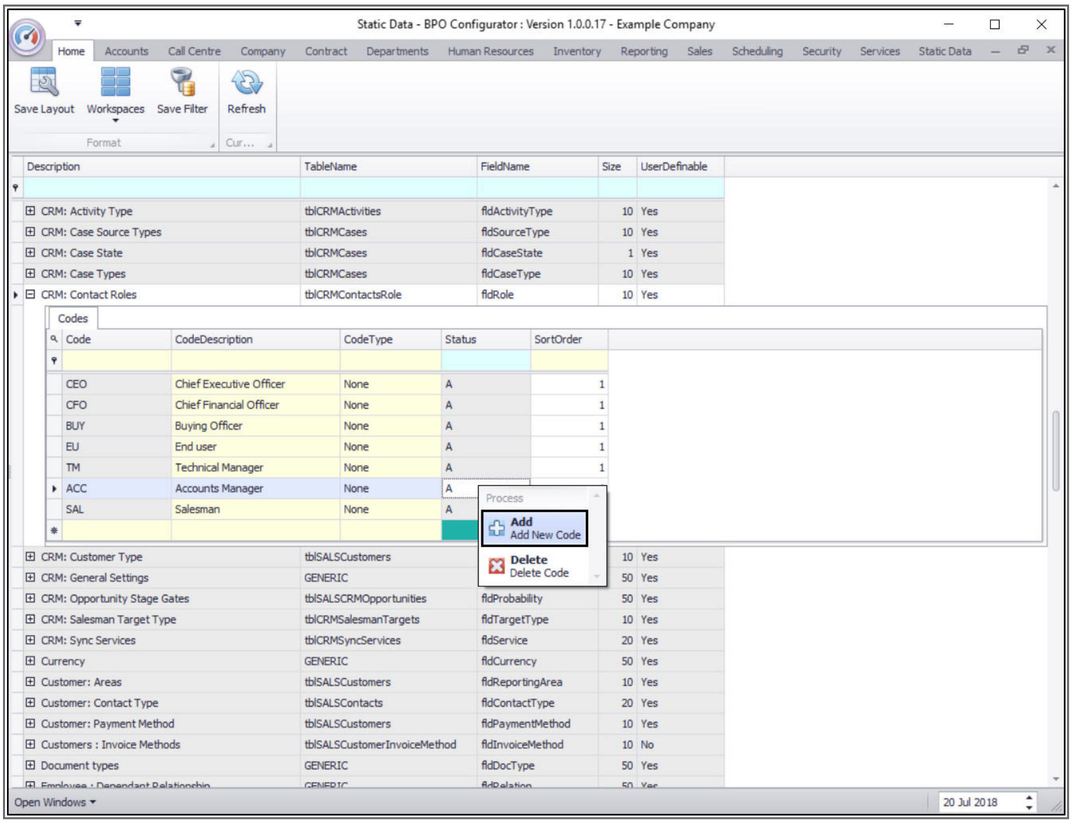
- The ***Static Data*** listing screen will be displayed.
- Use the ***filter row*** or ***scroll down*** the list until you find the ***CRM: Contact Roles*** row.
- Click on the ***expand*** icon in this row.



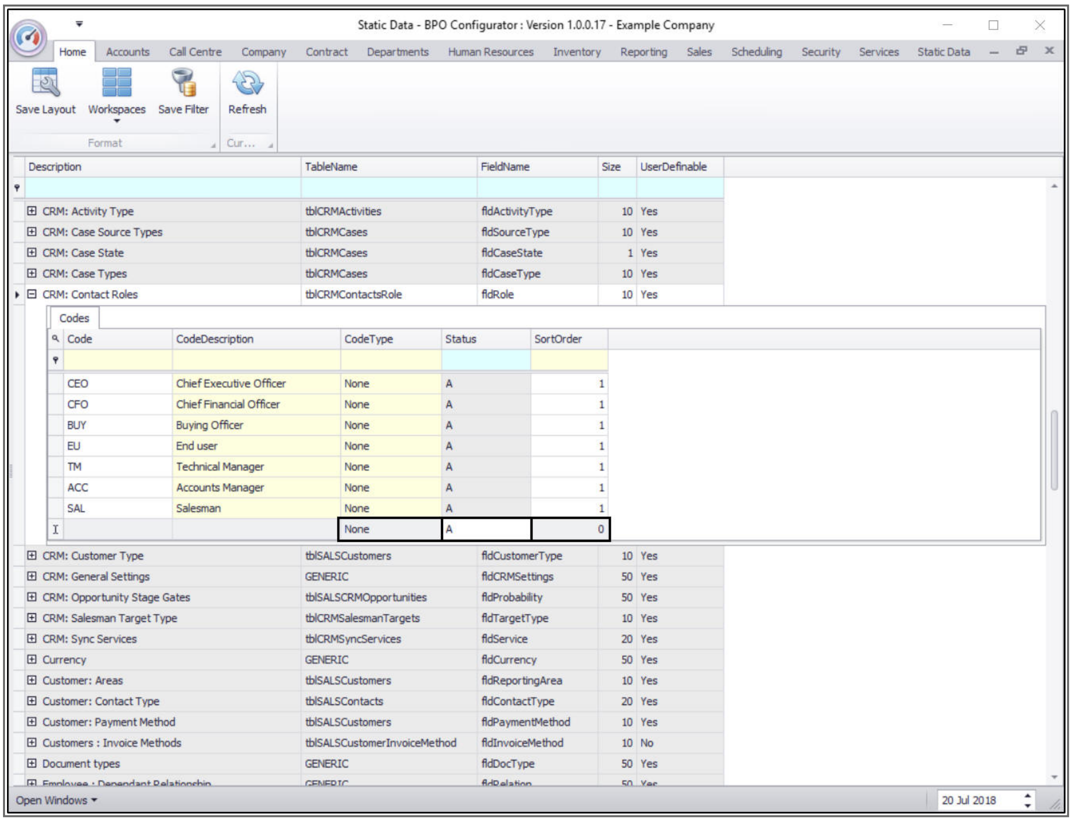
- The CRM: Contact Roles ***Codes*** frame will be expanded.
- Here you can view a list of ***CRM: Contact Roles codes*** currently on the system.
- ***Right click*** anywhere in a ***row*** of this ***Codes*** data grid.



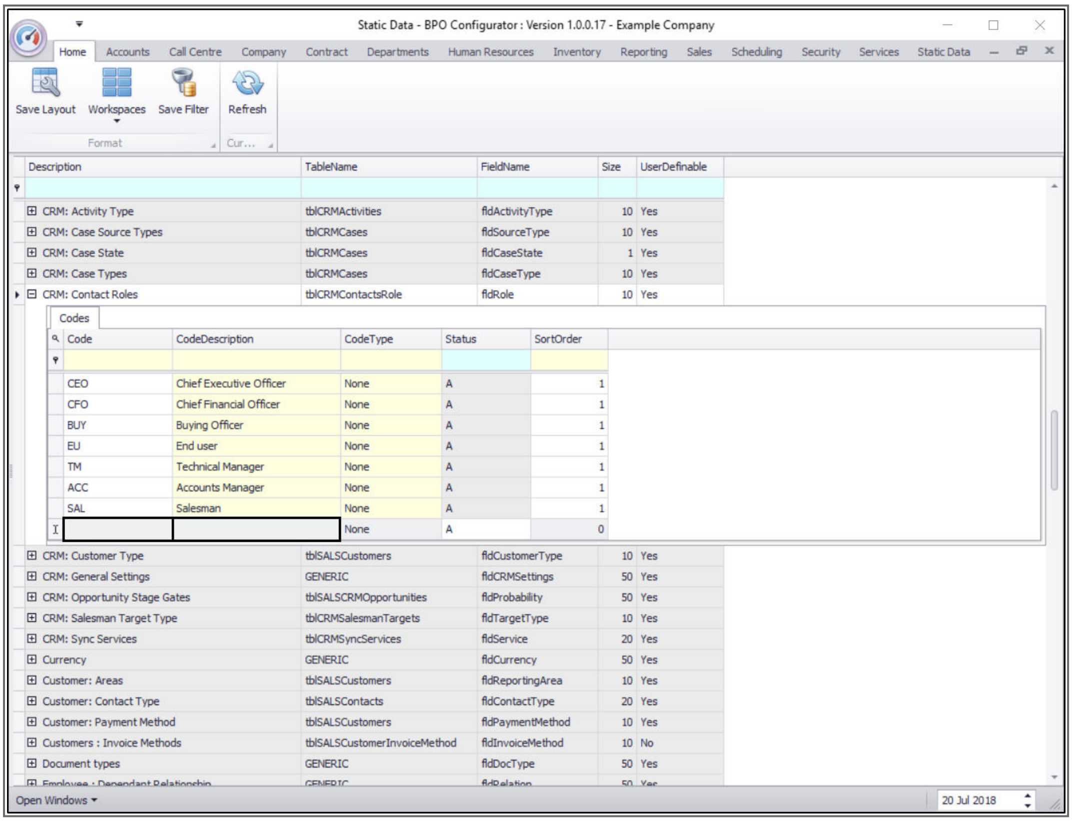
- A ***Process*** menu will pop up.
- Click on ***Add*** - Add New Code.



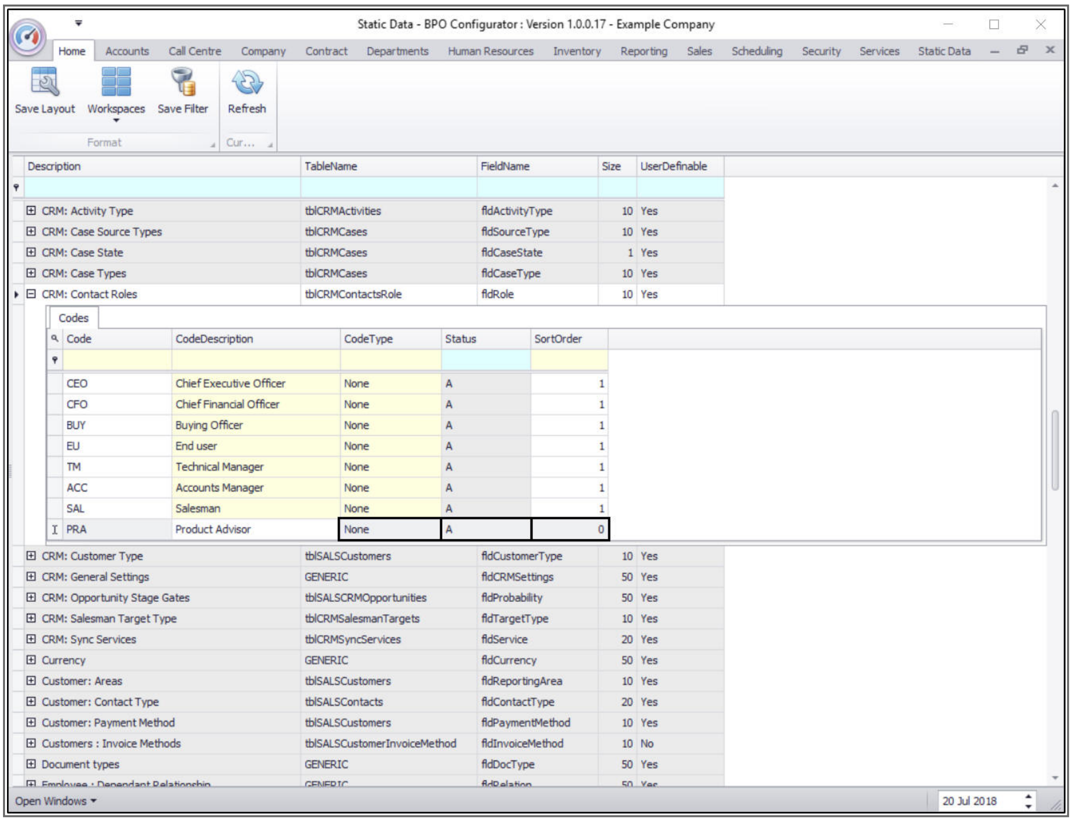
- The ***final row*** in the Codes data grid will now be ***'activated'***.
  - The ***Code Type***, ***Status*** and ***Sort Order*** columns will now be populated.



- **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.

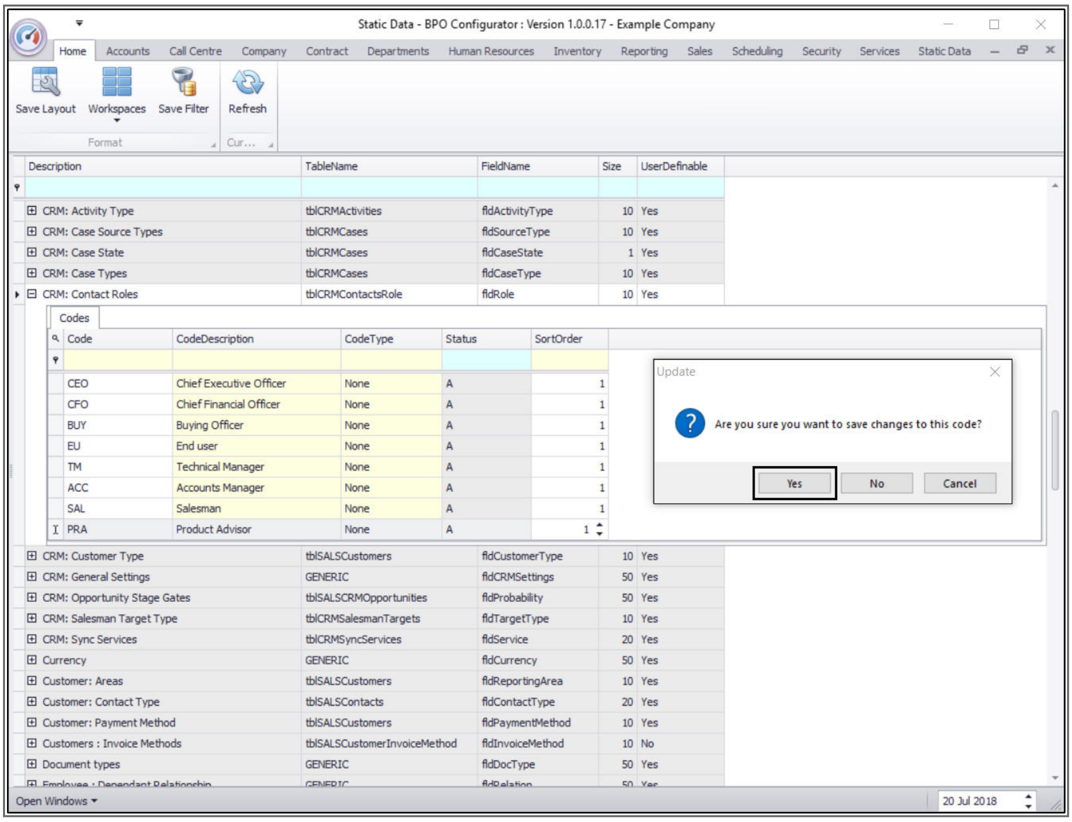


- **Code Type:** This can remain as ***None***.
- **Status:** This will auto populate with ***A*** - Active.
- **Sort Order:** Click in this text box and either type in or use the arrow indicators to select the sort order for this new CRM: Contact Role code.
    - **Note:** The ***sort order*** is the 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.

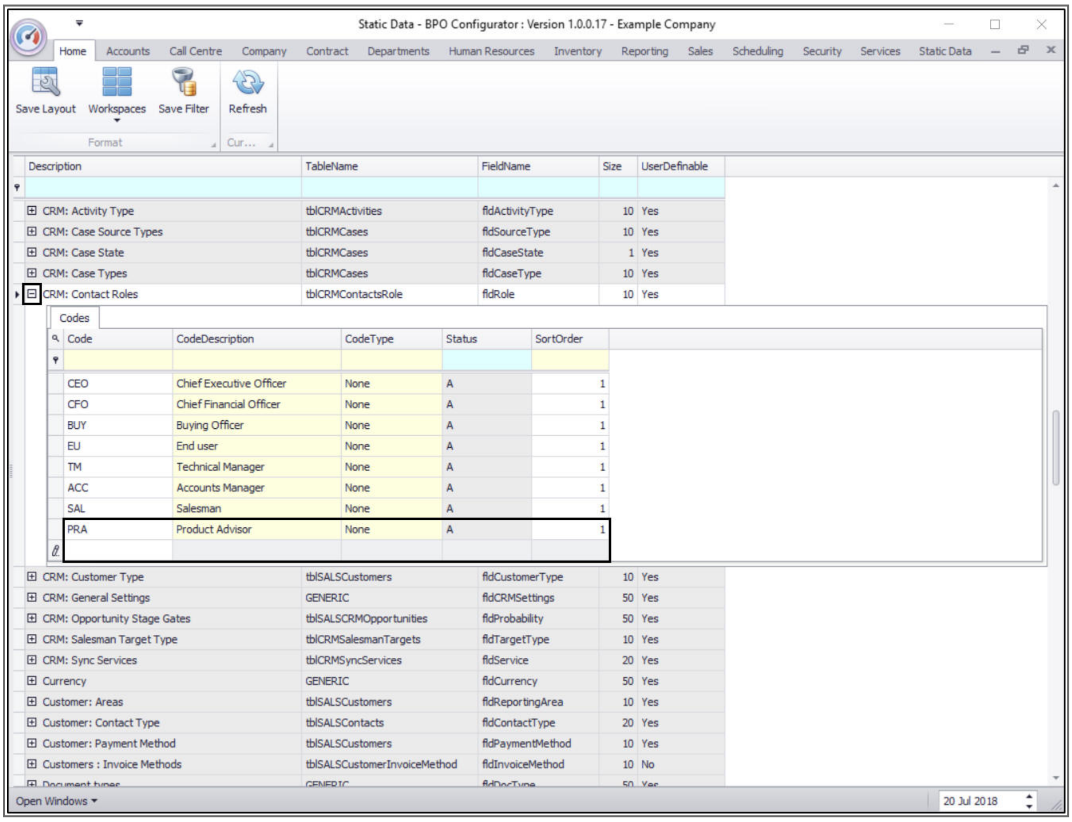


- When you have finished adding the new CRM: Contact Role code details, press ***Enter***.
- An ***Update*** message box will appear, asking;
    - ***Are you sure you want to save changes to this code?***

- Click on ***Yes***.



- 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 - BPO Configurator : Version 1.0.0.17 - Example Company
Home
Accounts
Call Centre
Company
Contract
Departments
Human Resources
Inventory
Reporting
Sales
Scheduling
Security
Services
Static Data
Save Layout
Workspaces
Save Filter
Refresh
Format
Description
TableName
FieldName
Size
UserDefinable
CRM: Activity Type tblCRMActivities fldActivityType 10 Yes
CRM: Case Source Types tblCRMCases fldSourceType 10 Yes
CRM: Case State tblCRMCases fldCaseState 1 Yes
CRM: Case Types tblCRMCases fldCaseType 10 Yes
CRM: Contact Roles tblCRMContactsRole fldRole 10 Yes
Codes
Code
CodeDescription
CodeType
Status
SortOrder
CEO Chief Executive Officer None A 1
CFO Chief Financial Officer None A 1
BUY Buying Officer None A 1
EU End user None A 1
TM Technical Manager None A 1
ACC Accounts Manager None A 1
SAL Salesman None A 1
PRA Product Advisor None A 1
CRM: Customer Type tblSALSCustomers fldCustomerType 10 Yes
CRM: General Settings GENERIC fldCRMSettings 50 Yes
CRM: Opportunity Stage Gates tblSALSCRMOpportunities fldProbability 50 Yes
CRM: Salesman Target Type tblCRMSalesmanTargets fldTargetType 10 Yes
CRM: Sync Services tblCRMSyncServices fldService 20 Yes
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
Open Windows
20 Jul 2018

MNU.108.046