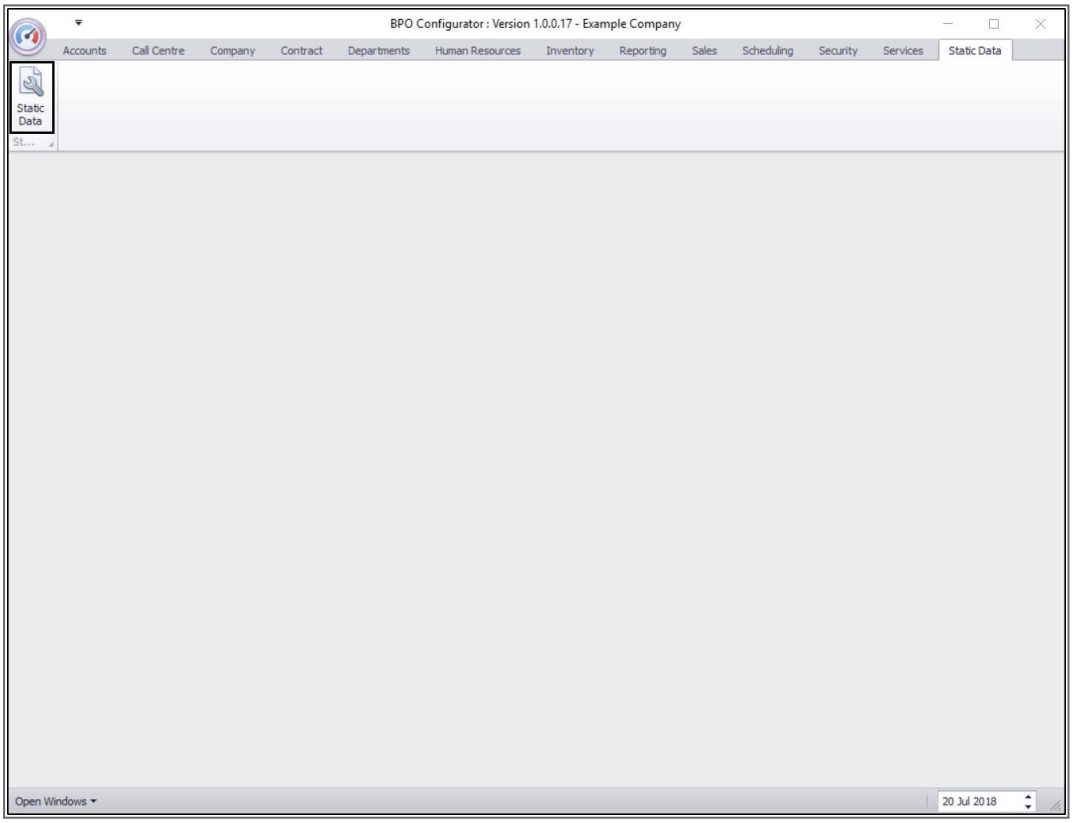
STATIC DATA

STATIC DATA - CUSTOMER: AREAS

Reporting Areas are required for Customers in BPO CRM, but can also be used in BPO without BPO CRM.

These Reporting Areas give you the ability to categorise your clients, or group them into specific physical or otherwise pre-defined areas.

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



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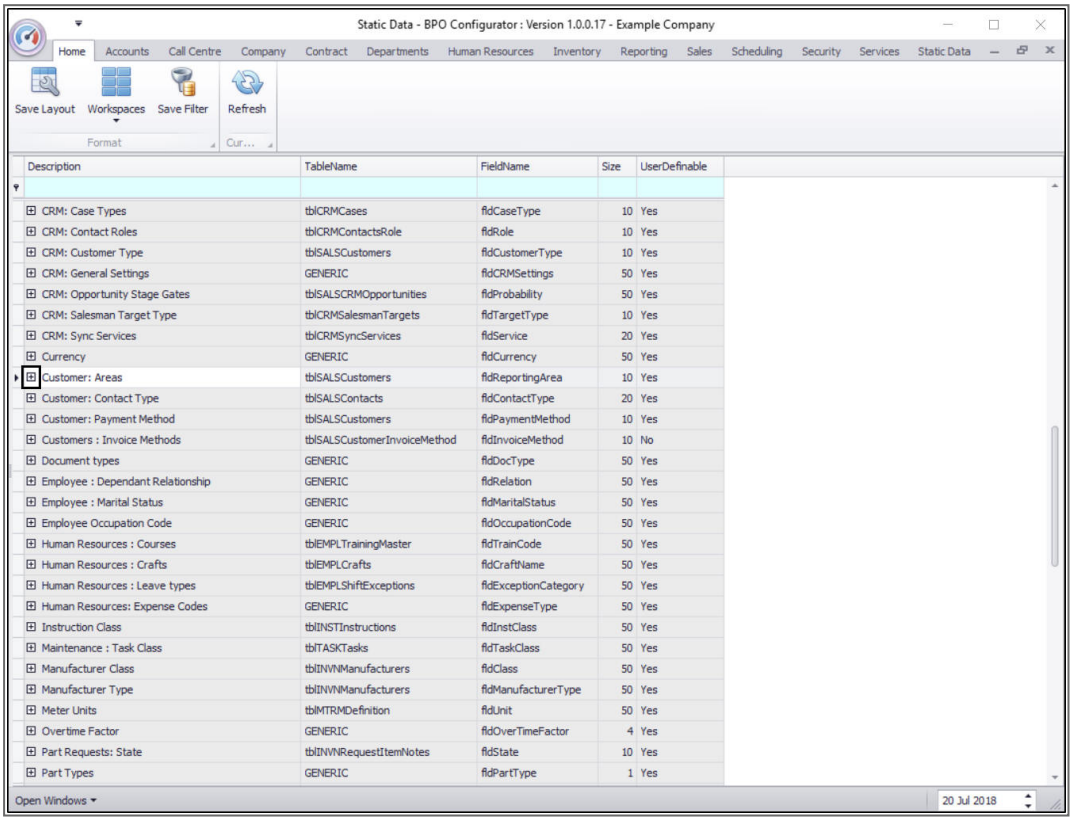
- The ***Static Data*** listing screen will be displayed.
- Use the ***filter row*** or ***scroll down*** the list until you find the ***Customer: Areas*** row.
- Click on the ***expand*** icon in this row.



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

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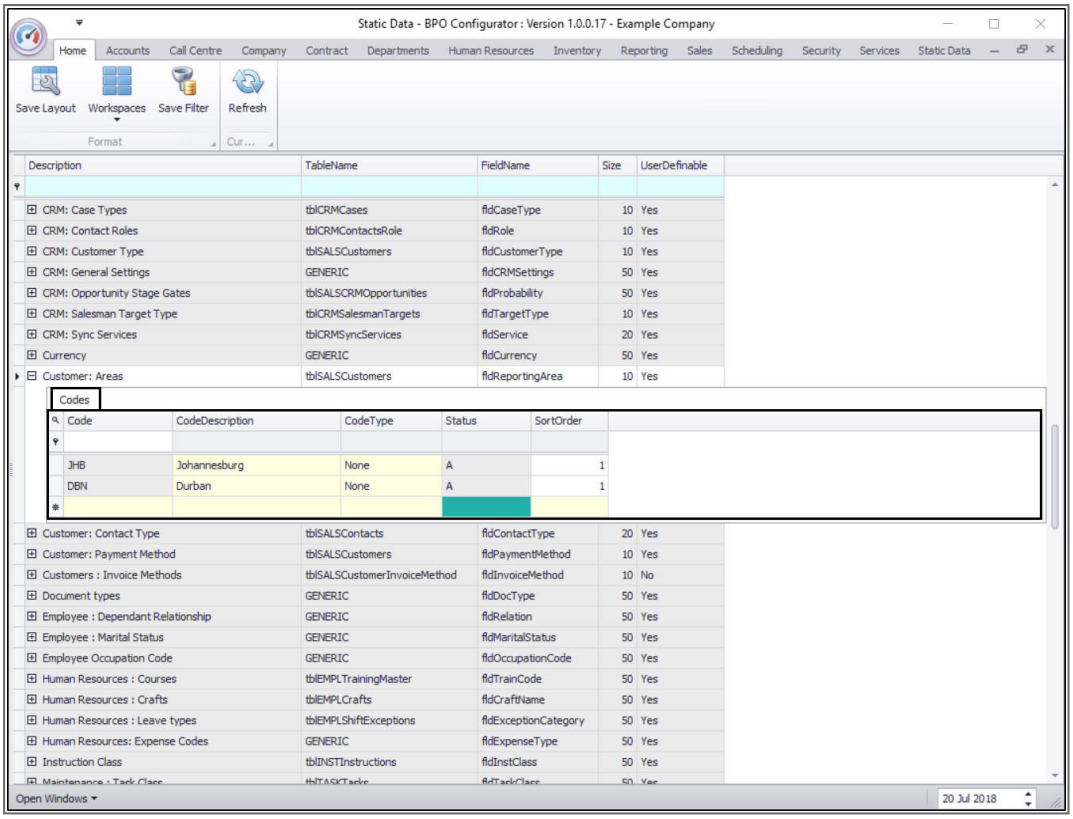

- A ***Process*** menu will pop up.
- Click on ***Add*** - Add New Code.

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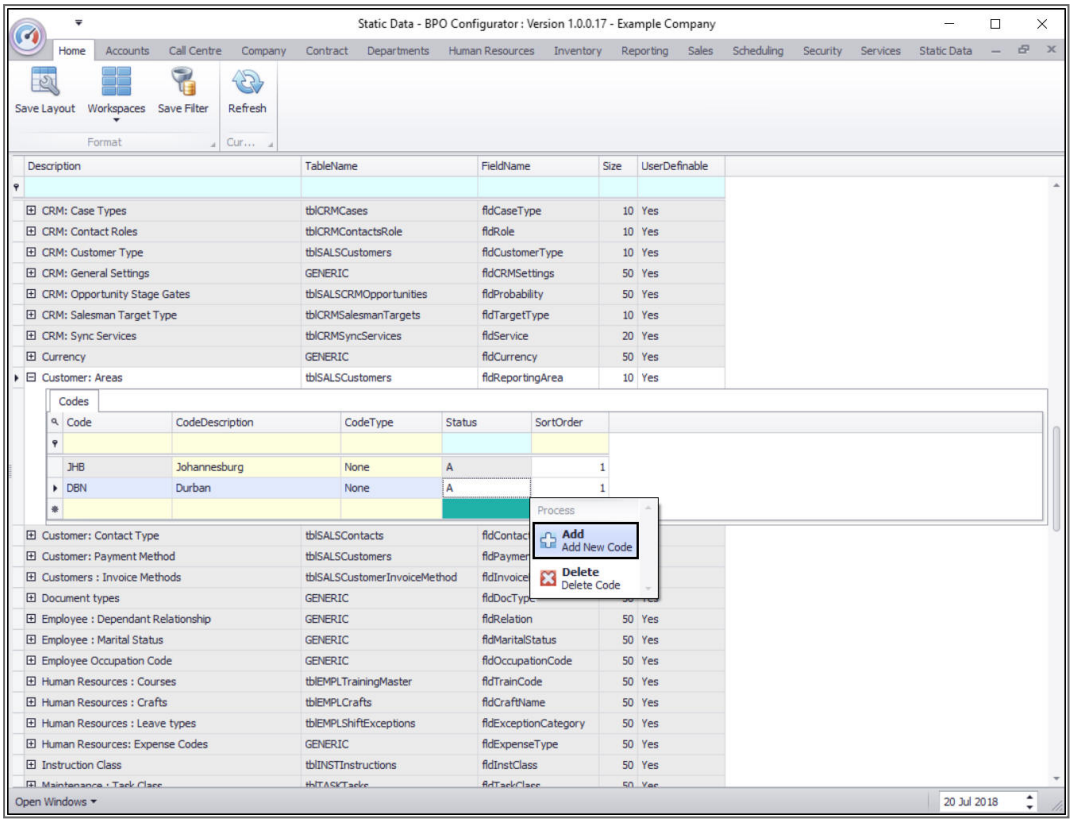

- The ***final row*** in the Codes data grid will now be ***'activated'***.
    - The ***Code Type***, ***Status*** and ***Sort Order*** columns will now be populated.

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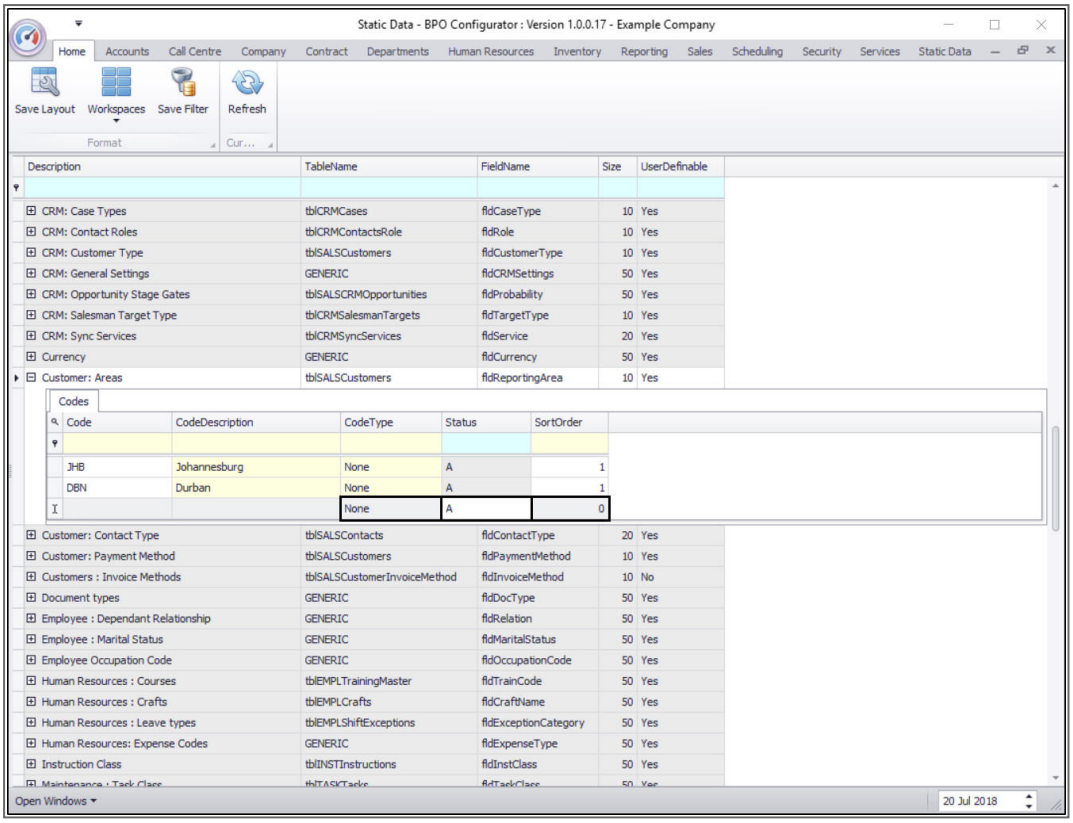

- **Code:** Click in this text box and type in a ***code*** specific for this new Customer: Area.
- **Code Description:** Click in this text box and type in a ***description*** for this new Customer: Area code.

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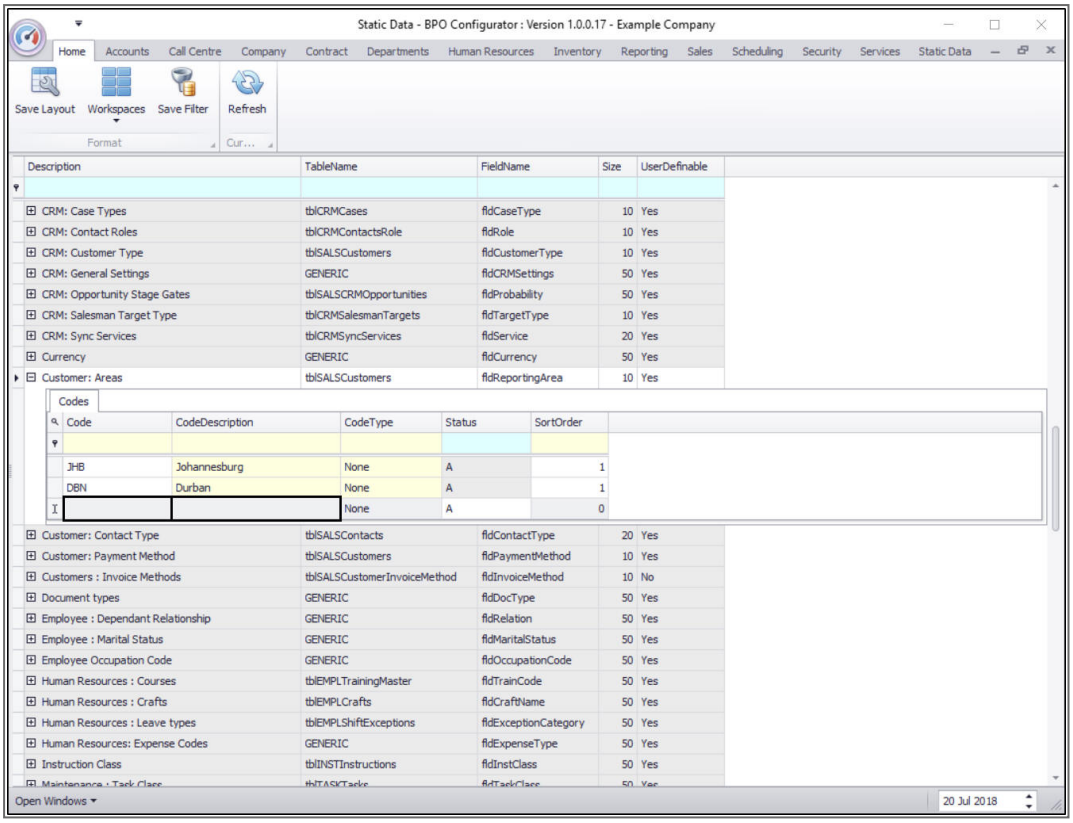

- **Code Type:** This can remain as ***None***.
- **Status:** This will auto populate with ***A*** - Active.
- **Sort Order:** Click in this text box and either type in or use the arrow indicators to select the sort order for this new Customer: Area code.
    - **Note:** The ***sort order*** is the order in which this will appear in the Customer: Area code drop-down list in BPO. If each Customer: Area 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.

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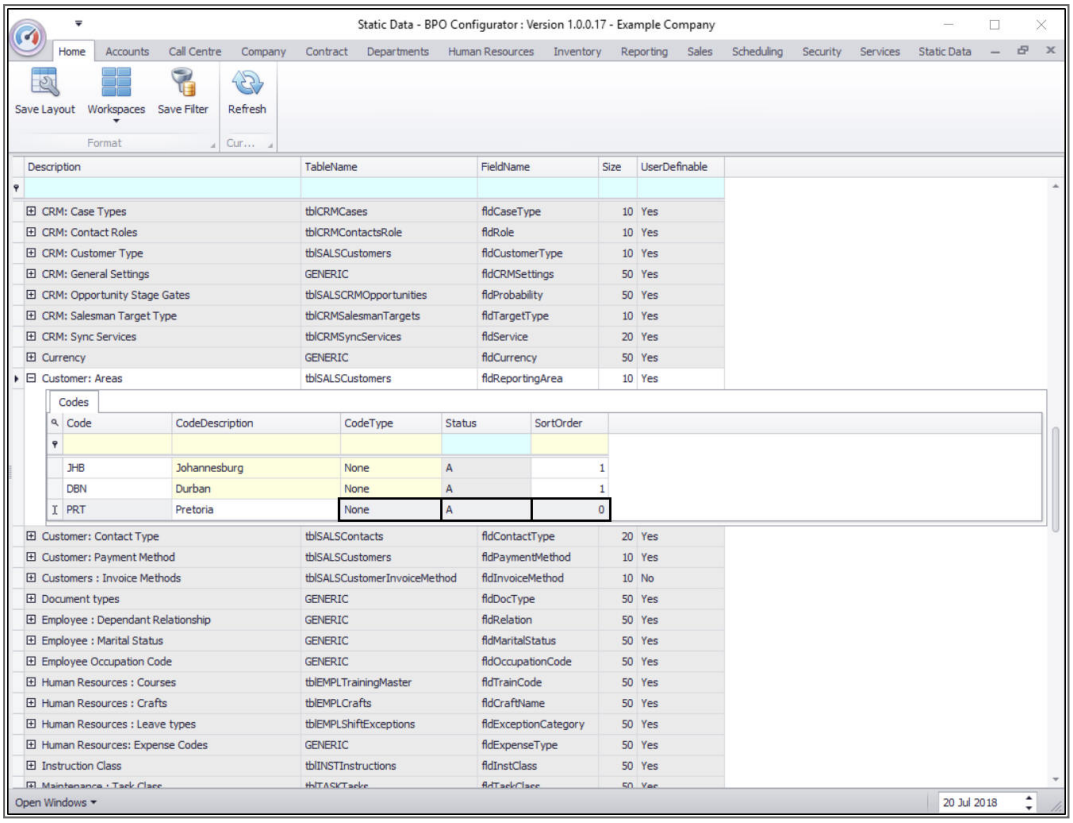

- When you have finished adding the new Customer: Area code details, press ***Enter***.
- An ***Update*** message box will appear, asking;
    - ***Are you sure you want to save changes to this code?***

- Click on ***Yes***.

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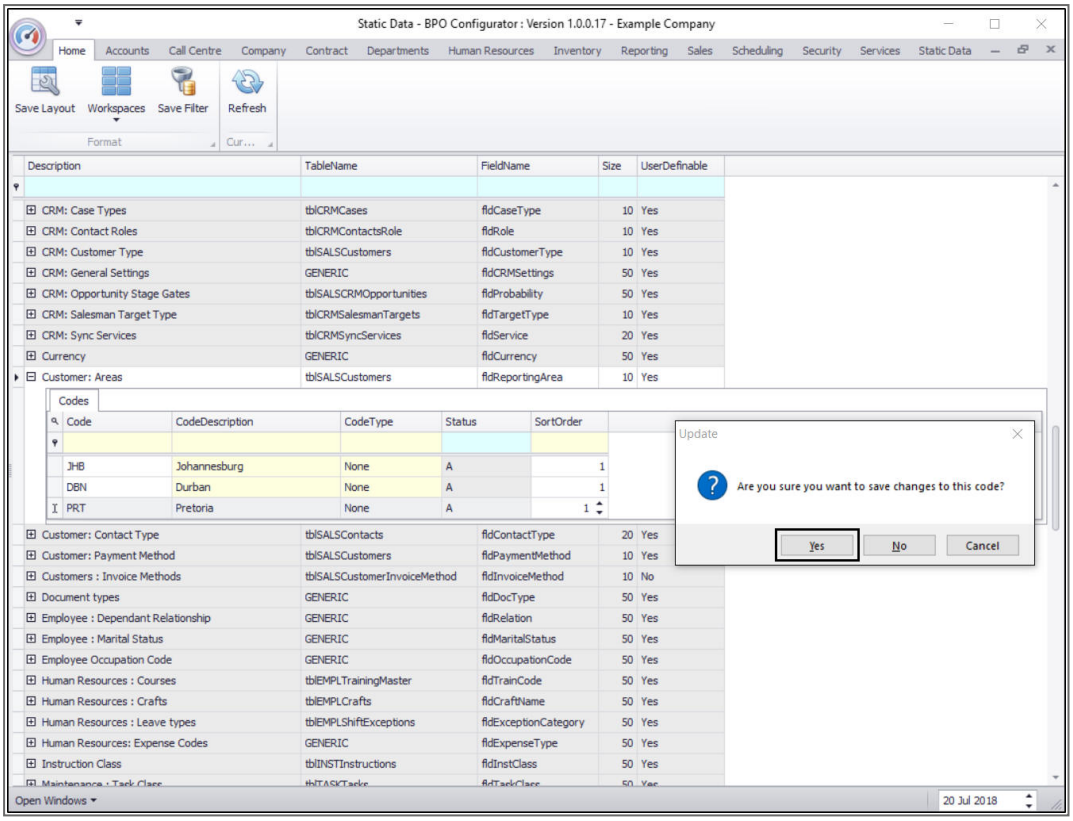

- The new Customer: Area code will be ***saved*** and a ***new row*** will be added to the ***Codes*** data grid.
- ***Collapse*** the Codes frame when you are done.

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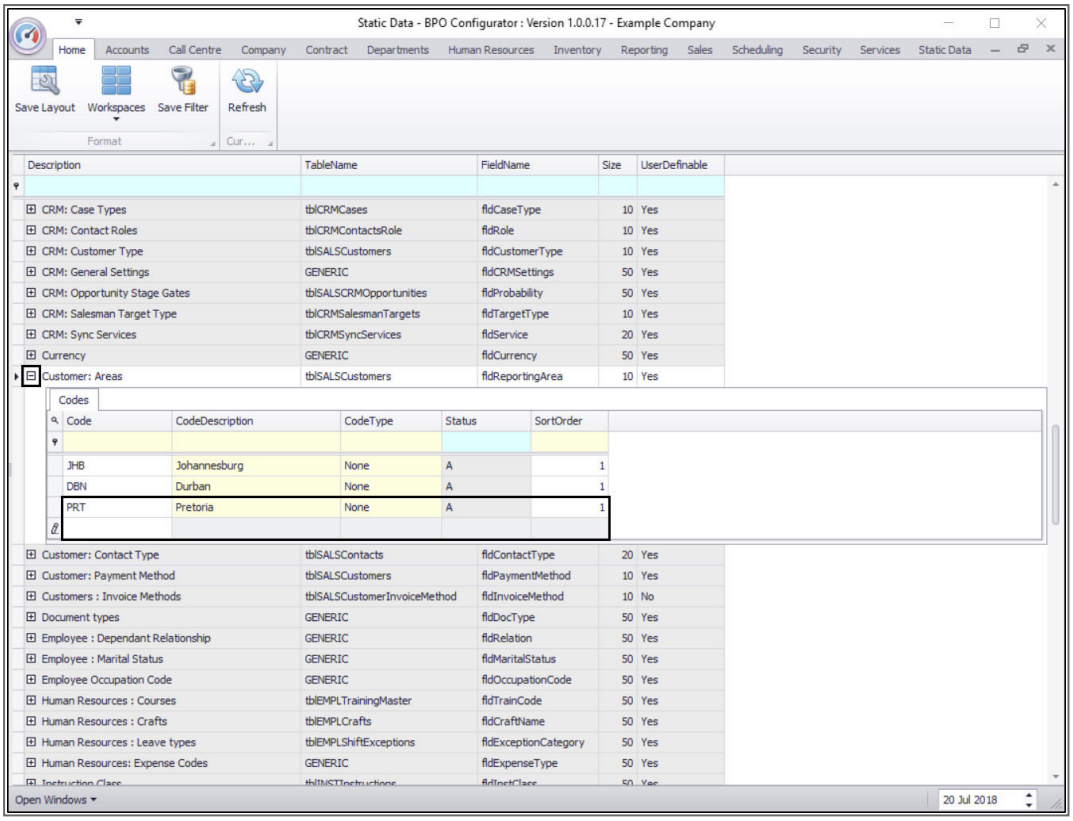

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