

We are currently updating our site; thank you for your patience.

STATIC DATA

STATIC DATA - SALES: CREDIT NOTE REASON

Ribbon Access: Configurator > Static Data> Static Data

STATIC DATA LISTING SCREEN

	Ŧ				BPO Cor	nfigurator : Version 1.	0.0.9 - Exampl	e Company				_		\times
	Accounts	Call Centre	Company	Contract	Departments	Human Resources	Inventory	Reporting	Sales	Scheduling	Security	Services	Static Data	
S														
Static Data														
Data St														
Dun 1	•													
Open W	/indows 🕶											03 /	Apr 2018	1.



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

		igurator : Version 1.0.0.9 -				-		- ×
Home Accounts Call Centre Company	Contract Departments Huma	n Resources Inventory	Reportin	g Sales Scheduling	g Security Services	Static Data	-	B, 1
Description	TableName	FieldName	Size	UserDefinable				
Procurement : Requisition Other Costs	tblPRCHRequisitions	fldPRCostType	50	Yes				
Procurement : Requisition Types	tblPRCHRequisitions	fidPRType	50	Yes				
Procurement : Supplier Class	tblPRCHSuppliers	fldClass	50	Yes				
Procurement : Supplier Type	tblPRCHSuppliers	fldSupplierType	50	Yes				
Project Contact Type	tblPMNGProjectContacts	fldContactType	50	Yes				
Project Methodology Class	tblPMNGMethodology	fldPMMethodClass	50	Yes				
E Reporting : Report Sub Types	tblRPTSSavedReports	fldReportSubType	50	Yes				
Reporting : Report Types	tblRPTSSavedReports	fldReportType	50	Yes				
Gales : Credit Note Reason Codes	tblSALSCrNoteRelatedRefs	fldReferenceID	4	Yes				
	tblSALSAddresses	fldAddressType	4	Yes				
Sales : Document Status	tblSALSInvoices	fldStatus	1	No				
E Sales : Quote detail types	tblSALSQuotesDetails	fldQuoteDetailType	50	Yes				
☑ Sales : Quote payment terms	tblSALSQuoteConfig	fldQuoteTermsCode	10	Yes				
Gales : Quote Status	tblSALSQuotes	fldQuoteStatus	50	Yes				
Gales : Quote Unit Types	tblSALSQuotesDetails	fldQuoteUnitType	50	Yes				
Sales : Quotes Other Costs	tblSALSQuotes	fldQuoteCostType	50	Yes				
Sales : Service Class	GENERIC	fldServiceClass	50	Yes				
Sales : Service Type	GENERIC	fldServiceType	50	Yes				
☑ Sales : Service Unit of Measure	GENERIC	fldUnitofMeasure	50	Yes				
☑ Sales: Credit Terms	tblSALSCustomers	fldCreditTerms	20	Yes				
Stock Adjustments : Reason Code	tblINVNAdjustmentRequest	fldReasonCode	10	Yes				
Task: Day Of Week	tblASMNTaskSchedule	fldDayOfWeek	10	No				
Task: Week Of Month	tblASMNTaskSchedule	fldWeekOfMonth	10	No				
Warranties : Warranty Type	tblWARRWarranty	fldType	10	Yes				
Work Orders : Class	tblWKORWorkOrder	fldWOClass	50	Yes				
Work Orders : Rectification Codes	tblWKORWorkSchedule	fldRectificationCode	10	Yes				
Work Orders : Type	tblWKORWorkOrder	fldWOType	50	Yes				
Work Orders: Work Order Status ■	tblWKORWorkOrder	fldStatus	1	No				

CREDIT NOTE REASON CODES FRAME

- The Sales: Credit Note Reason **Codes** frame will be expanded.
- Here you can view a list of **Sales Credit Note Reason Codes** currently on the system.



•	₹ Home A	Accounts Call Centre Compar			nfigurator : Version 1.0.0 nan Resources Inventor			uling Security Service	s Static Data	 ×
ave La	ayout Wor	÷								
Desc	Forr	mat 🛛 🖌 Cur	TableName		FieldName	Size	UserDefinable			 _
+ P	rocurement	: Reguisition Other Costs	tblPRCHRequi	sitions	fldPRCostType	50) Yes			
		: Requisition Types	tblPRCHRequi		fldPRType) Yes			
		: Supplier Class	tblPRCHSuppli	ers	fldClass	50	Yes			
ΞP	rocurement	: Supplier Type	tblPRCHSuppli	ers	fldSupplierType	50	Yes			
ΞP	roject Conta	act Type	tblPMNGProje	ctContacts	fldContactType	50	Yes			
ΞP	roject Metho	odology Class	tblPMNGMetho	odology	fldPMMethodClass	50	Yes			
± R	eporting : R	eport Sub Types	tblRPTSSaved	Reports	fldReportSubType	50) Yes			
ΞR	leporting : R	eport Types	tblRPTSSaved	Reports	fldReportType	50) Yes			
ΞS	ales : Credit	Note Reason Codes	tblSALSCrNote	RelatedRefs	fldReferenceID	4	Yes			
	Codes									
	۹ Code	CodeDescription	CodeType	Status	SortOrder					
	٩									
	▶ 1	Order Cancelled	None	A	1					
	2	Incorrect Selling Price	None	A	2					
	3	Technician Fault	None	A	3					
	4	Within service contract	None	A	4					
	*	Incorrect part	None	A	5					
± s	ales : Custo	mer addresses	tblSALSAddre	sses	fldAddressType	4	ł Yes			
÷ S	ales : Docum	nent Status	tblSALSInvoice	es	fldStatus	1	L No			
		detail types	tblSALSQuote		fldQuoteDetailType) Yes			
		payment terms	tblSALSQuote	-	fldQuoteTermsCod		Yes			
	ales : Quote		tblSALSQuote		fldQuoteStatus) Yes			
	ales : Quote		tblSALSQuote		fldQuoteUnitType		Yes			
		s Other Costs	tblSALSQuote	s	fldQuoteCostType		Yes			
	ales : Servic		GENERIC		fldServiceClass		Yes			
	ales : Servic		GENERIC		fldServiceType		Yes			
±S	ales : Servic Nindows ▼	e Unit of Measure	GENERIC		fldUnitofMeasure	50) Yes		03 Apr 3	_

ADD NEW REASON CODE

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



2	-					Static Da	ta - BPO Cor	nfigurator : Version 1.0.0.9	- Example	Company			-		>
9	Home	Accounts	Call Centre	Company	Contra	ct Depart	ments Hum	an Resources Inventory	Reportin	ig Sales So	heduling Se	ecurity Services	Static Data	-	Ð
ave	Layout W	/orkspaces	Save Filter	Refresh											
De	scription	ormat	4	Cur ∡	Table	eName		FieldName	Size	UserDefinable					_
	Procuremen	nt : Requisiti	on Other Cost	c .	thipp	CHRequisiti	nns	fldPRCostType	50	Yes					
		nt : Requisiti		-		CHRequisiti		fldPRType		Yes					
		nt : Supplier				CHSuppliers		fldClass	50	Yes					
ŧ	Procuremen	nt : Supplier	Туре		tblPR	CHSuppliers		fldSupplierType	50	Yes					
ŧ	Project Cor	ntact Type			tblPN	INGProjectC	ontacts	fldContactType	50	Yes					
Ŧ	Project Met	thodology Cl	ass		tblPN	INGMethodo	logy	fldPMMethodClass	50	Yes					
ŧ	Reporting :	Report Sub	Types		tblRF	TSSavedRe	ports	fldReportSubType	50	Yes					
Ŧ	Reporting :	Report Typ	es		tblRF	TSSavedRe	ports	fldReportType	50	Yes					
Ξ	Sales : Cree	dit Note Rea	son Codes		tblsA	ALSCrNoteRe	atedRefs	fldReferenceID	4	Yes					
	Codes														
	۹ Code	Code	eDescription		(CodeType	Status	SortOrder							
	۴														
	1	Orde	er Cancelled		1	None	A	1							
	2	Inco	rrect Selling Pr	ice	1	None	A	2							
	▶ 3	Tech	nician Fault		1	None	A	3	-						
	4	With	in service cont	tract	1	None	Α	Process	1						
	5	Inco	rrect part		1	None	A	Add New Code							
	*														
Ŧ	Sales : Cus	tomer addre	sses		tblSA	ALSAddresse	s	Delete Code	4	Yes					
	Sales : Doc	ument Statu	IS		tblsA	ALSInvoices		ndstatus	1	No					
ŧ	Sales : Quo	te detail typ	les		tblsA	ALSQuotesD	etails	fldQuoteDetailType	50	Yes					
ŧ	Sales : Quo	te payment	terms		tblsA	ALSQuoteCo	nfig	fldQuoteTermsCode	10	Yes					
ŧ	Sales : Quo	te Status			tblsA	ALSQuotes		fldQuoteStatus	50	Yes					
ŧ	Sales : Quo	te Unit Type	es		tblsA	ALSQuotesD	etails	fldQuoteUnitType	50	Yes					
	Sales : Quo	tes Other O	osts		tblsA	ALSQuotes		fldQuoteCostType	50	Yes					
Ŧ	Sales : Serv	vice Class			GENE	ERIC		fldServiceClass	50	Yes					
ŧ	Sales : Serv	vice Type			GENE	ERIC		fldServiceType	50	Yes					
Ŧ	Sales : Serv	vice Unit of M	Measure		GENE	ERIC		fldUnitofMeasure	50	Yes					

- 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	-			Static Da	ta - BPO Co	nfigurator : Version 1.0.0.9	9 - Example	Company		-		×
9	Home A	ccounts Call Centre C	Company Co	ntract Depart	ments Hun	nan Resources Inventory	Reportin	ig Sales Schedi	uling Security Se	rvices Static Data	-	8
	23		EP									
ave	Layout Work	spaces Save Filter R	efresh									
	Form	•	ur ,									
D	escription			TableName		FieldName	Size	UserDefinable				
De	escription			ablename		Fieldiname	Size	UserDefinable				
	Dreg wamant i	Requisition Other Costs		tblPRCHRequisit	iene	fldPRCostType	50	Yes				
		Requisition Types		tblPRCHRequisit		fidPRType		Yes				
	Procurement :			tblPRCHSupplier		fldClass		Yes				
	Procurement :			tblPRCHSupplier		fldSupplierType		Yes				
	Project Contac			tblPMNGProject		fldContactType		Yes				
	Project Metho			tblPMNGMethod		fidPMMethodClass		Yes				
ŧ	Reporting : Re	port Sub Types		tblRPTSSavedRe	ports	fldReportSubType	50	Yes				
Ŧ	Reporting : Re	port Types		tblRPTSSavedRe	ports	fldReportType	50	Yes				
-	Sales : Credit I	Note Reason Codes		tblSALSCrNoteR	elatedRefs	fldReferenceID	4	Yes				
	Codes											
	۹ Code	CodeDescription		CodeType	Status	SortOrder						
	9											
	1	Order Cancelled		None	A	1						
	2	Incorrect Selling Price		None	A	2						
	3	Technician Fault		None	A	3						
	4	Within service contract	t	None	A	4						
	5	Incorrect part		None	A	5						
	I			None	Α	0						
ŧ	Sales : Custom	ner addresses		tblSALSAddress	es	fldAddressType	4	Yes				
	Sales : Docume	ent Status		tblSALSInvoices		fldStatus	1	l No				
ŧ	Sales : Quote	detail types		tblSALSQuotesD	etails	fldQuoteDetailType	50	Yes				
ŧ	Sales : Quote	payment terms		tblSALSQuoteCo	nfig	fldQuoteTermsCode	10	Yes				
ŧ	Sales : Quote	Status		tblSALSQuotes		fldQuoteStatus	50	Yes				
Ŧ	Sales : Quote	Unit Types		tblSALSQuotesD	etails	fldQuoteUnitType	50	Yes				
	Sales : Quotes	Other Costs		tblSALSQuotes		fldQuoteCostType	50	Yes				
ŧ	Sales : Service	Class	1	GENERIC		fldServiceClass	50	Yes				
ŧ	Sales : Service	Туре		GENERIC		fldServiceType	50	Yes				
Ŧ	Sales : Service	Unit of Measure		GENERIC		fldUnitofMeasure	50	Yes			_	

- **Code:** Click in this text box and type in a code specific for this sales credit note reason.
- **Code Description:** Click in this text box and type in a description for this new sales credit note reason code.



1		₹ Home Ac	counts Call Centre	Company				nfigurator : Version				heduling	Security	Services	Static Data	-	8
ave	Lay	rout Work	•	Refresh							-	-					
De	escrip	ption		com a	Table	lame		FieldName		Size	UserDefinable	2					_
	Pro	curement :	Requisition Other Cos	ts	tblPRC	HRequisition	s	fldPRCostTy	pe	50	Yes						
Ŧ	Pro	curement :	Requisition Types		tblPRC	HRequisition	s	fldPRType		50	Yes						
ŧ	Pro	curement :	Supplier Class		tblPRC	HSuppliers		fldClass		50	Yes						
÷	Pro	curement :	Supplier Type		tblPRC	HSuppliers		fldSupplierTy	/pe	50	Yes						
ŧ	Proj	ject Contac	t Type		tblPMN	IGProjectCor	ntacts	fldContactTy	/pe	50	Yes						
ŧ	Proj	ject Method	lology Class		tblPMN	GMethodolo	gy	fldPMMethod	Class	50	Yes						
ŧ	Rep	porting : Re	port Sub Types		tbiRPT	SSavedRepo	rts	fldReportSub	Туре	50	Yes						
ŧ	Rep	porting : Re	port Types		tbiRPT	SSavedRepo	rts	fldReportTyp	be	50	Yes						
Ξ	Sale	es : Credit N	lote Reason Codes		tblSAL	SCrNoteRela	tedRefs	fldReference	ID	4	Yes						
		Codes															
	٩	Code	CodeDescription		Co	deType	Status	SortOrder									
	٩																
		1	Order Cancelled		No	ne	A	1									
		2	Incorrect Selling P	rice	No	ne	A	2									
		3	Technician Fault		No	ne	A	3									
		4	Within service con	ntract	No	one	A	4									
		5	Incorrect part		No	one	A	5									
	I				No	ne	A	0									
ŧ	Sale	es : Custom	er addresses		tblSAL	SAddresses		fldAddressTy	/pe	4	Yes						
	Sale	es : Docume	ent Status		tblSAL	SInvoices		fldStatus		1	No						
ŧ	Sale	es : Quote d	detail types		tblSAL	SQuotesDeta	ails	fldQuoteDet	ailType	50	Yes						
ŧ	Sale	es : Quote p	payment terms		tblSAL	SQuoteConfi	g	fldQuoteTerr	msCode	10	Yes						
ŧ	Sale	es : Quote S	Status		tblSAL	SQuotes		fldQuoteStat	tus	50	Yes						
ŧ	Sale	es : Quote l	Jnit Types		tblSAL	SQuotesDeta	ails	fldQuoteUnit	Type	50	Yes						
	Sale	es : Quotes	Other Costs		tblSAL	SQuotes		fldQuoteCos	tType	50	Yes						
ŧ	Sale	es : Service	Class		GENER	UC		fldServiceCla	ISS	50	Yes						
ŧ	Sale	es : Service	Туре		GENER	UC		fldServiceTyp	pe	50	Yes						
Ŧ	Sale	es : Service	Unit of Measure		GENER	IC		fldUnitofMea	isure	50	Yes						

- 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 note reason code.
 - Note: The sort order is the order in which this will appear in the sales credit note reason code drop-down list in Nucleus Service. If each sales credit note reason code has the number 1, then the drop-down list will usually default to an alphabetical order in Nucleus Service. If, for example, it is



numbered **6**, then it will appear **6th** in the drop-down list in Nucleus Service.

9	Home Ad	counts Call Centre Company	Contrac	t Depart	nents Hum	an Resources Inventor	y Reportin	ig Sales Sche	duling Security	Services	Static Data	 8
ve	Layout Work	spaces Save Filter										
De	escription		Table	Name		FieldName	Size	UserDefinable				
	Procurement :	Requisition Other Costs	tblPR	CHRequisitio	ons	fldPRCostType	50	Yes				
÷	Procurement :	Requisition Types	tblPR	CHRequisitio	ons	fldPRType	50	Yes				
ŧ	Procurement :	Supplier Class	tblPR	CHSuppliers		fldClass	50	Yes				
÷	Procurement :	Supplier Type	tblPR	CHSuppliers		fldSupplierType	50	Yes				
÷	Project Contac	t Type	tblpm	INGProjectC	ontacts	fldContactType	50	Yes				
	Project Method			INGMethodo		fldPMMethodClass		Yes				
		port Sub Types		TSSavedRe		fldReportSubType		Yes				
	Reporting : Re			TSSavedRe		fldReportType		Yes				
-	Sales : Credit !	Note Reason Codes	tblSA	LSCrNoteRe	latedRefs	fldReferenceID	4	Yes				
	Codes											
	۹ Code	CodeDescription	C	CodeType	Status	SortOrder						
	٩											
	1	Order Cancelled	N	lone	A	1						
	2	Incorrect Selling Price	N	None	A	2						
	3	Technician Fault	N	lone	A	3						
	4	Within service contract	N	lone	A	4						
	5	Incorrect part	N	lone	A	5						
	I 6	Over Supply	N	lone	A	0. 🗘						
Ŧ	Sales : Custom	er addresses	tblSA	LSAddresse	s	fidAddressType	4	Yes				
	Sales : Docume	ent Status	tblSA	LSInvoices		fldStatus	1	No				
÷	Sales : Quote	detail types	tblSA	LSQuotesDe	tails	fidQuoteDetailType	50	Yes				
Ŧ	Sales : Quote	payment terms	tblSA	LSQuoteCor	nfig	fidQuoteTermsCod	e 10	Yes				
Ŧ	Sales : Quote !	Status	tblSA	LSQuotes		fldQuoteStatus	50	Yes				
÷	Sales : Quote I	Unit Types	tblSA	LSQuotesDe	tails	fldQuoteUnitType	50	Yes				
	Sales : Quotes	Other Costs	tblSA	LSQuotes		fldQuoteCostType	50	Yes				
ŧ	Sales : Service	Class	GENE	RIC		fldServiceClass	50	Yes				
Đ	Sales : Service	Туре	GENE	RIC		fldServiceType	50	Yes				
Ŧ	Salas : Service	Unit of Measure	GENE	RIC		fldUnitofMeasure	50	Yes				

SAVE NEW REASON CODE

- When you have finished adding the new sales credit note reason 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.



	-			Static Da	ta - BPO Cor	figurator : Version 1.0	.0.9 - Examp	le Company				-			×
Ľ	Home Ac	counts Call Centre Compan	y Contr	act Depart	ments Hum	an Resources Invent	ory Report	ing Sales	Scheduling	g Security	Services	Static Data	-	8	
ave L	Layout Work	spaces Save Filter													
Des	scription			leName		FieldName	Size	UserDefin	able						
E F	Procurement :	Reguisition Other Costs	the	RCHRequisiti	ons	fldPRCostType		i0 Yes							
		Requisition Types		RCHRequisiti		fidPRType		i0 Yes							
	Procurement :			RCHSupplier		fldClass	5	i0 Yes							
Ð F	Procurement :	Supplier Type	tblF	RCHSuppliers	;	fldSupplierType	5	0 Yes							
	Project Contac		tblF	PMNGProjectC	ontacts	fldContactType	5	i0 Yes							
ŧ	Project Method	ology Class	tblF	MNGMethodo	logy	fldPMMethodClas	is 5	i0 Yes							
± F	Reporting : Rep	port Sub Types	tblF	RPTSSavedRe	ports	fldReportSubTyp	e 5	i0 Yes							
ŧ	Reporting : Rep	port Types	tblF	RPTSSavedRe	ports	fldReportType	5	i0 Yes							
Ξ 5	Sales : Credit N	lote Reason Codes	tbls	SALSCrNoteRe	elatedRefs	fldReferenceID		4 Yes							
	9 1 2	Order Cancelled Incorrect Selling Price		None	A	1 2	?	Are you su	re you war	nt to save ch	anges to th	nis code?			
	3	Technician Fault		None	A	3			M			Cancel			
	4	Within service contract		None	Α	4			<u>Y</u> es	No		Cancel			
	5	Incorrect part		None	A	5									
	I 6	Over Supply		None	A	6 韋									
± 5	Sales : Custom	er addresses	tbls	SALSAddresse	s	fldAddressType		4 Yes							
+ 5	Sales : Docume	ent Status	tbls	SALSInvoices		fldStatus		1 No							
	Sales : Quote d			SALSQuotesD		fldQuoteDetailTy		i0 Yes							
		payment terms		SALSQuoteCo	nfig	fldQuoteTermsCo		0 Yes							
	Sales : Quote S			SALSQuotes		fldQuoteStatus		i0 Yes							
	Sales : Quote L			SALSQuotesD	etails	fldQuoteUnitTyp		i0 Yes							
	Sales : Quotes Sales : Service			SALSQuotes		fldQuoteCostTyp fldServiceClass		i0 Yes i0 Yes							
	Sales : Service Sales : Service			NERIC		fldServiceType		i0 Yes							
		Unit of Measure		NERIC		fldUnitofMeasure		i0 Yes							
	Windows -	onit of Medaure	GEI	ILPO C		nuonitorneasure		165				03 Apr			1

- The new sales credit note reason code details will be **saved** and a **new row** will be added to the **Codes** data grid.
- **Collapse** the Codes frame.



Sales Credit Note Reason

9	₩ Home Acc	counts Call Centre Company	Contra			figurator : Version 1.0.0 an Resources Inventor			Scheduling	Security	Services	Static Data	-	× 8
ave L	ayout Works	spaces Save Filter Refresh					, ,	-	-					
Des	cription		Tab	leName		FieldName	Size	UserDefina	able					_
+ P	Procurement : R	Requisition Other Costs	tblP	RCHRequisitio	ons	fldPRCostType	50	Yes						
ΞP	Procurement : F	Requisition Types	tblP	RCHRequisitio	ons	fldPRType	50	Yes						
±Ρ	Procurement : S	Supplier Class	tblP	RCHSuppliers		fldClass	50	Yes						
± P	Procurement : S	Supplier Type	tblP	RCHSuppliers		fldSupplierType	50	Yes						
÷Ρ	Project Contact	t Type	tblP	MNGProjectC	ontacts	fldContactType	50	Yes						
±Ρ	Project Method	ology Class	tblP	MNGMethodo	logy	fldPMMethodClass	50	Yes						
± R	Reporting : Rep	oort Sub Types	tblR	PTSSavedRe	ports	fldReportSubType	50	Yes						
± R	Reporting : Rep	port Types	tblR	PTSSavedRe	ports	fldReportType	50	Yes						
Ξs	Sales : Credit N	ote Reason Codes	tbls	ALSCrNoteRe	latedRefs	fldReferenceID	4	Yes						
	Codes													
	۹ Code	CodeDescription		CodeType	Status	SortOrder								
	9													
	1	Order Cancelled		None	Α	1								
	2	Incorrect Selling Price		None	Α	2								
	3	Technician Fault		None	Α	3								
	4	Within service contract		None	Α	4								
	5	Incorrect part		None	A	5								
	6	Over Supply		None	A	6								
	a.													
± s	Sales : Custome	er addresses	tbls	ALSAddresse	s	fldAddressType	4	Yes						
÷ 5	Sales : Documer	nt Status	tbls	ALSInvoices		fldStatus	1	No						
± s	Sales : Quote d	etail types	tbls	ALSQuotesDe	tails	fldQuoteDetailTyp	e 50	Yes						
	Sales : Quote p			ALSQuoteCor	nfig	fldQuoteTermsCod		Yes						
	Sales : Quote S			ALSQuotes		fldQuoteStatus		Yes						
	Sales : Quote U			ALSQuotesDe	tails	fldQuoteUnitType		Yes						
	Sales : Quotes (ALSQuotes		fldQuoteCostType		Yes						
	Sales : Service (IERIC		fldServiceClass		Yes						
± 5	Sales : Service 1	Type	GEN	IERIC		fldServiceType	50	Yes						

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