

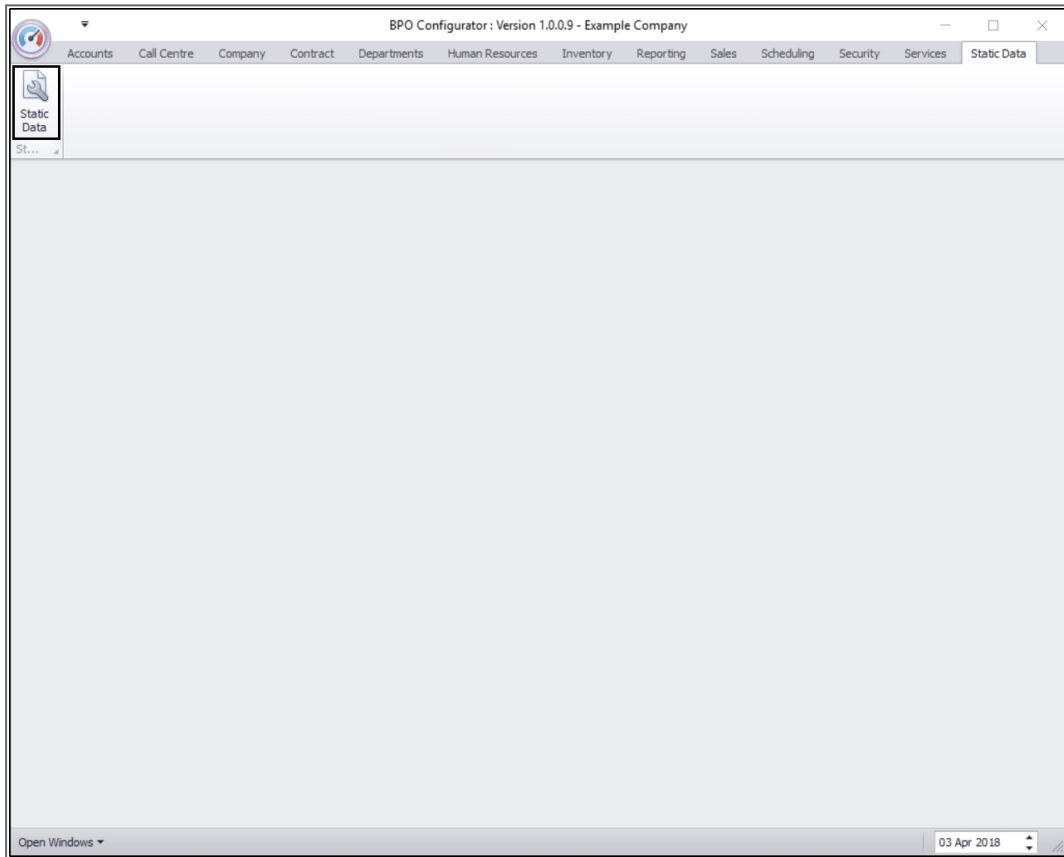
We are currently updating our site; thank you for your patience.

STATIC DATA

STATIC DATA – SALES: CREDIT NOTE REASON

Ribbon Access: Configurator > Static Data> Static Data

STATIC DATA LISTING SCREEN



- 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.

Description	TableName	FieldName	Size	UserDefinable
Procurement : Requisition Other Costs	tbPRCHRequisitions	fldPRCostType	50	Yes
Procurement : Requisition Types	tbPRCHRequisitions	fldPRType	50	Yes
Procurement : Supplier Class	tbPRCHSuppliers	fldClass	50	Yes
Procurement : Supplier Type	tbPRCHSuppliers	fldSupplierType	50	Yes
Project Contact Type	tbPMMNGProjectContacts	fldContactType	50	Yes
Project Methodology Class	tbPMMNGMethodology	fldPMMMethodClass	50	Yes
Reporting : Report Sub Types	tbIRPTSSavedReports	fldReportSubType	50	Yes
Reporting : Report Types	tbIRPTSSavedReports	fldReportType	50	Yes
Sales : Credit Note Reason Codes	tbSALScriNoteRelatedRefs	fldReferenceID	4	Yes
Sales : Customer addresses	tbSALSAddresses	fldAddressType	4	Yes
Sales : Document Status	tbSALSInvoices	fldStatus	1	No
Sales : Quote detail types	tbSALSQuotesDetails	fldQuoteDetailType	50	Yes
Sales : Quote payment terms	tbSALSQuoteConfig	fldQuoteTermsCode	10	Yes
Sales : Quote Status	tbSALSQuotes	fldQuoteStatus	50	Yes
Sales : Quote Unit Types	tbSALSQuotesDetails	fldQuoteUnitType	50	Yes
Sales : Quotes Other Costs	tbSALSQuotes	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	tbSALSCustomers	fldCreditTerms	20	Yes
Stock Adjustments : Reason Code	tbINWNAdjustmentRequest	fldReasonCode	10	Yes
Task: Day Of Week	tbASMNTaskSchedule	fldDayOfWeek	10	No
Task: Week Of Month	tbASMNTaskSchedule	fldWeekOfMonth	10	No
Warranties : Warranty Type	tbWARRWarranty	fldType	10	Yes
Work Orders : Class	tbWKORWorkOrder	fldWOClass	50	Yes
Work Orders : Rectification Codes	tbWKORWorkSchedule	fldRectificationCode	10	Yes
Work Orders : Type	tbWKORWorkOrder	fldWOTType	50	Yes
Work Orders : Work Order Status	tbWKORWorkOrder	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.

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Home Accounts Call Centre Company Contract Departments Human Resources Inventory Reporting Sales Scheduling Security Services Static Data

Save Layout Workspaces Save Filter Refresh

Description	TableName	FieldName	Size	UserDefinable
Procurement : Requisition Other Costs	tblPRCHRequisitions	fldPRCostType	50	Yes
Procurement : Requisition Types	tblPRCHRequisitions	fldPRTType	50	Yes
Procurement : Supplier Class	tblPRCHSuppliers	fldClass	50	Yes
Procurement : Supplier Type	tblPRCHSuppliers	fldSupplierType	50	Yes
Project Contact Type	tblPMMNGProjectContacts	fldContactType	50	Yes
Project Methodology Class	tblPMMNGMethodology	fldPMMMethodClass	50	Yes
Reporting : Report Sub Types	tblRPTSSavedReports	fldReportSubType	50	Yes
Reporting : Report Types	tblRPTSSavedReports	fldReportType	50	Yes
Sales : Credit Note Reason Codes	tblSALSCNNoteRelatedRefs	fldReferenceID	4	Yes

Code	CodeDescription	CodeType	Status	SortOrder
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
5	Incorrect part	None	A	5

Sales : Customer addresses	tblSALSAddresses	fldAddressType	4	Yes
Sales : Document Status	tblSALSInvoices	fldStatus	1	No
Sales : Quote detail types	tblSALSQuotesDetails	fldQuoteDetailType	50	Yes
Sales : Quote payment terms	tblSALSQuoteConfig	fldQuoteTermsCode	10	Yes
Sales : Quote Status	tblSALSQuotes	fldQuoteStatus	50	Yes
Sales : 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

03 Apr 2018

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.

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Save Layout Workspaces Save Filter Refresh

Description	TableName	FieldName	Size	UserDefinable
Procurement : Requisition Other Costs	tblPRCHRequisitions	fldPRCostType	50	Yes
Procurement : Requisition Types	tblPRCHRequisitions	fldPRTType	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	fldPMMMethodClass	50	Yes
Reporting : Report Sub Types	tblRPTSSavedReports	fldReportSubType	50	Yes
Reporting : Report Types	tblRPTSSavedReports	fldReportType	50	Yes
Sales : Credit Note Reason Codes	tblSALSCRNoteRelatedRefs	fldReferenceID	4	Yes

Code	CodeDescription	CodeType	Status	SortOrder
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	
5	Incorrect part	None	A	
*				

Process
Add
Add New Code
Delete
Delete Code

Sales : Customer addresses	tblSALSAddresses		4	Yes
Sales : Document Status	tblSALSInvoices	fldStatus	1	No
Sales : Quote detail types	tblSALSQuotesDetails	fldQuoteDetailType	50	Yes
Sales : Quote payment terms	tblSALSQuoteConfig	fldQuoteTermsCode	10	Yes
Sales : Quote Status	tblSALSQuotes	fldQuoteStatus	50	Yes
Sales : 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

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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.

Static Data - BPO Configurator: Version 1.0.0.9 - Example Company

Home Accounts Call Centre Company Contract Departments Human Resources Inventory Reporting Sales Scheduling Security Services Static Data

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Description	TableName	FieldName	Size	UserDefinable
Procurement : Requisition Other Costs	tbPRCHRequisitions	fidPRCostType	50	Yes
Procurement : Requisition Types	tbPRCHRequisitions	fidPRTType	50	Yes
Procurement : Supplier Class	tbPRCHSuppliers	fidClass	50	Yes
Procurement : Supplier Type	tbPRCHSuppliers	fidSupplierType	50	Yes
Project Contact Type	tbPMNGProjectContacts	fidContactType	50	Yes
Project Methodology Class	tbPMNGMethodology	fidPMMMethodClass	50	Yes
Reporting : Report Sub Types	tbIRPTSSavedReports	fidReportSubType	50	Yes
Reporting : Report Types	tbIRPTSSavedReports	fidReportType	50	Yes
Sales : Credit Note Reason Codes	tbSALSCNoteRelatedRefs	fidReferenceID	4	Yes

Code	CodeDescription	CodeType	Status	SortOrder
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
5	Incorrect part	None	A	5
I		None	A	0

Sales : Customer addresses	tbSALSAddresses	fidAddressType	4	Yes
Sales : Document Status	tbSALSInvoices	fidStatus	1	No
Sales : Quote detail types	tbSALSQuotesDetails	fidQuoteDetailType	50	Yes
Sales : Quote payment terms	tbSALSQuoteConfig	fidQuoteTermsCode	10	Yes
Sales : Quote Status	tbSALSQuotes	fidQuoteStatus	50	Yes
Sales : Quote Unit Types	tbSALSQuotesDetails	fidQuoteUnitType	50	Yes
Sales : Quotes Other Costs	tbSALSQuotes	fidQuoteCostType	50	Yes
Sales : Service Class	GENERIC	fidServiceClass	50	Yes
Sales : Service Type	GENERIC	fidServiceType	50	Yes
Sales : Service Unit of Measure	GENERIC	fidUnitOfMeasure	50	Yes

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- **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.

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Save Layout Workspaces Save Filter Refresh

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Description	TableName	FieldName	Size	UserDefinable
Procurement : Requisition Other Costs	tbPRCHRequisitions	fidPRCostType	50	Yes
Procurement : Requisition Types	tbPRCHRequisitions	fidPRTType	50	Yes
Procurement : Supplier Class	tbPRCHSuppliers	fidClass	50	Yes
Procurement : Supplier Type	tbPRCHSuppliers	fidSupplierType	50	Yes
Project Contact Type	tbPMNGProjectContacts	fidContactType	50	Yes
Project Methodology Class	tbPMNGMethodology	fidPMethodClass	50	Yes
Reporting : Report Sub Types	tbIRPTSSavedReports	fidReportSubType	50	Yes
Reporting : Report Types	tbIRPTSSavedReports	fidReportType	50	Yes
Sales : Credit Note Reason Codes	tbSALSCNoteRelatedRefs	fidReferenceID	4	Yes

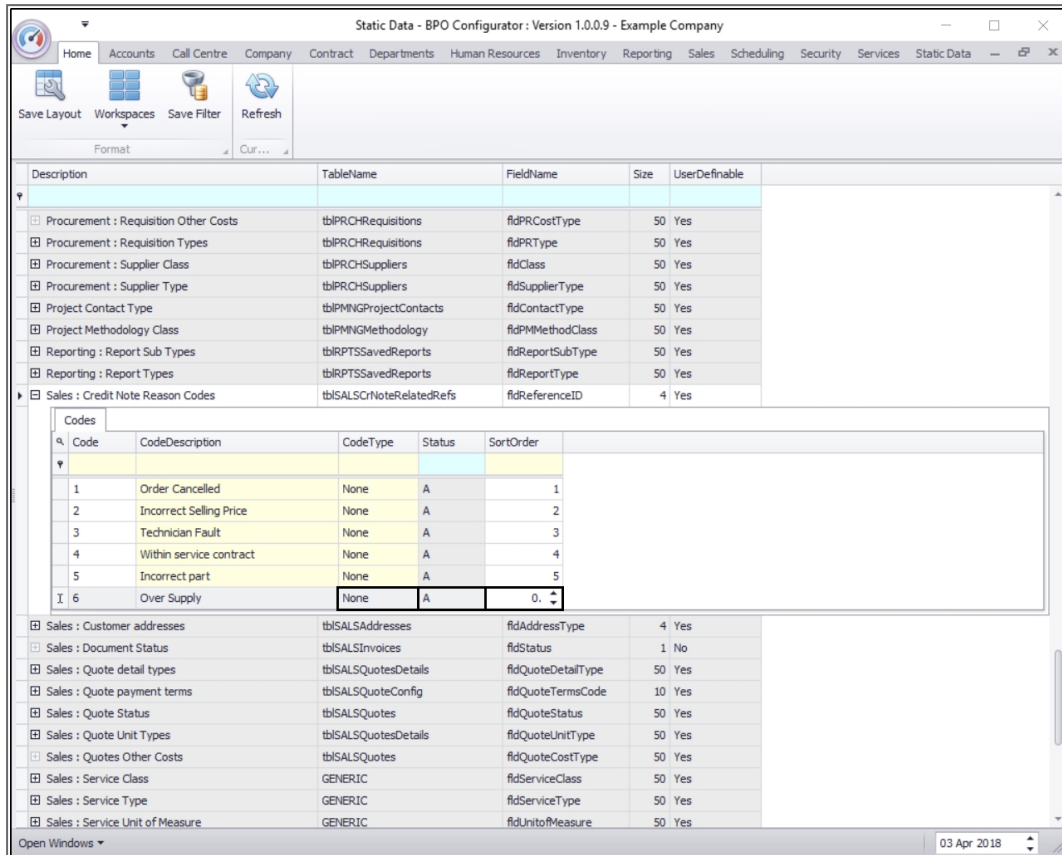
Code	CodeDescription	CodeType	Status	SortOrder
1	Order Cancelled	None	A	1
2	Incorrect Selling Price	None	A	2
3	Technician Fault	None	A	3
4	Within service contract	None	A	4
5	Incorrect part	None	A	5
I		None	A	0

Sales : Customer addresses	tbSALSAddresses	fidAddressType	4	Yes
Sales : Document Status	tbSALSInvoices	fidStatus	1	No
Sales : Quote detail types	tbSALSQuotesDetails	fidQuoteDetailType	50	Yes
Sales : Quote payment terms	tbSALSQuoteConfig	fidQuoteTermsCode	10	Yes
Sales : Quote Status	tbSALSQuotes	fidQuoteStatus	50	Yes
Sales : Quote Unit Types	tbSALSQuotesDetails	fidQuoteUnitType	50	Yes
Sales : Quotes Other Costs	tbSALSQuotes	fidQuoteCostType	50	Yes
Sales : Service Class	GENERIC	fidServiceClass	50	Yes
Sales : Service Type	GENERIC	fidServiceType	50	Yes
Sales : Service Unit of Measure	GENERIC	fidUnitofMeasure	50	Yes

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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 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.



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**.

The screenshot shows the 'Static Data - BPO Configurator' interface. The main table lists various data tables and their fields. The 'Codes' section is expanded, showing a list of credit note reason codes. An 'Update' dialog box is open, asking 'Are you sure you want to save changes to this code?' with 'Yes', 'No', and 'Cancel' buttons.

Description	TableName	FieldName	Size	UserDefinable
Procurement : Requisition Other Costs	tblPRCHRequisitions	fldPRCostType	50	Yes
Procurement : Requisition Types	tblPRCHRequisitions	fldPRTType	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	fldPMMMethodClass	50	Yes
Reporting : Report Sub Types	tblRPTSSavedReports	fldReportSubType	50	Yes
Reporting : Report Types	tblRPTSSavedReports	fldReportType	50	Yes
Sales : Credit Note Reason Codes	tblSALSCNoteRelatedRefs	fldReferenceID	4	Yes

Code	CodeDescription	CodeType	Status	SortOrder
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
5	Incorrect part	None	A	5
6	Over Supply	None	A	6

- 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.

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Save Layout Workspaces Save Filter Refresh

Format Cur...

Description	TableName	FieldName	Size	UserDefinable
Procurement : Requisition Other Costs	tblPRCHRequisitions	fldPRCostType	50	Yes
Procurement : Requisition Types	tblPRCHRequisitions	fldPRTType	50	Yes
Procurement : Supplier Class	tblPRCHSuppliers	fldClass	50	Yes
Procurement : Supplier Type	tblPRCHSuppliers	fldSupplierType	50	Yes
Project Contact Type	tblPMMNGProjectContacts	fldContactType	50	Yes
Project Methodology Class	tblPMMNGMethodology	fldPMMMethodClass	50	Yes
Reporting : Report Sub Types	tblRPTSSavedReports	fldReportSubType	50	Yes
Reporting : Report Types	tblRPTSSavedReports	fldReportType	50	Yes
Sales : Credit Note Reason Codes	tblSALSCrNoteRelatedRefs	fldReferenceID	4	Yes

Codes				
Code	CodeDescription	CodeType	Status	SortOrder
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
5	Incorrect part	None	A	5
6	Over Supply	None	A	6

Sales : Customer addresses	tblSALSAddresses	fldAddressType	4	Yes
Sales : Document Status	tblSALSInvoices	fldStatus	1	No
Sales : Quote detail types	tblSALSQuotesDetails	fldQuoteDetailType	50	Yes
Sales : Quote payment terms	tblSALSQuoteConfig	fldQuoteTermsCode	10	Yes
Sales : Quote Status	tblSALSQuotes	fldQuoteStatus	50	Yes
Sales : 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

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