

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

STATIC DATA

STATIC DATA - CALLS: HOLD REASON CODES

Ribbon Access: Static Data> Static Data



- 1. The **Static Data** listing screen will be displayed.
- Use the filter row or scroll down the list until you find the Calls: Hold Reason Codes row.
- 3. Click on the **expand** icon to expand the **Codes** frame.
- 4. Here you can view a list of the **hold reason codes** currently on the system.



	Home Accounts Call Centre	Compar	Static Data - BPO Config ny Contract Departments	s Human Resou						Services	Static Data	-	
	e Layout Workspaces Save Filter Ref	fresh	ry Contract Deparametric			anton y i	cepor ang	Juica	Security	Scivices	51800 2018	-	
D	Description		TableName	FieldName		Parent	ieldName	Size		UserDefin	able		-
	□: ` <u>`</u>		A D C	1 0 0		ROC		-		a 🛛 c			
Đ	Calls : Call Types		tblSALSCalls	fidCallType					10	Yes			
Œ	Calls : Data Refresh Rate		GENERIC	fldCallRefresh	ate				5	Yes			
E	- Calls : Hold Reason Codes		tblSALSCallHoldEvents	fidHoldReason	Code				10	Yes			
	Codes < 3												
	Code	CodeD	escription	CodeTyp	e SortOrd	der	Status					 	٦
	AC	Awaiti	ng Client Confirmation	None		1	A	1					1
	AD	Awaiti	ng Details	None		1	A						
	AG	Awaiti	ng Scheduled Date	None		1	A						
	DQ	Develo	pment Queue	None		1	A						
	QA	Quote	Acceptance	None		2	A		-4				
	SL	Servio	e limit reached	None		5	A		_				
	CQC		ng Client quote confirmation	None			A						
	APS		ng Parts	None			A						
	ATPS	Awaiti	ng Third Party Service	None		1	A						
													_
Đ	B Calls : Pending Reason Codes		tblSALSCallPendingEvents	fldPendingRea	onCode				10	Yes			
	Categories : Entity Category		GENERIC	fldCategory						Yes			
	B Categories : Entity Class		GENERIC	fldClass						Yes			
	Categories : Entity Type		GENERIC	fldType						Yes			
	E Company : Tax Codes		GENERIC	fldSysTaxCode						Yes			
	E Company : Tax Types		GENERIC	fldTaxType					-	Yes			
	Configuration : Action Types		tblMTRMDefinition	fldActionType fldAddressTyp						No			
₫	E Configuration : Address Types		GENERIC	haAddressTyp					4	140			

ADD HOLD REASON CODE

5. Right click in a row in the Codes data grid to display the Process

menu.

6. Click on Add - Add New Code.



Description Calls : C Calls : C	Workspaces Save Filter Format Curr	resh	TableName	FieldName			eporung	30105	Security	Jervices	State Data	_	8	
■ Calls : C Calls : D Calls : H	all Types ata Refresh Rate			FieldName										
■ Calls : C Calls : D Calls : H	all Types ata Refresh Rate					ParentF	ieldName	Size		UserDefina	ble		_	-
Calls : D Calls : H Calls : H	ata Refresh Rate			a 🗖 c		REC		-		4 0 4				
Calls : D Calls : H Calls : H	ata Refresh Rate		tblSALSCalls	fldCallType					10	Yes				
	iold Reason Codes		GENERIC	fldCallRefreshRat	e				5	Yes				
Codes			tblSALSCallHoldEvents	fldHoldReasonCod	le				10	Yes				
Code AC AD QQ QA SL CQC APS	Process	Aw Aw De Qu Ser	deDescription aiting Client Confirmation aiting Details aiting Scheduled Date velopment Queue ote Acceptance vvice limit reached aiting Client quote confirmation aiting Parts	CodeType None None None None None None None Non	SortOrder	1 1 1 2 5 1 2	A A A A A A							
ATPS 6	Add Add New Code		aiting Third Party Service	None		1	A							
Calls : P	ending Rease	÷	tblSALSCallPendingEvents	fldPendingReason	Code				10	Yes				
Categor	ies : Entity Category		GENERIC	fldCategory					50	Yes				
Categor	ies : Entity Class		GENERIC	fldClass					4	Yes				
	ies : Entity Type		GENERIC	fldType					2	Yes				
E Compan	iy : Tax Codes		GENERIC	fldSysTaxCode					4	Yes				
	iy : Tax Types		GENERIC	fldTaxType					-	Yes				
	ration : Action Types		tblMTRMDefinition	fldActionType						No				
E Configur	ration : Address Types		GENERIC	fldAddressType					4	No				

- 7. An available row for adding the new hold reason code will display in the **Codes** data grid.
 - **Code:** Click in the text box to type in a code specific to the new call hold reason.
 - **Code Description:** Click in the text box to type in a description for the call hold reason code.
 - Code Type: This field will auto populate as None and may remain as is.
 - **Status:** The status field will auto populate with an **A** Active status.



- Sort Order¹: Click in the text box to type in or use the arrow indicators to select the sort order for the new hold reason code.
- 8. When you have finished adding the new call hold reason code details, press **Enter**.

Home	Accounts Call Centre	Compa	ny Contract Departments	Human Resource	es Inver	itory F	Reporting	Sales Security	Services Static D	oata —	8	
ave Layout Works	-	Refresh										
Description			TableName	FieldName		Parent	ieldName	Size	UserDefinable		_	-
* D ¢			••••	* D ¢		R C		-	* 0 ¢			
Calls : Call Type	s		tblSALSCalls	fldCallType				10	Yes			
E Calls : Data Ret			GENERIC	fldCallRefreshRat	e			5	Yes			
Calls : Hold Rea	son Codes		tblSALSCallHoldEvents	fldHoldReasonCod	de			10	Yes			
Codes		Cadat	Description	CodeType	SortOrde		Status				_	1
AC			ing Client Confirmation	None	SortOrde		A					1
AD			ing Details	None			A					
AG			ing Scheduled Date	None		-	A					
DQ			opment Queue	None		1	A					
QA			Acceptance	None		2	A					
SL		Servic	e limit reached	None		5	A					
CQC		Awaiti	ing Client quote confirmation	None		1	A					
APS		Awaiti	ing Parts	None		2	A	ress Enter when dor	ne			
ATPS		Awaiti	ing Third Party Service	None		1	A					l
AW		Awaiti	ing Warranty to be processed	None		0	A					
E Calls : Pending	Reason Codes		tblSALSCallPendingEvents	fldPendingReason	Code			10	Yes			
E Categories : En	tity Category		GENERIC	fldCategory				50	Yes			
Categories : En	tity Class		GENERIC	fldClass				4	Yes			
	tity Type		GENERIC	fldType				2	Yes			
E Company : Tax	Codes		GENERIC	fldSysTaxCode				4	Yes			
E Company : Tax	Types		GENERIC	fldTaxType				3	Yes			
Configuration :	Action Types		tblMTRMDefinition	fldActionType				50	No			
E Configuration	Address Types		GENERIC	fldAddressType				4	No			

9. When you receive the **Update** message to confirm;

• Are you sure you want to save changes to this code?

- 10. Click on Yes to save the code, or
 - Click on **No** to remove the information from the row,

enabling you to add new hold reason code information.

¹The sort order is the order in which the hold reason code will appear in the drop-down list. If each call hold reason code has the same number, e.g 0 or 1, then the drop-down list will default to an alphabetic order. If the sort order is numbered, for example number 5, then the reason code will appear 5th in the drop-down list.



	Home Accounts Call Centre Com	Static Data - BPO Config pany Contract Departments							Services	Static Data	-	8	
a	ve Layout Workspaces Save Filter Refresh												
	Format _ Curr	4				Update ·						×	
	Description	TableName	FieldName	Pa	aren				1				
	A D C	R B C	* 0 ¢	n[C.			L	é		41.5		
E	∃ Calls : Call Types	tblSALSCalls	fldCallType				Are you	i sure you v	vant to sav	e changes to	o this code?		
E	∃ Calls : Data Refresh Rate	GENERIC	fldCallRefreshRate	e									
E	∃ Calls : Hold Reason Codes	tblSALSCallHoldEvents	fldHoldReasonCod	le						_		-	
	Codes							<u>Y</u> es	N	lo	Cancel		
		deDescription	CodeType	SortOrder		Status			,			_	1
		aiting Client Confirmation	None	bortorder		A			,				
		aiting Details	None			A			1				
		aiting Scheduled Date	None			A		i i	10				
		velopment Queue	None			A							
	QA Qu	ote Acceptance	None			A							
	SL Ser	vice limit reached	None		:	A							
	CQC Aw	aiting Client quote confirmation	None		1	A							
	APS Aw	aiting Parts	None		1	A							
	ATPS Aw	aiting Third Party Service	None		1	A							
	AW Aw	aiting Warranty to be processed	None		(A							
E		tblSALSCallPendingEvents	fldPendingReason	Code				10	Yes				
E	∃ Categories : Entity Category	GENERIC	fldCategory					50	Yes				
E	∃ Categories : Entity Class	GENERIC	fldClass					4	Yes				
E	Categories : Entity Type	GENERIC	fldType					2	Yes				
E		GENERIC	fldSysTaxCode					4	Yes				
E	Company : Tax Types	GENERIC	fldTaxType					3	Yes				
	Configuration : Action Types	tblMTRMDefinition	fldActionType					50	No				
E		GENERIC	fldAddressType					4	No				
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- 11. The new call hold reason code will be **saved** and a **new row** will be added to the **Codes** data grid.
- 12. Collapse the Codes frame.
- 13. Close the screen when done.



1	Home Accounts Call Centre	e Compa	ny Contract Departments	Human Reso	rces Inve	entory F	Reporting	Sales Security	Services Static Da	ta —	8
av	÷	Refresh								13	/
[Description		TableName	FieldName		Parentf	ieldName	Size	UserDefinable		
2	Dc		* 0 ¢	a 🗖 c		ROC		-	s 🛛 c		
6	Calls : Call Types		tblSALSCalls	fldCallType				10	Yes		
ŀ	Calls : Data Refresh Rate		GENERIC	fldCallRefresh	late			5	Yes		
E	Calls : Hold Reason Codes		tblSALSCallHoldEvents	fldHoldReason	Code			10	Yes		
	Codes										
	Code	Codel	Description	CodeTyp	e SortOr	der	Status				_
	AC		ing Client Confirmation	None			A				
	AD		ing Details	None		1	A				
	AG	Await	ing Scheduled Date	None		1	A				
	DQ	Devel	opment Queue	None		1	A				
	QA	Quote	Acceptance	None		2	A				
	SL	Servio	e limit reached	None		5	A				
	CQC	Await	ing Client quote confirmation	None		1	A				
	APS	Await	ing Parts	None		2	A				
	ATPS		ing Third Party Service	None		1	A				
	AW	Await	ing Warranty to be processed	None		0	A <				
							< -				
0	Calls : Pending Reason Codes		tblSALSCallPendingEvents	fldPendingRea	onCode			10	Yes		
8	Categories : Entity Category		GENERIC	fldCategory				50	Yes		
6	Categories : Entity Class		GENERIC	fldClass				4	Yes		
	Categories : Entity Type		GENERIC	fldType				2	Yes		
	Company : Tax Codes		GENERIC	fldSysTaxCode					Yes		
8	Company : Tax Types		GENERIC	fldTaxType					Yes		
	Configuration : Action Types		tblMTRMDefinition Capture so	fldActionType				50	No		

REMOVE A HOLD REASON CODE

You may need to remove a Hold Reason Code that is no longer required.

1. Right click in the row of the Hold Reason Code that is no longer

required, to display the **Process** menu.

2. Click on **Delete** - Delete Code.



9		Static Data - BPO Config								
	e Layout Workspaces Save Filter Ref	Company Contract Departments	s Human Resourc	es Inventory	Reporting	Sales Security	Services Static	Data —	8	
D	Description	TableName	FieldName	Pare	entFieldName	Size	UserDefinable		_	-
		* 0 ¢	s C	REC		-	* 0 ¢			
Œ	Calls : Call Types	tblSALSCalls	fldCallType			10	Yes			
Đ	Calls : Data Refresh Rate	GENERIC	fldCallRefreshRat	e		5	Yes			
E	Calls : Hold Reason Codes	tblSALSCallHoldEvents	fldHoldReasonCo	de		10	Yes			
•	Code AC AD AG Process AG Process Add Ad New Code QA SL CQC APS ATPS AW	CodeDescription Awaiting Client Confirmation Awaiting Details Awaiting Scheduled Date Development Queue Quote Acceptance Service limit reached Awaiting Client quote confirmation Awaiting Parts Awaiting Third Party Service Awaiting Warranty to be processed	CodeType None None None None None None None Non	SortOrder SortOrder	Status 1 A 1 A 1 A 2 A 5 A 1 A 2 A 3 A 4 A 5 A 1 A 2 A 1 A 2 A 3 A 4 A					
] Calls : Pending Reason Codes	tblSALSCallPendingEvents	fidPendingReasor	nCode			Yes			
	Categories : Entity Category	GENERIC	fldCategory				Yes			
	Categories : Entity Class Categories : Entity Type	GENERIC	fldClass fldTvpe				Yes			
	Company : Tax Codes	GENERIC	fldSvsTaxCode				Yes			
	Company : Tax Types	GENERIC	fldTaxType				Yes			
	Configuration : Action Types	tblMTRMDefinition	fldActionType			50	No			

3. When you receive the **Delete Code** message to confirm;

• Are you sure you want to delete this static data code?

- 4. Click on \boldsymbol{Yes} to remove the code, or
 - Click on **No** to ignore the request and to leave the code in the Hold Reason Code list.



0	T		Static Data - BPO Config											
	Home Accounts Call Centre	Company	Contract Departments	Human Resource	es Invent	ory R	leporting	Sales	Security	Services	Static Data	-	8	
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a	ve Layout Workspaces Save Filter Re	fresh												
	÷													
	Format 🚽 Cur	rr												
	Description		bleName	FieldName			ieldName	Size		UserDefina	ble			
	A B C	* E	¢.	8 C		ROC		=		a 🗖 c				
E	∃ Calls : Call Types	tb	SALSCalls	fldCallType					10	Yes				
E	∃ Calls : Data Refresh Rate	GE	INERIC	fldCallRefreshRa	te				5	Yes				
E	∃ Calls : Hold Reason Codes	tb	SALSCallHoldEvents	fldHoldReasonCo	de				10	Yes				
	Codes													
	Code	CodeDesc	ription	CodeType	SortOrde	r	Status							1
	AC		lient Confirmation	None		1	A							1
	AD	Awaiting D	Details	None		1	A							
	AG	Awaiting S	cheduled Date	None		1	A							
	DQ	Developm	ent Queue	None		Dele	ete Code	-		3			×	
	QA	Quote Acc	eptance	None						1				
	SL	Service lim	nit reached	None					11	·				
	CQC	Awaiting (Client quote confirmation	None			? Are	e you sur	e you want	to delete th	nis static dat	ta code?		
	APS	Awaiting P	Parts	None										
	ATPS	Awaiting T	hird Party Service	None					_					
	AW	Awaiting V	Varranty to be processed	None					[Yes		No		
												1		
E		tb	SALSCallPendingEvents	fldPendingReaso	nCode				10	Yes				
E	Categories : Entity Category	GE	NERIC	fldCategory					50	Yes				
E	Categories : Entity Class	GE	NERIC	fldClass					4	Yes	4			
E	∃ Categories : Entity Type	GE	NERIC	fldType					2	Yes				
E	± Company : Tax Codes	GE	NERIC	fldSysTaxCode					4	Yes				
E	① Company : Tax Types	GE	INERIC	fldTaxType					3	Yes				
	Configuration : Action Types	tb	MTRMDefinition	fldActionType					50	No				
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- 5. The **Call Error Code** will be removed from the list.
- 6. **Collapse** the Codes frame.
- 7. Close the screen when done.



		Static Data - BPO Config ompany Contract Department						v2.5.0.7 Sales Security	Services Static I	Data — I
an	ve Layout Workspaces Save Filter	h								7
Ì	Description	TableName	FieldNan	ne	Pi	arentFi	eldName	Size	UserDefinable	
Í	A@c	#BC	a 🖬 c		8	8 C		=	a 🗖 c	
1	Calls : Call Types	tblSALSCalls	fidCallTy	pe				10	Yes	
-1	Calls : Data Refresh Rate	GENERIC		efreshRate				5	Yes	
E	Calls : Hold Reason Codes	tblSALSCallHoldEvents	fldHoldR	easonCode	2			10	Yes	
	Carlas									
	Codes Code	CodeDescription	Co	deType	SortOrder		Status			
		waiting Client Confirmation		one	Sartoruel	1		-		
		waiting Scheduled Date		one		1		5		
	1	evelopment Queue	No	one		1	A			
	-	Quote Acceptance	No	one		2	A			
		ervice limit reached	No	one		5	A			
	CQC A	waiting Client quote confirmation	No	one		1	A			
	APS A	waiting Parts	No	one		2	A			
	ATPS A	waiting Third Party Service	No	one		1	A			
	AW	waiting Warranty to be processed	No	one		0	A			
ŧ.										
E		tblSALSCallPendingEvents	fldPendir	ngReasonC	ode			10	Yes	
E	Categories : Entity Category	GENERIC	fldCateg	jory				50	Yes	
6	E Categories : Entity Class	GENERIC	fldClass					4	Yes	
6	Categories : Entity Type	GENERIC	fldType					2	Yes	
E	① Company : Tax Codes	GENERIC	fldSysTa	axCode				4	Yes	
E	Company : Tax Types	GENERIC	fldTaxTy	ype				3	Yes	
	Configuration : Action Types	tblMTRMDefinition	fldAction	пТуре				50	No	
E	① Configuration : Address Types	GENERIC	fldAddre	essType				4	No	

EDIT HOLD REASON CODE

You can make changes to the Code Description, Code Type or the Sort Order for a Hold Reason Code.

- **Code Description:** Click in the field and replace the existing description with the new description, if required.
- **Code Type:** Click in the field to replace the existing code type with a new code type, if required.
- **Sort Order:** Click in the field to type in or use the arrow indicators to select a new sort order, if required.
- When you have made the required changes, click anywhere on the Codes frame.
- 2. You will receive an Update message to confirm,
 - Are you sure you want to save changes to this code?



- 3. Click on **Yes** to save the changes, or
 - Click on **No** to ignore the change and leave the code as is.
- 4. **Collapse** the Codes frame.
- 5. Close the screen when done.

Home Accounts Call Centre	Compar	ny Contract Departments	Human Resource	es Inven	ntory R	eporting	Sales Secu	irity	Services	Static D	Data	- 1	8
÷	Refresh											5	/
Description		TableName	FieldName		ParentFi	ieldName	Size		UserDef	inable			
* 0 :		A D C	4 0 0		REC		-		a 🛛 c				
Calls : Call Types		tblSALSCalls	fldCallType					10	Yes				
Calls : Data Refresh Rate		GENERIC	fldCallRefreshRate	e				5	Yes				
E Calls : Hold Reason Codes		tblSALSCallHoldEvents	fldHoldReasonCod	de				10	Yes				
Codes 4													
Codes 4	CodeD	escription	CodeType	SortOrde	er	Status							_
		ng Client Confirmation	None	bortora	1				_				
AC						Update							
AC AG		-	None		1	opuate			-	2			X
	Awaitir	ng Scheduled Date			1	opuate				2			×
AG	Awaitir	ng Scheduled Date	None		-			ire voi	k u want to	save cha	nges to th	is code?	
AG DQ	Awaitir Develo Quote	ng Scheduled Date	None		1		Are you su	ire you	k u want to	save char	nges to th	is code?	
AG DQ QA	Awaitir Develo Quote Service	ng Scheduled Date opment Queue Acceptance	None None None		1	?		ire you	y want to	save chai	nges to th	is code?	
AG DQ QA SL	Awaitir Develo Quote Service Awaitir	ng Scheduled Date opment Queue Acceptance e limit reached	None None None None		1 2 5		Are you su	ire you	y want to	save char			
AG DQ QA SL CQC	Awaitir Develo Quote Service Awaitir Awaitir	ng Scheduled Date opment Queue Acceptance e limit reached ng Client quote confirmation	None None None None None		1 2 5 1		Are you su		y want to			is code? Cancel	
AG DQ QA SL CQC APS	Awaitir Develo Quote Service Awaitir Awaitir Awaitir	ng Scheduled Date ppment Queue Acceptance e limit reached ng Client quote confirmation ng Parts	None None None None None None		1 2 5 1 2		Are you su		u want to				
AG DQ QA SL CQC APS ATPS	Awaitir Develo Quote Service Awaitir Awaitir Awaitir Awaitir	g Scheduled Date priment Queue Acceptance e limit reached ing Client quote confirmation ing Parts ing Third Party Service	None None None None None None None		1 2 5 1 2 1	A	Are you su		k u want to				×
AG DQ QA SL CQC APS ATPS AW	Awaitir Develo Quote Service Awaitir Awaitir Awaitir Awaitir	g Scheduled Date opment Queue Acceptance e lmit reached ng Client quote confirmation ng Parts ng Third Party Service ng Warranty to be processed	None None None None None None None None		1 2 5 1 2 1 0	A	Are you su			No		Cancel	
AG DQ QA SL CQC CQC APS ATPS AW	Awaitir Develo Quote Service Awaitir Awaitir Awaitir Awaitir	g Scheduled Date opment Queue Acceptance e lmit reached ng Client quote confirmation ng Parts ng Third Party Service ng Warranty to be processed	None None None None None None None None	Code	1 2 5 1 2 1 0	A	Are you su	es		No	after makin	Cancel	
AG DQ QA SL CQC APS ATPS AW AD	Awaitir Develo Quote Service Awaitir Awaitir Awaitir Awaitir	ng Scheduled Date opment Queue Acceptance e lmit reached ng Client quote confirmation ng Parts ng Third Party Service ng Warranty to be processed ng Call Details	None None None None None None None None	Code	1 2 5 1 2 1 0	A	Are you su	es 3		No lick here a	after makin	Cancel	
AG DQ QA SL CQC APS ATPS AW AD Calls : Pending Reason Codes 	Awaitir Develo Quote Service Awaitir Awaitir Awaitir Awaitir	ng Scheduled Date opment Queue Acceptance le lmit reached ng Client quote confirmation ng Parts ng Third Party Service ng Warranty to be processed ng Call Details tbISALSCallPendingEvents	None None None None None None None None	Code	1 2 5 1 2 1 0	A	Are you su	es 3 10 50	Yes	No lick here a	after makin	Cancel	
AG DQ QA SL CQC APS ATPS AW AD El Calls : Pending Reason Codes El Categories : Entity Category El Categories : Entity Class	Awaitir Develo Quote Service Awaitir Awaitir Awaitir Awaitir	ng Scheduled Date opment Queue Acceptance e lmit reached ng Client quote confirmation ng Parts ng Third Party Service ng Warranty to be processed ng Call Details tbISALSCallPendingEvents GENERIC	None None None None None None None None	Code	1 2 5 1 2 1 0	A	Are you su	es 10 50 4	Yes	No lick here a	after makin	Cancel	
AG DQ QA SL CQC APS ATPS AW AD El Calls : Pending Reason Codes El Calegories : Entity Category El Categories : Entity Category El Categories : Entity Category El Categories : Entity Type	Awaitir Develo Quote Service Awaitir Awaitir Awaitir Awaitir	ng Scheduled Date ppment Queue Acceptance e limit reached ng Client quote confirmation ng Parts ng Third Party Service ng Warranty to be processed ng Call Details tbISALSCallPendingEvents GENERIC	None None None None None None None None	Code	1 2 5 1 2 1 0	A	Are you su	es 10 50 4 2	Yes Yes	No lick here a	after makin	Cancel	
AG DQ QA SL CQC APS ATPS AW AD El Calls : Pending Reason Codes El Categories : Entity Category	Awaitir Develo Quote Service Awaitir Awaitir Awaitir Awaitir	ng Scheduled Date ppment Queue Acceptance e limit reached ng Client quote confirmation ng Parts ng Third Party Service ng Warranty to be processed ng Call Details tbISALSCallPendingEvents GENERIC GENERIC	None None None None None None None None	Code	1 2 5 1 2 1 0	A	Are you su	es 10 50 4 2 4	Yes Yes Yes	No lick here a	after makin	Cancel	

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