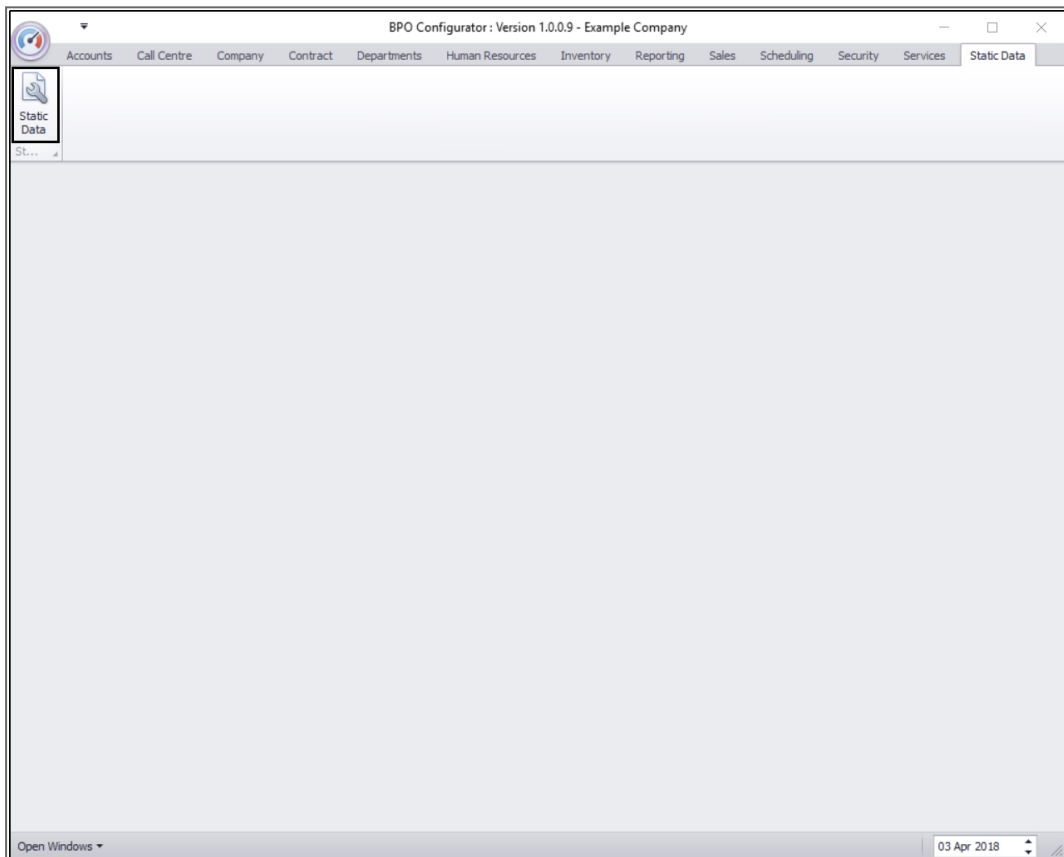


We are currently updating our site; thank you for your patience.

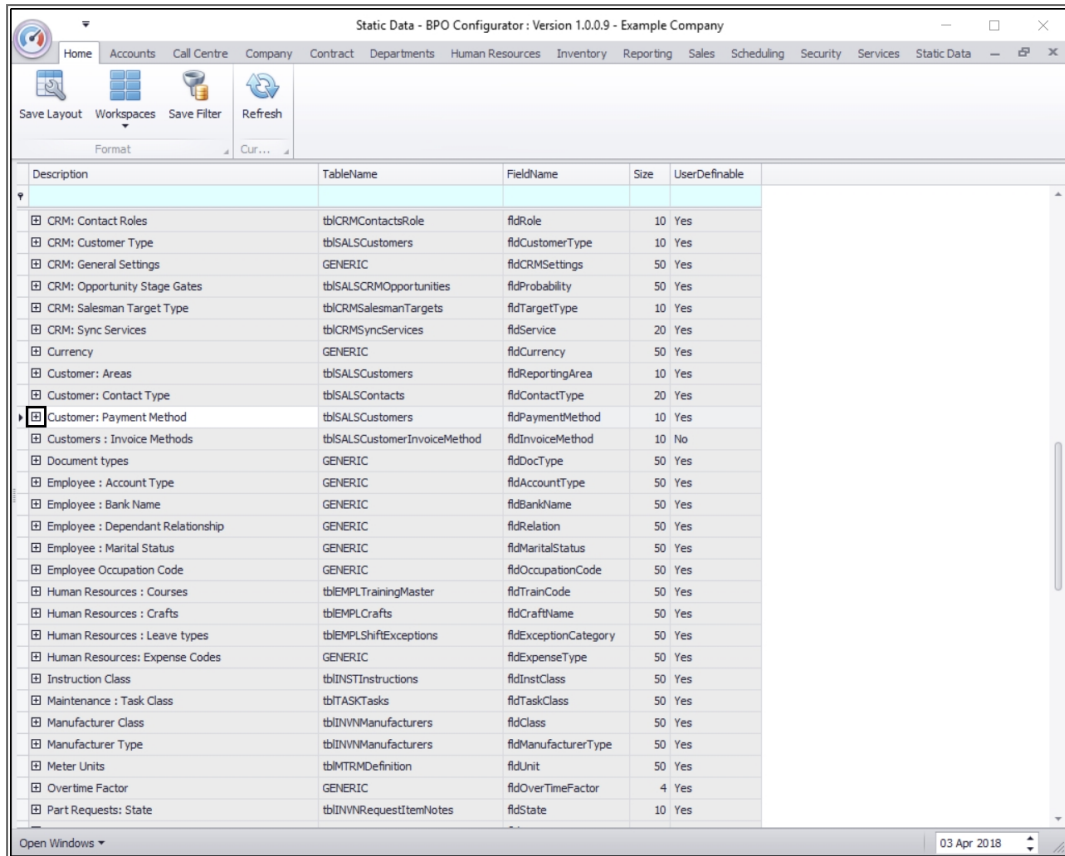
## STATIC DATA

### STATIC DATA – CUSTOMER: PAYMENT METHOD

Ribbon Access: Configurator > Static Data > Static Data

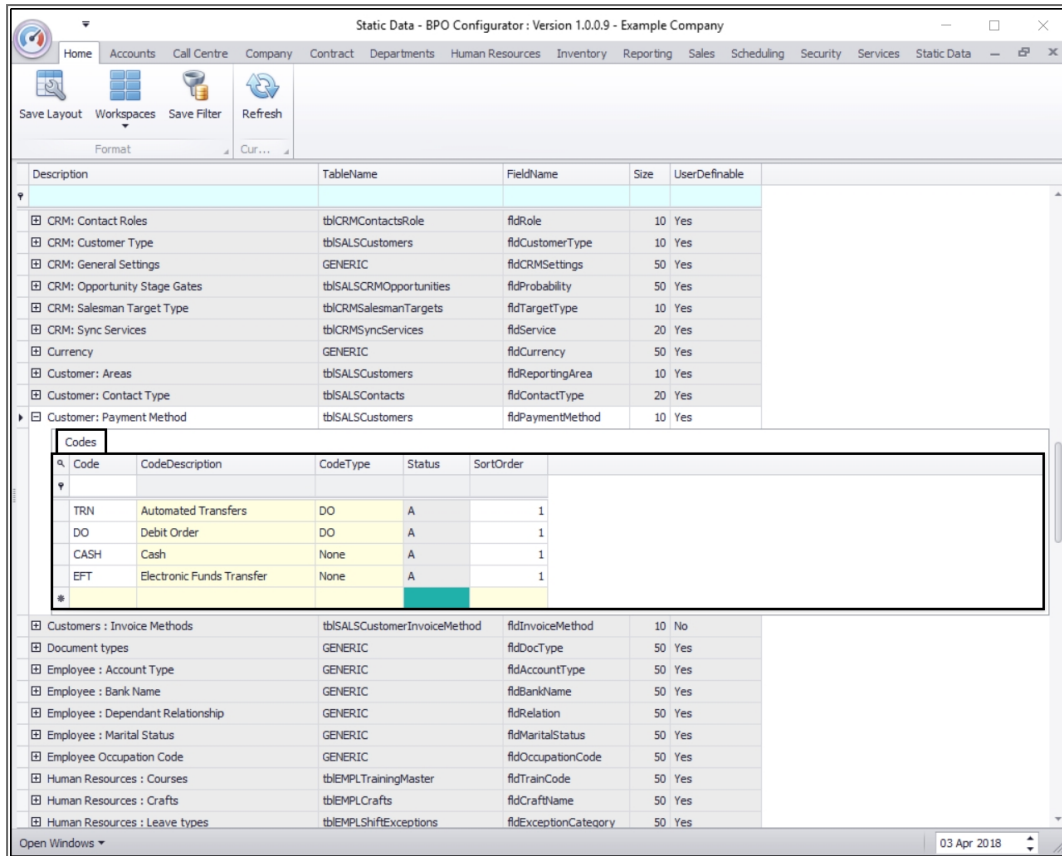


- The **Static Data** listing screen will be displayed.
- Use the **filter row** or **scroll down** the list until you find the **Customer: Payment Method** row.
- Click on the **expand** icon in this row.



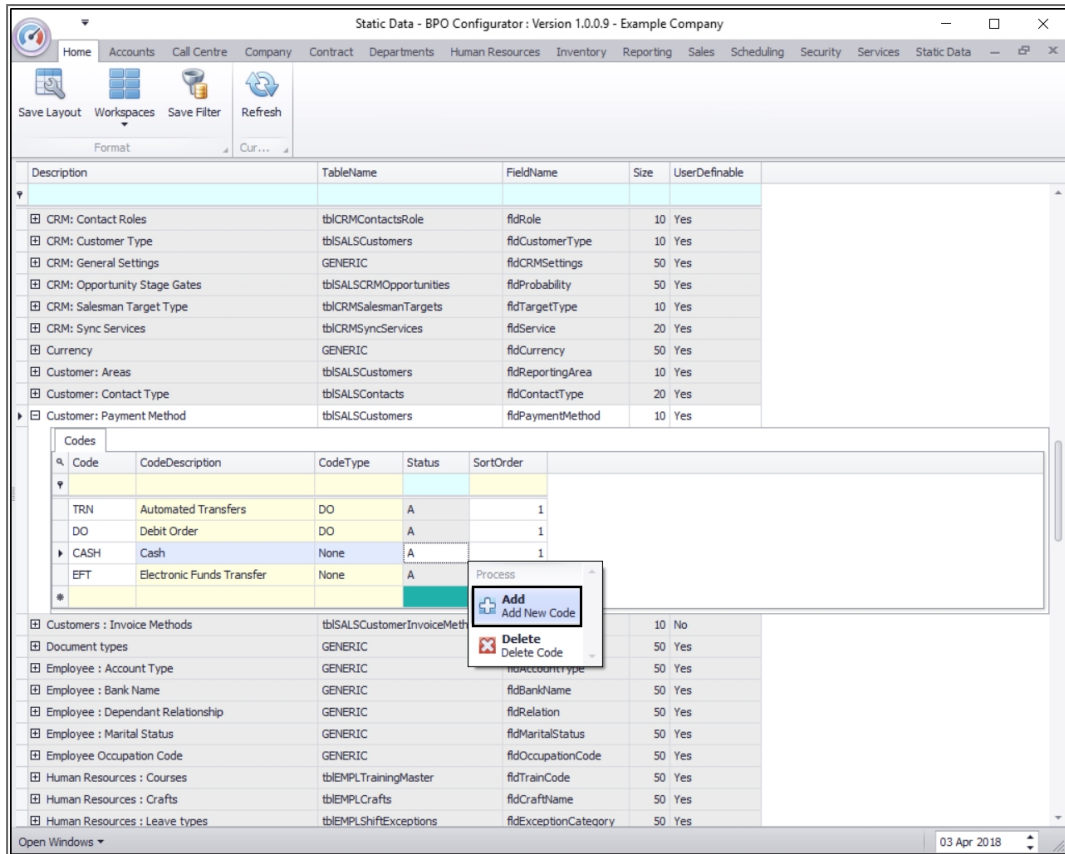
Description	TableName	FieldName	Size	UserDefinable
CRM: Contact Roles	tb\CRMContactsRole	fidRole	10	Yes
CRM: Customer Type	tb\SALSCustomers	fidCustomerType	10	Yes
CRM: General Settings	GENERIC	fidCRMSettings	50	Yes
CRM: Opportunity Stage Gates	tb\SALSCRMOpportunities	fidProbability	50	Yes
CRM: Salesman Target Type	tb\CRMSalesmanTargets	fidTargetType	10	Yes
CRM: Sync Services	tb\CRMSyncServices	fidService	20	Yes
Currency	GENERIC	fidCurrency	50	Yes
Customer: Areas	tb\SALSCustomers	fidReportingArea	10	Yes
Customer: Contact Type	tb\SALSContacts	fidContactType	20	Yes
Customer: Payment Method	tb\SALSCustomers	fidPaymentMethod	10	Yes
Customers : Invoice Methods	tb\SALSCustomerInvoiceMethod	fidInvoiceMethod	10	No
Document types	GENERIC	fidDocType	50	Yes
Employee : Account Type	GENERIC	fidAccountType	50	Yes
Employee : Bank Name	GENERIC	fidBankName	50	Yes
Employee : Dependant Relationship	GENERIC	fidRelation	50	Yes
Employee : Marital Status	GENERIC	fidMaritalStatus	50	Yes
Employee Occupation Code	GENERIC	fidOccupationCode	50	Yes
Human Resources : Courses	tb\EMPLTrainingMaster	fidTrainCode	50	Yes
Human Resources : Crafts	tb\EMPLCrafts	fidCraftName	50	Yes
Human Resources : Leave types	tb\EMPLShiftExceptions	fidExceptionCategory	50	Yes
Human Resources: Expense Codes	GENERIC	fidExpenseType	50	Yes
Instruction Class	tb\INSTInstructions	fidInstClass	50	Yes
Maintenance : Task Class	tb\TASKTasks	fidTaskClass	50	Yes
Manufacturer Class	tb\INWNManufacturers	fidClass	50	Yes
Manufacturer Type	tb\INWNManufacturers	fidManufacturerType	50	Yes
Meter Units	tb\IMTRMDefinition	fidUnit	50	Yes
Overtime Factor	GENERIC	fidOverTimeFactor	4	Yes
Part Requests: State	tb\INWRRequestItemNotes	fidState	10	Yes

- The Customer: Payment Method **Codes** frame will be expanded.
- Here you can view a list of **payment method codes** currently on the system.



## ADD A NEW PAYMENT METHOD CODE

- **Right click** anywhere in a **row** of the **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.

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

Save Layout Workspaces Save Filter Refresh

Format Cur...

Description	TableName	FieldName	Size	UserDefinable
CRM: Contact Roles	tbCRMContactsRole	fidRole	10	Yes
CRM: Customer Type	tbISALSCustomers	fidCustomerType	10	Yes
CRM: General Settings	GENERIC	fidCRMSettings	50	Yes
CRM: Opportunity Stage Gates	tbISALSCRMOpportunities	fidProbability	50	Yes
CRM: Salesman Target Type	tbCRMSalesmanTargets	fidTargetType	10	Yes
CRM: Sync Services	tbCRMSyncServices	fidService	20	Yes
Currency	GENERIC	fidCurrency	50	Yes
Customer: Areas	tbISALSCustomers	fidReportingArea	10	Yes
Customer: Contact Type	tbISALSCustomers	fidContactType	20	Yes
Customer: Payment Method	tbISALSCustomers	fidPaymentMethod	10	Yes

Code	CodeDescription	CodeType	Status	SortOrder
TRN	Automated Transfers	DO	A	1
DO	Debit Order	DO	A	1
CASH	Cash	None	A	1
EFT	Electronic Funds Transfer	None	A	1
I		None	A	0

Customers : Invoice Methods	tbISALSCustomerInvoiceMethod	fidInvoiceMethod	10	No
Document types	GENERIC	fidDocType	50	Yes
Employee : Account Type	GENERIC	fidAccountType	50	Yes
Employee : Bank Name	GENERIC	fidBankName	50	Yes
Employee : Dependant Relationship	GENERIC	fidRelation	50	Yes
Employee : Marital Status	GENERIC	fidMaritalStatus	50	Yes
Employee Occupation Code	GENERIC	fidOccupationCode	50	Yes
Human Resources : Courses	tbEMPLTrainingMaster	fidTrainCode	50	Yes
Human Resources : Crafts	tbEMPLCrafts	fidCraftName	50	Yes
Human Resources : Leave types	tbEMPLShiftExceptions	fidExceptionCategory	50	Yes

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

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

Save Layout Workspaces Save Filter Refresh

Format Cur...

Description	TableName	FieldName	Size	UserDefinable
CRM: Contact Roles	tbCRMContactsRole	fidRole	10	Yes
CRM: Customer Type	tbISALSCustomers	fidCustomerType	10	Yes
CRM: General Settings	GENERIC	fidCRMSettings	50	Yes
CRM: Opportunity Stage Gates	tbISALSCRMOpportunities	fidProbability	50	Yes
CRM: Salesman Target Type	tbCRMSalesmanTargets	fidTargetType	10	Yes
CRM: Sync Services	tbCRMSyncServices	fidService	20	Yes
Currency	GENERIC	fidCurrency	50	Yes
Customer: Areas	tbISALSCustomers	fidReportingArea	10	Yes
Customer: Contact Type	tbISALSCustomers	fidContactType	20	Yes
Customer: Payment Method	tbISALSCustomers	fidPaymentMethod	10	Yes

Code	CodeDescription	CodeType	Status	SortOrder
TRN	Automated Transfers	DO	A	1
DO	Debit Order	DO	A	1
CASH	Cash	None	A	1
EFT	Electronic Funds Transfer	None	A	1
I		None	A	0

Customers : Invoice Methods	tbISALSCustomerInvoiceMethod	fidInvoiceMethod	10	No
Document types	GENERIC	fidDocType	50	Yes
Employee : Account Type	GENERIC	fidAccountType	50	Yes
Employee : Bank Name	GENERIC	fidBankName	50	Yes
Employee : Dependant Relationship	GENERIC	fidRelation	50	Yes
Employee : Marital Status	GENERIC	fidMaritalStatus	50	Yes
Employee Occupation Code	GENERIC	fidOccupationCode	50	Yes
Human Resources : Courses	tbEMPLTrainingMaster	fidTrainCode	50	Yes
Human Resources : Crafts	tbEMPLCrafts	fidCraftName	50	Yes
Human Resources : Leave types	tbEMPLShiftExceptions	fidExceptionCategory	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 payment method code.
  - **Note:** The **sort order** is the order in which this will appear in the payment method code drop-down list in BPO. If each payment method 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 **5**, then it will appear **5th** in the drop-down list in BPO.

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

Save Layout Workspaces Save Filter Refresh

Format Cur...

Description	TableName	FieldName	Size	UserDefinable
CRM: Contact Roles	tb\CRMContactsRole	fidRole	10	Yes
CRM: Customer Type	tb\SALSCustomers	fidCustomerType	10	Yes
CRM: General Settings	GENERIC	fidCRMSettings	50	Yes
CRM: Opportunity Stage Gates	tb\SALSCRMOpportunities	fidProbability	50	Yes
CRM: Salesman Target Type	tb\CRMSalesmanTargets	fidTargetType	10	Yes
CRM: Sync Services	tb\CRMSyncServices	fidService	20	Yes
Currency	GENERIC	fidCurrency	50	Yes
Customer: Areas	tb\SALSCustomers	fidReportingArea	10	Yes
Customer: Contact Type	tb\SALSContacts	fidContactType	20	Yes
Customer: Payment Method	tb\SALSCustomers	fidPaymentMethod	10	Yes

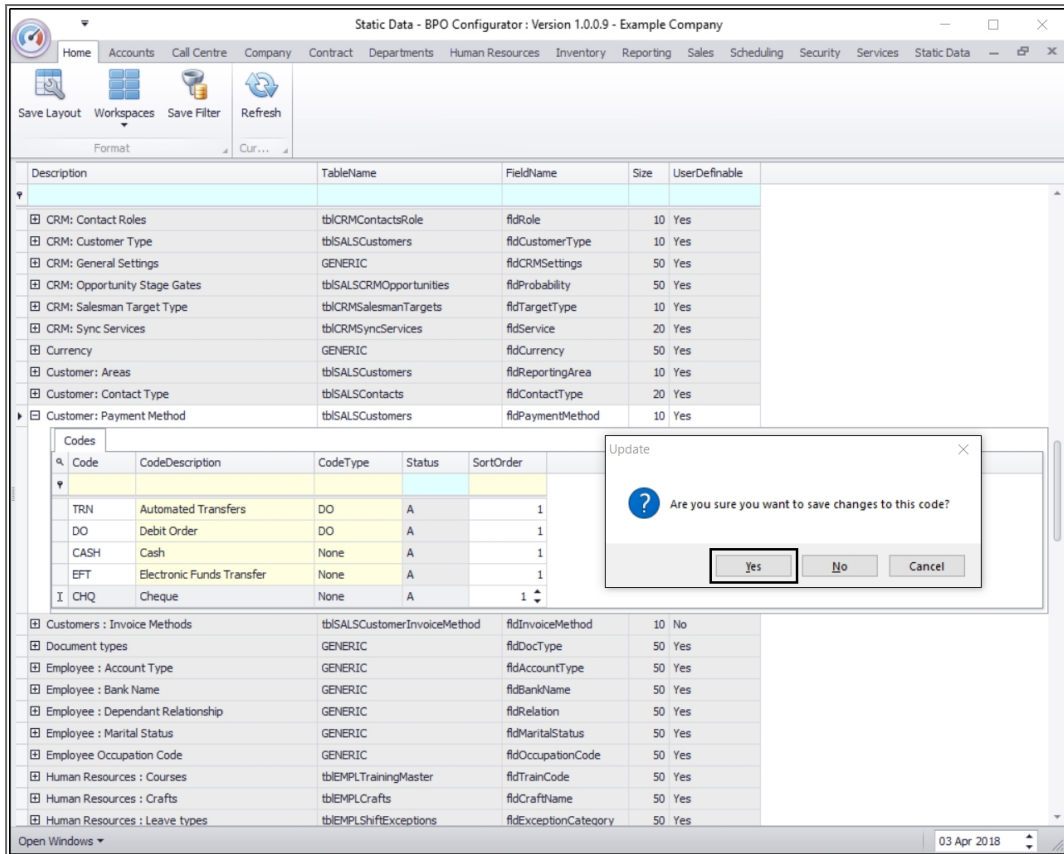
Code	CodeDescription	CodeType	Status	SortOrder
TRN	Automated Transfers	DO	A	1
DO	Debit Order	DO	A	1
CASH	Cash	None	A	1
EFT	Electronic Funds Transfer	None	A	1
I CHQ	Cheque	None	A	0

Customers : Invoice Methods	tb\SALSCustomerInvoiceMethod	fidInvoiceMethod	10	No
Document types	GENERIC	fidDocType	50	Yes
Employee : Account Type	GENERIC	fidAccountType	50	Yes
Employee : Bank Name	GENERIC	fidBankName	50	Yes
Employee : Dependant Relationship	GENERIC	fidRelation	50	Yes
Employee : Marital Status	GENERIC	fidMaritalStatus	50	Yes
Employee Occupation Code	GENERIC	fidOccupationCode	50	Yes
Human Resources : Courses	tb\EMPLTrainingMaster	fidTrainCode	50	Yes
Human Resources : Crafts	tb\EMPLCrafts	fidCraftName	50	Yes
Human Resources : Leave types	tb\EMPLShiftExceptions	fidExceptionCategory	50	Yes

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- When you have finished adding the new payment method 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 payment method code details will be **saved** and a **new row** will be added to the **Codes** data grid.
- **Collapse** the Codes frame.



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

Save Layout Workspaces Save Filter Refresh

Format Cur...

Description	TableName	FieldName	Size	UserDefinable
CRM: Contact Roles	tblCRMContactsRole	fldRole	10	Yes
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	tblSALSCustomers	fldContactType	20	Yes
Customer: Payment Method	tblSALSCustomers	fldPaymentMethod	10	Yes

Codes

Code	CodeDescription	CodeType	Status	SortOrder
TRN	Automated Transfers	DO	A	1
DO	Debit Order	DO	A	1
CASH	Cash	None	A	1
EFT	Electronic Funds Transfer	None	A	1
CHQ	Cheque	None	A	1

Customers : Invoice Methods	tblSALSCustomerInvoiceMethod	fldInvoiceMethod	10	No
Document types	GENERIC	fldDocType	50	Yes
Employee : Account Type	GENERIC	fldAccountType	50	Yes
Employee : Bank Name	GENERIC	fldBankName	50	Yes
Employee : Dependant Relationship	GENERIC	fldRelation	50	Yes
Employee : Marital Status	GENERIC	fldMaritalStatus	50	Yes
Employee Occupation Code	GENERIC	fldOccupationCode	50	Yes
Human Resources : Courses	tblEMPLTrainingMaster	fldTrainCode	50	Yes
Human Resources : Crafts	tblEMPLCrafts	fldCraftName	50	Yes

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