

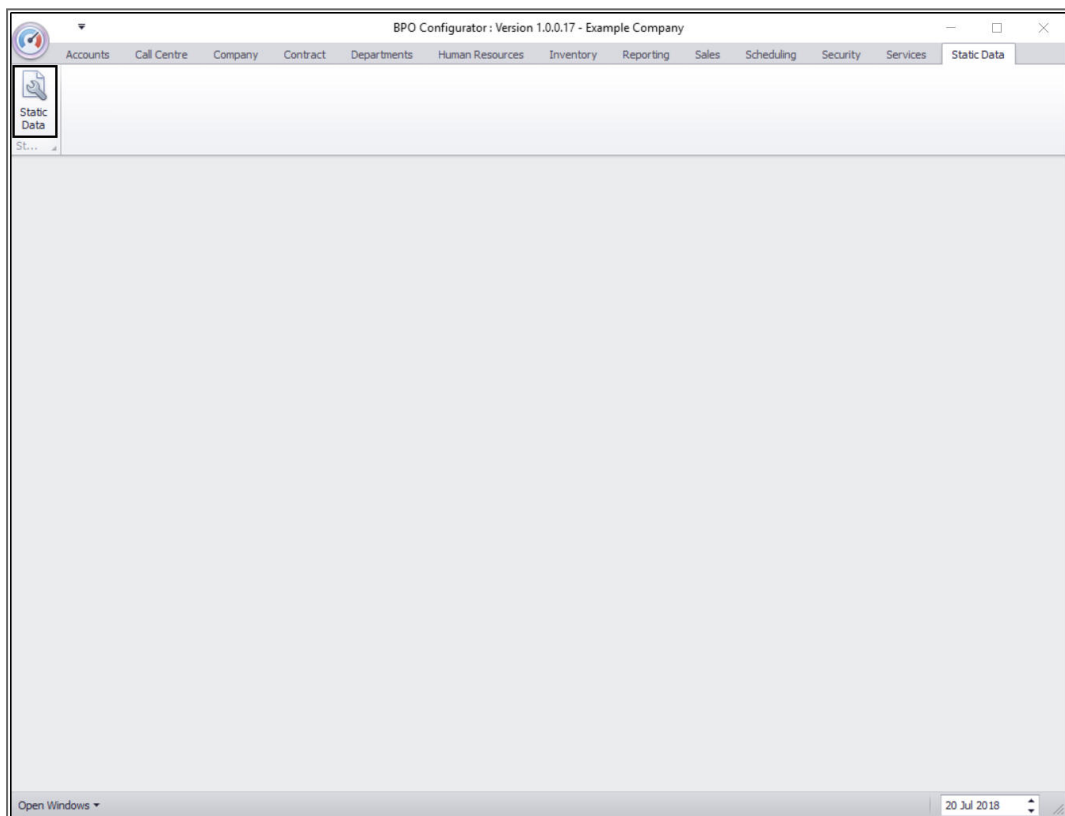
We are currently updating our site; thank you for your patience.

## STATIC DATA

### STATIC DATA - CRM: CONTACT ROLE

Customer Contact Roles must be configured for use in BPO CRM, when creating a new customer contact, e.g. 'Buying Officer', 'Technical Manager', etc.

**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 **CRM:**

## Contact Roles row.

- Click on the **expand** icon in this row.

Description	TableName	FieldName	Size	UserDefinable
CRM: Activity Type	tblCRMActivities	fldActivityType	10	Yes
CRM: Case Source Types	tblCRMCases	fldSourceType	10	Yes
CRM: Case State	tblCRMCases	fldCaseState	1	Yes
CRM: Case Types	tblCRMCases	fldCaseType	10	Yes
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
Customer: Invoice Methods	tblSALSCustomerInvoiceMethod	fldInvoiceMethod	10	No
Document types	GENERIC	fldDocType	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
Human Resources : Leave types	tblEMPLShiftExceptions	fldExceptionCategory	50	Yes
Human Resources: Expense Codes	GENERIC	fldExpenseType	50	Yes
Instruction Class	tblINSTInstructions	fldInstClass	50	Yes
Maintenance : Task Class	tblTASKTasks	fldTaskClass	50	Yes
Manufacturer Class	tblIINWManufacturers	fldClass	50	Yes
Manufacturer Type	tblIINWManufacturers	fldManufacturerType	50	Yes
Meter Units	tblMTRMDefinition	fldUnit	50	Yes

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

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Description	TableName	FieldName	Size	UserDefinable
CRM: Activity Type	tblCRMActivities	fldActivityType	10	Yes
CRM: Case Source Types	tblCRMCases	fldSourceType	10	Yes
CRM: Case State	tblCRMCases	fldCaseState	1	Yes
CRM: Case Types	tblCRMCases	fldCaseType	10	Yes
CRM: Contact Roles	tblCRMContactsRole	fldRole	10	Yes

Codes

Code	CodeDescription	CodeType	Status	SortOrder
CEO	Chief Executive Officer	None	A	1
CFO	Chief Financial Officer	None	A	1
BUY	Buying Officer	None	A	1
EU	End user	None	A	1
TM	Technical Manager	None	A	1
ACC	Accounts Manager	None	A	1
SAL	Salesman	None	A	1

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
Customers : Invoice Methods	tblSALSCustomerInvoiceMethod	fldInvoiceMethod	10	No
Document types	GENERIC	fldDocType	50	Yes
Employee : Dependant Relationship	GENERIC	fldRelation	50	Yes

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

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Description	TableName	FieldName	Size	UserDefinable
CRM: Activity Type	tblCRMActivities	fldActivityType	10	Yes
CRM: Case Source Types	tblCRMCases	fldSourceType	10	Yes
CRM: Case State	tblCRMCases	fldCaseState	1	Yes
CRM: Case Types	tblCRMCases	fldCaseType	10	Yes
CRM: Contact Roles	tblCRMContactsRole	fldRole	10	Yes

Code	CodeDescription	CodeType	Status	SortOrder
CEO	Chief Executive Officer	None	A	1
CFO	Chief Financial Officer	None	A	1
BUY	Buying Officer	None	A	1
EU	End user	None	A	1
TM	Technical Manager	None	A	1
ACC	Accounts Manager	None	A	1
SAL	Salesman	None	A	1
*				

Process  
Add New Code  
Delete Code

CRM: Customer Type	tblSALSCustomers			10	Yes
CRM: General Settings	GENERIC			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
Customers : Invoice Methods	tblSALSCustomerInvoiceMethod	fldInvoiceMethod		10	No
Document types	GENERIC	fldDocType		50	Yes
Employee : Disconnected Relationship	GENERIC	fldRelation		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.

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Description	TableName	FieldName	Size	UserDefinable
CRM: Activity Type	tblCRMActivities	fldActivityType	10	Yes
CRM: Case Source Types	tblCRMCases	fldSourceType	10	Yes
CRM: Case State	tblCRMCases	fldCaseState	1	Yes
CRM: Case Types	tblCRMCases	fldCaseType	10	Yes
CRM: Contact Roles	tblCRMContactsRole	fldRole	10	Yes

Code	CodeDescription	CodeType	Status	SortOrder
CEO	Chief Executive Officer	None	A	1
CFO	Chief Financial Officer	None	A	1
BUY	Buying Officer	None	A	1
EUJ	End user	None	A	1
TM	Technical Manager	None	A	1
ACC	Accounts Manager	None	A	1
SAL	Salesman	None	A	1
I		None	A	0

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
Customers : Invoice Methods	tblSALSCustomerInvoiceMethod	fldInvoiceMethod	10	No
Document types	GENERIC	fldDocType	50	Yes
Employee - Dependant Relationship	GENERIC	fldRelation	50	Yes

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- **Code:** Click in this text box and type in a **code** specific for this new CRM: Contact Role.
- **Code Description:** Click in this text box and type in a **description** for this new CRM: Contact Role code.

Description	TableName	FieldName	Size	UserDefinable
CRM: Activity Type	tblCRMActivities	fldActivityType	10	Yes
CRM: Case Source Types	tblCRMCases	fldSourceType	10	Yes
CRM: Case State	tblCRMCases	fldCaseState	1	Yes
CRM: Case Types	tblCRMCases	fldCaseType	10	Yes
CRM: Contact Roles	tblCRMContactsRole	fldRole	10	Yes

Code	CodeDescription	CodeType	Status	SortOrder
CEO	Chief Executive Officer	None	A	1
CFO	Chief Financial Officer	None	A	1
BUY	Buying Officer	None	A	1
EUJ	End user	None	A	1
TM	Technical Manager	None	A	1
ACC	Accounts Manager	None	A	1
SAL	Salesman	None	A	1
I		None	A	0

- **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 CRM: Contact Role code.
  - **Note:** The **sort order** is the order in which this will appear in the CRM: Contact Role code drop-down list in BPO. If each CRM: Contact Role 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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Description	TableName	FieldName	Size	UserDefinable
CRM: Activity Type	tblCRMActivities	fldActivityType	10	Yes
CRM: Case Source Types	tblCRMCases	fldSourceType	10	Yes
CRM: Case State	tblCRMCases	fldCaseState	1	Yes
CRM: Case Types	tblCRMCases	fldCaseType	10	Yes
CRM: Contact Roles	tblCRMContactsRole	fldRole	10	Yes

Code	CodeDescription	CodeType	Status	SortOrder
CEO	Chief Executive Officer	None	A	1
CFO	Chief Financial Officer	None	A	1
BUY	Buying Officer	None	A	1
EU	End user	None	A	1
TM	Technical Manager	None	A	1
ACC	Accounts Manager	None	A	1
SAL	Salesman	None	A	1
PRA	Product Advisor	None	A	0

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
Customers : Invoice Methods	tblSALSCustomerInvoiceMethod	fldInvoiceMethod	10	No
Document types	GENERIC	fldDocType	50	Yes
Employee : Dependant Relationship	GENERIC	fldRelation	50	Yes

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- When you have finished adding the new CRM: Contact Role 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' application window. The main table displays various CRM entities and their associated fields. A 'Codes' sub-table is expanded, showing a list of roles. A confirmation dialog box titled 'Update' is overlaid on the table, asking 'Are you sure you want to save changes to this code?' with 'Yes', 'No', and 'Cancel' buttons.

Description	TableName	FieldName	Size	UserDefinable
CRM: Activity Type	tblCRMActivities	fldActivityType	10	Yes
CRM: Case Source Types	tblCRMCases	fldSourceType	10	Yes
CRM: Case State	tblCRMCases	fldCaseState	1	Yes
CRM: Case Types	tblCRMCases	fldCaseType	10	Yes
CRM: Contact Roles	tblCRMContactsRole	fldRole	10	Yes

Code	CodeDescription	CodeType	Status	SortOrder
CEO	Chief Executive Officer	None	A	1
CFO	Chief Financial Officer	None	A	1
BUY	Buying Officer	None	A	1
EU	End user	None	A	1
TM	Technical Manager	None	A	1
ACC	Accounts Manager	None	A	1
SAL	Salesman	None	A	1
PRA	Product Advisor	None	A	1

- The new CRM: Contact Role 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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Description	TableName	FieldName	Size	UserDefinable
CRM: Activity Type	tbICRMActivities	fldActivityType	10	Yes
CRM: Case Source Types	tbICRMCases	fldSourceType	10	Yes
CRM: Case State	tbICRMCases	fldCaseState	1	Yes
CRM: Case Types	tbICRMCases	fldCaseType	10	Yes
CRM: Contact Roles	tbICRMContactsRole	fldRole	10	Yes

Codes

Code	CodeDescription	CodeType	Status	SortOrder
CEO	Chief Executive Officer	None	A	1
CFO	Chief Financial Officer	None	A	1
BUY	Buying Officer	None	A	1
EUJ	End user	None	A	1
TM	Technical Manager	None	A	1
ACC	Accounts Manager	None	A	1
SAL	Salesman	None	A	1
PRA	Product Advisor	None	A	1

CRM: Customer Type	tbISALSCustomers	fldCustomerType	10	Yes
CRM: General Settings	GENERIC	fldCRMSettings	50	Yes
CRM: Opportunity Stage Gates	tbISALSCRMOpportunities	fldProbability	50	Yes
CRM: Salesman Target Type	tbICRMSalesmanTargets	fldTargetType	10	Yes
CRM: Sync Services	tbICRMSyncServices	fldService	20	Yes
Currency	GENERIC	fldCurrency	50	Yes
Customer: Areas	tbISALSCustomers	fldReportingArea	10	Yes
Customer: Contact Type	tbISALSCustomers	fldContactType	20	Yes
Customer: Payment Method	tbISALSCustomers	fldPaymentMethod	10	Yes
Customer: Invoice Methods	tbISALSCustomerInvoiceMethod	fldInvoiceMethod	10	No
Document Types	GENERIC	fldDocType	50	Yes

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