

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

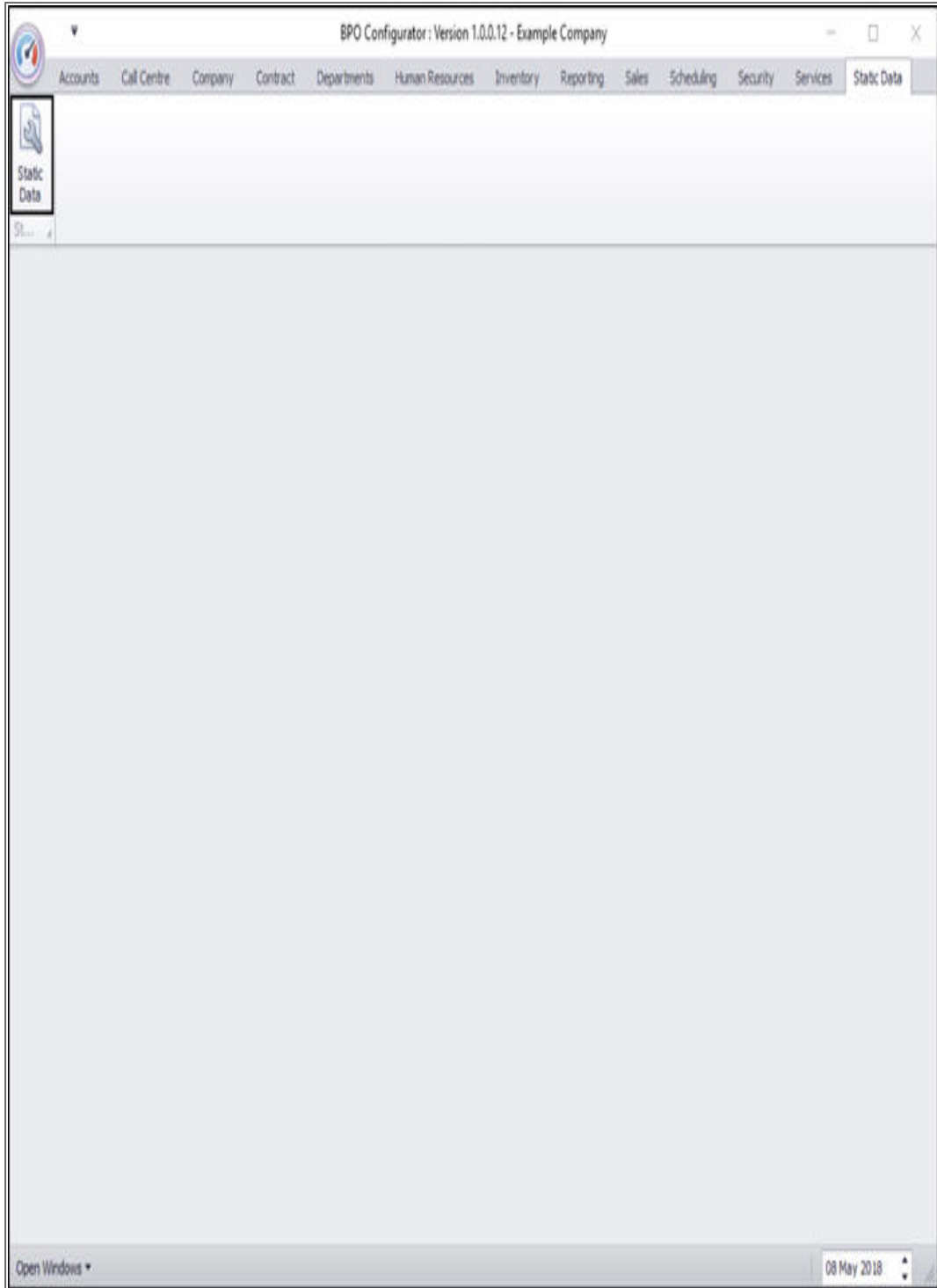
# STATIC DATA

## STATIC DATA - SALES: CREDIT TERMS

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**Ribbon Access:** Configurator > Static Data > Static Data

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## **FIND THE SALES: CREDIT TERMS ROW**

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

Static Data - BPO Configurator : Version 1.0.0.12 - 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	UserDefnible
Reporting : Report Sub Types	tbRPTSavedReports	fdReportSubType	50	Yes
Reporting : Report Types	tbRPTSavedReports	fdReportType	50	Yes
Sales : Credit Note Reason Codes	tbSALSCNoteRelatedRefs	fdReferenceID	4	Yes
Sales : Customer addresses	tbSALSAddresses	fdAddressType	4	Yes
Sales : Document Status	tbSALSInvoices	fdStatus	1	No
Sales : Quote detail types	tbSALSQuotesDetails	fdQuoteDetailType	50	Yes
Sales : Quote payment terms	tbSALSQuoteConfig	fdQuoteTermsCode	10	Yes
Sales : Quote Status	tbSALSQuotes	fdQuoteStatus	50	Yes
Sales : Quote Unit Types	tbSALSQuotesDetails	fdQuoteUnitType	50	Yes
Sales : Quotes Other Costs	tbSALSQuotes	fdQuoteCostType	50	Yes
Sales : Service Class	GENERIC	fdServiceClass	50	Yes
Sales : Service Type	GENERIC	fdServiceType	50	Yes
Sales : Service Unit of Measure	GENERIC	fdUnitofMeasure	50	Yes
Sales : Credit Terms	tbSALSCustomers	fdCreditTerms	20	Yes
Stock Adjustments : Reason Code	tbINWAdjustmentRequest	fdReasonCode	10	Yes
Task: Day Of Week	tbASMTaskSchedule	fdDayOfWeek	10	No
Task: Week Of Month	tbASMTaskSchedule	fdWeekOfMonth	10	No
Warranties : Warranty Type	tbWARRWarranty	fdType	10	Yes
Work Orders : Class	tbWOKORWorkOrder	fdWOCClass	50	Yes
Work Orders : Rectification Codes	tbWOKORWorkSchedule	fdRectificationCode	10	Yes
Work Orders : Type	tbWOKORWorkOrder	fdWOTType	50	Yes
Work Orders : Work Order Status	tbWOKORWorkOrder	fdStatus	1	No

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- The Sales: Credit Terms **Codes** frame will be expanded.
- Here you can view a list of **sales credit terms types** currently on the system.

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Save Layout Workspaces Save Filter Refresh

Format Cur...

Description	TableName	FieldName	Size	UserDefinable
Reporting : Report Sub Types	tblRPTSSavedReports	fldReportSubType	50	Yes
Reporting : Report Types	tblRPTSSavedReports	fldReportType	50	Yes
Sales : Credit Note Reason Codes	tblSALSCreditNoteRelatedRefs	fldReferenceID	4	Yes
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
Sales : Credit Terms	tblSALSCustomers	fldCreditTerms	20	Yes

Codes

Code	CodeDescription	CodeType	Status	SortOrder
0	COD	0	A	0
1	30 Days	30	A	1
2	60 Days	60	A	2
3	90 Days	90	A	3
4	120 Days	120	A	4
5	150 Days	150	A	5

Stock Adjustments : Reason Code	tblBINVAdjustmentRequest	fldReasonCode	10	Yes
Task: Day Of Week	tblASMTaskSchedule	fldDayOfWeek	10	No

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## ADD A CREDIT TERM

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- **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

Format Cur...

Description	TableName	FieldName	Size	UserDefinable
Reporting : Report Sub Types	tbRPTSSavedReports	fdReportSubType	50	Yes
Reporting : Report Types	tbRPTSSavedReports	fdReportType	50	Yes
Sales : Credit Note Reason Codes	tbSALSCNoteRelatedRefs	fdReferenceID	4	Yes
Sales : Customer addresses	tbSALSAddresses	fdAddressType	4	Yes
Sales : Document Status	tbSALSInvoices	fdStatus	1	No
Sales : Quote detail types	tbSALSQuotesDetails	fdQuoteDetailType	50	Yes
Sales : Quote payment terms	tbSALSQuoteConfig	fdQuoteTermsCode	10	Yes
Sales : Quote Status	tbSALSQuotes	fdQuoteStatus	50	Yes
Sales : Quote Unit Types	tbSALSQuotesDetails	fdQuoteUnitType	50	Yes
Sales : Quotes Other Costs	tbSALSQuotes	fdQuoteCostType	50	Yes
Sales : Service Class	GENERIC	fdServiceClass	50	Yes
Sales : Service Type	GENERIC	fdServiceType	50	Yes
Sales : Service Unit of Measure	GENERIC	fdUnitofMeasure	50	Yes
Sales : Credit Terms	tbSALSCustomers	fdCreditTerms	20	Yes

Codes

Code	CodeDescription	CodeType	Status	SortOrder
0	000	0	A	0
1	30 Days	30	A	1
2	60 Days	60	A	2
3	90 Days	90	A	3
4	120 Days	120	A	4
5	150 Days	150	A	5

Process

Add Add New Code

Delete Delete Code

Stock Adjustments : Reason Code tbDWNAdjustmentReque 10 Yes

Task: Day Of Week tbASMTaskSchedule 10 No

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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 1.0.0.12 - 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	UserDefnble
Reporting : Report Sub Types	tbRPTSSavedReports	fdReportSubType	50	Yes
Reporting : Report Types	tbRPTSSavedReports	fdReportType	50	Yes
Sales : Credit Note Reason Codes	tbSALSCNoteRelatedRefs	fdReferenceID	4	Yes
Sales : Customer addresses	tbSALSAddresses	fdAddressType	4	Yes
Sales : Document Status	tbSALSInvoices	fdStatus	1	No
Sales : Quote detail types	tbSALSQuotesDetails	fdQuoteDetailType	50	Yes
Sales : Quote payment terms	tbSALSQuoteConfig	fdQuoteTermsCode	10	Yes
Sales : Quote Status	tbSALSQuotes	fdQuoteStatus	50	Yes
Sales : Quote Unit Types	tbSALSQuotesDetails	fdQuoteUnitType	50	Yes
Sales : Quotes Other Costs	tbSALSQuotes	fdQuoteCostType	50	Yes
Sales : Service Class	GENERIC	fdServiceClass	50	Yes
Sales : Service Type	GENERIC	fdServiceType	50	Yes
Sales : Service Unit of Measure	GENERIC	fdUnitofMeasure	50	Yes
Sales : Credit Terms	tbSALSCustomers	fdCreditTerms	20	Yes

Codes

Code	CodeDescription	CodeType	Status	SortOrder
0	COO	0	A	0
1	30 Days	30	A	1
2	60 Days	60	A	2
3	90 Days	90	A	3
4	120 Days	120	A	4
5	150 Days	150	A	5
I		None	A	0

Stock Adjustments : Reason Code	tbDYNAdjustmentRequest	fdReasonCode	10	Yes
Task: Day Of Week	tbASMTTaskSchedule	fdDayOfWeek	10	No

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- **Code:** Click in this text box and type in a **code** specific for this new sales credit terms.

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

The screenshot shows the 'Static Data - BPO Configurator' application. The main window displays a table of static data with columns: Description, TableName, FieldName, Size, and UserDefinable. The 'Sales: Credit Terms' entry is selected, showing it is linked to the 'tbSALCustomers' table and the 'fdCreditTerms' field.

Description	TableName	FieldName	Size	UserDefinable
Reporting : Report Sub Types	tbRPTSSavedReports	fdReportSubType	50	Yes
Reporting : Report Types	tbRPTSSavedReports	fdReportType	50	Yes
Sales : Credit Note Reason Codes	tbSALSCNoteRelatedRefs	fdReferenceID	4	Yes
Sales : Customer addresses	tbSALAddresses	fdAddressType	4	Yes
Sales : Document Status	tbSALSInvoices	fdStatus	1	No
Sales : Quote detail types	tbSALSQuotesDetails	fdQuoteDetailType	50	Yes
Sales : Quote payment terms	tbSALSQuoteConfig	fdQuoteTermsCode	10	Yes
Sales : Quote Status	tbSALSQuotes	fdQuoteStatus	50	Yes
Sales : Quote Unit Types	tbSALSQuotesDetails	fdQuoteUnitType	50	Yes
Sales : Quotes Other Costs	tbSALSQuotes	fdQuoteCostType	50	Yes
Sales : Service Class	GENERIC	fdServiceClass	50	Yes
Sales : Service Type	GENERIC	fdServiceType	50	Yes
Sales : Service Unit of Measure	GENERIC	fdUnitofMeasure	50	Yes
Sales : Credit Terms	tbSALCustomers	fdCreditTerms	20	Yes

A modal window titled 'Codes' is open, showing a table for adding a new credit term code:

Code	CodeDescription	CodeType	Status	SortOrder
0	COD	0	A	0
1	30 Days	30	A	1
2	60 Days	60	A	2
3	90 Days	90	A	3
4	120 Days	120	A	4
5	150 Days	150	A	5
I		None	A	0

The 'I' row is highlighted, indicating it is the selected entry for adding a new code. The application interface includes a menu bar (Home, Accounts, Call Centre, Company, Contract, Departments, Human Resources, Inventory, Reporting, Sales, Scheduling, Security, Services, Static Data) and a toolbar with options like Save Layout, Workspaces, Save Filter, Refresh, and Format.

- **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 terms code.
  - **Note:** The sort order is the order in which this new Credit Term will appear in the Credit Terms drop-down list in BPO2. If each Credit Term has the same number e.g. 0 or 1, then the drop-down list will usually default to an alphabetical order in BPO2. If you wish the Credit Terms to be listed in a certain order then number each one in the order that you wish to view them.

Static Data - BPO Configurator : Version 1.0.0.12 - 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
Reporting : Report Sub Types	tblRPTSSavedReports	fldReportSubType	50	Yes
Reporting : Report Types	tblRPTSSavedReports	fldReportType	50	Yes
Sales : Credit Note Reason Codes	tblSALSCreditNoteRelatedRefs	fldReferenceID	4	Yes
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
Sales : Credit Terms	tblSALSCustomers	fldCreditTerms	20	Yes

Codes

Code	CodeDescription	CodeType	Status	SortOrder
0	COD	0	A	0
1	30 Days	30	A	1
2	60 Days	60	A	2
3	90 Days	90	A	3
4	120 Days	120	A	4
5	150 Days	150	A	5
6	180 Days	0	A	0

Stock Adjustments : Reason Code	tblINWAdjustmentRequest	fldReasonCode	10	Yes
Task: Day Of Week	tblASMTadSchedule	fldDayOfWeek	10	No

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### **SAVE CREDIT TERM DETAILS**

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- When you have finished adding the new sales credit terms code details, either press **Tab** or **Enter** on your keyboard or **click outside** of the data grid.
- An **Update** message box will appear, asking;
  - Are you sure you want to save changes to this code?
- Click on **Yes**.

Static Data - BPO Configurator : Version 1.0.0.12 - 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
Reporting : Report Sub Types	tblRPTSSavedReports	fldReportSubType	50	Yes
Reporting : Report Types	tblRPTSSavedReports	fldReportType	50	Yes
Sales : Credit Note Reason Codes	tblSALSCNoteRelatedRefs	fldReferenceID	4	Yes
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
Sales : Credit Terms	tblSALSCustomers	fldCreditTerms	20	Yes

Codes

Code	CodeDescription	CodeType	Status	SortOrder
0	COO	0	A	0
1	30 Days	30	A	1
2	60 Days	60	A	2
3	90 Days	90	A	3
4	120 Days	120	A	4
5	150 Days	150	A	5
6	180 Days	0	A	6

Update

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

Yes No Cancel

Stock Adjustments : Reason Code tblINVAdjustmentRequest fldReasonCode 10 Yes

Task: Day Of Week tblASMTaskSchedule fldDayOfWeek 10 No

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- The new sales credit terms code will be **saved** and a **new row** will be added to the **Codes** data grid.

- **Collapse** the Codes frame when you are done.

The screenshot shows the 'Static Data - BPO Configurator' application window. The main table lists various static data items with columns for Description, TableName, FieldName, Size, and UserDefinable. The 'Sales: Credit Terms' entry is selected, and a 'Codes' frame is collapsed below it, showing a table of credit term codes.

Description	TableName	FieldName	Size	UserDefinable
Sales : Quote Status	tbSALSQuotes	fdQuoteStatus	50	Yes
Sales : Quote Unit Types	tbSALSQuotesDetails	fdQuoteUnitType	50	Yes
Sales : Quotes Other Costs	tbSALSQuotes	fdQuoteCostType	50	Yes
Sales : Service Class	GENERIC	fdServiceClass	50	Yes
Sales : Service Type	GENERIC	fdServiceType	50	Yes
Sales : Service Unit of Measure	GENERIC	fdUnitOfMeasure	50	Yes
Sales: Credit Terms	tbSALSCustomers	fdCreditTerms	20	Yes

Code	CodeDescription	CodeType	Status	SortOrder
0	000	0	A	0
1	30 Days	30	A	1
2	60 Days	60	A	2
3	90 Days	90	A	3
4	120 Days	120	A	4
5	150 Days	150	A	5
6	180 Days	None	A	6

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