

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

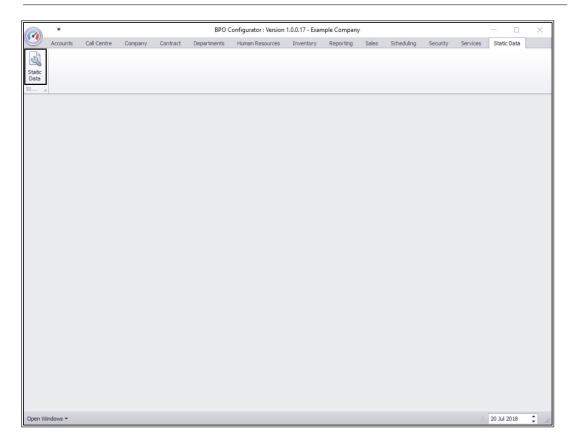
STATIC DATA

STATIC DATA - CUSTOMER: AREAS

Reporting Areas are required for Customers in BPO CRM, but can also be used in BPO without BPO CRM.

These Reporting Areas give you the ability to categorise your clients, or group them into specific physical or otherwise pre-defined areas.

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

Home Accounts Call Centre Compan	y Contract Departments Hum	an Resources Invento	ry Re	porting Sales	Scheduling	Security	Services	Static Data	- 1	8
ve Layout Workspaces Save Filter										
Description	TableName	FieldName	Size	UserDefinable	1					
CRM: Case Types	tblCRMCases	fldCaseType	10	Yes						
CRM: Contact Roles	tblCRMContactsRole	fidRole	10	Yes						
CRM: Customer Type	tblSALSCustomers	fldCustomerType	10	Yes						
CRM: General Settings	GENERIC	fidCRMSettings	50							
CRM: Opportunity Stage Gates	tblSALSCRMOpportunities	fidProbability	50	Yes						
CRM: Salesman Target Type	tblCRMSalesmanTargets	fldTargetType	10	Yes						
CRM: Sync Services	tblCRMSyncServices	fldService	20	Yes						
Currency	GENERIC	fidCurrency	50	Yes						
E Customer: Areas	tblSALSCustomers	fidReportingArea	10	Yes						
Customer: Contact Type	tblSALSContacts	fidContactType	20	Yes						
Customer: Payment Method	tblSALSCustomers	fidPaymentMethod	10	Yes						
☑ Customers : Invoice Methods	tblSALSCustomerInvoiceMethod	fldInvoiceMethod	10	No						
Document types	GENERIC	fldDocType	50	Yes						
Employee : Dependant Relationship	GENERIC	fidRelation	50	Yes						
Employee : Marital Status	GENERIC	fidMaritalStatus	50	Yes						
Employee Occupation Code	GENERIC	fldOccupationCode	50	Yes						
Human Resources : Courses	tblEMPLTrainingMaster	fldTrainCode	50	Yes						
Human Resources : Crafts	tblEMPLCrafts	fidCraftName	50	Yes						
Human Resources : Leave types	tblEMPLShiftExceptions	fidExceptionCategory	50	Yes						
Human Resources: Expense Codes	GENERIC	fldExpenseType	50	Yes						
Instruction Class	tblINSTInstructions	fidInstClass	50	Yes						
Maintenance : Task Class	tblTASKTasks	fldTaskClass	50	Yes						
Manufacturer Class	tblINVNManufacturers	fldClass	50	Yes						
Manufacturer Type	tblINVNManufacturers	fldManufacturerType	50	Yes						
Meter Units	tblMTRMDefinition	fldUnit	50	Yes						
Overtime Factor	GENERIC	fldOverTimeFactor	4	Yes						
Part Requests: State	tblINVNRequestItemNotes	fldState	10	Yes						
Part Types	GENERIC	fldPartType	1	Yes						

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



2	Ŧ			Static Data -	BPO Cor	nfigurator : \	/ersion 1.0.0.	17 - Exa	mple Company				-		>
9	Home Accounts	Call Centre Company	Contrac	t Department	s Hum	an Resource	s Inventor	y Re	porting Sales	Scheduling	Security	Services	Static Data	-	8
ave l	ayout Workspaces	Save Filter Refresh													
Des	cription	-	TableNa	ame		FieldName		Size	UserDefinable						_
	CRM: Case Types		thickne	Cases		fldCaseTv	pe	10	Yes						
	CRM: Contact Roles			ContactsRole		fldRole		10							
	CRM: Customer Type		thISALS	Customers		fldCustom	erType	10	Yes						
± (CRM: General Settings		GENERI	C		fldCRMSet		50	Yes						
 (CRM: Opportunity Sta	ge Gates	tblSALS	CRMOpportunities	5	fldProbabi	ity	50	Yes						
	CRM: Salesman Targe	t Type	thickma	SalesmanTargets		fldTargetT	ype	10	Yes						
•	CRM: Sync Services		thickms	SyncServices		fldService		20	Yes						
	Currency		GENERI	с		fldCurrent	y	50	Yes						
Ξ (Customer: Areas		tblSALS	Customers		fidReporti	ngArea	10	Yes						
	Codes														
	Code Code Code		CodeType Status			IS	SortOrder								
	Р JHB	Johannesburg	None A				1								
	DBN	Durban		None	A			1							
	*	Durban		None	^			1							
	Customer: Contact Ty	pe	tblSALS	Contacts	_	fldContact	Туре	20	Yes						
	Customer: Payment M	ethod	tblSALS	Customers		fldPaymer	tMethod	10	Yes						
	Customers : Invoice M	lethods	thISALS	CustomerInvoice	4ethod	fldInvoice	Method	10	No						
± (Document types		GENERI	c		fldDocTyp	e	50	Yes						
•	Employee : Dependan	t Relationship	GENERI	C		fidRelation	i	50	Yes						
± 6	Employee : Marital Sta	itus	GENERI	C		fidMaritalS	tatus	50	Yes						
	Employee Occupation	Code	GENERI	С		fldOccupa	tionCode	50	Yes						
± 1	Human Resources : Co	ourses	thIEMPL	TrainingMaster		fldTrainCo	de	50	Yes						
•	luman Resources : Cr	afts	tblempt	Crafts		fldCraftNa	me	50	Yes						
	luman Resources : Le	ave types	tblempL	ShiftExceptions		fldExcepti	onCategory	50	Yes						
H	luman Resources: Exp	pense Codes	GENERI	с		fldExpens	еТуре	50	Yes						
	idition recorded con con														
ŧ	instruction Class		tblinsti	Instructions		fldInstClas	is	50	Yes						

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



2	Ŧ					Static Data -	BPO Cor	figurator :	Version 1.0.0.1	7 - Exa	mple Com	npany				-			×
9	Home	Accounts	Call Centre	Company	Contrac	t Department	s Hum	an Resourci	es Inventor	y Re	porting	Sales	Scheduling	Security	Services	Static Data	-	₽	
ave La		Au Workspaces Save Filter Format Cur																	
Desc	ription				TableNa	me		FieldNam	2	Size	UserDefin	able	1					_	-
Ð C	RM: Case Ty	vpes			thiCRM	Cases		fldCaseT	/pe	10	Yes								
• c	RM: Contact	t Roles			thiCRM	ContactsRole		fldRole		10	Yes								
E C	RM: Custom	er Type			thISALS	Customers		fldCustor	nerType	10	Yes								
E C	RM: General	Settings			GENERI	с		fldCRMSe	ttings	50	Yes								
Ð C	RM: Opport	unity Stage (Gates		thisals	CRMOpportunitie	s	fldProbab	ility	50	Yes								
Ð C	RM: Salesma	an Target Ty	/pe		thiCRMS	SalesmanTargets		fldTarget	Туре	10	Yes								
E 0	RM: Sync Se	ervices			thickms	SyncServices		fldService		20	Yes								
D	urrency				GENERI	с		fldCurren	cy	50	Yes								
8 0	ustomer: An	omer: Areas			tblSALS	Customers		fldReport	ingArea	10	Yes								
	Codes		CodeDescription			CodeType	Statu	ie.	SortOrder										
	Code CodeDescription	don	coderype		51610	13	301001021												
	JHB		Johannesbur	0		None	A			1									
	DBN		Durban	9		None	A			1									
	*								Process	-	*								
E O	ustomer: Co	ontact Type			thisals	Contacts		fidContac	Add										-
		yment Metho	od		thisals	Customers		fldPayme	Add Ne	w Code									
⊞ 0	ustomers : I	nvoice Meth	ods		thisals	CustomerInvoice	Method	fldInvoice	Delete										
Ð D	ocument typ	bes			GENERI	с		fldDocTy		Joue									
Đ Đ	Document types Employee : Dependant Relationship				GENERI	с		fidRelatio	n	50	Yes								
Đ Đ	Employee : Dependant Relationship Employee : Marital Status			GENERI	с		fidMarital	Status	50	Yes									
Ð Đ	Employee Occupation Code						fldOccupationCode		50	Yes									
⊞ H	uman Resou	irces : Cours	es		thempu	TrainingMaster		fldTrainC	ode	50	Yes								
⊞ H	uman Resou	rces : Crafts	s		tblEMPL	Crafts		fldCraftN	ame	50	Yes								
⊞ H	uman Resou	irces : Leave	e types		t blempL	ShiftExceptions		fldExcept	ionCategory	50	Yes								
H 🗄	uman Resou	irces: Expen	se Codes		GENERI	с		fldExpens	seType	50	Yes								
🗄 Ir	struction Cl	ass			tblINST	Instructions		fldInstCla	ISS	50	Yes								
	B Instruction Class				HITASK	Tacke		AdTackCl	206	50	Yer								

- 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 Cor	figurator	: Version 1.0.0	0.17 - Exa	mple C	Company				-			×
Ľ	Home Ad	ccounts	Call Centre	Company	Contra	ct Department	s Hum	an Resour	ces Invent	ory Re	eporting	Sales	Scheduling	Security	Services	Static Data	-	₽	
2		out Workspaces Save Filter Refresh																	
ve L	avout Works	spaces Sa	ave Filter	Refresh															
		÷																	
	Forma	at	a.	Cur a															
Des	cription				TableN	ame		FieldNar	ne	Size	UserD	efinable							
⊞ C	RM: Case Typ	es			tblCRM	Cases		fldCase	Туре	10	Yes								
	RM: Contact F	Roles			tblCRM	ContactsRole		fldRole		10	Yes								
	RM: Customer	r Type			tblSALS	Customers		fldCusto	omerType	10	Yes								
⊞ C	RM: General S	Settings			GENER	IC		fldCRMS	Settings	50	Yes								
⊞ C	RM: Opportun	hity Stage G	Gates		tblSALS	CRMOpportunitie	5	fldProba	ability	50	Yes								
	RM: Salesman		pe			SalesmanTargets		fldTarge		10									
						SyncServices		fldServi	77 7 -0	20	1.000								
	urrency	rency stomer: Areas				IC		fldCurre		50	Yes								
Ξc	ustomer: Area	as			tblSALS	Customers		fldRepo	rtingArea	10	Yes								_
	Codes																		_
	Code CodeDescription		ription		CodeType	Statu	IS	SortOrder										4	
	9																		
	JHB		Johannes	burg		None	Α			1									
	DBN		Durban			None	А			1									
	I					None	Α			0									
	ustomer: Con	tact Type			tblSALS	Contacts		fldConta	actType	20	Yes								
	ustomer: Payr	ment Metho	bd		tbisALS	Customers		fldPaym	entMethod	10	Yes								
± c	ustomers : Inv	voice Metho	ods		tblSALS	CustomerInvoice	lethod	fldInvoi	ceMethod	10	No								
Ð D	ocument type	s			GENER	tC		fldDocT	ype	50	Yes								
ΞE	imployee : Dependant Relationship			GENER	IC		fidRelat	ion	50	Yes									
E E	mployee : Mar	rital Status			GENERIC			fidMarit	50	Yes									
ΞE	mployee Occu	pation Cod	e		GENER	IC		fldOccupationCode		50	Yes								
H E	luman Resourc	ces : Course	es		thempu	TrainingMaster		fldTrainCode		50) Yes								
Ð H	uman Resourc	ces : Crafts			thempu	Crafts		fldCraft	Name	50	Yes								
Ð H	Human Resources : Leave types			tblEMPLShiftExceptions f			fldExceptionCategory		50	Yes									
Ð H	uman Resourc	ces: Expens	se Codes		GENER	IC		fldExpe	nseType	50	Yes								
E Ir	nstruction Clas	ss			tblINST	Instructions		fldInstC	lass	50	Yes								
	Maintenance - Task Class						AdTack	lace	50	Vec									

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



	-					Static Data -	BPO Cor	nfigurator	Version 1.0.0.	17 - Exa	mple Co	ompany				-			×
Ľ	Home	Accounts	Call Centre	e Company	Contra	ct Departmen	ts Hum	ian Resourc	es Inventor	y Re	porting	Sales	Scheduling	Security	Services	Static Data	-	8	
2	N.			422															
ve La	ayout W	/orkspaces	Save Filter	Refresh															
		•																	
	Fo	ormat		Cur a															
Desc	cription				TableNa	ame		FieldNam	e	Size	UserDe	finable							
⊞ C	RM: Case	Types			tblCRM	Cases		fldCaseT	ype	10	Yes								
	RM: Conta	act Roles			tblCRM	ContactsRole		fldRole		10	Yes								
	RM: Custo	omer Type			tbisALS	Customers		fldCusto	merType	10	Yes								
⊕ C	RM: Gene	ral Settings			GENERI	IC		fldCRMS	ettings	50	Yes								
		ortunity Stage			tbiSALS	CRMOpportunitie	:S	fldProba	bility	50									
		man Target	Гуре			SalesmanTargets		fldTarge		10									
						SyncServices		fldServic			Yes								
	urrency	rrency stomer: Areas				IC		fldCurren			Yes								
EC	ustomer:	Areas			tbiSALS	Customers		fldRepor	tingArea	10	Yes								_
	Codes																		_
	Code CodeDescription		cription	CodeType Status			JS	SortOrder											
	٩				New														
	JHB		Johannes	sburg		None	Α			1									
	DBN		Durban			None	A			1									
_ l	I					None	A			0									
€C	ustomer:	Contact Type	2		tbisALS	Contacts		fldConta	ctType	20	Yes								
. E	ustomer: I	Payment Met	thod		thisals	Customers		fldPayme	entMethod	10	Yes								
⊕ C	ustomers	: Invoice Me	thods		tbisALS	CustomerInvoice	Method	fldInvoic	eMethod	10	No								
⊞ D	ocument t	types			GENERI	IC		fldDocTy	pe	50	Yes								
Đ Đ	mployee :	Dependant I	Relationship		GENERI	IC		fldRelatio	n	50	Yes								
⊞ E	mployee :	Marital Stat.	JS		GENERI	IC		fidMarita	50	Yes									
Ð E	Employee Occupation Code			GENERI	IC		fldOccup	50	Yes										
H 🗄	uman Res	ources : Cou	rses		tblempl	TrainingMaster		fldTrainC	50	Yes									
Ð H	uman Res	ources : Cra	fts		thiempl	Crafts		fldCraft		50	Yes								
ΞH	uman Res	ources : Lea	ve types		tbiEMPL	ShiftExceptions		fldExcep	tionCategory	50	Yes								
		ources: Expe	ense Codes		GENERI	IC		fldExpen		50	Yes								
E Ir	nstruction					Instructions		fldInstCl		50	Yes								
Instruction Class Maintenance - Tack Class					RdTack()			Ver											

- 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 Customer: Area code.
 - Note: The sort order is the order in which this will appear in the Customer: Area code drop-down list in BPO. If each Customer: Area 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.



2	-					Static Data - E	PO Con	figurator :	/ersion 1.0.0.	17 - Exa	mple Co	ompany				—			\times
2	Home	Accounts	Call Centr	e Company	Contrac	t Departments	Huma	an Resource	s Inventor	y Re	porting	Sales	Scheduling	Security	Services	Static Data	-	₽	
	M	yout Workspaces Save Filter Refresh																	
ave	Lavout V	Norkspaces	Save Filter	Refresh															
		÷																	
	F	Format		Cur a															
De	scription				TableNa	ame		FieldName		Size	UserDe	finable							
Ð	CRM: Case	e Types			tblCRM	Cases		fldCaseTy	pe	10	Yes								
Ð	CRM: Cont	tact Roles			tblCRM	ContactsRole		fldRole		10	Yes								
Ð	CRM: Cust	tomer Type			tblSALS	Customers		fldCustom	erType	10	Yes								
Ð	CRM: Gene	eral Settings			GENERI	с		fldCRMSe		50	Yes								
		ortunity Stag				CRMOpportunities		fldProbab		50									
		sman Target	Туре			SalesmanTargets		fldTarget		10									
	CRM: Sync	c Services				SyncServices		fldService		20	1.000								
	Currency				GENERI			fldCurren		50									
Ξ	Customer: Areas				tbiSALS	Customers		fldReport	ngArea	10	Yes								_
																			_
	Code CodeDescription		scription		CodeType	Statu	s	SortOrder											
	9																		
	JHB		Johanne	esburg		None	Α			1									
	DBN		Durban			None	A			1									
	I PRT		Pretoria			None	Α			0									
Ð	Customer:	Contact Typ	e		tblSALS	Contacts		fldContac	Туре	20	Yes								
Ð	Customer:	Payment Me	thod		tbisALS	Customers		fldPaymer	tMethod	10	Yes								
Ð	Customers	s : Invoice Me	thods		tbiSALS	CustomerInvoiceM	ethod	fldInvoice	Method	10	No								
	Document				GENERI			fldDocTyp		50	Yes								
Ð	Employee : Dependant Relationship				GENERI	с		fidRelatio	ı	50	Yes								
	Employee : Marital Status				GENERI	с		fldMaritalStatus		50	Yes								
		Occupation C			GENERI	С		fldOccupationCode		50	Yes								
-		sources : Cou				TrainingMaster		fldTrainCode		50	Yes								
	Human Resources : Crafts		tblEMPLCrafts f			fldCraftName		50	Yes										
		sources : Lea						onCategory	50										
		sources: Exp	ense Codes					fldExpens			Yes								
_	Instruction					Instructions		fldInstCla			Yes								
	Maintenan Windows	re · Tack Cla	cc.		HUTASK	Tacke	_	fidTack()	cc	50	Vec					20 Jul 2			

- When you have finished adding the new Customer: Area 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.



	Ŧ			Static Data -	BPO Cor	figurator	Version 1.0.0	.17 - Exa	mple	e Company						
Ľ	Home Accour	nts Call Centre Compar	ny Contra	act Departmen	ts Hum	an Resourc	es Invento	ry Re	portin	ng Sales	Scheduling	Security	Services	Static Data	-	8
ve L	ayout Workspace	es Save Filter Refresh														
Des	cription		Table	lame		FieldNam	e	Size	User	rDefinable						
± (CRM: Case Types		tblCRM	1Cases		fldCaseT	vpe	10	Yes							
	CRM: Contact Roles			1ContactsRole		fldRole	18-	10	Yes							
	CRM: Customer Tvp			SCustomers			merType	10	Yes							
E (CRM: General Settin	IQS	GENER	uc		fldCRMS		50	Yes							
	CRM: Opportunity S		tblSAL	SCRMOpportunitie	s	fldProba		50	Yes							
± (CRM: Salesman Targ	get Type	thickn	1SalesmanTargets		fldTarge	Туре	10	Yes							
•	CRM: Sync Services		thicRM	SyncServices		fldServic	e	20	Yes							
Ð (Currency		GENER	UC		fldCurren	су	50	Yes							
8	Customer: Areas		tblSAL	SCustomers		fldRepor	tingArea	10	Yes							
	Codes															
	Codes Code Q Code Code CodeDescription			CodeType Status			SortOrder			[
	9									Update						×
	ЈНВ	Johannesburg		None	A			1								
	DBN	Durban		None	A			1		?	Are you su	re you wan	t to save cha	anges to this	code?	
	I PRT	Pretoria		None	Α	1		\$								
	Customer: Contact	Туре	tbisaL	SContacts		fldConta	ctType	20	Yes		122		1			_ 1
•	Customer: Payment	Method	tblSAL	SCustomers		fidPayme	ntMethod	10	Yes			Yes	No	Ca	ancel	
E (Customers : Invoice	Methods	thISAL	SCustomerInvoice	Method	fldInvoic	eMethod	10	No	-						
Ð (Document types		GENER	uc		fldDocTy	pe	50	Yes							
± в	Employee : Dependa	ant Relationship	GENER	uc		fidRelatio	n	50	Yes							
Ð E	Employee : Marital S	itatus	GENER	uc		fidMarita	IStatus	50 Yes								
Đ Đ	Employee Occupatio	GENER	UC		fldOccup	50 Yes										
± ۱	Human Resources : Courses		tblemp	LTrainingMaster		fldTrainC	ode	50 Yes								
Ðŀ	Human Resources :	Crafts	tblEMP	LCrafts		fldCraft	lame	50	Yes							
ÐH	Human Resources :	Leave types	themp	LShiftExceptions		fldExcep	tionCategory	50	Yes							
Ð	Human Resources: E	Expense Codes	GENER	UC		fldExpen	seType	50	Yes							
ÐI	Instruction Class		tblINS	TInstructions		fldInstCl	BSS	50	Yes							
FL N	Maintenance · Tack	Clace	HolTAS	KTacke		AdTackC	ace	50	Vec					20 Jul		

- The new Customer: Area code will be **saved** and a **new row** will be added to the **Codes** data grid.
- **Collapse** the Codes frame when you are done.



	-				Static Data -	BPO Cor	nfigurator :	Version 1.0.0	.17 - Exa	mple Co	ompany							\times				
9				Contrac	ct Department	s Hum	ian Resourc	es Invento	ry Re	porting	Sales	Scheduling	Security	Services	Static Data	-	₽					
ve Lay	out Workspaces	Save Filter	Refresh																			
Descrip	ption			TableNa	ame		FieldNam	e	Size	UserDe	finable							-				
	M: Case Types			thICRM	Cases		fldCaseT	vpe	10	Yes												
	M: Contact Roles			thickm	ContactsRole		fidRole		10	Yes												
	M: Customer Type			tbISALS	Customers		fldCustor	nerType	10	Yes												
	M: General Settings			GENERI	C		fldCRMSe	ettings	50	Yes												
	M: Opportunity Stag	e Gates		tblSALS	CRMOpportunities	5	fidProbab	ality	50	Yes												
	M: Salesman Target	Туре		thickm	SalesmanTargets		fldTarget	Туре	10	Yes												
	M: Sync Services			thickm	SyncServices		fldService	2	20	Yes												
E Cun	2010 (1997)			GENERI	C		fldCurren	су	50	Yes												
🗄 Cus	stomer: Areas			tblSALS	Customers		fldReport	tingArea	10	Yes												
	Codes																					
a	Codes CodeDescription			CodeType Statu			JS	SortOrder														
9																		1				
	знв	Johanne	sburg		None	А			1													
	DBN	Durban			None	А			1													
	PRT	Pretoria			None	А			1													
a																						
E Cus	tomer: Contact Typ	e		tblSALS	Contacts		fldConta	ctType	20	Yes												
E Cus	tomer: Payment Me	thod		tbISALS	Customers		fidPayme	ntMethod	10	Yes												
E Cus	Customer: Payment Method Customers : Invoice Methods			thISALS	CustomerInvoice	lethod	fidInvoice	eMethod	10	No												
🕀 Doc	Customers : Invoice Methods Document types			GENERI	C		fldDocTy	pe	50	Yes												
🕀 Emp	Document types Employee : Dependant Relationship			GENERI	C		fidRelation		50	Yes												
🕀 Emp	Employee : Marital Status						fldMaritalStatus		fldMaritalStatus		fldMaritalStatus		50	Yes								
± Emp	Employee Occupation Code			GENERI	C		fldOccupationCode		50	Yes												
🗄 Hun	Human Resources : Courses					fldTrainC	ode	50	Yes													
Hun	nan Resources : Cra	afts		tblempL	Crafts		fldCraftN	lame	50	Yes												
Hun Hun	nan Resources : Lea	ave types		tblempL	ShiftExceptions		fldExcept	tionCategory	50	Yes												
	nan Resources: Exp	ense Codes		GENERI	-		fldExpen		.50	Yes												
I Inct	truction Class			HUNST	Instructions		fidInct();	acc.	50	Ver						2018		-				

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