

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

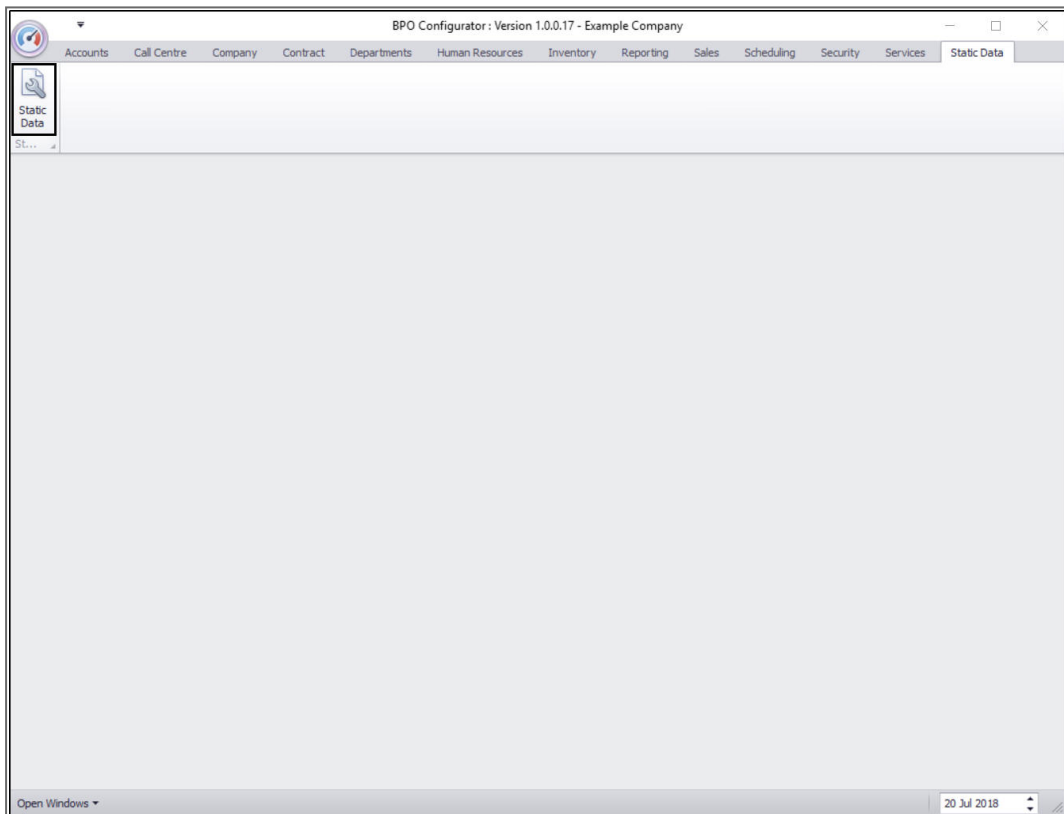
STATIC DATA

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.

Description	TableName	FieldName	Size	UserDefinable
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	tblSALSContacts	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
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	tblINWMManufacturers	fldClass	50	Yes
Manufacturer Type	tblINWMManufacturers	fldManufacturerType	50	Yes
Meter Units	tblMTRMDefinition	fldUnit	50	Yes
Overtime Factor	GENERIC	fldOverTimeFactor	4	Yes
Part Requests: State	tblINWRRequestItemNotes	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.

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Home Accounts Call Centre Company Contract Departments Human Resources Inventory Reporting Sales Scheduling Security Services Static Data

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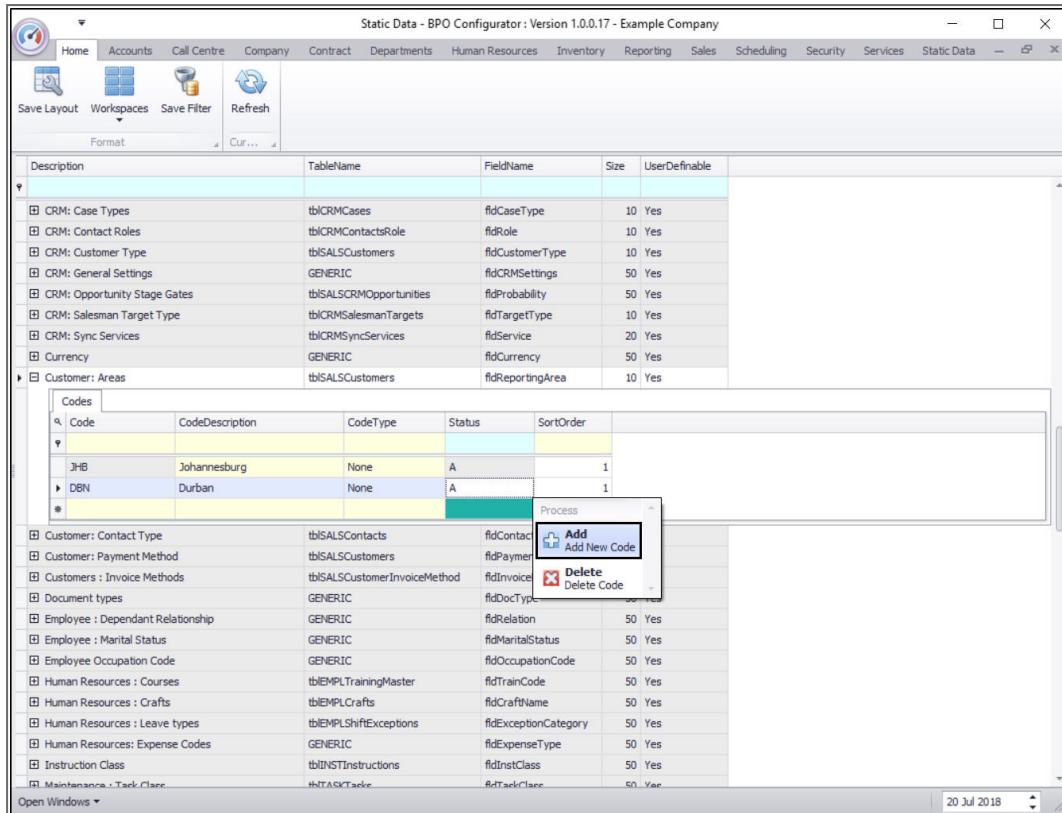
Description	TableName	FieldName	Size	UserDefinable
CRM: Case Types	tbICRMCases	fldCaseType	10	Yes
CRM: Contact Roles	tbICRMContactsRole	fldRole	10	Yes
CRM: Customer Type	tbISALSCustomers	fldCustomerType	10	Yes
CRM: General Settings	GENERIC	fldCRMSettings	50	Yes
CRM: Opportunity Stage Gates	tbISALSCRMOpportunities	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

Code	CodeDescription	CodeType	Status	SortOrder
JHB	Johannesburg	None	A	1
DBN	Durban	None	A	1

Customer: Contact Type	tbISALSCustomers	fldContactType	20	Yes
Customer: Payment Method	tbISALSCustomers	fldPaymentMethod	10	Yes
Customers: Invoice Methods	tbISALSCustomerInvoiceMethod	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	tbIEMLTrainingMaster	fldTrainCode	50	Yes
Human Resources: Crafts	tbIEMLCrafts	fldCraftName	50	Yes
Human Resources: Leave types	tbIEMLShiftExceptions	fldExceptionCategory	50	Yes
Human Resources: Expense Codes	GENERIC	fldExpenseType	50	Yes
Instruction Class	tbINSTInstructions	fldInstClass	50	Yes
Maintenance: Task Class	tbTASKTask	fldTaskClass	50	Yes

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- 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.

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Description	TableName	FieldName	Size	UserDefinable
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

Code	CodeDescription	CodeType	Status	SortOrder
JHB	Johannesburg	None	A	1
DBN	Durban	None	A	1
		None	A	0

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
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	tblTASKTask	fldTaskClass	50	Yes

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- **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.

Description	TableName	FieldName	Size	UserDefinable
CRM: Case Types	tbICRMCases	fldCaseType	10	Yes
CRM: Contact Roles	tbICRMContactsRole	fldRole	10	Yes
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

Code	CodeDescription	CodeType	Status	SortOrder
JHB	Johannesburg	None	A	1
DBN	Durban	None	A	1
		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 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.

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CRM: Case Types	tbICRMCases	fdCaseType	10	Yes
CRM: Contact Roles	tbICRMContactsRole	fdRole	10	Yes
CRM: Customer Type	tbISALSCustomers	fdCustomerType	10	Yes
CRM: General Settings	GENERIC	fdCRMSettings	50	Yes
CRM: Opportunity Stage Gates	tbISALSCRMOpportunities	fdProbability	50	Yes
CRM: Salesman Target Type	tbICRMSalesmanTargets	fdTargetType	10	Yes
CRM: Sync Services	tbICRMSyncServices	fdService	20	Yes
Currency	GENERIC	fdCurrency	50	Yes
Customer: Areas	tbISALSCustomers	fdReportingArea	10	Yes

Code	CodeDescription	CodeType	Status	SortOrder
JHB	Johannesburg	None	A	1
DBN	Durban	None	A	1
PRT	Pretoria	None	A	0

Customer: Contact Type	tbISALSCustomers	fdContactType	20	Yes
Customer: Payment Method	tbISALSCustomers	fdPaymentMethod	10	Yes
Customers : Invoice Methods	tbISALSCustomerInvoiceMethod	fdInvoiceMethod	10	No
Document types	GENERIC	fdDocType	50	Yes
Employee : Dependant Relationship	GENERIC	fdRelation	50	Yes
Employee : Marital Status	GENERIC	fdMaritalStatus	50	Yes
Employee Occupation Code	GENERIC	fdOccupationCode	50	Yes
Human Resources : Courses	tbIEMPLTrainingMaster	fdTrainCode	50	Yes
Human Resources : Crafts	tbIEMPLCrafts	fdCraftName	50	Yes
Human Resources : Leave types	tbIEMPLShiftExceptions	fdExceptionCategory	50	Yes
Human Resources: Expense Codes	GENERIC	fdExpenseType	50	Yes
Instruction Class	tbINSTInstructions	fdInstClass	50	Yes
Maintenance : Task Class	tbTASKTask	fdTaskClass	50	Yes

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- 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**.

The screenshot shows the 'Static Data - BPO Configurator' application window. The main table displays static data with columns: Description, TableName, FieldName, Size, and UserDefinable. A 'Codes' sub-table is visible, showing columns: Code, CodeDescription, CodeType, Status, and SortOrder. 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: 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

Code	CodeDescription	CodeType	Status	SortOrder
JHB	Johannesburg	None	A	1
DBN	Durban	None	A	1
I PRT	Pretoria	None	A	1

- 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.

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CRM: Sync Services	tbICRMSyncServices	fldService	20	Yes
Currency	GENERIC	fldCurrency	50	Yes
Customer: Areas	tbISALSCustomers	fldReportingArea	10	Yes

Codes

Code	CodeDescription	CodeType	Status	SortOrder
JHB	Johannesburg	None	A	1
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Customer: Contact Type	tbISALSContacts	fldContactType	20	Yes
Customer: Payment Method	tbISALSCustomers	fldPaymentMethod	10	Yes
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Employee Occupation Code	GENERIC	fldOccupationCode	50	Yes
Human Resources: Courses	tbEMPLTrainingMaster	fldTrainCode	50	Yes
Human Resources: Crafts	tbEMPLCrafts	fldCraftName	50	Yes
Human Resources: Leave types	tbEMPLShiftExceptions	fldExceptionCategory	50	Yes
Human Resources: Expense Codes	GENERIC	fldExpenseType	50	Yes
Instruction Class	tbINSTRUCTION	fldInstClass	50	Yes

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