Pivotal SYSTEMS

Relationship Management

Work Center Field Setup Guide
For FACTS 7.8 or Newer

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Relationship Management – Work Center Field Setup Guide

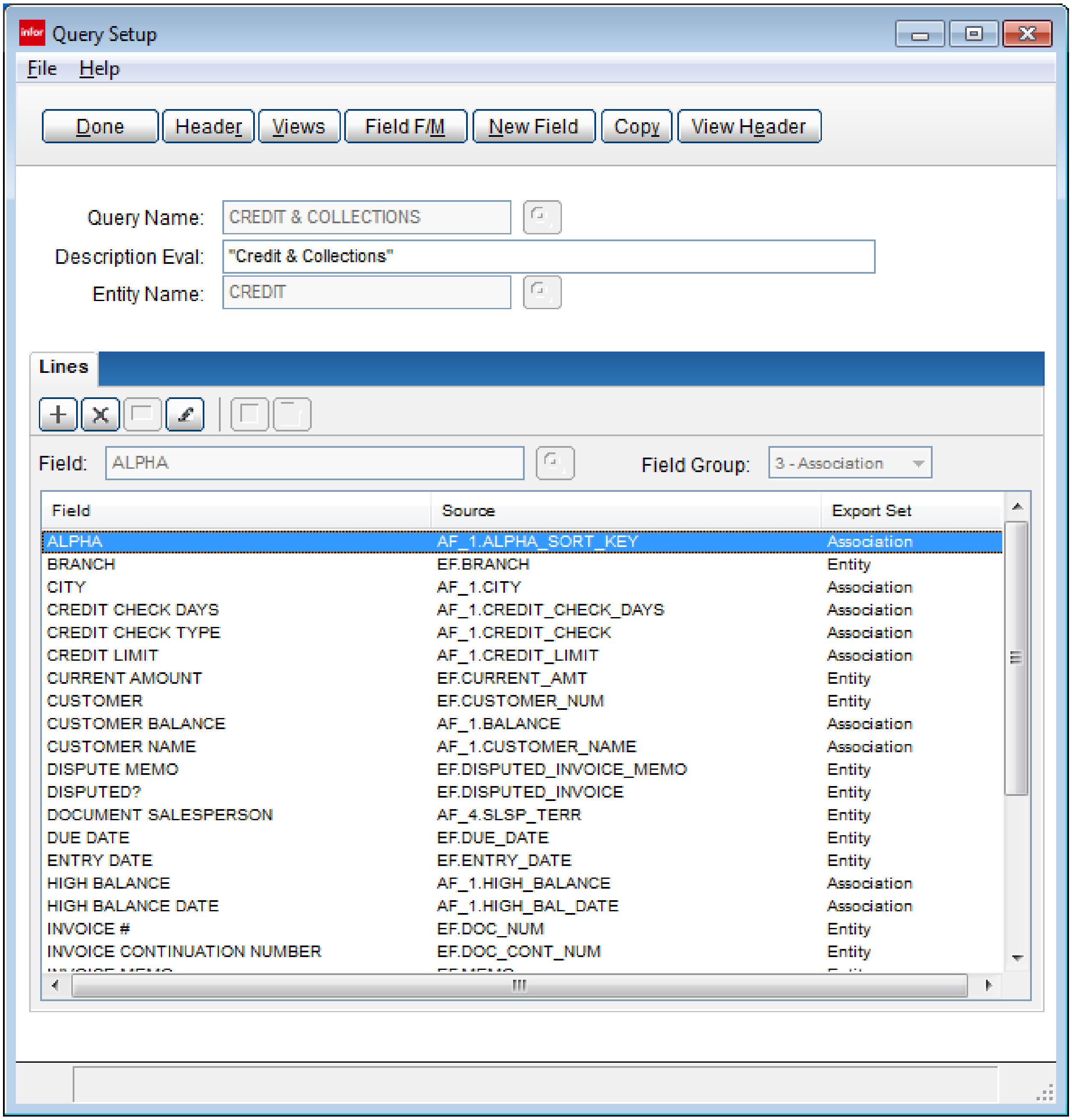
Contents

Introduction

This document is intended as a guide to assist you in defining data fields that will be used in RM Work Centers. While some elements may be somewhat technical, the guide provides the general framework for both technical and non-technical alike. One of the critical success elements in an RM implementation is getting the customer's data delivered and presented in an understandable form through the different Work Centers.

While the Credit & Collections, Quote, Sales Order and Purchase Order Work Centers are pre-configured and functional out of the box, the Opportunity, Customer Profile and Vendor Profile Work Centers contain numerous user defined fields that will need to be properly configured in order to make them productive for your customers.

Query Setup



Line Fields

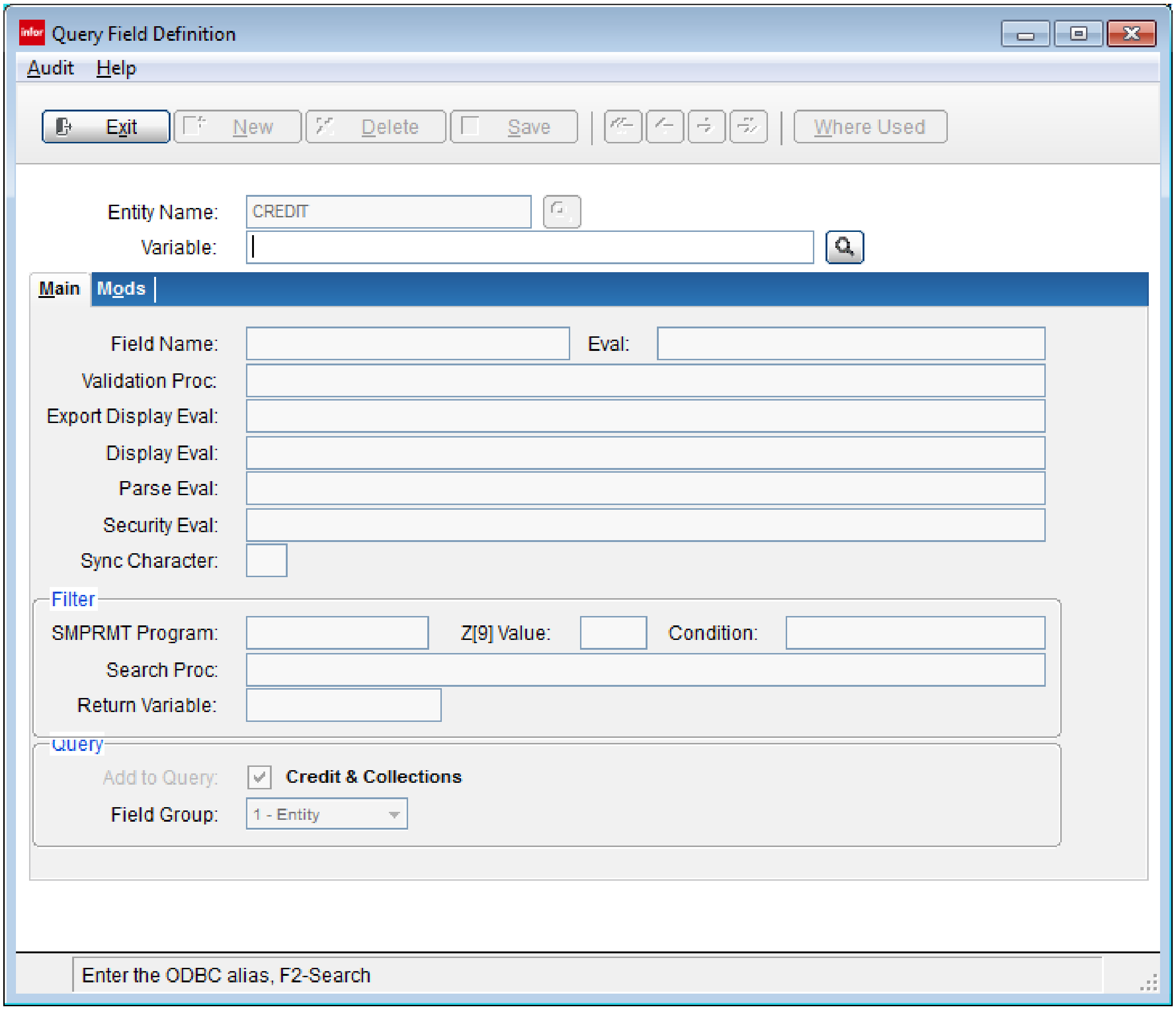
Field – The field name as defined through the Field F/M

Field Group – Specifies one of the 3 list boxes used to present the user with fields. They are Entity, Contact and Association

Buttons

In order to gain access to the views, Field F/M, New Field, Copy or View Header buttons, the user must be set up as a Work Center admin user. This is set in the User Code Additional Info F/M on the RM infrequent file maintenance menu.

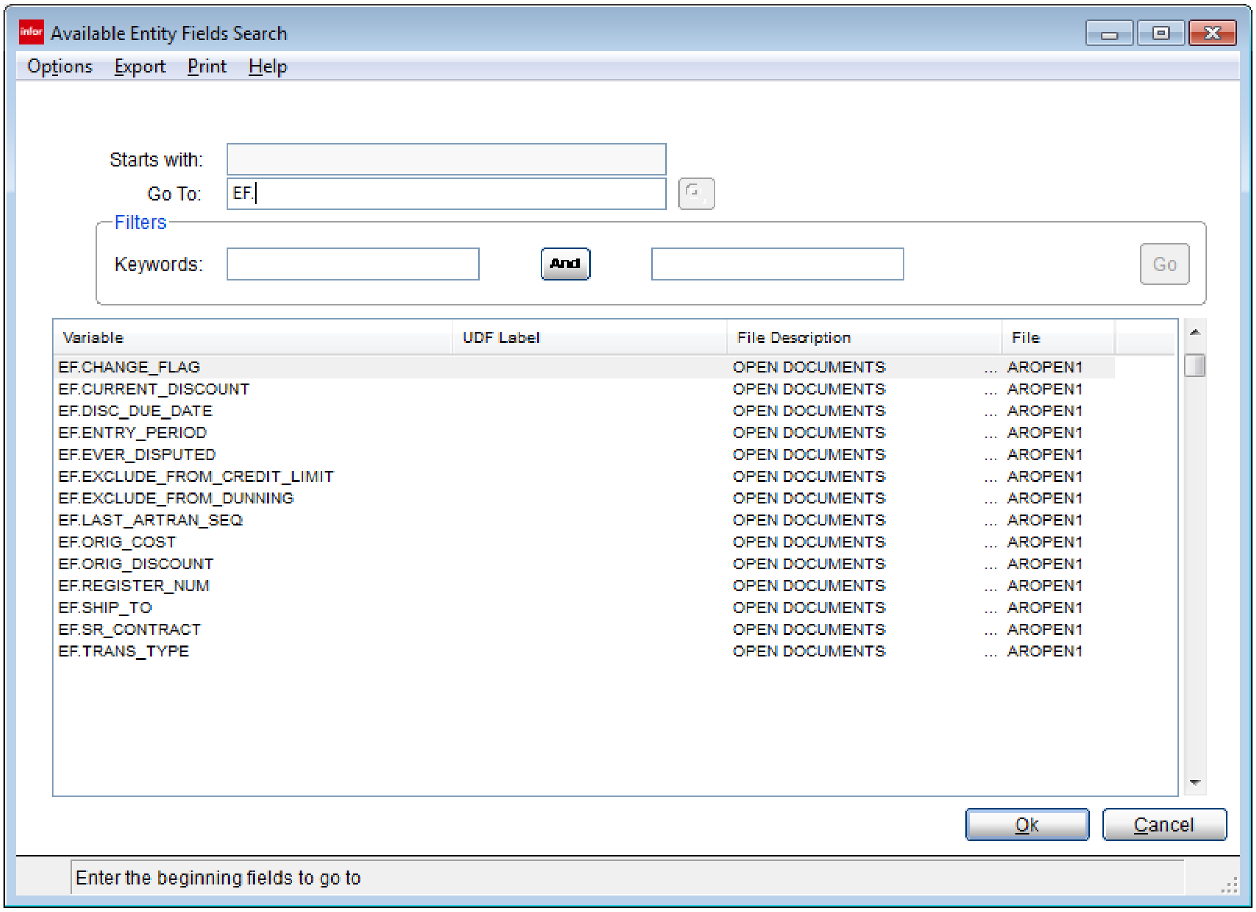
New Field – Runs the Query Field Definition F/M (RMF820). ***Important***: Adding or removing fields from a query should be done while no one is using the affected work center. Afterwards, remove the related work center work files from the system so they will be properly redefined.



Entity Name – is passed from the Work Center Setup program and can not be changed here.

Variable – The variable name for any entity or associated file.

Search – Displays all fields from the Work Center file definitions that have not been assigned a field name.



Field Name – This is the field name that is presented to the end user through the Work center UI. Field names are forced to upper case and can include spaces, punctuation, etc.

Field Eval – Used to accommodate multiple languages

Validation Proc – The validation procedure. Typically used to get customer name, etc.

Return Variable – Used in filter presentation when building SMPRMT records

Export Display Eval – Used to format fields for export to Excel. If left blank, the raw data is exported.

Display Eval – Used to format fields for display in the tree view or other Work Center panels. – See the section at the end for more info on display and parse evals.

Parse Eval – Used to get the actual field data when the tree view control is read

Security Eval – Not used at this time. May be used in future implementations. This field is permanently disabled

Sync Character – Sync character, if applicable. These are the same ones used in SMINQY.

SMPRMT Program, Z[9] Value, Condition and **Return Variable** – These fields are used only to reference an existing SMPRMT record for the pre-input procedure and the Z4$ string so that the filter will present the same drop boxes and valid values as the regular maintenance.

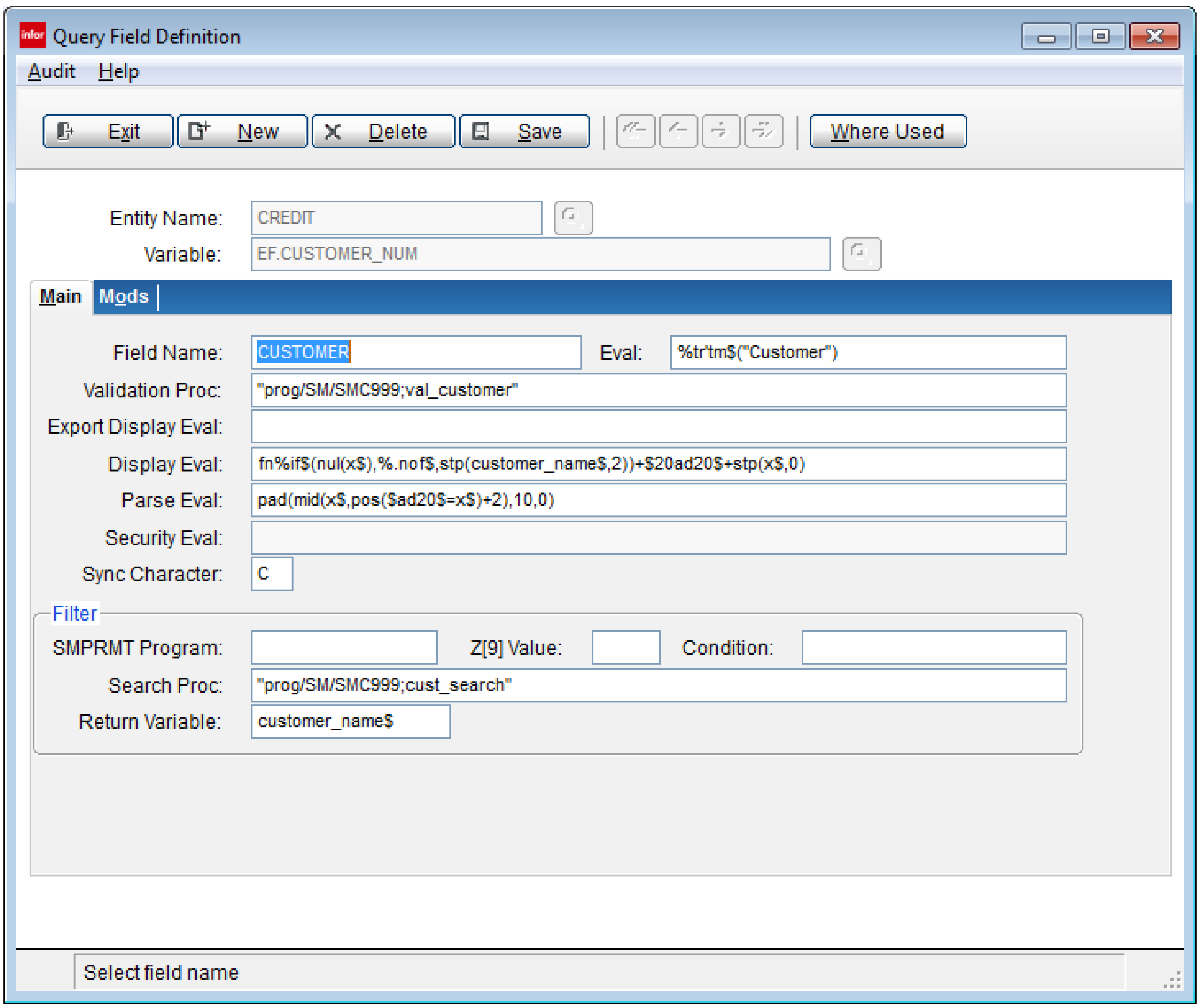
Search Proc – The search procedure used in filter definition.

The following 2 fields are only available when adding a new record.

Add to Query – If checked, the field will be automatically added to the calling query.

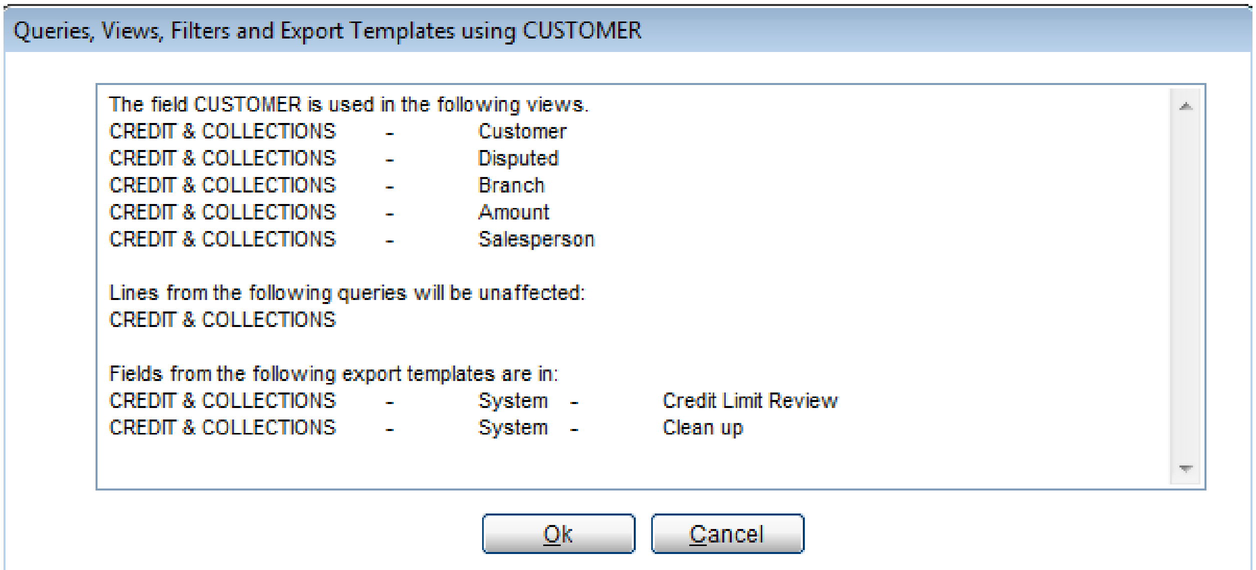
Field Group – Specifies one of the 3 list boxes used to present the user with fields. They are Entity, Contact and Association

Field F/M



When a record is deleted or the field name is changed, the field name may be present on any number of views, queries filters or export templates. To prevent data corruption and errors, all of the appropriate files are checked and the following message displayed. The only difference between the change and delete is the Change/Delete button.

Changes to all of the queries, views, export templates and filters indicated are automatic.

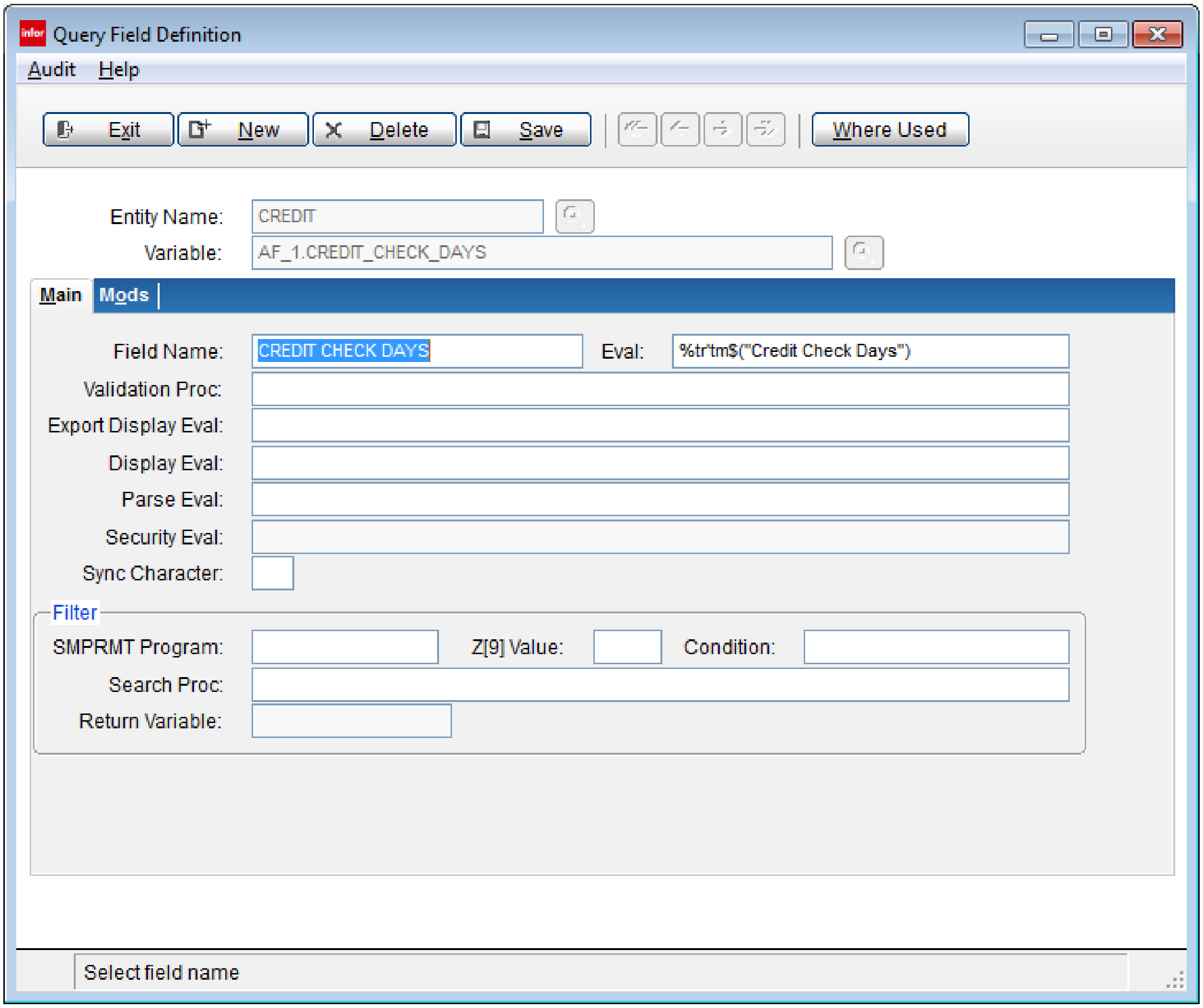


Field Types

Data Only

Data only field types are fields that will only be used in list boxes or grid displays. Some examples are:

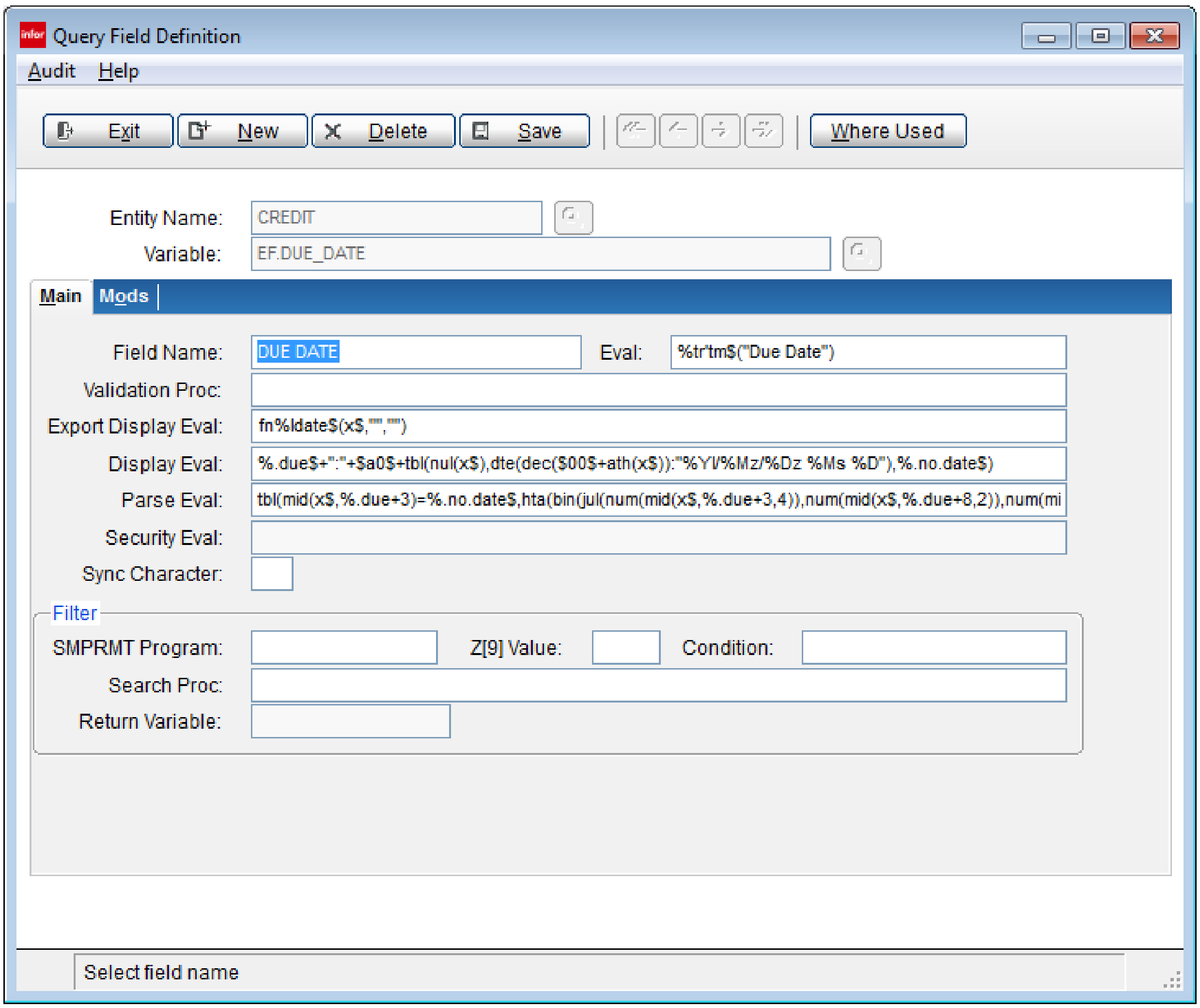
- Credit check days
- Contact phone number
- Invoice continuation number



Label

Label fields need to identify the data being displayed and are used in the tree view. For example, invoice entry and due dates can't be told apart unless a label exists. Some examples are:

- Dates
- Amounts
- Yes/No or check box fields



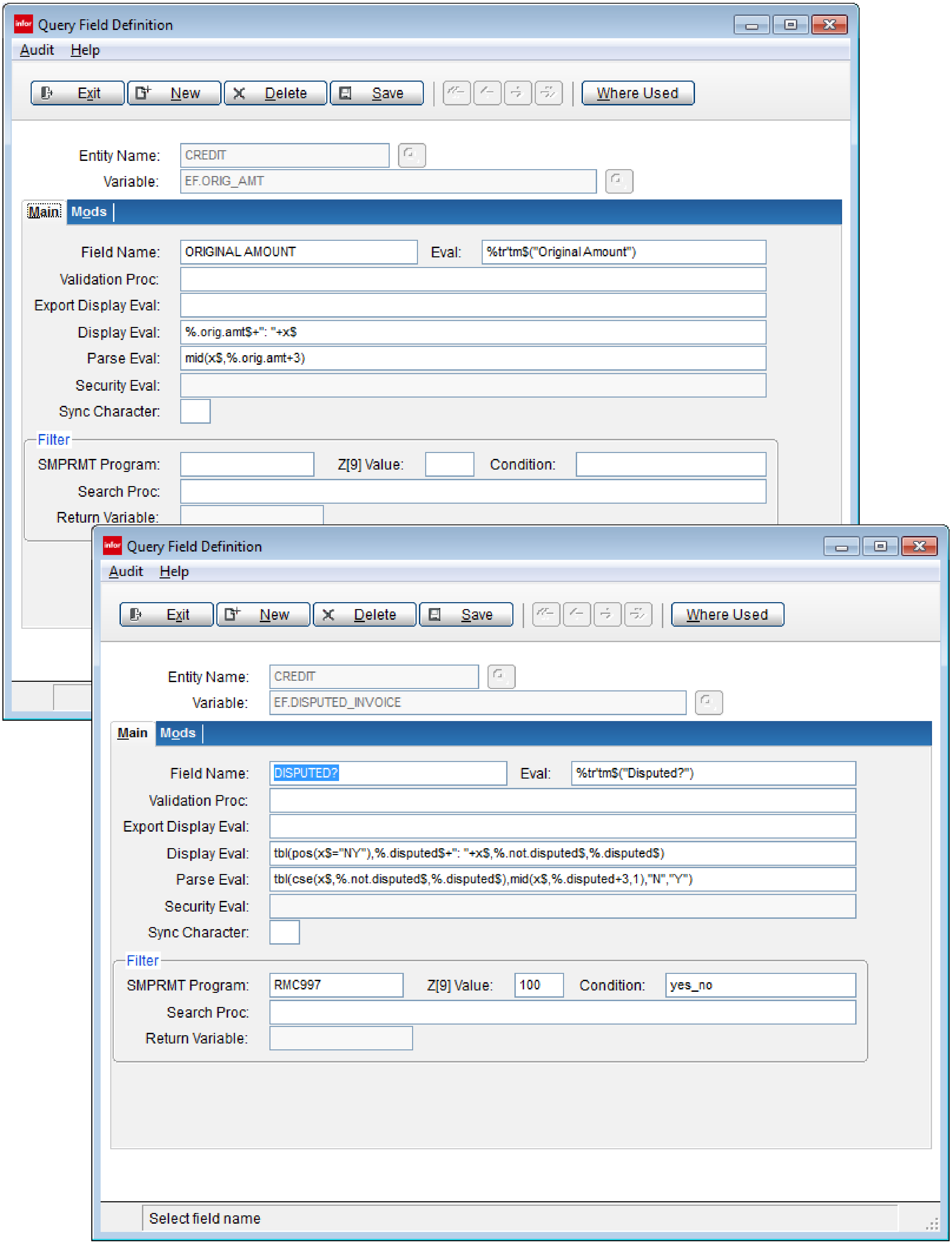
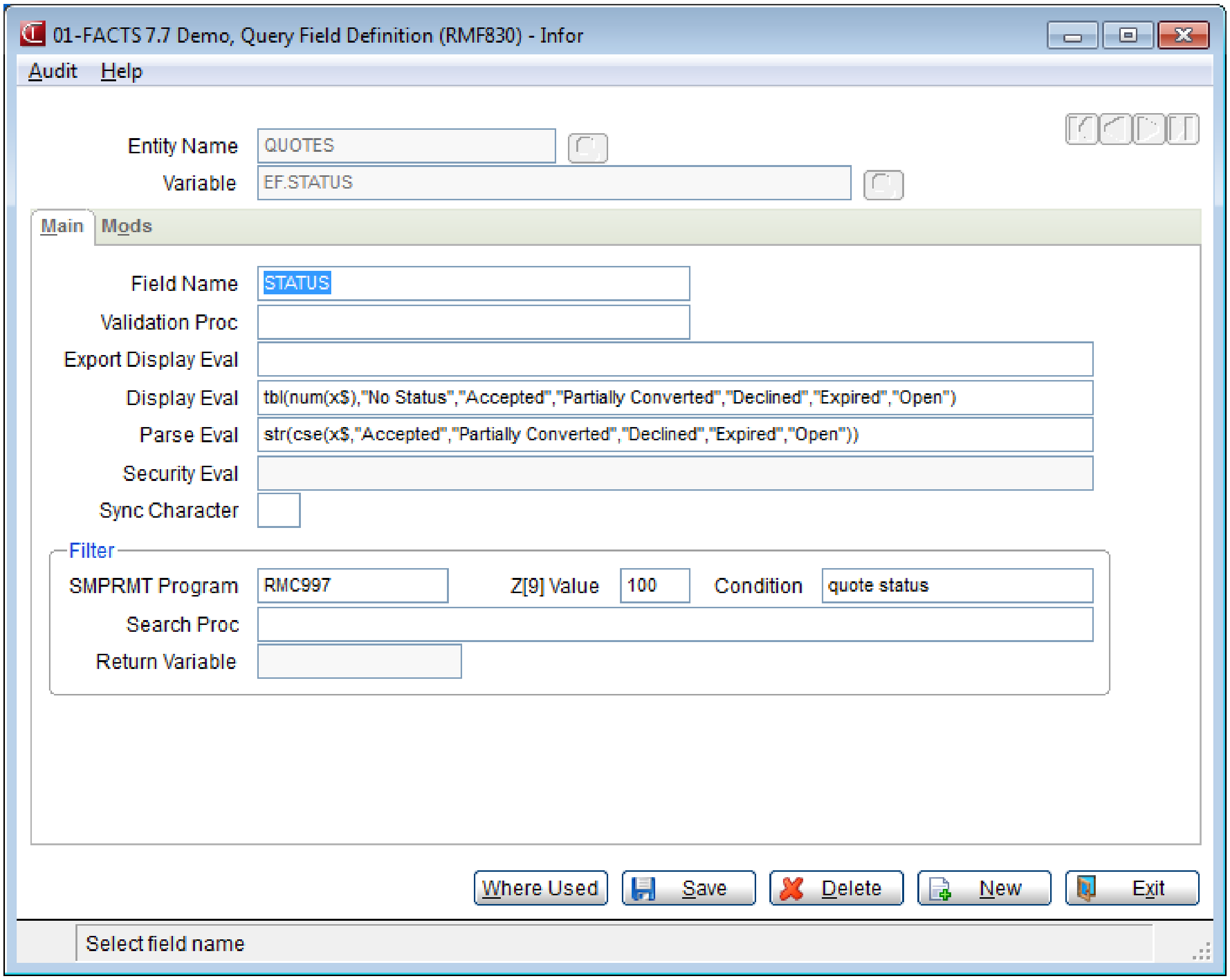

Query Field Definition
Audit Help
Exit New Delete Save Where Used
Entity Name: CREDIT
Variable: EF.ORIG_AMT
Main Mods
Field Name: ORIGINAL AMOUNT
Eval: %tr'tm$("Original Amount")
Validation Proc:
Export Display Eval:
Display Eval: %.orig.amt$+": "+x$
Parse Eval: mid(x$,%.orig.amt+3)
Security Eval:
Sync Character:
Filter
SMPRMT Program:
Z[9] Value:
Condition:
Search Proc:
Return Variable:
Query Field Definition
Audit Help
Exit New Delete Save Where Used
Entity Name: CREDIT
Variable: EF.DISPUTED_INVOICE
Main Mods
Field Name: DISPUTED?
Eval: %tr'tm$("Disputed?")
Validation Proc:
Export Display Eval:
Display Eval: tbl(pos(x$="NY"),%.disputed$+": "+x$,%.not.disputed$,%.disputed$)
Parse Eval: tbl(cse(x$,%.not.disputed$,%.disputed$),mid(x$,%.disputed+3,1),"N","Y")
Security Eval:
Sync Character:
Filter
SMPRMT Program: RMC997
Z[9] Value: 100
Condition: yes_no
Search Proc:
Return Variable:
Select field name

Table or Drop Box

These fields are those that either have a drop box selection in the standard software or are codes that are translated into words for display. Some examples are:

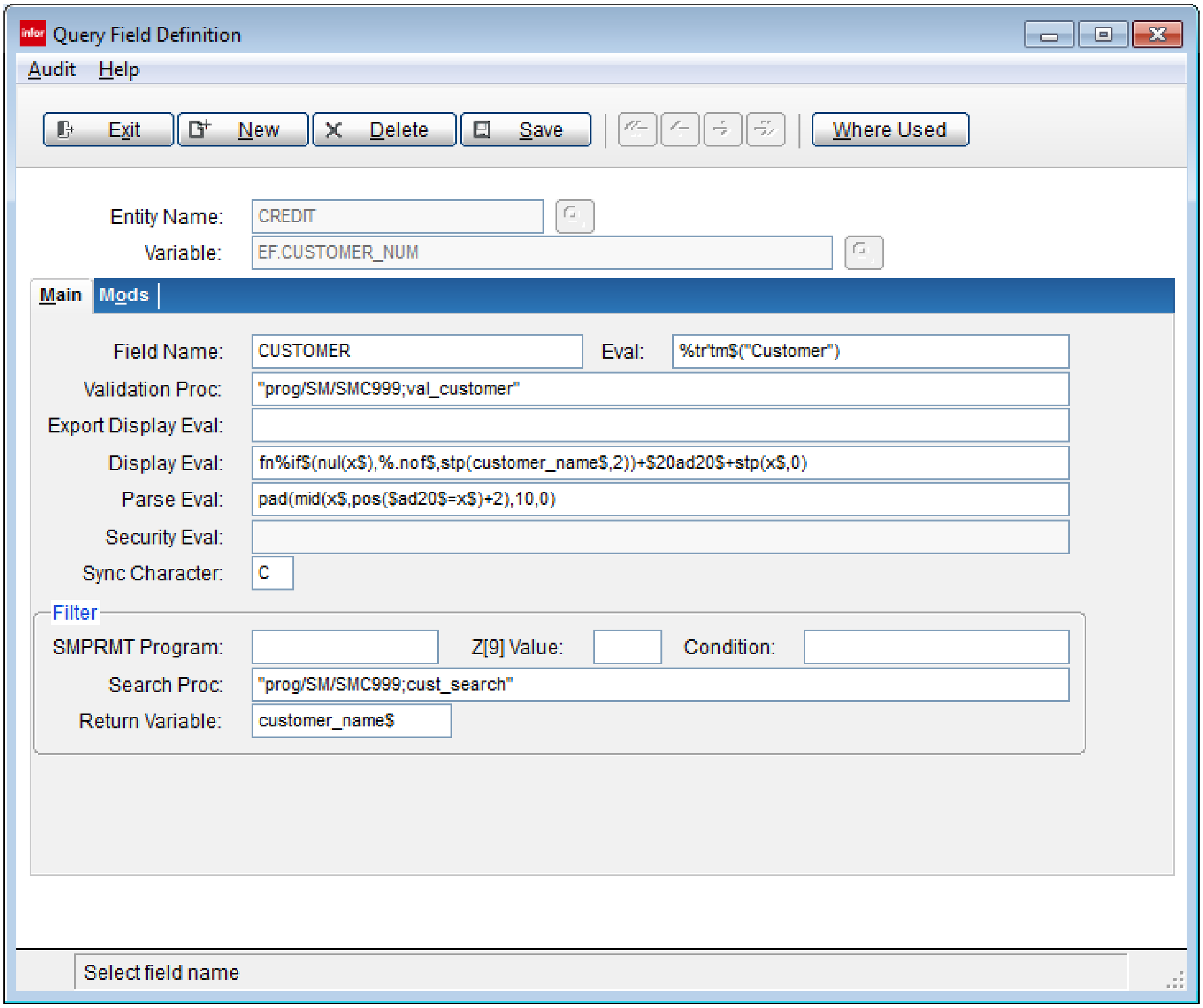
- Credit check type
- Quote status



File Verified

File verified fields have supporting file maintenance programs and are generally displayed as code: description. Some examples are:

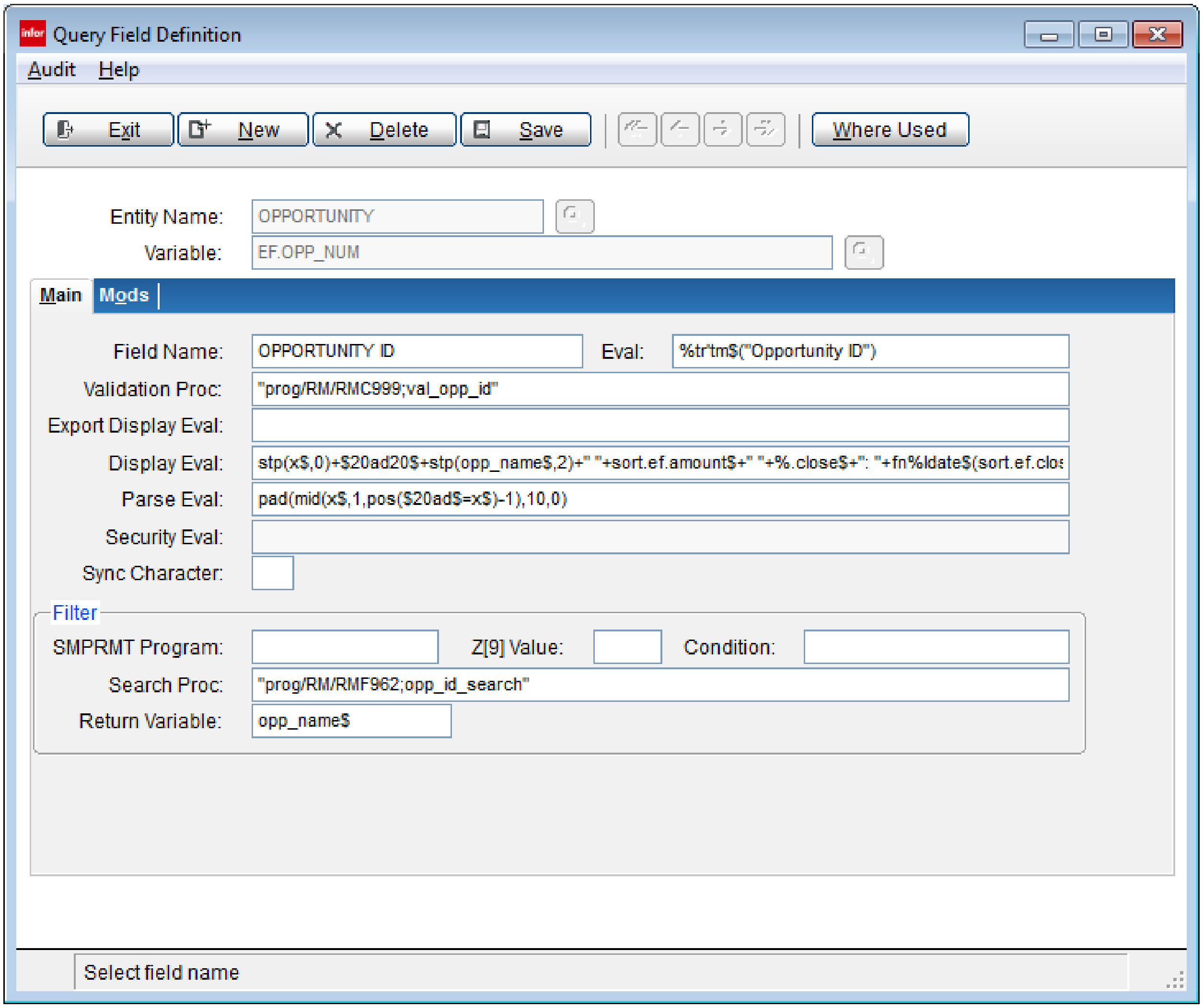
- Customer/Vendor number
- Branch
- Salesperson

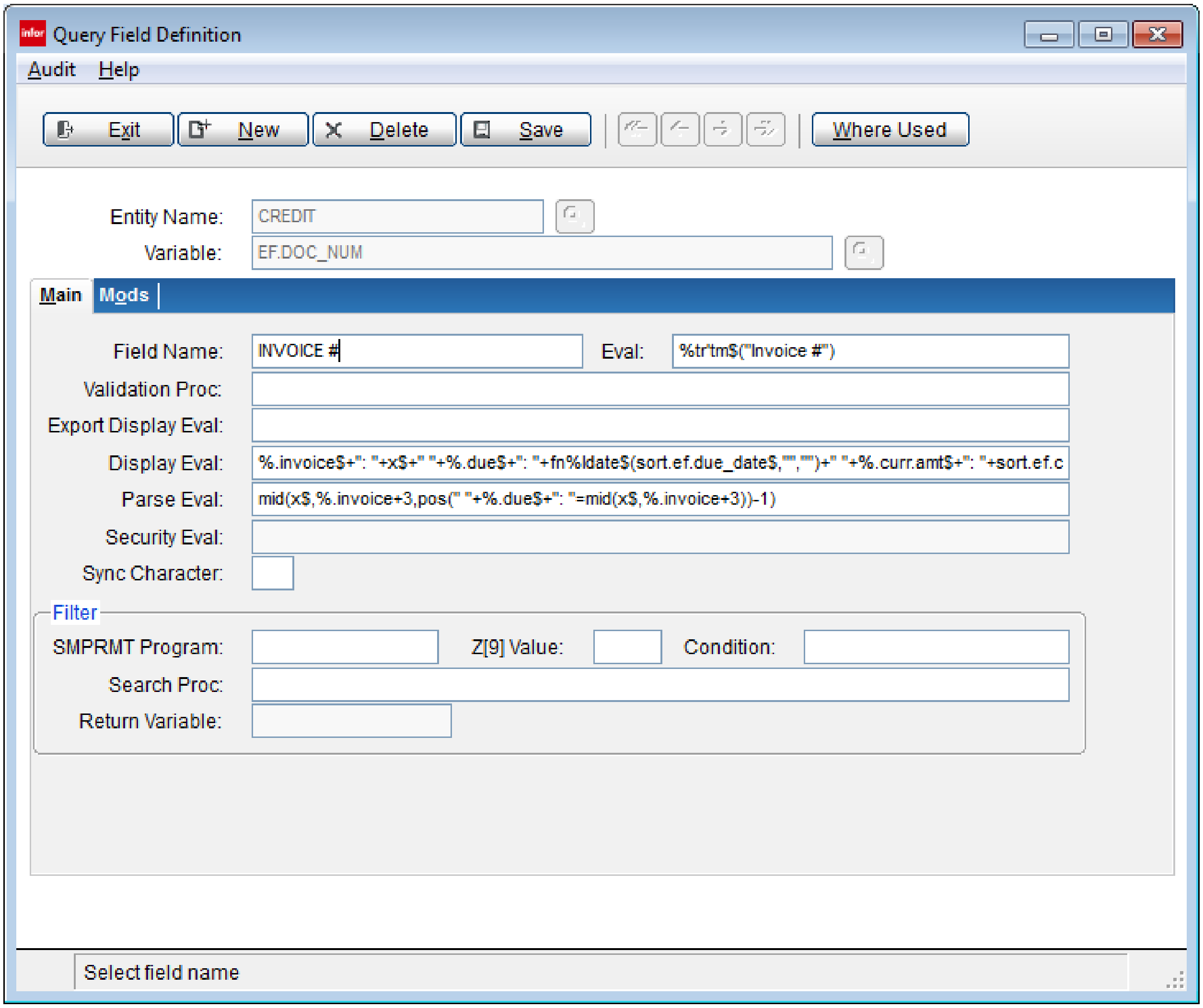


Combination

Combination fields are those that have multiple data elements. Examples are:

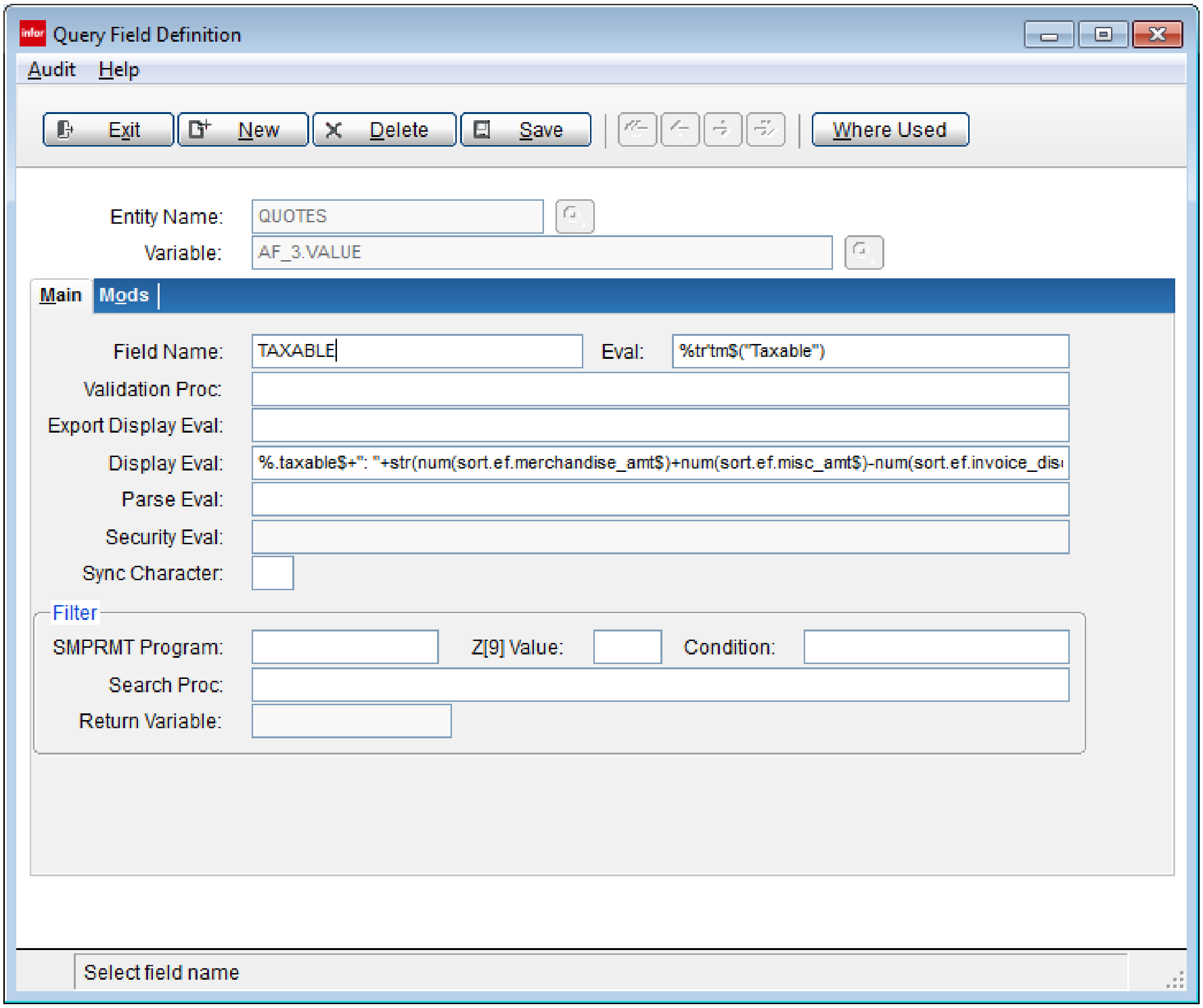
- Invoice number in Credit & Collections
- Opportunity ID




Query Field Definition
Audit
Help
Exit
New
Delete
Save
Where Used
Entity Name:
CREDIT
Variable:
EF.DOC_NUM
Main
Mods
Field Name:
INVOICE #
Eval:
%tr'tm$("Invoice #")
Validation Proc:
Export Display Eval:
Display Eval:
%.invoice$+": "+x$+" "+%.due$+": "+fn%ldate$(sort.ef.due_date$,"","")+" "+%.curr.amt$+": "+sort.ef.c
Parse Eval:
mid(x$,%.invoice+3,pos(" "+%.due$+": "=mid(x$,%.invoice+3))-1)
Security Eval:
Sync Character:
Filter
SMPRMT Program:
Z[9] Value:
Condition:
Search Proc:
Return Variable:
Select field name

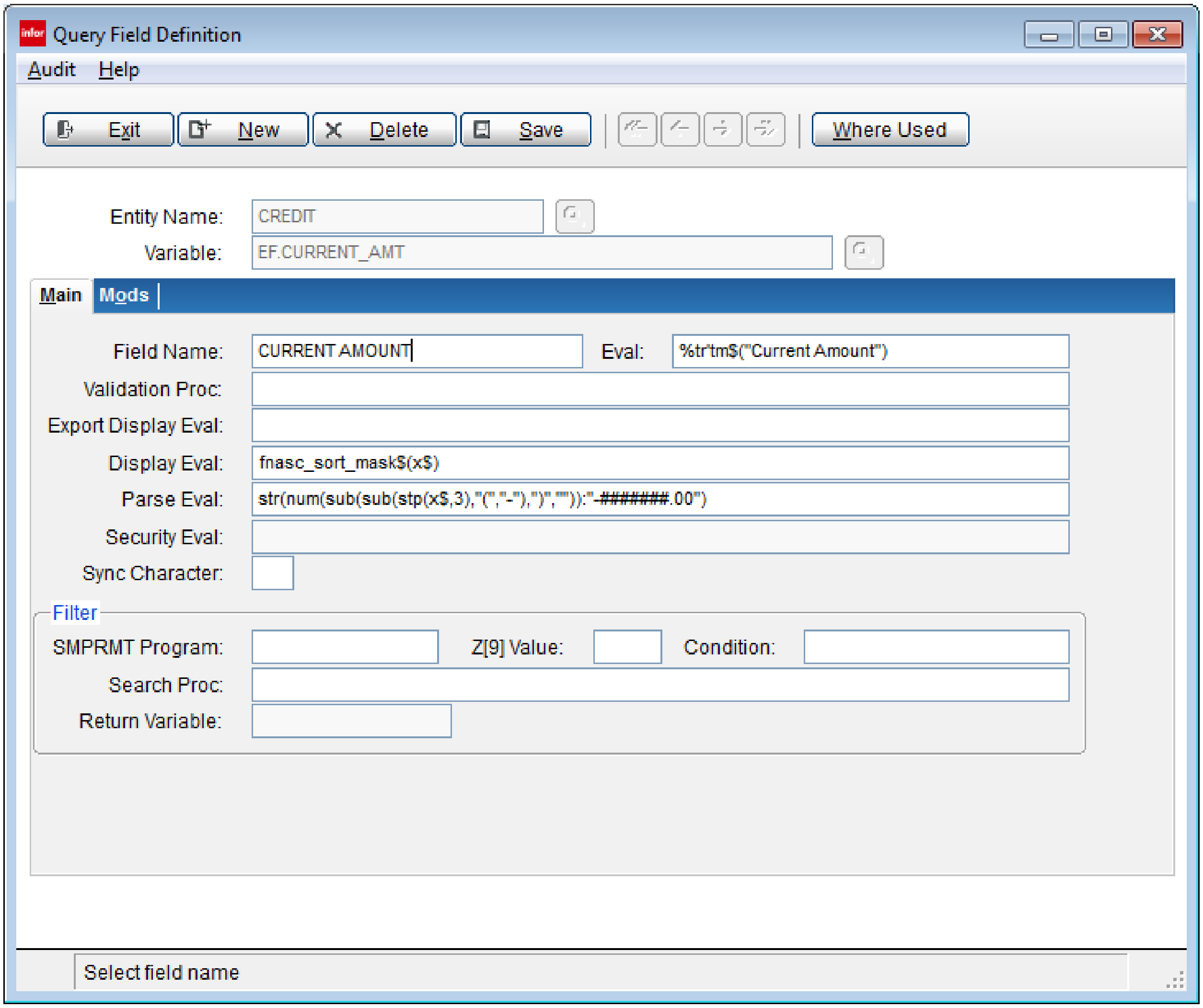
Calculating

These are generally fields where numeric calculations are made. An example is the amount in the Quote Work Center that adds the merchandise + miscellaneous – discount.



Function

Any system or custom function can be used to present data. The only standard example is the amount view in Credit & Collections



Exercises

End User

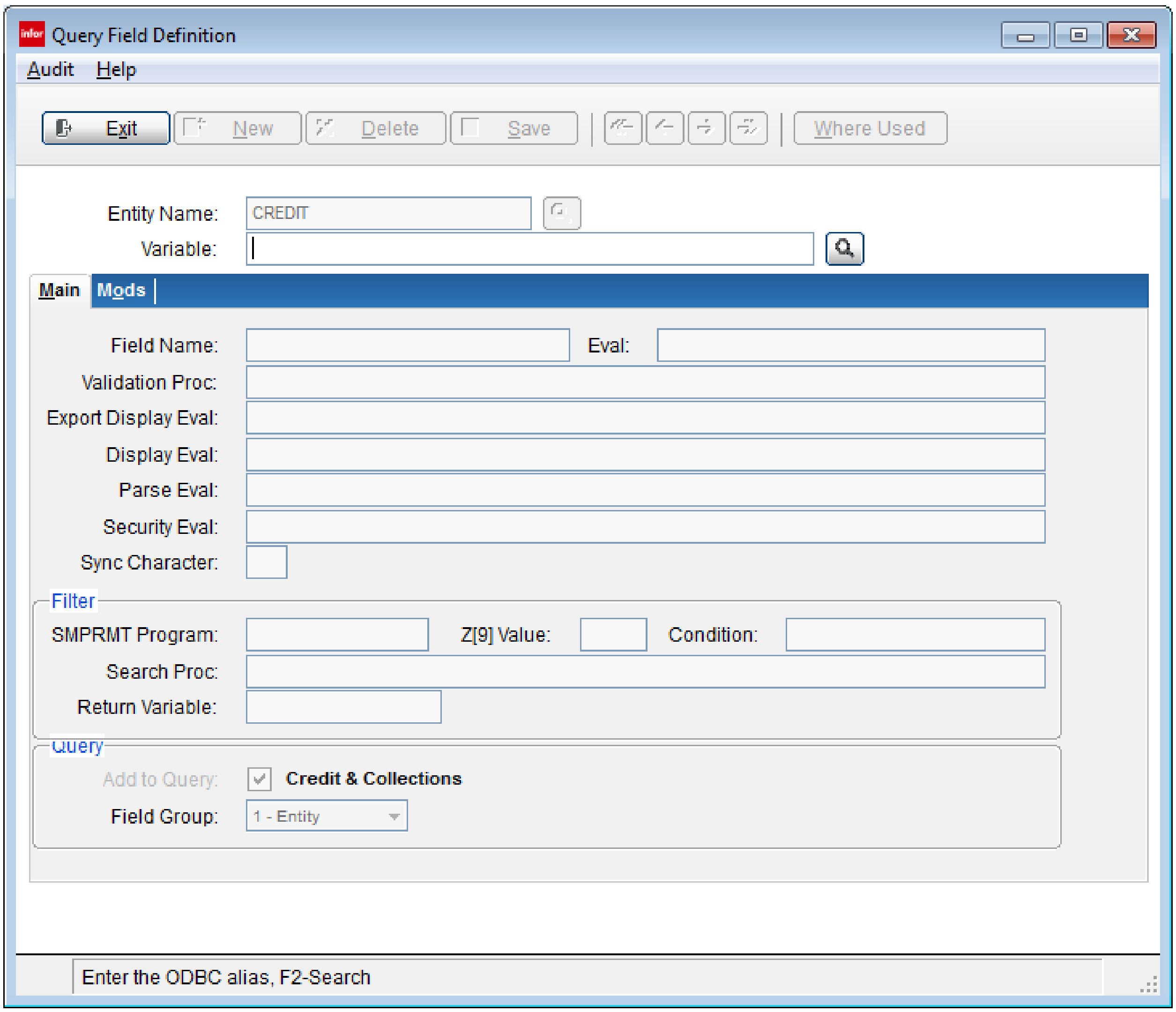
1. From the ‘New Field’ entry screen, pick a field from the available fields in the Quote Manager Work Center that would be suitable for a label only field. Define the field and assign to the appropriate field group. After the field has been defined, add the field to the Quote Summary view.
2. From the ‘New Field’ entry screen, pick a field from the available fields in the Credit & Collections Work Center to be used in the definition of a view. The field should be a date, amount or a Y/N field. Define the field and assign to the appropriate field group. After the field has been defined, create a view using the newly defined field.
3. Take the field defined in #2 above and change the export display eval to send only the raw data to the export.

Implementation

1. From the ‘New Field’ entry screen, pick a field from the available fields in the Credit & Collections Work Center to be used in the definition of a view and to be used in filters. The field should be a drop box type of field. Define the field and assign to the appropriate field group. After the field has been defined, create a view using the newly defined field. Then define a filter template using the new field.
2. From the ‘New Field’ entry screen, pick a field from the available fields in the Quote Manager Work Center that is a file verified field. Define the field and assign to the appropriate field group. After the field has been defined, create a view using the newly defined field. Then define a filter template using the new field.
3. Create a new field in the Quote Manager for the ship to showing the ship-to code, name, city and zip. (This may be too hard)

RM Work Center Field Setup Worksheet

End User field name:	
FACTS data file name:	
ODBC alias:	
Field Group: (Entity/Contact/Association)	



Question	**Answer**	**Action**
Is the data file defined in Work Center Metadata F/M?	No	1) Make sure that the file can be logically linked to the entity file. 2) Add file to the Work Center Metadata F/M 3) After saving the record, press the 'Update Vars' button. The fields will then be available to the Query Setup program.
Will the field be used in the tree view?	Yes	Make sure that the field has a label in the 'Display Eval'

Will the field be exported to Excel?	Yes	By default, the data is sent to Excel just as it is in the file. If you want the data to be formatted, include an eval here. Dates are the classic example.
Is this a file verified field?	Yes	1) Find the appropriate validation routine in SMC999 or wherever the standard metadata validates and enter into the ‘Validation Eval’ field. 2) Create a parse statement that will return the field to it’s original value and size and enter into the ‘Parse Eval’ field.
Will this field be used in a filter?	Yes	1) If the field is a file verified field, find the appropriate search routine in SMC999 or wherever the standard metadata searches and enter the process into the ‘Search Proc’ field. 2) If there is a validation routine, enter the variable (ie customer_name$) returned into the ‘Return Variable’ field. 3) If the field is a table (drop box) enter the SMPRMT Program, Z[9] value and Condition that corresponds to the SMPRMT record in standard FACTS.
Is this a field that will synchronize with inquiry programs?	Yes	Enter the appropriate sync character into the ‘Sync Character’ field.: • ‘C’ for customers • ‘V’ for vendors • ‘I’ for Items • ‘R’ for RM contacts