



Relationship Management

**Work Center Field Setup Guide
For FACTS 7.8 or Newer**



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Relationship Management – Work Center Field Setup Guide

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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

Query Name: CREDIT & COLLECTIONS

Description Eval: "Credit & Collections"

Entity Name: CREDIT

Lines

Field: ALPHA Field Group: 3 - Association

Field	Source	Export Set
ALPHA	AF_1.ALPHA_SORT_KEY	Association
BRANCH	EF.BRANCH	Entity
CITY	AF_1.CITY	Association
CREDIT CHECK DAYS	AF_1.CREDIT_CHECK_DAYS	Association
CREDIT CHECK TYPE	AF_1.CREDIT_CHECK	Association
CREDIT LIMIT	AF_1.CREDIT_LIMIT	Association
CURRENT AMOUNT	EF.CURRENT_AMT	Entity
CUSTOMER	EF.CUSTOMER_NUM	Entity
CUSTOMER BALANCE	AF_1.BALANCE	Association
CUSTOMER NAME	AF_1.CUSTOMER_NAME	Association
DISPUTE MEMO	EF.DISPUTED_INVOICE_MEMO	Entity
DISPUTED?	EF.DISPUTED_INVOICE	Entity
DOCUMENT SALESPERSON	AF_4.SLSP_TERR	Entity
DUE DATE	EF.DUE_DATE	Entity
ENTRY DATE	EF.ENTRY_DATE	Entity
HIGH BALANCE	AF_1.HIGH_BALANCE	Association
HIGH BALANCE DATE	AF_1.HIGH_BAL_DATE	Association
INVOICE #	EF.DOC_NUM	Entity
INVOICE CONTINUATION NUMBER	EF.DOC_CONT_NUM	Entity
INVOICE MEMO	EF.MEMO	Entity

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.

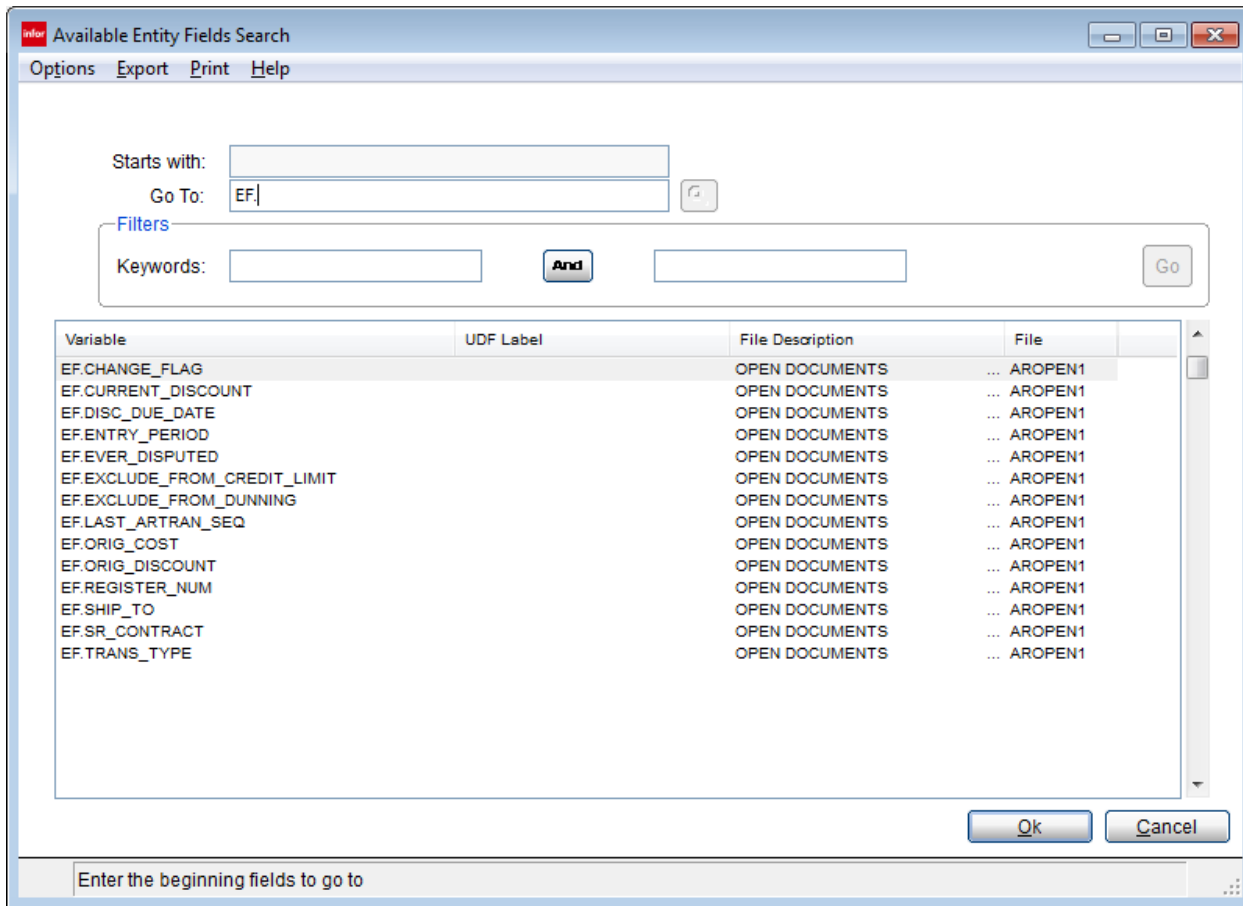
New Field – Runs the Query Field Definition F/M (RMF820). *Important:* Adding or removing fields from a query should be done while no one is using the affected work center. Afterwards, remove the related work center work files from the system so they will be properly redefined.

The screenshot shows the 'Query Field Definition' window. The 'Entity Name' field is populated with 'CREDIT'. The 'Variable' field is empty. The 'Main' section contains several empty text boxes for 'Field Name', 'Validation Proc', 'Export Display Eval', 'Display Eval', 'Parse Eval', and 'Security Eval', along with a 'Sync Character' checkbox. The 'Filter' section includes 'SMPRMT Program', 'Search Proc', and 'Return Variable' fields. The 'Query' section has 'Add to Query' checked for 'Credit & Collections' and 'Field Group' set to '1 - Entity'. The status bar at the bottom indicates 'Enter the ODBC alias, F2-Search'.

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

The screenshot shows the 'Query Field Definition' window with the following configuration:

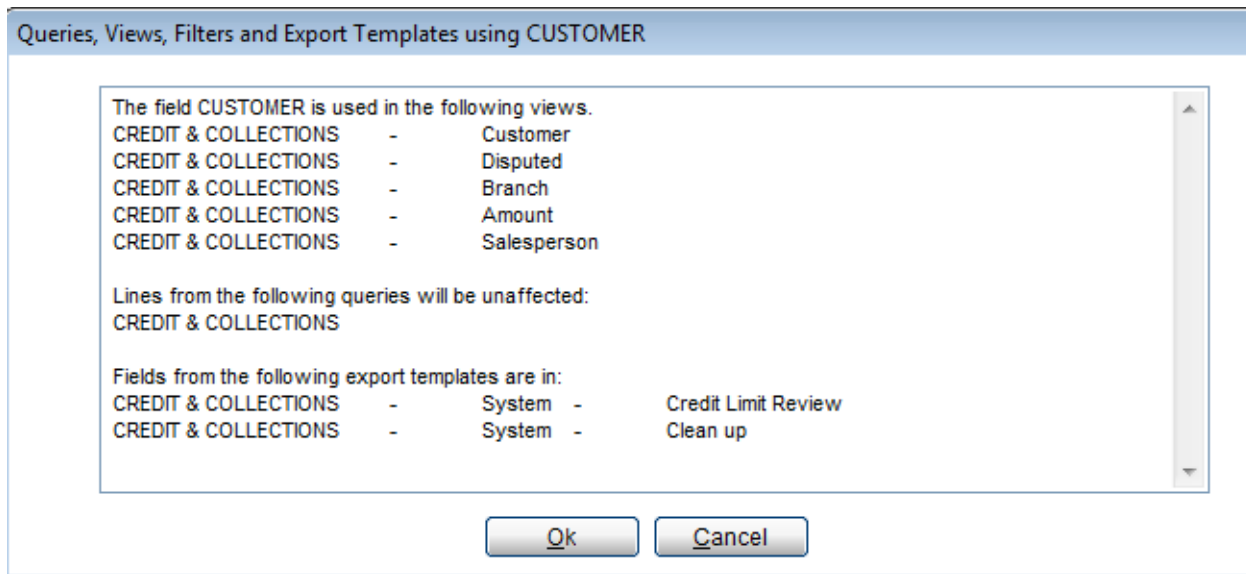
- Entity Name:** CREDIT
- Variable:** EF.CUSTOMER_NUM
- Main Tab:**
 - Field Name:** CUSTOMER
 - Eval:** %trtm\$("Customer")
 - Validation Proc:** "prog/SM/SMC999;val_customer"
 - Export Display Eval:** (empty)
 - Display Eval:** fn%if\$(nul(x\$),%.nof\$,stp(customer_name\$,2))+S20ad20\$+stp(x\$,0)
 - Parse Eval:** pad(mid(x\$,pos(\$ad20\$=x\$)+2),10,0)
 - Security Eval:** (empty)
 - Sync Character:** C
- Filter Tab:**
 - SMPRMT Program:** (empty)
 - Z[9] Value:** (empty)
 - Condition:** (empty)
 - Search Proc:** "prog/SM/SMC999;cust_search"
 - Return Variable:** customer_name\$

At the bottom, there is a 'Select field name' dropdown menu.

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

Query Field Definition

Audit Help

Exit New Delete Save Where Used

Entity Name: CREDIT

Variable: AF_1.CREDIT_CHECK_DAYS

Main Mgds

Field Name: CREDIT CHECK DAYS Eval: %trtm\$("Credit Check Days")

Validation Proc:

Export Display Eval:

Display Eval:

Parse Eval:

Security Eval:

Sync Character:

Filter

SMPRMT Program: Z[9] Value: Condition:

Search Proc:

Return Variable:

Select field name

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.DUE_DATE

Main Mods

Field Name: DUE DATE Eval: %trtm\$("Due Date")

Validation Proc:

Export Display Eval: fn%ldate\$(x\$, "", "")

Display Eval: %.due\$+":"+&a0\$+tbl(nul(x\$),dte(dec(\$00\$+ath(x\$)):"%YV%Mz/%Dz %Ms %D"),%no.date\$)

Parse Eval: tbl(mid(x\$,%.due+3)=%no.date\$,hta(bin(jul(num(mid(x\$,%.due+3,4))),num(mid(x\$,%.due+8,2))),num(mi

Security Eval:

Sync Character:

Filter

SMPRMT Program: Z[9] Value: Condition:

Search Proc:

Return Variable:

Select field name

infor 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: %trtm\$("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:

infor Query Field Definition

Audit Help

Exit New Delete Save Where Used

Entity Name: CREDIT
Variable: EF.DISPUTED_INVOICE

Main Mods

Field Name: DISPUTED? Eval: %trtm\$("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

The screenshot shows a software window titled "01-FACTS 7.7 Demo, Query Field Definition (RMF830) - Infor". The window has a menu bar with "Audit" and "Help". Below the menu bar, there are two input fields: "Entity Name" with the value "QUOTES" and "Variable" with the value "EF.STATUS".

Below these fields is a tabbed interface with "Main" and "Mods" tabs. The "Main" tab is active and contains several fields:

- Field Name: STATUS
- Validation Proc: (empty)
- Export Display Eval: (empty)
- Display Eval: tbl(num(x\$),"No Status","Accepted","Partially Converted","Declined","Expired","Open")
- Parse Eval: str(cse(x\$,"Accepted","Partially Converted","Declined","Expired","Open"))
- Security Eval: (empty)
- Sync Character: (empty)

Below the "Main" tab is a "Filter" section with the following fields:

- SMPRMT Program: RMC997
- Z[9] Value: 100
- Condition: quote status
- Search Proc: (empty)
- Return Variable: (empty)

At the bottom of the window, there is a toolbar with buttons: "Where Used", "Save", "Delete", "New", and "Exit". Below the toolbar is a text box labeled "Select field name".

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

The screenshot shows the 'Query Field Definition' window with the following details:

- Entity Name:** CREDIT
- Variable:** EF.CUSTOMER_NUM
- Field Name:** CUSTOMER
- Eval:** %trtm\$("Customer")
- Validation Proc:** "prog/SM/SMC999;val_customer"
- Export Display Eval:** (empty)
- Display Eval:** fn%if\$(nul(x\$),%.nof\$,stp(customer_name\$,2))+\$20ad20\$+stp(x\$,0)
- Parse Eval:** pad(mid(x\$,pos(\$ad20\$=x\$)+2),10,0)
- Security Eval:** (empty)
- Sync Character:** C
- Filter:**
 - SMPRMT Program:** (empty)
 - Z[9] Value:** (empty)
 - Condition:** (empty)
 - Search Proc:** "prog/SM/SMC999;cust_search"
 - Return Variable:** customer_name\$

At the bottom of the window, there is a text box labeled 'Select field name'.

Combination

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

- Invoice number in Credit & Collections
- Opportunity ID

infor Query Field Definition

Audit Help

Exit New Delete Save Where Used

Entity Name: OPPORTUNITY

Variable: EF.OPP_NUM

Main Mods

Field Name: OPPORTUNITY ID Eval: %trtm\$("Opportunity ID")

Validation Proc: "prog/RM/RMC999;val_opp_id"

Export Display Eval:

Display Eval: stp(x\$,0)+\$20ad20\$+stp(opp_name\$,2)+""+sort.ef.amount\$+" "+%.close\$+"": "+fn%ldate\$(sort.ef.clos

Parse Eval: pad(mid(x\$,1,pos(\$20ad\$=x\$)-1),10,0)

Security Eval:

Sync Character:

Filter

SMPRMT Program: Z[9] Value: Condition:

Search Proc: "prog/RM/RMF962;opp_id_search"

Return Variable: opp_name\$

Select field name

Query Field Definition [minimize] [maximize] [close]

Audit Help

Exit New Delete Save [undo] [redo] [refresh] [refresh] Where Used

Entity Name: CREDIT [refresh]
 Variable: EF.DOC_NUM [refresh]

Main Mods

Field Name: INVOICE # Eval: %trtm\$("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.

Query Field Definition

Audit Help

Exit New Delete Save Where Used

Entity Name: QUOTES Variable: AF_3.VALUE

Main Mgds

Field Name: TAXABLE Eval: %trtm\$("Taxable")

Validation Proc:

Export Display Eval:

Display Eval: %.taxable\$+*: "+str(num(sort.ef.merchandise_amt\$)+num(sort.ef.misc_amt\$)-num(sort.ef.invoice_dis

Parse Eval:

Security Eval:

Sync Character:

Filter

SMPRMT Program: Z[9] Value: Condition:

Search Proc:

Return Variable:

Select field name

Function

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

Query Field Definition

Audit Help

Exit New Delete Save Where Used

Entity Name: CREDIT

Variable: EF.CURRENT_AMT

Main Mods

Field Name: CURRENT AMOUNT Eval: %tr'tm\$("Current Amount")

Validation Proc:

Export Display Eval:

Display Eval: fnasc_sort_mask\$(x\$)

Parse Eval: str(num(sub(sub(stp(x\$,3),\"(",\"-\",)\",\"\"))\"-#####.00\"))

Security Eval:

Sync Character:

Filter

SMPRMT Program: Z[9] Value: Condition:

Search Proc:

Return Variable:

Select field name

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.: <ul style="list-style-type: none"> • 'C' for customers • 'V' for vendors • 'I' for Items • 'R' for RM contacts