LEADMASTER

MANAGE REFERENCE TABLES

The basic reference "pull-down" tables that can be maintained are:

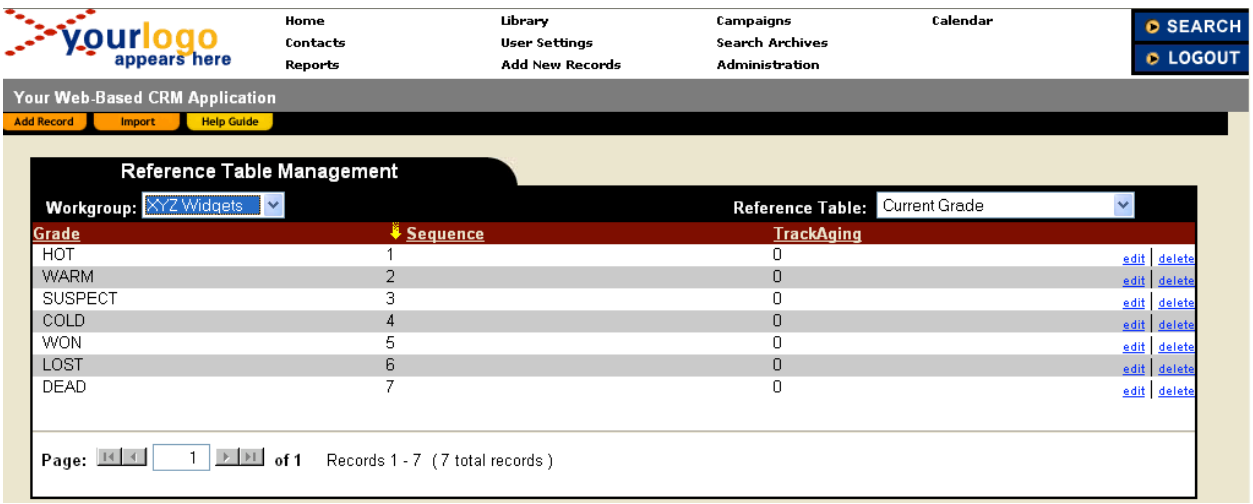
- Current Grade
- Initial Grade
- Title Code (the application stores the Title Code in the database and not the text value)
- Function Code (the application stores the Function Code in the database and not the text value)
- State Code
- Country Code
- Marketing Mix (the application stores the Marketing Mix Code in the database and not the text value)
- List Source (the application stores the List Source Code in the database and not the text value)
- Probability (Sales Update screen – contains percentages in decimal values)
- Opportunity Discounts (Opportunity Discounting must be Enabled in the Workgroup screen for this to be activated)
- Follow-Up Types Sales (Type field on Call Back/Event screen)
- Follow-Up Types 2
- Preferred Method of Contact (Contact Method field on Contact detail screen)
- Marketing Activity (field on the Marketing Activity on Contact detail screen – can be created via the Add Activity function in the Search Results screen)
- Marketing Status (field on the Marketing Activity on Contact detail screen – can be created via the Add Activity function in the Search Results screen)
- Opp Types
- Opportunity Sales Stage (Opportunity detail screen)
- Sales Status (Opportunity detail screen)
- Opportunity Close Reason (Opportunity detail screen)
- Opportunity Custom 1 (Opportunity detail screen)
- Opportunity Custom 2 (Opportunity detail screen)
- Opportunity Custom 3 (Opportunity detail screen)
- Opportunity Custom 4 (Opportunity detail screen)
- Opportunity Products (Opportunity detail screen – Product Details)
- Ref_CaseMgtStatus (Case screen detail)
- Ref_CaseMgtOrigin (Case screen detail)
- Ref_CaseMgtPriority (Case screen detail)
- Ref_CaseMgtType (Case screen detail)
- Ref_CaseMgtCaseReason (Case screen detail)
- Ref_CaseMgtCloseReason (Case screen detail)
- Ref_CaseMgtCustom1
- Ref_CaseMgtCustom2
- Ref_CaseMgtCustom3
- Ref_CaseMgtCustom4
- Special Interest 1 – 12 (labels for three Special Interest areas displayed on the Search and other detail screens)
- Contact Single Select 1 (user defined custom field available on Contact Detail screen)
- Contact Single Select 2 (user defined custom field available on Contact Detail screen)

- Contact Single Select 3 (user defined custom field available on Contact Detail screen)
- Contact Single Select 4 (user defined custom field available on Contact Detail screen)
- Contact Multiple Select 1 (user defined custom field available on Contact Detail screen)
- Contact Multiple Select 2 (user defined custom field available on Contact Detail screen)
- Merge Fields Maintenance
- Workgroup URL Mapping

These tables can be maintained for each workgroup within an individual database.

Reference Tables file maintenance is accessed by clicking on the Administration function in the top banner of the application and then selecting the hyperlink called Manage Reference Tables.

The following is an example of the Reference Tables file maintenance screen:



Select the Company/Workgroup (if you have access to multiple ones) and the Reference Table you want to modify. Additional entries can be add via the Add Record tab, Edited via the edit hyperlink or actually deleted via the delete hyperlink.

Each table has the ability for the user to sequence the order that the entries will appear in the screen pull-down field.

Some tables as noted above store the code value and not the actual text value in the application DB. These are fields that traditionally were imported directly from Telemarketing firms and this cut down on the possibility of misspelling the text names. It also make it possible to say change the text value in List Source without having to file maintain all of the values for that List Source Code.

[Note: User will not see any changes to these table values until they log into the application again because session variables including tables are set at logon time]

[Note: the names of the Reference Tables above can be renamed in the Custom Labels function by choosing the Label Group: Manage Reference Tables]