
CRW045 Work with Contact Template

<i>Overview</i>	Templates can be created to be used by the user when adding Contact Access types for e-Commerce users to make the process more efficient. Once the template is created it is used to default information when adding an access type via the Work with Contact Access menu option.
<i>Purpose</i>	This panel allows you to: <ul style="list-style-type: none">Add contact template detailsChange contact template detailsChange customer classification template detailsChange contact classification template detailsCopy contact templateDelete contact template details

Examples

This section illustrates examples concerning:

[Example 1: Add/Modify contact template details](#)

[Example 2: Modify contact template master details](#)

[Example 3: Delete contact template](#)

[Example 4: Copy contact template details](#)

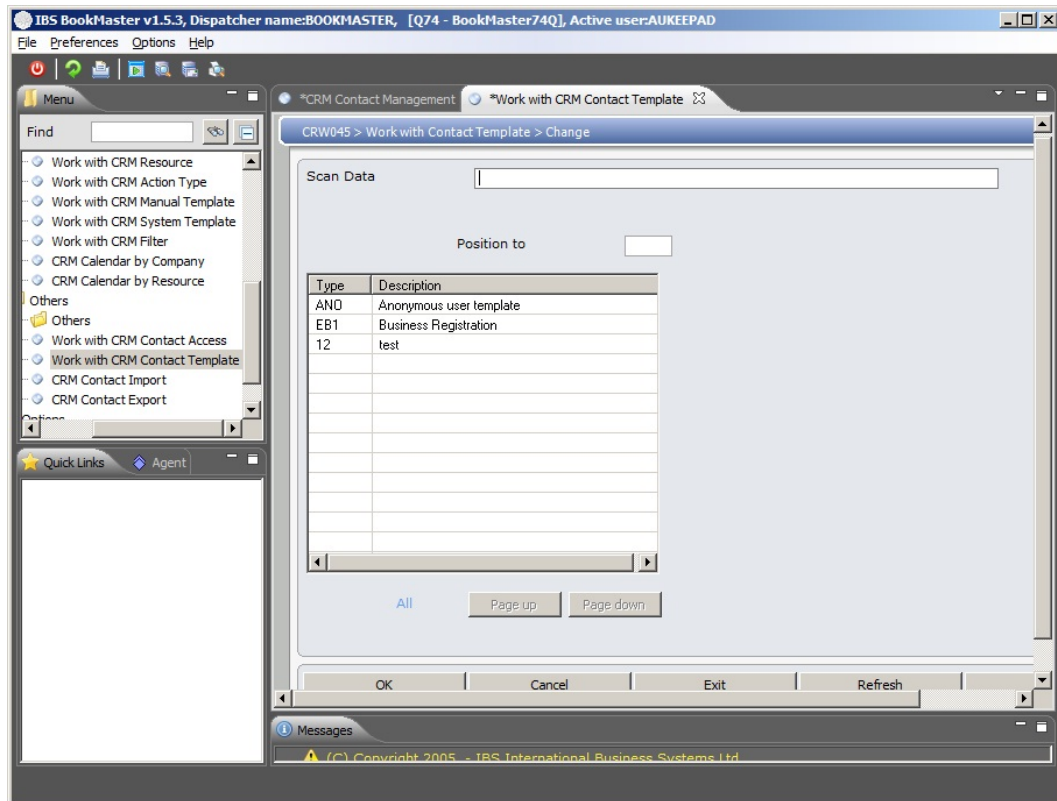
[Example 5: Modify classification template details](#)

Example 1: Add/Modify contact template details

This example describes how to add a new contact template.

1. Select option **Work with CRM Contact Template** from Publishing Modules>Customer Relationship Management>CRM Other Maintenance>CRM Templates menu.

CRW045 Work with Contact Template main panel is displayed.



Functions

Add

Add a new contact template.

Options

Master

Master accesses Work with Contact Template (Master) in the change mode.

Customer class

Customer Class accesses Work with Classification Template in the change mode.

Cont Class

Cont Class accesses Work with Classification Template in the change mode.

Change

Change accesses Work with Contact Template in the change mode.

Copy

Copy accesses Work with Contact Template in the copy mode.

Delete

Delete accesses Work with Contact Template in the delete mode, to delete the contact template record.

Relevant Fields

Type

This is the type of the contact. Picked up from the control file TMSCRM/CR-CTYP

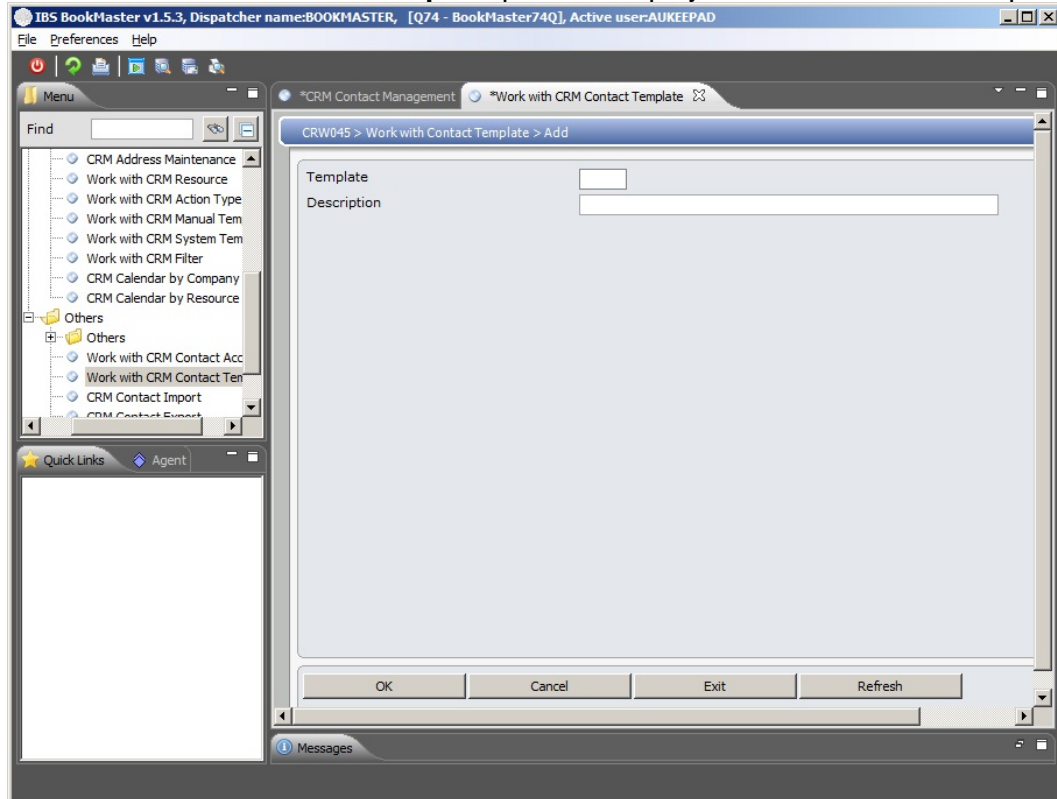
Description

This is a brief description of the Incident, template or action being created. When exporting information to Excel a description can be exported.

The description of the access, class type or incident. When importing Contacts the description is one given to the import. The brief description of the Contact type which can be an Author, Sales Agent or Librarian.

2. Click Add function.

CRW045 Work with Contact Template panel is displayed to add a contact template.



Relevant Fields

Template

Specify the template to use to default information.

Description

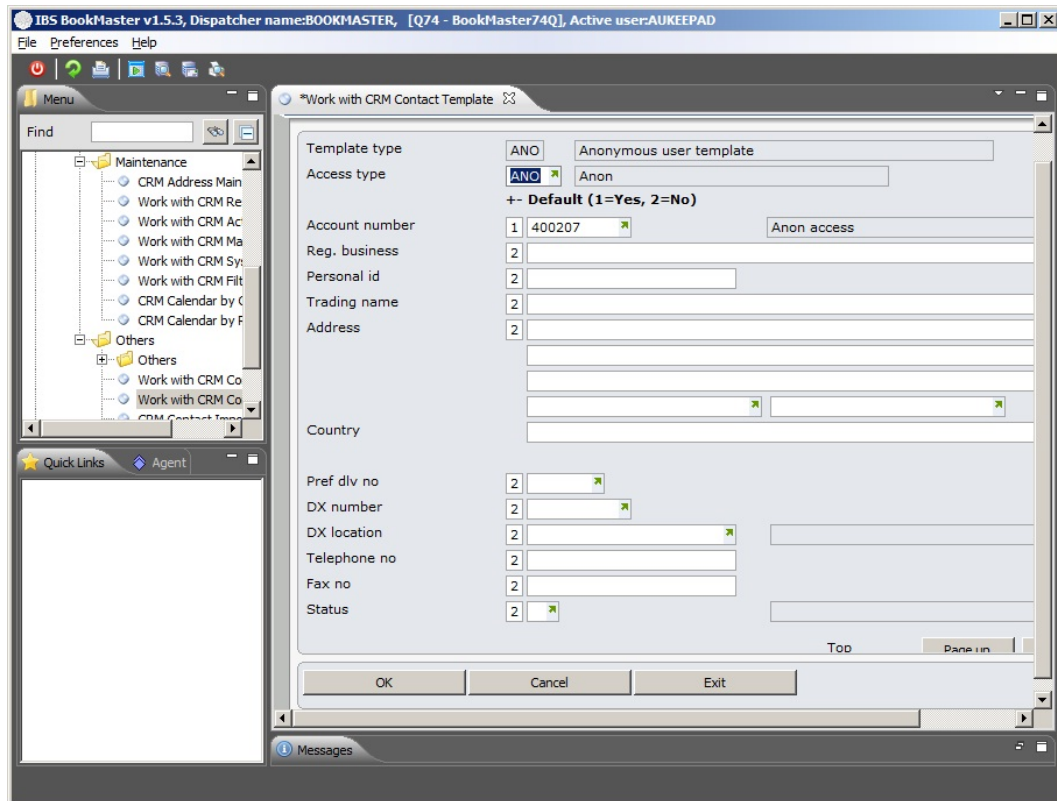
This is a brief description of the Incident, template or action being created. When exporting information to Excel a description can be exported.

The description of the access, class type or incident. When importing Contacts the description is one given to the import.

The brief description of the Contact type which can be an Author, Sales Agent or Librarian.

3. Click OK to add the contact template details.

The next panel to add a contact template is displayed.



Relevant Fields

Access type

The access type for the Contact/External User.

Account number

A number used to identify the customer account.

When adding a Contact's access definition, flag the security level the Contact has for the account number. Valid choices are:

Not allowed

View

Change

Registered business

When adding a Contact's template definition, flag the default the Contact has for the registered business. Valid choices are:

Yes, default the registered business

No, do not default the registered business

Personal id

When adding a Contact's template definition, flag the default Contact has for the Personal ID. Valid choices are:

Yes, default the Personal ID

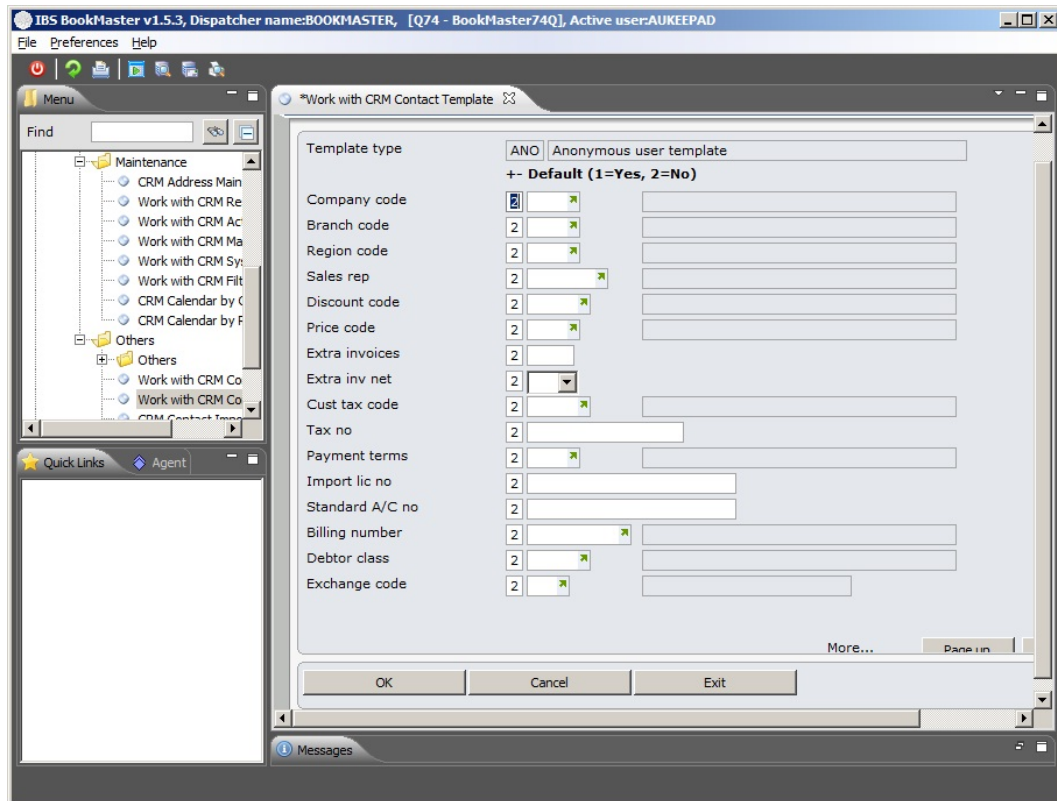
No, do not default the Personal ID

Trading name

When adding a Contact's template definition, flag the default Contact has for the trading name. Valid choices are:

Yes, default the trading name

	No, do not default the trading name
Address	When adding a Contact's template definition, flag the default Contact has for the address. Valid choices are: Yes, default the address No, do not default the address
Country	When entering a Contract's template definition, enter the default country for the Contact.
Preferred delivery number	When adding a Contact's template definition, flag the default the Contact has for the preferred delivery number. Valid choices are: Yes, default the preferred delivery number No, do not default the preferred delivery number
DX number	When adding a Contact's template definition, flag the default Contact has for the DX number. Valid choices are: Yes, default the DX number No, do not default the DX number
DX location	When adding a Contact's template definition, flag the default Contact has for the DX location. Valid choices are: Yes, default the DX location No, do not default the DX location
Telephone no	When adding a Contact's template definition, flag the default Contact has for the telephone number. Valid choices are: Yes, default the telephone number No, do not default the telephone number
Fax no	When adding a Contact's template definition, flag the default Contact has for the fax number. Valid choices are: Yes, default the fax number No, do not default the fax number
Status	When adding a Contact's template definition, flag the default Contact has for the status. Valid choices are: Yes, default the status No, do not default the status When adding a Contact's template definition, flag the default Contact for the delivery address status. Valid choices are: Yes, default the delivery address status No, do not default the delivery address status



Relevant Fields

Company code

When adding a Contact's template definition, flag the default Contact has for the Company code. Valid choices are:
Yes, default the Company Code.

No, do not default the Company Code.

Branch code

When adding a Contact's template definition, flag the default Contact has for the Branch code. Valid choices are:
Yes, default the Branch Code.

No, do not default the Branch Code.

Region code

When adding a Contact's template definition, flag the default Contact has for the Region code. Valid choices are:
Yes, default the Region Code.

No, do not default the Region Code.

Sales rep

When adding a Contact's template definition, flag the default the Contact has for the sales rep. Valid choices are:

Yes, default the sales rep

No, do not default the sales rep
When adding a Contact's template definition, flag the default the Contact has for the sales rep. Valid choices are:

Yes, default the sales rep

No, do not default the sales rep

Discount code	<p>When adding a Contact's template definition, flag the default Contact has for the Discount code. Valid choices are: Yes, default the Discount Code.</p> <p>No, do not default the Discount Code.</p>
Price code	<p>When adding a Contact's template definition, flag the default Contact has for the Price code. Valid choices are: Yes, default the Price Code.</p> <p>No, do not default the Price Code.</p>
Extra invoices	<p>When adding a Contact's template definition, flag the default Contact has for the Extra Invoices. Valid choices are: Yes, default the Extra Invoices.</p> <p>No, do not default the Extra Invoices.</p>
Extra inv net	<p>When adding a Contact's template definition, flag the default Contact has for the Extra Invoice Net. Valid choices are: Yes, default the Extra Invoice net.</p> <p>No, do not default the Extra Invoice net.</p>
Customer tax code	<p>When adding a Contact's template definition, flag the default the Contact has for the customer tax code. Valid choices are: Yes, default the customer tax code</p> <p>No, do not default the customer tax code</p>
Tax no	<p>When adding a Contact's template definition, flag the default Contact has for the Tax Number. Valid choices are: Yes, default the Tax number .</p> <p>No, do not default the Tax number.</p>
Payment terms	<p>When adding a Contact's template definition, flag the default Contact has for the Payment Terms. Valid choices are: Yes, default the Payment Terms</p> <p>No, do not default the Payment Terms</p>
Import licence no	<p>When adding a Contact's template definition, flag the default the Contact has for the import licence number. Valid choices are: Yes, default the import licence number</p> <p>No, do not default the import licence number</p>
Standard A/C no	<p>When adding a Contact's template definition, flag the default Contact has for the Standard R/C Number. Valid choices are: Yes, default the Standard R/C number</p> <p>No, do not default the Standard R/C number</p>
Billing number	<p>When adding a Contact's template definition, flag the default Contact has for the Billing Number. Valid choices are: Yes, default the Billing number</p>

No, do not default the Billing number

Debtor class

When adding a Contact's template definition, flag the default Contact has for the Debtor Class. Valid choices are:

Yes, default the Debtor Class.

No, do not default the Debtor Class.

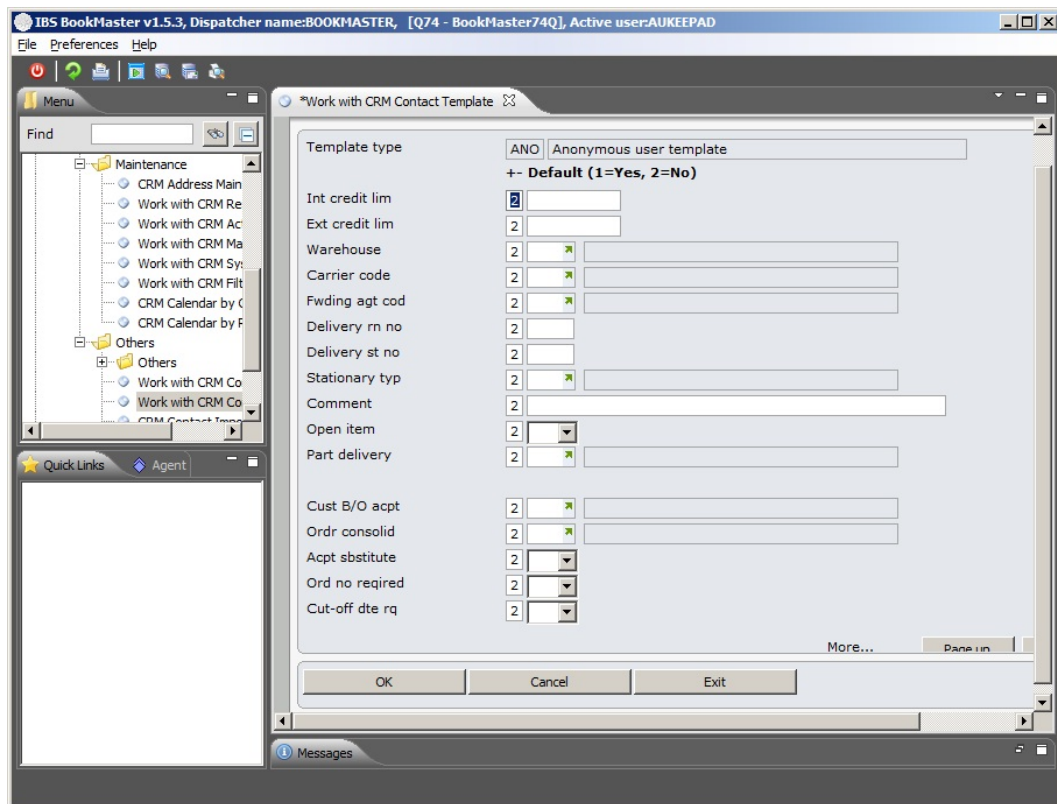
Exchange code

When adding a Contact's template definition, flag the default Contact has for the Exchange Code. Valid choices are:

Yes, default the Exchange Code

No, do not default the Exchange Code

5. Page Down.



6. Click Prompt F4=search to display the Warehouse search program

Relevant Fields

Internal credit limit

When adding a Contact's template definition, flag the default the Contact has for the internal credit limit. Valid choices are:

Yes, default the internal credit limit

No, do not default the internal credit limit

External credit limit

When adding a Contact's template definition, flag the default the Contact has for the external credit limit. Valid choices are:

Yes, default the external credit limit

	No, do not default the external credit limit
Warehouse	<p>When adding a Contact's template definition, flag the default the Contact has for the warehouse. Valid choices are:</p> <p>Yes, default the warehouse</p> <p>No, do not default the warehouse</p>
Carrier code	<p>When adding a Contact's template definition, flag the default the Contact has for the carrier code. Valid choices are:</p> <p>Yes, default the carrier code</p> <p>No, do not default the carrier code</p>
Forwarding agent code	<p>When adding a Contact's template definition, flag the default the Contact has for the forwarding agent code flag. Valid choices are:</p> <p>Yes, default the forwarding agent code flag</p> <p>No, do not default the forwarding agent code flag</p>
Delivery run no	<p>When adding a Contact's template definition, flag the default the Contact has for the delivery run number. Valid choices are:</p> <p>Yes, default the delivery run number</p> <p>No, do not default the delivery run number</p>
Delivery stop no	<p>When adding a Contact's template definition, flag the default the Contact has for the delivery stop number. Valid choices are:</p> <p>Yes, default the delivery stop number</p> <p>No, do not default the delivery stop number</p>
Stationary type	<p>When adding a Contact's template definition, flag the default the Contact has for the stationary type. Valid choices are:</p> <p>Yes, default the stationary type</p> <p>No, do not default the stationary type</p>
Comment	<p>When adding a Contact's template definition, flag the default the Contact has for the comment. Valid choices are:</p> <p>Yes, default the comment</p> <p>No, do not default the comment</p>
Open item	<p>When adding a Contact's template definition, flag the default the Contact has for the open item. Valid choices are:</p> <p>Yes, default the open item</p> <p>No, do not default the open item</p>
Part Delivery	Specify if the customer allows partial delivery.

Customer B/O
accept

When adding a Contact's template definition, flag the default the Contact has for the customer backorder acceptance flag. Valid choices are:

Yes, default the customer backorder acceptance flag

No, do not default the customer backorder acceptance flag

Order
consolidation

When adding a Contact's template definition, flag the default the Contact has for the order consolidation flag. Valid choices are:

Yes, default the order consolidation flag

No, do not default the order consolidation flag

Accept substitute

When adding a Contact's access definition, flag the security level the Contact has for the accept substitutes flag. Valid choices are:

Not allowed

View

Change

Order no required

When adding a Contact's template definition, flag the default the Contact has for the order number required flag. Valid choices are:

Yes, default the order number required flag

No, do not default the order number required flag

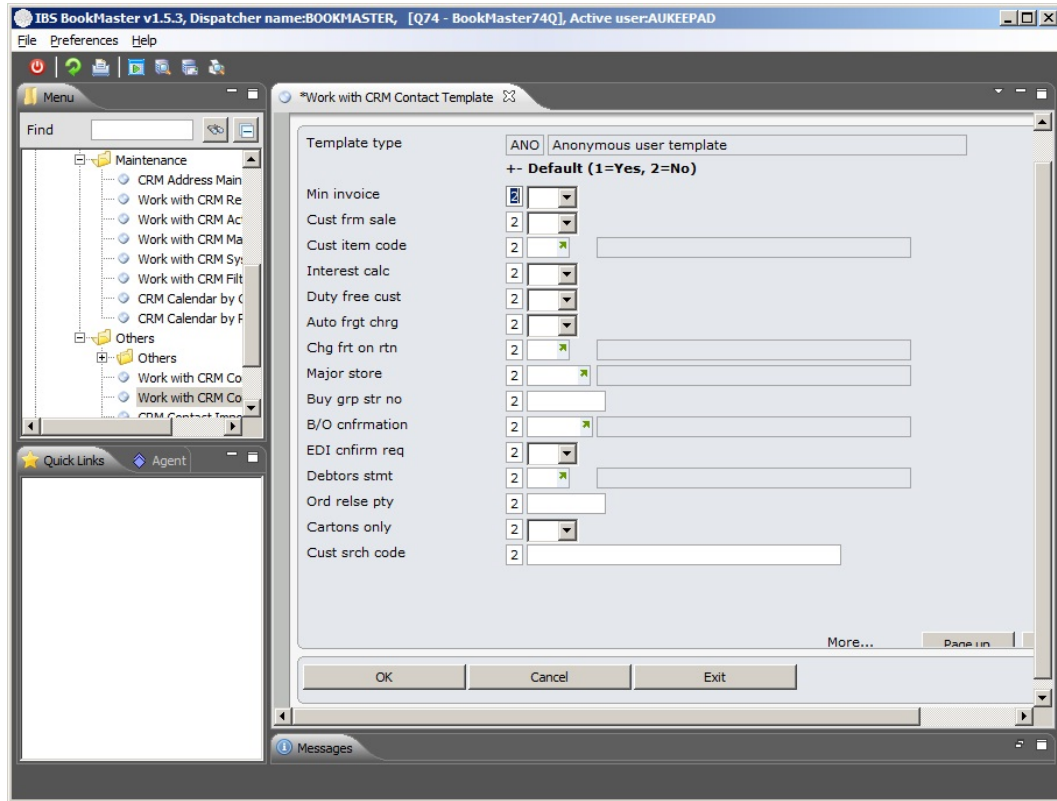
Cut-off date
required

When adding a Contact's template definition, flag the default the Contact has for the cut off date required flag. Valid choices are:

Yes, default the cut off date required flag

No, do not default the cut off date required flag

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Relevant Fields

Minimum invoice

When adding a Contact's template definition, flag the default Contact has for the Min. Invoice. Valid choices are:
 Yes, default the Min. Invoice.
 No, do not default the Min. Invoice.

Customer firm sale

When adding a Contact's template definition, flag the default the Contact has for the customer firm sale flag. Valid choices are:
 Yes, default the customer firm sale flag
 No, do not default the customer firm sale flag

Customer item code

When adding a Contact's template definition, flag the default the Contact has for the customer item code. Valid choices are:
 Yes, default the customer item code
 No, do not default the customer item code

Interest calculation

When adding a Contact's template definition, flag the default the Contact has for the interest calculation. Valid choices are:
 Yes, default the interest calculation
 No, do not default the interest calculation

Duty free customer

When adding a Contact's template definition, flag the default the Contact has for the duty free customer flag. Valid choices are:

	<p>Yes, default the duty free customer flag</p> <p>No, do not default the duty free customer flag</p>
Auto freight charge	<p>When adding a Contact's template definition, flag the default the Contact has for the auto freight charge flag. Valid choices are:</p> <p>Yes, default the auto freight charge flag.</p> <p>No, do not default the auto freight charge flag.</p>
Charge freight on return	<p>When adding a Contact's template definition, flag the default the Contact has for the Charge Freight on Return flag. Valid choices are:</p> <p>Yes, default the Charge Freight on Return flag</p> <p>No, do not default the Charge Freight on Return flag</p>
Major store	<p>When adding a Contact's template definition, flag the default Contact has for the major store. Valid choices are:</p> <p>Yes, default the major store.</p> <p>No, do not default the major store.</p>
Buy group store no	<p>When adding a Contact's template definition, flag the default the Contact has for the buying group store number. Valid choices are:</p> <p>Yes, default the buying group store number</p> <p>No, do not default the buying group store number</p>
B/O confirmation	<p>When adding a Contact's template definition, flag the default Contact has for the backorder confirmation flag. Valid choices are:</p> <p>Yes, default the backorder confirmation flag.</p> <p>No, do not default the backorder confirmation flag.</p>
EDI confirm required	<p>When adding a Contact's template definition, flag the default the Contact has for the EDI confirmation required flag. Valid choices are:</p> <p>Yes, default the EDI confirmation required flag</p> <p>No, do not default the EDI confirmation required flag</p>
Debtors statement	<p>When adding a Contact's template definition, flag the default the Contact has for the Debtors statement. Valid choices are:</p> <p>Yes, default the Debtors statement</p> <p>No, do not default the Debtors statement</p>
Order release party	<p>When adding a Contact's template definition, flag the default the Contact has for the order release priority. Valid choices are:</p> <p>Yes, default the order release priority</p> <p>No, do not default the order release priority</p>
Cartons only	<p>When adding a Contact's template definition, flag the default Contact has for the cartons only flag. Valid choices are:</p> <p>Yes, default the cartons only flag.</p> <p>No, do not default the cartons only flag.</p>
Customer search	<p>When adding a Contact's template definition, flag the default the Contact has for the customer search code. Valid choices</p>

code

are:

Yes, default the customer search code

No, do not default the customer search code

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IBS BookMaster v1.5.3, Dispatcher name:BOOKMASTER, [Q74 - BookMaster74Q], Active user-AUKEEPAD

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*Work with CRM Contact Template

CRW045 > Work with Contact Template > Change

Template type	ANO	Anonymous user template
+- Default (1=Yes, 2=No)		
Contact id	2	
Company	1 01	BOOKMASTER AUSTRALIA
Currency	1 A	Australian Dollar
Salutation	1 Mr	Mr
Given name	1 Mister	
Middle name	1 Anon	
Family name	1 Anon	
Name suffix	1 Anon	
Full name	1 .	
Address line 1	1 Anon	
Line 2		Big tree
City		Behind a waterfall
State		Abbeywood
Postcode		QLD
Country		
Contact type	1 ZZ	General

More... Pane in

Relevant Fields

Contact id

When adding a Contact's template definition, flag the default Contact has for the contact ID. Valid choices are:

Yes, default the contact ID.

No, do not default the contact ID.

Company

When adding a Contact's template definition, flag the default Contact has for the Company code. Valid choices are:

Yes, default the Company Code.

No, do not default the Company Code.

Currency

When adding a Contact's template definition, flag the default Contact has for the Exchange Code. Valid choices are:

Yes, default the Exchange Code

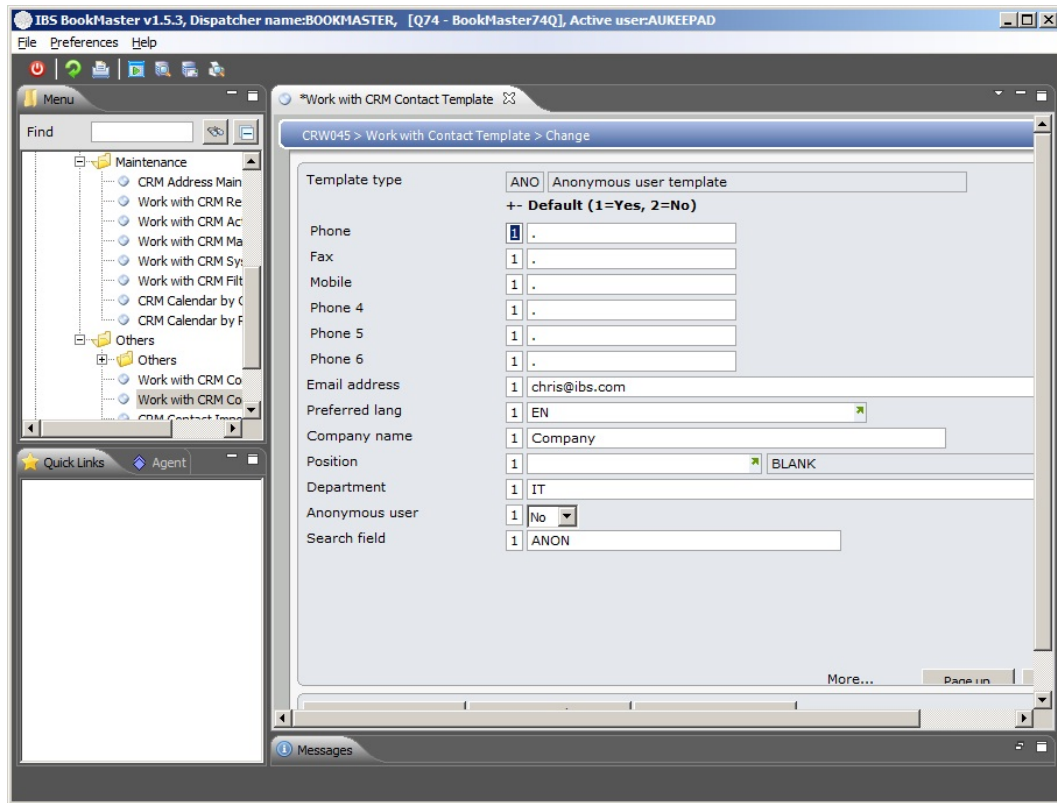
No, do not default the Exchange Code

Salutation

When adding a Contact's template definition, flag the default Contact has for the Salutation. Valid choices are:

Yes, default the Salutation

	No, do not default the Salutation
Given name	When adding a Contact's access definition, flag the security level the Contact has for the given name. Valid choices are: Not allowed View Change
Middle name	When adding a Contact's template definition, flag the default Contact has for the middle name. Valid choices are: Yes, default the middle name. No, do not default the middle name.
Family name	When adding a Contact's template definition, flag the default Contact has for the Family name. Valid choices are: Yes, default the Family name. No, do not default the Family name.
Name suffix	When adding a Contact's template definition, flag the default Contact has for the name suffix. Valid choices are: Yes, default the name suffix. No, do not default the name suffix.
Full name	When adding a Contact's template definition, flag the default Contact has for the Full name. Valid choices are: Yes, default the Full name. No, do not default the Full name.
Address line 1	The first line of the address is mandatory.
Address line 2	The second line of the address is optional. This is used to enter additional address informatio
City	The city the customer/contact resides in.
State	The State the customer/contact resides.
Postcode	The Postcode for the address entered.
Country	When entering a Contract's template definition, enter the default country for the Contact.
Contact type	When adding a Contact's template definition, flag the default Contact has for the contact type. Valid choices are: Yes, default the contact type. No, do not default the contact type.



Relevant Fields

Phone

When adding a Contact's template definition, flag the default Contact has for the phone number. Valid choices are:
Yes, default the phone number.

No, do not default the phone number.

Fax

When adding a Contact's template definition, flag the default Contact has for the fax number . Valid choices are:
Yes, default the fax number

No, do not default the fax number

Mobile

When adding a Contact's template definition, flag the default Contact has for the Mobile No. Valid choices are:
Yes, default the mobile number

No, do not default the mobile number

Phone 4

When adding a Contact's template definition, flag the default Contact has for the additional phone number. Valid choices are:

Yes, default the additional phone number.

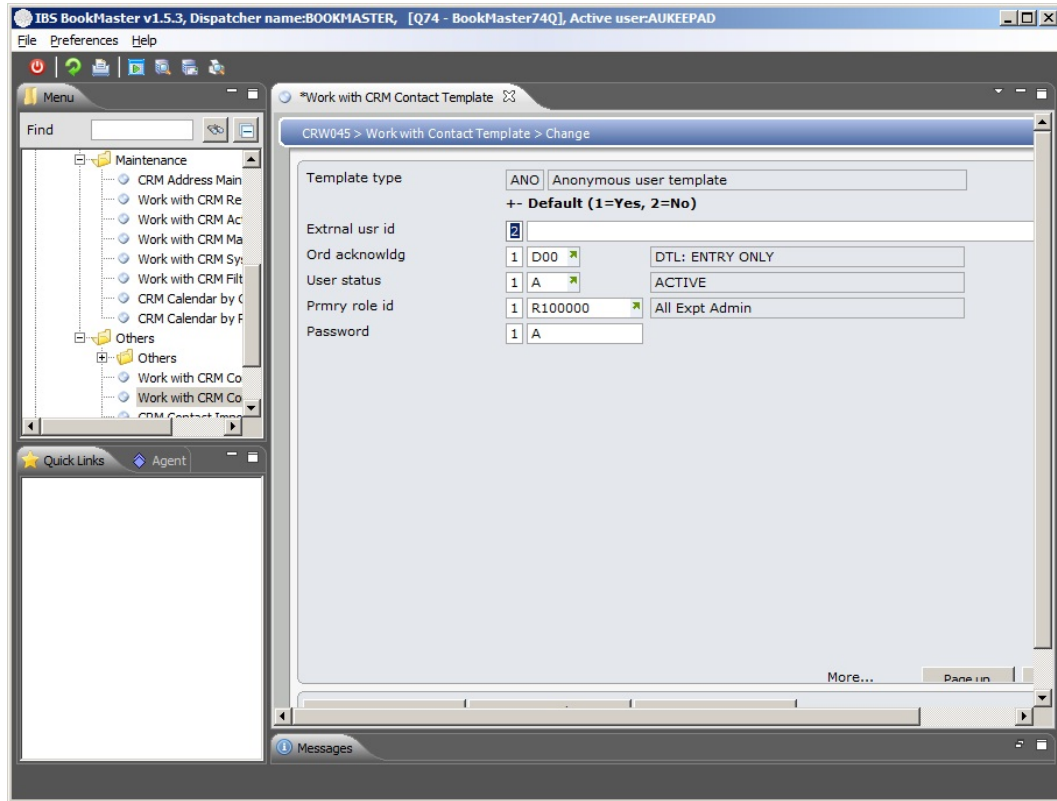
No, do not default the additional phone number.

Phone 5

When adding a Contact's template definition, flag the default Contact has for the additional phone number. Valid choices are:

Yes, default the additional phone number.

Phone 6	<p>No, do not default the additional phone number.</p> <p>When adding a Contact's template definition, flag the default Contact has for the additional phone number. Valid choices are:</p> <p>Yes, default the additional phone number.</p>
Email address	<p>No, do not default the additional phone number.</p> <p>When adding a Contact's template definition, flag the default Contact has for the email address. Valid choices are:</p> <p>Yes, default the email address.</p>
Preferred language	<p>No, do not default the email address.</p> <p>When adding a Contact's template definition, flag the default the Contact has for the preferred language. Valid choices are:</p> <p>Yes, default the preferred language</p> <p>No, do not default the preferred language</p>
Company name	<p>When adding a Contact's template definition, flag the default Contact has for the Company name. Valid choices are:</p> <p>Yes, default the Company name</p> <p>No, do not default the Company name</p>
Position	<p>When adding a Contact's template definition, flag the default Contact has for the Position. Valid choices are:</p> <p>Yes, default the Position.</p> <p>No, do not default the Position.</p>
Department	<p>When adding a Contact's template definition, flag the default Contact has for the Department. Valid choices are:</p> <p>Yes, default the Department.</p> <p>No, do not default the Department.</p>
Anonymous user	<p>When adding a Contact's template definition, flag the default Contact has for the anonymous user. Valid choices are:</p> <p>Yes, default the anonymous user.</p> <p>No, do not default the anonymous user.</p>
Search field	<p>When adding a Contact's template definition, flag the default Contact has for the search field. Valid choices are:</p> <p>Yes, default the search field.</p> <p>No, do not default the search field.</p>



Relevant Fields

External user id

When adding a Contact's template definition, flag the default Contact has for the external user ID. Valid choices are: Yes, default the external user ID.

No, do not default the external user ID. .

Order acknowledge

When adding a Contact's template definition, flag the default Contact has for the order acknowledge flag. Valid choices are:

Yes, default the order acknowledge flag.

No, do not default the order acknowledge flag.

User status

When adding a Contact's template definition, flag the default Contact has for the user status. Valid choices are: Yes, default the user status.

No, do not default the user status.

Primary role id

The code used to depict the assigned user role, such as Administrative or All Except Admin.

When adding a Contact's template definition, flag the default Contact has for the primary role ID. Valid choices are: Yes, default the primary role ID.

No, do not default the primary role ID.

Password

When adding a Contact's template definition, flag the default Contact has for the password. Valid choices are:
Yes, default the password.

No, do not default the password.

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IBS BookMaster v1.5.3, Dispatcher name:BOOKMASTER, [Q74 - BookMaster74Q], Active user:AUKEEPAD

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- CRM Contact Tem

Quick Links Agent

*Work with CRM Contact Template

CRW045 > Work with Contact Template > Change

Template type ANO Anonymous user template

+ Default (1=Yes, 2=No)

Delv cust name

Delvry address

Country

Delivery no 2

Delivery ph 2

Delvry fax no 2

DX number 2

DX location 2

Delv addr sts 2

Search keyword 2

Carrier code 2

Forwrdng agnt 2

Delvry stop no 2

Delvry run no 2

Bottom Done in

Messages

Relevant Fields

Delivery customer name

When adding a Contact's template definition, flag the default the Contact has for the delivery customer name. Valid choices are:

Yes, default the delivery customer name

No, do not default the delivery customer name

Delivery address

When adding a Contact's template definition, flag the default Contact has for the delivery address. Valid choices are:

Yes, default the delivery address.

No, do not default the delivery address.

Delivery number

When adding a Contact's template definition, flag the default Contact has for the delivery number. Valid choices are:

Yes, default the delivery number.

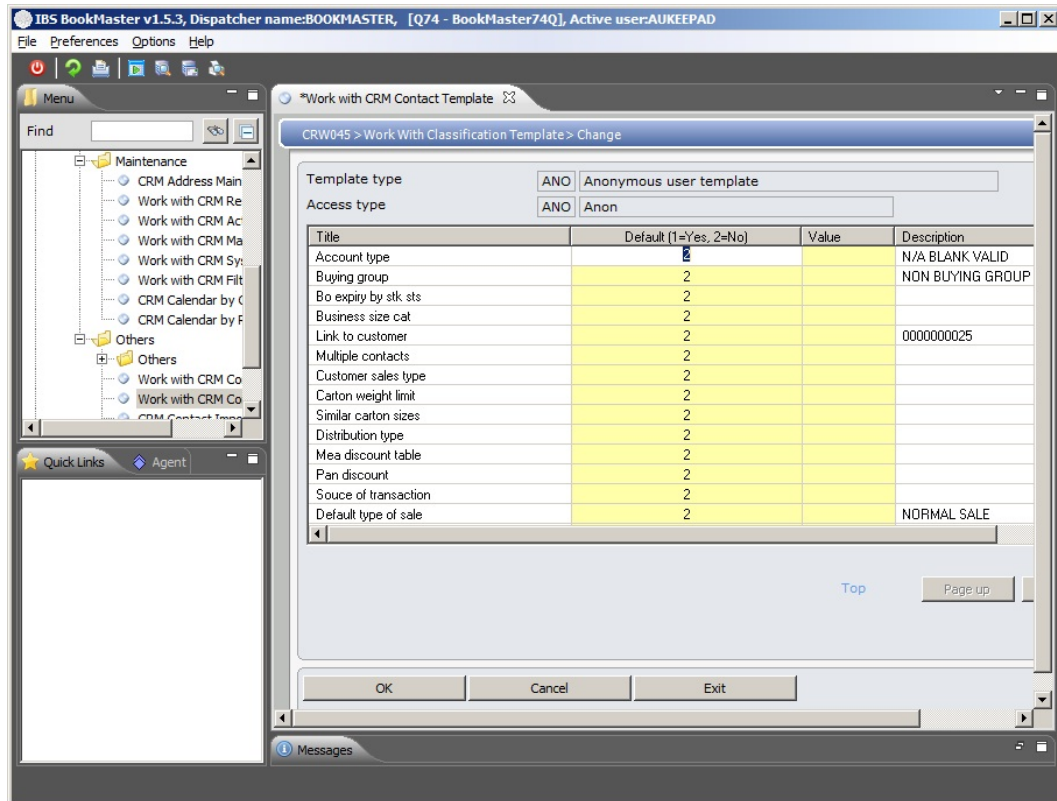
No, do not default the delivery number.

Delivery phone

When adding a Contact's template definition, flag the default Contact has for the delivery phone number. Valid choices are:

	<p>Yes, default the delivery phone number.</p> <p>No, do not default the delivery phone number.</p>
Delivery fax no	<p>When adding a Contact's template definition, flag the default Contact has for the delivery fax number. Valid choices are:</p> <p>Yes, default the delivery fax number.</p> <p>No, do not default the delivery fax number.</p>
DX number	<p>When adding a Contact's template definition, flag the default Contact has for the DX number. Valid choices are:</p> <p>Yes, default the DX number</p> <p>No, do not default the DX number</p>
DX location	<p>When adding a Contact's template definition, flag the default Contact has for the DX location. Valid choices are:</p> <p>Yes, default the DX location</p> <p>No, do not default the DX location</p>
Delivery address status	<p>When adding a Contact's template definition, flag the default the Contact has for the status. Valid choices are:</p> <p>Yes, default the status</p> <p>No, do not default the status</p> <p>When adding a Contact's template definition, flag the default the Contact has for the delivery address status. Valid choices are:</p> <p>Yes, default the delivery address status</p> <p>No, do not default the delivery address status</p>
Search keyword	<p>When adding a Contact's template definition, flag the default Contact has for the search keyword. Valid choices are:</p> <p>Yes, default the search keyword.</p> <p>No, do not default the search keyword.</p>
Carrier code	<p>When adding a Contact's template definition, flag the default Contact has for the Carrier code. Valid choices are:</p> <p>Yes, default the Carrier code.</p> <p>No, do not default the Carrier code.</p>
Forwarding agent	<p>When adding a Contact's template definition, flag the default the Contact has for the forwarding agent code flag. Valid choices are:</p> <p>Yes, default the forwarding agent code flag</p> <p>No, do not default the forwarding agent code flag</p>
Delivery stop no	<p>When adding a Contact's template definition, flag the default Contact has for the Delivery Stop Number. Valid choices are:</p> <p>Yes, default the Delivery Stop number</p> <p>No, do not default the Delivery Stop number</p>
Delivery run no	<p>When adding a Contact's template definition, flag the default Contact has for the Delivery Run Number. Valid choices are:</p> <p>Yes, default the Delivery Run number</p> <p>No, do not default the Delivery Run number</p>

12. Click **OK** to display the following screen.



13. Click **OK**.

Example 2: Modify contact template master details

This example describes how to modify contact template master details.

1. Select option **Work with Contact Template**.

CRW045 Work with Contact Template main panel is displayed.

2. Select option **Master** for any template.

CRW045 Work with Contact Template –Change panel is displayed.

Example 3: Delete contact template

This example describes how to delete an identified contact template.

1. Select option **Work with Contact Template**.

CRW045 Work with Contact Template main panel is displayed.

2. Select option **Delete** for an identified template.

CRW045 Work with Contact Template panel waiting for the confirmation to delete template is displayed.

Example 4: Copy contact template details

This example describes how to copy existing contact template details to the new contact template.

1. Select option **Work with Contact Template**.

CRW045 Work with Contact Template main panel is displayed.

2. Select option **Copy** for an identified template.

CRW045 Work with Contact Template panel in copy mode is displayed.

Example 5: Modify classification template details

This example describes how to modify existing classification template details.

1. Select option **Work with Contact Template**.

CRW045 Work with Contact Template main panel is displayed.

2. Select option **Customer Class** for an identified template.

CRW045 Work with Classification Template panel in change mode is displayed.

Cross Reference

- See CRW050 Work with Contact Access