Application Setup—Introduction
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Application Setup – Setup Center Introduction

Introduction to Application Setup

The Application Setup tables are typically data tables that are generically used within the system. There are also setup tables specific to certain functions only. An import process is the most often used method of populating the large setup tables. Sometimes this import is run on a regular basis.
Shared Functions

Company Setup (ST 1-1)

Company Attributes
This table is used to maintain a list of user-defined Language codes that are selected in the Customer and Vendor records for language translation purposes. Once a selection is made in a company record, the language identified in this table is loaded automatically by the application in the read-only Language field.

Company Groups
The Company Groups table is used by the Service Provider to define in both the Customer and Vendor records the type of company they represent. This value can be used for reporting purposes.

Cust. Relationships
This table is used to maintain a list of Customer Relationship codes. A relationship code is used to define the relationship of a customer site to the master customer record. This code can also be used to define other relationships such as third-party billing and business management companies. Once this relationship is defined in the customer record, any order in which the Customer is selected as the Site ID of the order and third-party Customer ID is entered in the Customer ID field of the order then invoicing will be to the third-party customer.
Customer Groups

This table is used to maintain Customer Group codes. This code is used to group customers together according to standards developed by the Service Provider. Once the groups have been created, the Customer Group designation is selected in the Customer record. After a group is defined, one or more price books can be created that are specific to the Customer Group. Pricing Rules can then be applied to provide for discounts or markups.

Customer Department (Cust. Depart.)

This table is used to maintain answers that can be selected for the Want To Know More question, “Which described your department?” found on the Want To Know More page accessed from the Login screen.

Field Personnel

This table is used to maintain answers that can be selected for the Want To Know More question, “How many personnel deployed in the field?” found on the Want To Know More page accessed from the Login screen.

Fields

This table is used to maintain answers that can be selected for the Want To Know More question, “In which field do you work?” found on the Want To Know More page accessed from the Login screen.

Industries

This table is used maintaining classifications of industries that is define the customer company. The industry descriptions may be different from SIC code selected in the customer record and may be possibly used for sales classification purposes.

Interested

This table is used to maintain answers that can be selected for the Want To Know More question, “Which of our services interest you?” found on the Want To Know More page accessed from the Login screen.

Origin Codes

The Origin Code is used to identify where a prospect or customer lead came from. This is useful for marketing research to determine which leads are the most valuable and what are the best sources of qualified leads. An Origin code is selected in Customer and Prospect Company record.
SIC Codes

SIC - Standard Industry Codes are international codes used to classify and describe the type of industry that is affiliated with a company. The first two digits in the four-digit SIC define a major business sector, and the last two digits denote a facility's specialty within the major sector. NAICS codes can be entered to this table instead if the Service Provider wants to use the more recent industry identification codes.

Stores

This table is used to maintain a list of store names. These stores represent locations where customers purchase equipment that will need to be warranty registered with the Service Provider. These store names can be selected by a customer contact when filling in the Product Warranty Registration form accessed from the Login screen by clicking the Warranty Self Registration link.

Titles

This table is used to maintain answers that can be selected for the Want To Know More question, “Which describes your title?” found on the Want To Know More page accessed from the Login screen.

Vendor Groups

The Vendor Groups code provides a method for grouping vendors (providers of products and services for the Service Provider organization) by the type or size of their companies, or by any other criteria, for organizational purposes. The vendor group is used for reporting purposes.
Global Application Setup (ST 1-2)

This table is used to control many functions within the application. Many are not specific to a particular module or function but instead affect how the application behaves in many areas.

Application Setup is used to define parameters that are applied through the application for all users of the application. Among the parameters defined here is the method used to cost products, define the method to use for profitability calculations and the allocation window just to name a few. The parameters included in Application Setup help to personalize the application to be more in keeping with the Service Provider’s guidelines.

Financial Settings

This page stores global parameters that define the default financial functionality.

Logistics

This page stores global parameters define the default options for the Logistics functionality.

Miscellaneous I

This page stores miscellaneous global parameters for various modules in Astea Alliance.
**Miscellaneous II**

This is the second page which stores miscellaneous global parameters for various modules in Astea Alliance.

**Taxation Settings**

This page displays the stores the global parameters for the taxation tracking.

**Chan./Dem. Source**

This table stores a listing of codes used by the system to define the how or in what manner an order or demand was created. These sources appear in the Multi Channel page tab in the Customer Support portal and in Customer Support Orders.

**Security SOX**

This page is used to define various password security and SOX compliance values.

**Cost Domain**

This page is used to maintain a list of Cost Domains that will be used to track average cost of inventory by cost domain.

**Retrieve Limit**

This page is used to define search results retrieve limits. In some cases the standard 100 records is sufficient in other modules it just is not. Although the system provides a Next and Previous button to scan through large number of records, in some cases the service provider may wish to establish their own limits. This page provides for this functionality.

**Printers**

This page is used to define which network or local printers should be available for users to use for printing various types of reports. For example printing Pick Lists can be defined to a specific printer usual within the warehouse’s stocking area. This list of printers is defined on this page are then available on the lookup windows of printer selection within the application.

**Printer Functions**

This page is used to define which network or local printers should be available for users to use for printing various types of reports. For example printing Pick Lists can be defined to a specific printer usual within the warehouse’s stocking area.
Specific Reports
This page is used to view all custom reports added to the application. Additional custom reports can also be added on this page.

Restricted Inventory
This page stores the global defaults for restricted inventory, such as consigned and reserved inventory for customers.

Document Roles
This page is used to view Document roles which are a pre-define combination of a system document (order or record) and a human resource’s role code. This value is used when creating a new Chat group. When Document Role is selected in the Chat Group, then the role from this table can be selected.

Site Access Hours
This page stores the company access hours for each working day. These values are used by the DSE and Dispatch Console. The DSE will assign orders according to the Site Access hours. For the Dispatch Console there is a validation for orders that are dragged and dropped into a time slot outside of the Site Access Hours.
General Setup

- Address Types
- Contact Phone Books
- Credit Card Companies
- Customers Phone Book
- Device Type
- E-Mail Types
- Employees Phone Book
- ITIL Categories (New)
- Literature List
- Note Types
- Paging Service Companies
- Phone Types
- Vendors Phone Book

General Setup (ST 1-3)

Address Types

When an address is entered into a record, the user must specify what purpose the address record will be used for. This could be the address where billing is to be sent or where shipments will be received. Each of these purposes is known as an Address Type. Codes entered here appear in drop-down list in the Customer, Vendors, Contacts, Products and Employees records.

Contact Phone Book

This table is used to retrieve Contact phone numbers and to add additional phone numbers as needed. This module assists the CTI application to quickly find the Contact associated to the phone number identified on the incoming phone call.

Credit Companies

This table is used to maintain a list of credit card companies including an identifier and a description. In the Customer Center, the list shown here is provided as selection of a Credit Card Company. Once the information is saved to the customer record, the credit card company is included as part of the load default process for order modules. Together with the Credit Card Company, the Expiration Date and Credit Card Number are supplied to these modules as well. This information was input directly into the Customer record. Credit card data is provided strictly for information’s sake; the application makes no checks concerning the validity of the data.
Customer Phone Book

This table is used to retrieve Customer phone numbers and to add additional phone numbers as needed. This module assists the CTI application to quickly find the Customer associated to the phone number identified on the incoming phone call.

Device Types

This table is used to maintain Device Types used to describe the install item by the type of device it is.

E-Mail Types

This table is used to maintain and classify E-mail types. The descriptions can be used to define the type of E-Mail address like personal e-mail addresses.

Employee Phone Book

This table is used to retrieve Employee phone numbers and to add additional phone numbers as needed.

ITIL Categories

The ITIL Categories module allows for the setup of ITIL Incident and Problem Categories and Sub-Categories. It allows those Sub-Categories to be mapped to Action Groups.

Literature Types

This table is used to maintain Literature Types. Literature type is used to define the type of attachment added to the Literature Center. The system includes standard types used by the system but the Service Provider can add additional codes as needed.

Note Types

This table is used to create and maintain the Note types that the Service Provider will used to identify different types of notes created in various orders and records.

Paging Service Companies

The Paging Service Companies table is used to maintain a list of paging companies that provide services to the Service Provider. The codes and descriptions created in this table appear in the Paging Company Lookup list in the Employee records.
Phone Types
This table is used to create and maintain the phone types that the Service Provider will use to identify various types of phones.

Vendor Phone Book
This table is used to retrieve Vendor phone numbers and to add additional phone numbers as needed. This module assists the CTI application to quickly find the Vendor associated to the phone number identified on the incoming phone call.
Product Setup

- ABC Codes
- Activity Types
- Categories
- Demand Statuses
- Demand Types
- General Prod.
- Models
- Prod. Types
- Product Classes
- Product Lines
- Product Sectors
- Software Version
- Stop Codes

Product Setup (ST 1-4)

ABC Codes

ABC Codes provide a method for grouping products by a given criterion, such as material, price or production date. The codes and descriptions created in this table appear in the ABC Code lookup list in the Products module.

Activity Types

This table is used to maintain Activity Types. Activity Types are used to identify the types of activities associated to various transactions within the system.

Categories

The Product Categories table enables the service provider to classify products in different ways for organizational purposes. Each Product Category can be assigned a Warranty Type for each warranty class (Customer, Vendor, Repair) that will be used as defaults for products belonging to the particular category. Product Categories can also be used to define product exclusions to contract coverage. The Product Categories can be used in GL Translation Rules.

Classes

The Product Classes table enables the Service Provider to classify products in different ways for organizational purposes.
Demand Statuses

The Demand Status table contains a list of codes and descriptions used to identify the status of activities, expenses, or material demands. Besides the standard statuses provided with the system, user-defined statuses can also be added to this table.

Demand Types

The Demand Type table contains a list of codes and descriptions used to identify the type of demand, for organizational purposes.

General Product Class

The General Product Classification table is used to classify products in different ways for organizational purposes. In this table Product does refer to a “part” but a type of product feature within the application.

Models

The Models table enables the Service Provider the ability to list various models of products. Models are also used in the Service Guide page of the Problem code table. This provides the ability to define Services Guides at the Model level rather than the individual Product record.

Product Types

The Product Types table enables the Service Provider to classify products in different ways for organizational purposes. The Product type can be used in GL Translation Rules.

Product Lines

The Product Lines table enables the Service Provider to classify products, and product lines, in different ways for organizational purposes. Often Customer Support Orders are opened for a specific Product Line instead of an actual Product ID.

Product Sectors

Product Sectors are used for service agent assignment booking. It is used to determine what type of products that the service agent works on associated to the Territory covered by the service agent.
Software Versions

This table is used to create and maintain Software Version codes that are used in Product, Inventory Item and Installed Item records for tracking the current version of software associated to the respective record.

Stop Codes

This table is used to create and maintain Stop Codes. A Stop Code is used to define why a labor activity period ended.
Human Resources Setup

- Consultant Types
- Contact Types
- Field Personnel (Human R...)
- Grades
- Job Functions
- Management Levels
- Roles
- SA Types
- Skill Statuses
- Skills
- Titles

Human Resources Setup (ST 1-5)

Consultant Types

This table is used to maintain a listing of all Consultant Types that the Service Provider maintains for the business. Consultant Types are selected in the Employee and Contact record modules.

Contact Types

The Contact Types table provides a method for classifying Contact persons by type, for organizational purposes. The Contact type in association with Sales Alliance defines whether this contact is ally, neutral or adversary at this company. The contact type is generic in that it is more associated to the contact itself and not necessarily associated with an opportunity in particular. Contact Rating is used to determine the contact relationship to an opportunity.

Field Personnel

This table is used to create and maintain the Field Personnel codes that will be used by the Service Provider to identify the size of the company based upon the number of field personnel.

Grades

The Grades table describes the grade of person’s skills or product association and is used to fine-tune a match between a Service Agent and the product to be serviced.
Job Functions

The Job Function table provides the Service Provider the ability to define the Job Functions of employees, which are relevant to the organization. It is also used to define Materials as a Job Function as well. Where materials may be needed during the sales process.

When a new resource is added to a Methodology step, it is the user’s option to select a specific person to do the job or select a Job Function as the resource type. If a specific person option is selected the user can select a specific the employee from the Employee list. If the Job Function option is selected, the user will be able select a Job Function or Material from this predefined list.

Management Levels

This Management Level table is used to classify employees and contacts according to their management level in their organization.

Roles

This table is used to maintain a list of work Roles. Roles define a job function or type of employee (Chief Accountant, Pre-Sales, Sales Support, Consultants, etc.) that are relevant to the Service Provider.

SA Types

The Service Agent Types table is used to create and maintain Service Agents Type codes. SA Type provides a method for grouping service agents by their work type (technician, engineer, analyst specialist, etc.), for organizational purposes.

Skill Statuses

This table maintains a listing of Skill Statuses that can be used to track the status of the approval process for defining a skill to a Service Agent. User-defined statuses can also be entered to this table.

Skills

The Skills table enables the Service Provider the ability to group necessary skills by type. The user can use this module to connect skills to persons and products. When an Service, Repair or Customer Support order is created and a product is identified, if that product has skill codes defined for it, then those skills can be matched to the Service Agents that are defined as having any or all the required skills.
Titles

This table is used to maintain a list of job titles that are associated to Employees and Contacts. This table provides for a standard naming convention when applying titles to persons within the database thereby providing a consistent recognizable title.
Organization Setup

- Action Groups Type
- Company Hours
- Departments
- Expense Rep. Statuses
- Holidays
- Node Types
- Repair Stations
- Shift Patterns
- Shifts
- Time Sheet Options
- Time Sheet Statuses

Organization Setup (ST 1-6)

Action Group Types
This table maintains the list of Action Group Types which are used to categorize action groups by type for reporting.

Company Hours
Company Hours refers to the hours generally worked by the Service Provider. The information entered here regarding standard working hours and available overtime is used by the application when costing and pricing work is performed. The Company Hours window can be overridden by a Contract.

Departments
This table is used to create and maintain Departments that are selected in the employee record to define what department an employee works in.

Expense Report Statuses
This table is used to maintain Status Codes that are used in Expense Reports. Besides the standard statuses provided with the system, user-defined statuses could also be added to this table. These status codes can be selected in the Status field of the Expense Report.

Holidays
The Holiday table is used to record the dates and names of holidays that are observed by the Service Provider’s organization. The information is taken into account when calculating availability and pricing for work performed.
Node Types

This table is used to define Node Types. Node Types are entered to a Node record to describe the type of the Node (i.e. Branch office). This code can be used in generating reports concerning nodes.

Repair Stations

The repair station code is used in the repair order to identify where in the repair process the unit being fixed can be located physically. In this situation the unit moves from station to station during the repair process. Knowing what station it is at can help determine how much longer it will take to repair the unit. In other cases this station may be the location where the unit will reside during the entire repair process, such as a technician’s bench.

Shift Patterns

A Shift Pattern is similar to a shift it that it defines work time, but a shift pattern is different in that the pattern can be only a few hours in one day and more hours on another day and cover multiple weeks of time within one pattern.

Shifts

A Shift refers to a standard set of working hours that an individual is assigned to work on any given day. Everyone can be assigned a particular shift, but only one shift can be assigned to a person within a particular period to time. In the SA Calendar module, in Service Agent Selection, the Shift Code assigned determines whether or not the agent is presently “on call”. Use of this code can help to narrow down the search for a particular agent as well.

Time Sheet Options

This table is used to define the parameters used in maintaining the Time Sheet control process. These values will determine whether a Time Sheet can be submitted properly based upon the Service Provider’s requirements.

Time Sheet Statuses

This table is used to maintain Status Codes that are used in Time Sheets. Besides the standard statuses provided with the system, user-defined statuses could also be added to this table. These status codes can be selected in the Status field of the Time Sheet.
Location Setup

- Countries
- States/Provinces
- Territories (New)
- Time Zones
- Zip Codes

Location Setup (ST 1-7)

Countries

The Country table contains information about countries including their languages, time zones, and currency. The codes and descriptions created in this table can be accessed from the Country drop-down list in all maintenance windows where an address appears, as well as in the States/Provinces table.

States/Provinces

The State/Province table lists the States and Provinces of the countries the Service Provider services. The codes and descriptions created in this table appear in the State/Province drop-down list in all windows where an address appears.

Territories

The Territories table is used to maintain Territories (Sales Territories usually) which might represent States, Provinces, Countries or regional areas that are assigned to Sales Representatives. The Territory field is found in the Company record in Sales Alliance and in the Customer record in Astea Alliance.

Time Zones

The Time Zones table contains a list of standard time zones that is provided with the application. The codes and descriptions created in this table appear in a number of modules. New requests for service can be entered either according to the Time Zone of the operator who logs in the call, or the customer. The Service Agent responding to the call can enter times using his/her own Time Zone. The application will calculate the time difference between the customer and service agent’s time zones when performing billing functions. If necessary, the Service Provider can create new entries to the table.
Zip Codes

The Zip Code table lists the Zip Codes maintained by the Service Provider. The codes and descriptions created in this table appear in the Lookup lists in all maintenance windows where an address appears.
Scheduling

- Alerts
- Appointment Slots
- Dispatch Console Session (New)
- Dispatch Console Session (New)
- Dispatch Console Settings
- DSE Default Parameters
- DSE Session (New)
- Filters
- Slot Occupancy

Scheduling (ST 2-1)

Alerts
This table is used to maintain and define the alerts that are used in the Dispatch Console.

Appointment Booking
This page is used to set default values for the Appointment Booking page of the service order. These default values can be changed for each individual order as needed. These parameters are applied on the Appointment Booking page of the service order module.

Appointment Slots
This page is used to define the appointment slots available for each day. So for a service company where each call takes approximately two hours each then theoretically 4 appointment slots can be defined for each day.

Dispatch Console Settings
This page is used to define the parameters that are to be used for the Dispatch Console.

DSE Default Parameters
This table is used to maintain a list of default values that are used to populate the fields in a newly created DSE Session. These default values can later be changed within each DSE Session to customize it for the local Node’s needs.
DSE Session
This table is used to create and maintain DSE Session records. A DSE session represents a Node of calls that will be scheduled by the DSE. Each DSE session has values that provide specific behavior that the DSE will follow when scheduling calls. The values defined in the DSE are defaulted from the DSE Default Parameters module but are then refined specifically in each DSE session to fit the local requirements of that Node.

Filters
This page is used to define the filters that are used in the Dispatch Console.

SA Interaction
This page is used to define the color coding that represents the usage occupancy for a designated time slot. The time slot will then change color as more and more of the usable usage of the slot is filled.

Slot Occupancy
This page is used to define the color coding that represents the usage occupancy for a designated time slot. The time slot will then change color as more and more of the usable usage of the slot is filled.
Advanced (ST 2-2)

This maintenance setup section is for labor activity and expense code tables as well as the order and record approval process and question tree builder.

Activity Codes

Activity Codes are used throughout the Astea Alliance application. Their main purpose is to define the labor that is performed on Service, Repair, Customer Support and Consultant Orders but also for Time Sheets. All Activity Codes are maintained in this table. There are two definitions of the Activity Codes maintained.

Approval Process

The Approval Process module is used to create a user-defined approval process flow that can be applied to various transactions or records in the system. These transactions or records include: Expense reports, Time Sheets, Status Report, Purchase Requisitions, Replenishment Orders, Customer Contracts, Three Way Match, Projects, Skills and Vendor Returns.

Checklist

Some companies that service equipment require that a checklist of tasks associated with an activity be used at the time the work is being done, so that readings, pass/fail and yes/no details can be captured for specific work. The practice of using checklists is most common during preventative or planned maintenance work orders, but it could be used in other instances as well.

Upon creation of an activity demand in an order, system will automatically create a checklist (if a relevant Checklist exists). There will be an option to add or delete a line from order’s checklist however user will not be able to delete mandatory lines.
Expense Codes

Expense Codes are used throughout the Astea Alliance application. This code’s main purpose is to define the expenses incurred by the Service Agent while working on Service, Repair and Consultant Orders. All Expense Codes are maintained in this table.

Question Tree Builder

The Question Tree module is used in the creation and maintenance of routine question and answer scripts that are accessed through the service, repair and customer support orders. Call takes use the Question Tree scripts to elicit specific details from the caller regarding the nature of the problem. The answers given by the caller suggest a possible course of action based on the behavior described and in some cases, actually resolve the problem.

Customer Support personnel select a Question Tree on-line from within an open service, repair or customer support order and choose either general Question Trees or ones that are specific to a particular Problem, Repair or Product code. As the questions are answered, the application retains all positive answers and ultimately presents a recommendation based on the information supplied up to that point. When finished, the answered questions are automatically saved as a Management Activity. This information can be viewed later by opening the Transaction Log and double-clicking on the Question Tree Management Activity.

Station Workflow

The repair Station Workflow is used to define the path that a repair should follow for a particular product. The repair stations workflow uses the Repair Stations created in the Repair Station code table.
Logistic Setup

- Bin Types
- Carriers
- Company Inventory Restrictions
- Delivery Types
- Dynamic Reorder Quantity
- Inv. Type Categories
- Inventory Types
- Logistics Adj. Reason
- Logistics Demand Statuses
- Logistics Year Periods
- Ownership Statuses
- Purchase Req. Statuses
- Replenish. Options
- Replenish. Statuses
- Sourcing Options
- Transaction Map
- UOM
- Vendor Reject Reasons
- Vendor Ret. Statuses
- Warehouse Types
- Warranty Types

Logistics

Logistics Setup (ST 3-1)

Bin Types

This table is used to create and maintain Bin Types that are used in warehouse and warehouse type records.

Carriers

Carriers are normally major shipping or delivery companies (UPS, FedEx, USPS) but they can also be local courier services or delivery by employee.

Company Inventory Restrictions

This table defines the Company Inventory Restriction codes that are used to define the inventory usage requirements.
Delivery Types

It is often necessary to not only define which carrier will deliver a shipment, but also what method of shipment should take place, for example: Overnight, 2 day, 1 week, signature required or no specific terms. Often these delivery types are defined by the carrier.

Inv. Type Categories

The Inventory Types Categories table provides codes that are used to define the type of inventory ownership used to track the ownership of inventory used for various material transactions.

Inventory Types

The Inventory Types table provides a method for categorizing products in warehouse bins or areas according to their condition. Inventory Types can also refer to warehouse bins and define the default inventory type for products created for those bins. A product of any Inventory Type can be placed in a warehouse of any Inventory Type. “Good” and “Bad” are predefined Inventory Types.

Logistics Adjustment Reasons

The Inventory Transactions/Adjustment Reasons table is used to classify the reasons for making adjustments or transfers to inventory. The descriptions created in this table appear in the Reason drop-down list of the Manual Adjustment, Direct Transfer, Miscellaneous Issue and Miscellaneous Receive modules.

Logistics Demand Statuses

This is a list of all Logistics Demand Statuses used by the system for each of the logistics transactions.

Mat. Return Reasons

This table lists the reasons why Material is being returned. These return reasons are used when swapping parts on orders and when parts are returned to a vendor.

Logistics Year Period

This table is used to create and maintain Logistics Year Periods. Product Usage will be accumulated per period, which in most cases will be calendar month, but could be something else. Although the table allows for multiple period records, only one record can be active at a time.
Ownership Statuses

The Ownership Status Codes table provides a list of codes specifying the basis on which an item is used at a customer site. You can classify items as owned, rented, leased, etc. The codes and descriptions created in this table appear in the field, Ownership located in the Installed Items module.

Purchase Requisition Statuses

This table maintains a listing of Purchase Requisition Statuses that can be used to track the status of a Purchase Requisition. User-defined statuses can also be entered to this table.

Replenishment Options

This page is used to define default values for the Replenishment Order module.

Replenishment Statuses

This table maintains a listing of Replenishment Order Statuses that can be used to track the status of a Replenishment Order. User-defined statuses can also be entered to this table.

Sourcing Options

The values entered on this screen are used as the default values on the Sourcing Options. While the options can be changed for a particular search, the module will revert to the default options when it is reopened.

Transaction Mapping

Certain logistic transactions require the user to specify the source or destination bin/area for the relevant product. This module defines standard bins/areas to be used as defaults when the user does not specify a bin location for the product in such a transaction. Standard bins/areas must always be defined whenever you create a warehouse type or warehouse.

UOM

The UOM (Unit Of Measure) Setup table provides a means to define quantities in different units of measure. For example, the price of a certain item can vary for different quantities. Some item quantities are measured in units, while others are measured by weight. Each company may have its own specific set of measurements. Examples of UOM types are: weight, length, area, time, volume, etc. The codes and descriptions created in this table appear in the UOM drop-down list in the Product Center module.
Vendor Return Statuses

Each status used during the life cycle of the Vendor Return is defined in this Status Table. The Service Provider can add additional user-defined status codes as needed.

Warehouse Types

The Warehouse Types table provides a means for the Service Provider to define and categorize warehouses.

Warranty Types

Warranty Types are templates used in the creation of warranties. As a template the warranty type is used to record information that is standard from warranty to warranty. In the case of vendors for example, where someone outside of the Service Provider’s organization defines the warranty, warranty type is used to record the vendor’s terms. Data entry time is shortened since existing information needed every time the product is purchased can be used to create a warranty for the product that will be carried over to the installed item, once it is sold.
Logistics Process (ST 3-2)

Source List

The Source Lists provides a combination of warehouses and/or vendors for part procurement. The system uses each list to step through the locations trying to find inventory or setting up a Purchase Request to a vendor. This is performed by a background process and the end result is the creation of an IMO, a Purchase Requisition or a Back Order against a warehouse.
Application Setup

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**Accounting Setup**

- Cost Center
- Cost Manual Adjustment
- Currencies
- Currency Conversion
- Financial Codes
- Financial Companies
- Fiscal Year Periods
- GL Application Setup
- Import Templates
- Labor Pricing Costing
- Payment Terms
- Sounds
- Travel Pricing

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**Financial**

**Accounting Setup (ST 4-1)**

Monetary values of transactions performed within Astea Alliance are captured to pass through the Financial Link to the Service Provider’s accounting system. To pass this data in a dependable and recognizable form accounting data setup has to be entered into the system for selection in records identified on these transactions. The Accounting setup includes such features as Product and Node/Warehouse financial codes, payment terms, cost centers and currency values. Once these financial data elements have been entered to the system the user can select them when creating other table records.

**Cost Center**

This table is used to create and maintain Cost Center codes. Often, departments and/or branches within the Service Provider organization are grouped together, for budgetary reasons, under a single Cost Center designation. The Cost Center table defines the unique identifiers and accompanying descriptive information for the Cost Centers in the organization.

**Cost Manual Adjustment**

The cost of a product is generally determined based on its Cost Type. There are three costing methods currently employed by the application: Standard, Last and Average. Changes in the cost of a particular product are made here, in the Cost Manual Adjustment table. This table is both a record of changes already made and the means to make additional changes as needed. Changes are reflected in the Product module as well.
Credit Companies

This table is used to maintain a list of credit card companies including an identifier and a description. In the Customer Center, the list shown here is provided as selection of a Credit Card Company. Once the information is saved to the customer record, the credit card company is included as part of the load default process for order modules. Together with the Credit Card Company, the Expiration Date and Credit Card Number are supplied to these modules as well. This information was input directly into the Customer record. Credit card data is provided strictly for information’s sake; the application makes no checks concerning the validity of the data.

Currencies

This table is used to maintain Currency codes that provide the basic list of all national currencies that are displayed in lookup lists throughout the application. In order to define the currency to be used in the Node, Customers, and Sites modules, among others, a record must first have been created here, in the Currencies module.

Currency Conversion

Throughout the financial community, conversion rates are updated regularly. Conversion rates determine how much of one currency type is exchanged for another. In the Currency Conversion setup table, conversion rate records are maintained for all countries.

Financial Codes

This module is used to create and maintain financial codes that will be added to Node, Warehouse, Product, Activity, Contract, Expense, and Travel records so that all financial transactions involving any of these records will include the financial code on the transaction records. This is necessary to meet the requirements of the accounting software, which can accept input from Astea Alliance via the Financial Link interface.

Financial Companies

This table is used to create and maintain Financial Company codes. Financial Company codes can be used to identify different financial transactions involving different company segments within a large organization. These codes are tracked on transaction records. This may be necessary to meet the requirements of the accounting software, which can accept input from Astea Alliance via the Alliance Link for Financials interface.
Fiscal Year Periods

This table is used to create and maintain Fiscal Year Periods. Alliance Link for Financials uses the Fiscal Year Period table for tracking financial periods. For most users, these periods are normally monthly periods. Although the table allows for multiple period records, only one record can be active at a time.

Labor Pricing Costing

This table is used to maintain generic Labor Pricing and Costing values. Labor is another way of referring to the Activities that are added to Service, Repair, Customer Support and Consultant Orders. An Activity is an action or set of actions performed by a service agent whether talking through problems on the telephone with a customer or repairing/maintaining equipment at the customer’s site.

Payment Terms

Payment terms define the method of payment for the price of an invoice. The codes defined here are used in the Customer Contracts, Contract Quotations, Contract Templates and Sales Order Billing Schedule.

Travel Pricing

These tables are used to define Travel Distance, Travel Time and Zone Charge cost and price information. Travel Price and Cost can be entered for multiple currencies. Travel Pricing can be entered in multiple price books. The Travel pricing is what is charged to customers for travel on service orders.
Financial

Taxation Setup (ST 4-2)

Monetary values of transactions performed within Astea Alliance are captured to pass through the Financial Link to the Service Provider’s accounting system. Part of the Accounting setup includes defining Taxation Codes. When the service provider is using Internal Taxation within Astea Alliance then taxation setup is required. These tables define the tax rates for locations and tax categories for sub-defining tax rates.

Canadian Tax Rates

This page displays the Canadian Taxation Rates currently setup in the Astea Alliance system. The Canadian tax regulations are substantially different than those used in either the United States or Europe.

Tax Categories

The Tax Categories table provides a means of classifying products, expenses, or activities for the purpose of charging tax. Tax regulations are generally applied according to an assigned category and are specific to geographic location, known as jurisdiction. The amount charged for tax, known as the Taxation Rate, is based on the unique combination of Tax Category and Jurisdiction. Tax Jurisdiction is defined in the Customer Center record on the Attributes tab page.

Taxation Rates

This table is used to view or add tax rates for various tax jurisdictions.

Taxation Policy

This table is used to specify the global taxation settings to be used in the application. The Taxation Setup module is used to maintain tax rates that the Service Provider will need to report to various tax authorities. Taxation Rates are used to determine what tax rate should be applied to the products and activities used on Orders and products sold on Sales Orders and Contract invoicing.
Contract/Quotation Setup

- Contract Adj. Reasons
- Contract Pricing Options
- Contract Statuses
- Contract Templates ✔ (New)
- Contract Types
- Coverage Schedule Templates... ✔ (New)
- Meter Types
- PM Schedule Maintenance ✔ (New)
- Preventive Maintenance
- Pricing Rules Templates ✔ (New)
- Service Level Templates ✔ (New)
- Time and Material Contracts ✔ (New)
- Workflow (Contract)
- Zones

Contract

Customer Contract Setup (ST 5-1)

The tables defined in this section are the maintenance tables used to build contracts and control how they function.

Contract Adjustment Reasons

For Drawdown contracts, the system maintains a computed total of units that have been drawn down to date. This total is displayed in the “Used Qty.” field on the Drawdown Adj. tab page on the Advanced Menu of the contract. Occasionally, manual adjustments to this total have to be made and a record of the adjustment is kept by the application. To make a manual adjustment, from within an open contract, click on the Drawdown Adj. tab page to add the adjustment.

Contract Statuses

This page displays the list of standard system contract statuses. However, besides the standard statuses, the Service Provider can create user-defined statuses as well. The user can change the status of a contract on the Change Status tab page on the Actions Menu.
**Contract Types**

The Contract Types table is used maintain a list of various contract types. Besides being a descriptive value for defining the various types of contract sold by the service provider it can also be used to within the Price Book module to set contract pricing for products for each contract type.

**Meter Types**

The Meter Types table is used store the types of meters that will be tracked on equipment and contracts. Think of a meter type as a name of the meter. When meters are defined on a product record, the meter type will be used to define the meter. Only the names defined in this table can be used to define meters.

**Options**

This page is used to define all the options that might be provided by contracts for service. Often these options would be provided during PM orders but can be for either PM or UM orders. These options can be selected on the Contract Template and products priced accordingly. Each contract’s object of service has an Options page where the options can be selected for the object.

**PM Schedule Maintenance**

Before installation of an item, the service provider already knows how often and in what sequence the tasks involved should be performed. In this module, you record the details of just such a preventive maintenance schedule. Note that at this point the schedule has not yet been tied to a particular product. PM schedules are associated with products and installed items within their respective modules by selecting the schedule from the Schedule ID drop-down list. This drop-down list is located on the Service page of the Products module, and the Service Information page of the Installed Items module.

Only PM Schedules created in this module appear in the Schedule ID drop-down list. In addition, all schedules created in this module are General Purpose. Note, however, that schedules can be created for individual items and product types.

**Preventative Maintenance**

This page defines Preventative Maintenance settings that will be used by the system when running the PM Batch Scheduler.

**Workflow (Contract)**

This page provides global setup parameters that will define contract behavior and determine what values are applied for various contract features.
Zones

Zones are used as a method of charging a customer for travel to their site. This can be used in place of tracking travel time and mileage. It makes it easier on the Service Agents to not have to record this information and the customer is assured of a standard travel charge that is not affected by traffic or distance traveled from the last site the service agent was at.

Contracts Template Setup (ST 5-2)

The tables defined in this document are the template maintenance tables used to build contracts and warranties how they function.

Contract Templates

The Contract Templates module maintains all contract templates that are used to create Customer Contracts, Contract Quotations and T & M Contracts. Templates provide a fast and accurate method of creating contracts based upon standards established by the Service Provider. Templates default values such as Service Level, Coverage Schedule and Pricing Rules as well as billing and renewal information to new Contract or Quotation.

Coverage Schedule Template

The Coverage Schedule defines the days of the week, and the time of the day, that service is available under the terms of the contract negotiated between the service provider and the customer. The definition includes the days and hours, (as well as holidays), where the standard rate is used. In this module, general-purpose coverage schedules can be created that are available for use by any template, quotation or customer contract. General Purpose tables can be cloned within the Customer Contracts module, for a particular contract. Once cloned, the Coverage Schedule becomes specific to the identified contract.

Pricing Rules Template

Pricing Rules govern the way in which prices, located through a search of the price book hierarchy, are applied within the application. Each pricing rule is made up of one or more of four, basic components: activities, travel, expenses and materials. These components correspond to the demands that can be attached to a service, repair, customer support or consultant order.
Service Level Template

The Service Level defines the contractual level of service provided to customers. The service levels defined in this module are always General Purpose, and can be used by any contract template, contract quotation, or customer contract. General Purpose tables can be cloned within the Customer Contracts module, for a particular contract. Once cloned, the Service Level becomes specific to the identified contract.

Service levels define the maximum response and service times for calls as defined under the contract. In addition to defining the level of service provided for customers, they can also be used as a basis for evaluating the service the Service Provider provides to their customers.

Time and Material Contracts

The Service Level defines the contractual level of service provided to customers. The service
Vendor Contract Setup

- Vendor Contract Cost Rules ✓ (New)
- Workflow (Vendor Contract)

Vendor Contracts Setup (ST 5-3)

This table defines global settings for Vendor Contracts. These parameters control behavior within the Vendor Contracts.

Vendor Contract Cost Rules

This table defines the various Pricing Rules that are used with Vendor Contracts. Pricing Rules control what the vendor will be reimbursed for service work performed on orders. Purchase Requisitions are created to pay for invoices sent by the vendor.

Workflow (Vendor Contract)

This page is used to define all the options that might be provided by vendor contracts.
Collaboration Setup

- Alarms (New)
- Chat Groups (New)
- Monitoring
- Replacement
- Subscription Lists (New)

Advanced Functions

Collaboration Setup (ST 6-1)

Alarms

Alarms with sounds and Pop-up windows are used to warn users of status changes on orders. Since many service providers provide a very short timeframe for responding to the customer with a callback, it is critical that no time is lost in achieving this goal. Mandatory alarms are selected for the users depending on their roles within the application, but users can also select notifications that concern them because of their responsibilities.

I Replace

This page lists all the employees where this employee is the backup or replacement for the employee specified here.

Monitoring

This page lists the employee who monitors the Alarm. A manager can elect to monitor one his staff’s ability or performance in responding to alarms and notification. Therefore, this manager should be able to select the employee to monitor. When an event occurs that requires notification, then the manager would be copied on all notification except for the sound.

Replaced By

This page lists all the employees that backup the employee for alarms.

Replacements

This page is used to define replacements for Alarms defined to other employees. Because employees can sometimes be absent for vacation, sickness, and holidays a replacement needs to receive the notifications so that nothing is missed during his absence. This can be done by a Manager who will assign a replacement.
employee or it could be a manager who assigns another manager that has agreed to watch over alerts while he is away.

**Subscription List**

The Subscription List is a defined group of persons who will receive Subscription Messages displayed on the Subscription Message Ticker section of the Portal page. The Subscription List and the Subscription Message records can be created separately and then one can be associated to the other. Multiple Subscription lists can be associated to a Subscription Message. The Subscription Message Ticker displays a scrolling message or multiple messages in Priority order. Works just like News Tickers at the bottom of News Television shows. This provides both a marketing and information exchange between the Service Provider and its customers and employees.
Mobile Setup

- Configuration Builder (Mo...)
- Material Catalogs ✓ (New)
- Mobile Option Editor (MOE)
- Vendor Catalogs ✓ (New)
- Workflow (Mobile)

Mobile Setup (ST 6-3)

Material Catalog

A material catalog is a list of products from which a mobile agent can perform a product lookup for selecting a product to order. This table is used to build a catalog of products by using any combination of Product Class, Product Line, Product Category, and Product Type. The material catalog can then be assigned to a Mobile Configuration and the mobile configuration can be assigned to a service agent. Once the mobile configuration is assigned to the agent, then the material catalog that is defined to the configuration will be seen by the mobile user when they perform a product inquiry.

Vendor Catalog

A vendor catalog is a list of vendors from which a mobile agent can use to select from to back order a needed product from vendors that are approved for the service agent to use. For example, certain products may not be stock by a local warehouse and the agent would have to order the part directly from a vendor. This table is used to build a catalog of vendors by selecting any combination of Node, Vendor Group, Cost Center, state and country to define the list of vendors. The vendor catalog can then be defined to a Mobile Configuration and the mobile configuration can be assigned to a service agent. Once the mobile configuration is assigned to the agent, then the vendor catalog that is defined to the configuration will be seen by the mobile user when they perform a product back order.
Order Setup

- Cancel Reasons
- Cause Codes
- Impact Codes
- Mat. Return Reason
- Order Labor Statuses
- Order Source Types
- Order Statuses
- Priority Classes
- Priority Mapping
- Problem Codes
- Repair Codes
- Request Types
- Resol. Methods
- Return Actions
- Return Doc. Types
- Return Reasons
- SA Reject Reasons
- Severities
- SLA Failure Codes
- Un/Availability Codes
- Un/Availability Groups
- Urgency Codes
- W. Claim Decline Reas.

Documents Settings

Order Setup (ST 7-1)

The tables defined in this section are the maintenance tables used in Service, Customer Support, Repair and Consultant orders.

Cancel Reasons

The Cancel Reasons table is used to maintain a list of codes and descriptions of the possible reasons for canceling an order. The code and descriptions created in this table are displayed in the Cancel Reason lookup list on the Cancel page of an order.
Cause Codes

The Cause Codes table contains a list of possible causes for the caller’s problems. The descriptions created in this table are displayed in the Cause drop-down list in the Service, Repair and Customer Support Orders. An order may have one or multiple cause codes depending upon the data that needs to be collected for analysis reporting.

Impact Codes

This table stores Impact Codes that are used as a measure of the number of users impacted by an Incident or Problem reported by the customer. It also is used to define the number of users affected by the issue.

Order Labor Status

Each status used during the life cycle of a labor activity is defined in the Order Labor Status Table. This table is maintained by Astea.

Order Source Types

The Order Sources table contains a list of codes and descriptions identifying the methods a caller might use to communicate a problem (for example, via the telephone, fax or electronic mail). Some Order Sources also define means by which the Order was created automatically by some other part of the application. The codes and descriptions created in this table are displayed in the Order Source drop-down list in the Service Information screen of the order form. If call-takers enter an order source for every order, the Service Provider can analyze the actual sources for the orders.

Order Statuses

Each status used during the life cycle of the order is defined in the Order Status Table. The Service Provider can add additional user-defined status codes as needed. While the available range is variable for each module, the following rules apply:

Priority Classes

The priority of an order defines its importance to the service organization. The Service Provider can use this table’s values to classify the orders by their priority. Colors are be assigned to the various priority classes to visually differentiate between the classes. The range of priorities is 1-99 and combinations of number ranges can be assigned. During call taking and processing of orders, priorities are validated against the maximum priority used in this table.
Priority Mapping

This table stores the Priority Mapping for the defined Impact and Urgency codes. ITIL specifies that the combination of Urgency and Impact must determine the Priority of the Incident. The Priority Mapping module allows for each combination of Impact and Urgency to be mapped to a default Priority for use on orders based upon the user input of Impact and Urgency fields. This change of Priority code might also affect SLA Priority of a contract on the order if this function is used.

Problem Codes

Problem Codes explain, in short form, the reason why a service-related order was opened. Standard activities, expenses and material demands expected to be required for an order can be associated to a Service Guide which provides a quick method to add these demands to the order. Service Guide for example can be used for preventive maintenance routines required for normal upkeep of equipment. An order may have one or multiple problem codes depending upon the data that needs to be collected for analysis reporting. In general, Problem Codes are user-defined. There are no limitations or restrictions placed on the creation of the actual code, only that it is unique.

Repair Codes

Repair Codes are used to identify repair actions taken in fulfillment of Service, Repair and Customer Support Orders. An order may have one or multiple repair codes depending upon the data that needs to be collected for analysis reporting.

Request Types

The Request Types table contains a list of codes and descriptions identifying the general nature of the Service, Repair or Customer Support Order. Request Types define the type of reason why the order is created. Request types can define Preventative Maintenance, emergency, courtesy, call back or any other type of call the Service Provider wishes to track. Request Types are also used to determine whether a Customer Contract will be in effect for an order. Exceptions to Contract coverage can also be defined by Request Type.

Resolution Methods

Resolutions Methods table is used to maintain a list of codes used to describe resolution methods used in the completion procedures for Service, Repair and Customer Support Orders.

Return Actions

This table lists the system-defined actions that selected for a customer or vendor return.
Return Document Type
This table lists the system-defined documents that can be selected for identifying an original document for a customer or vendor return.

Return Reason
This table lists the system-defined reasons why a customer is returning a product from sales order or why a product is being returned to a vendor.

Severities
This table stores severity codes that are used to explain how serious the issue is that has been reported on orders.

SLA Failure Code
SLA refers to Service Level Agreement, which is normally provided by contract or warranty. The Service Level Agreement often defines when a customer has to be called back concerning a problem, when the SA must be at the customer site and sometimes when the broken product must be fixed by. There are times when these projected dates and times cannot be met. Traffic delays, unavailable spare parts, and other circumstances outside of the Service Provider’s control may prevent meeting these SLA requirements. SLA Failure codes are used to describe why the Service Agent did not meet the required obligation.

Un/Availability Codes
This table is used to maintain a list of customer Un/Availability reason codes. When a customer is unavailable, the clock on the service level agreement is stopped. A service agent must be reassigned for follow up and delays can have repercussions on customer service expectations and contractual obligations.

Un/Availability Groups
This table maintains the list of Un/Availability Groups. This group code provides a way to organize and limit the Un/Availability Reason codes available upon lookup. This provides for display of customer-specific reason codes for example. Un/Availability Reason codes can be assigned to more than one Un/Availability Group.

Urgency Codes
This table stores Urgency Codes that are used as a measure of the amount or type of business processes affected by the Incident.
Warranty Claim Decline Reasons

This table stores explanations regarding why a vendor refused to pay off on a claim submitted against a warranty held by the Service Provider. Entries are created as needed by the user and are entered into the record of the claim through the Warranty Claims module.

Order Workflow Setup

- Field Change Orders Setup
- Manual Assignment Reasons
- Prompts (Consult)
- Prompts ( Cust. Return)
- Prompts ( Cust. Support)
- Prompts (Repair)
- Prompts ( Sales)
- Prompts ( Service)
- Sales Order Types
- Workflow (Consult)
- Workflow ( Cust. Support)
- Workflow ( Mobile)
- Workflow ( Repair)
- Workflow ( Service)

Order Workflow Setup (ST 7-2)

The tables defined in this section are the prompts and workflow tables for Service, Customer Support, Repair, Consultant orders, Sales Order, Customer Returns and Field Change orders.

Alliance Mobile

This table controls how information is passed from the main application to the remote handheld device (Alliance Mobile).

Field Change Order

This module defines the workflow parameters that will be used by the Service Provider using Field Change Orders. These are global parameters that affect all FCO documents created in the system.
Manual Assignment Reasons

This page defines manual assignment reasons used in the Dispatch Console. When the DSE application is running and users override the DSE by making manual assignments to orders, then this provides a means of recording the reason for the manual assignment. This information can be used later to analyze the business and understand how the system can be better fine tuned.

Prompts (Consult)

This prompts setup table is used to define the parameters that control behavior of the Consultant Order.

Prompts (Cust. Return)

This prompts setup table is used to define the parameters that control behavior of the Customer Return Order.

Prompts (Cust. Support)

This prompts setup table is used to define the parameters that control behavior of the Customer Support Order.

Prompts (Repair)

This prompts setup table is used to define the parameters that control behavior of the Repair Order.

Prompts (Sales)

This prompts setup table is used to define the parameters that control behavior of the Sales Order.

Prompts (Service)

This prompts setup table is used to define the parameters that control behavior of the service order.

Sales Order Types

The Sales Order Types table contains a list of codes and descriptions identifying the various types of Sales Orders that the Service Provider may use.
Workflow (Consult)
This workflow setup table is used to define the parameters that control behavior of the Consultant Order.

Workflow (Cust. Support)
This workflow setup table is used to define the parameters that control behavior of the Customer Support Order.

Workflow (Repair)
This workflow setup table is used to define the parameters that control behavior of the Repair Order.

Workflow (Service)
This workflow setup table is used to define the parameters that control behavior of the service order.
PSA Setup

- Audit Action Status
- General Setup
- Payment Types
- PSA Classes
- PSA Events
- PSA Statuses
- PSA Task Templates (New)
- PSA Templates (New)
- Status Rep. Topics

PSA Setup (ST 7-4)

This document defines the various setup tables that will be used by the Service Provider to define codes that will be used in the PSA Center module.

Audit Action Status

This table is used to maintain Audit Log transaction action status codes.

Payment Types

This table is used to maintain a list of payment types. The payment type is used to define how a Service Agent or Consultant paid for an expense. Typically Cash, Personal Credit Card and Company Credit Card are the usually methods but other user-defined types can be added to this table.

PSA Events

This table is used to maintain Events are used to define a time during a project when billing can occur. Events are tracked within a project when Event Billing is used as the billing method.

PSA Setup

This table is used to maintain Status Report Topic codes that are used in Project Status Reports. Besides the standard

PSA Statuses

This table is used to maintain Status Codes that are used in Projects. Besides the standard statuses provided with the system, user-defined statuses can also be added to this table. These status codes can be selected in the Status field of the Project.
Status Rep. Topics

This table is used to maintain Status Report Topic codes that are used in Project Status Reports. Besides the standard statuses provided with the system, user-defined statuses could also be added to this table. These topic codes can be selected in the Status Report of the Project. This provides management with a standardized listing of various areas of concern to track the progress of a Project.
Sale Manager Setup (ST 7-3)

The Sales Manager Setup module provides tables that are used to create and store codes that will be used in Sales Force Automation Opportunities and Sales related orders. This provides the Service Provider with ability to track standardized codes that are meaningful and user-defined by the Service Provider.

Buckets

The Bucket Definitions table is used to establish a bucket code for defining opportunities at various percentages of completion. This feature can then be used to group opportunities at various stages of completion. These Bucket Definitions are used in the Term Forecast Report and the Sales Performance Report found in the Report Center of Astea Alliance.

Contact Ratings

The Contact Rating is used to identify how a company contact feels about the Service Provider’s proposal. The contact may favor the proposal and champion its cause at their company or maybe negative or indifferent about the proposal. It basically allows salesperson to identify friend or foe. This is especially true for someone reviewing an opportunity where they are not familiar with the contacts at that company location.
Industry Codes

Industry Codes, which is a different table from Standard Industry Codes (SIC or NAICS), allows tracking of companies based upon a user defined industry type. This is valuable for the Service Provider that uses an internal identifier for describing industries. This value can used in conjunction with the SIC codes as well.

Job Functions

The Job Function table provides the Service Provider the ability to define the Job Functions of employees, which are relevant to the organization. It is also used to define Materials as a Job Function as well where materials may be needed during the sales process.

Management Level

This Management Level table is used to classify employees and contacts according to their management level in their organization.

Origin Codes

The Origin Code is used to identify where a prospect or customer lead came from. This is useful for marketing research to determine which leads are the most valuable and what are the best sources of qualified leads. An Origin code is selected in Customer and Prospect Company record.

Origin Events

The Origin Event allows the user to further define what lead generation information the customer used. For Example, if the Origin Code was a “trade show,” then which trade-show in particular did the customer attend? In the case of magazine or periodical, which one and what issue # was seen by the customer. This allows the marketing personnel to determine if advertising in certain magazines is of value. When selecting an Origin Event for a Customer record, the Origin Event field listing is filtered to the Origin Code selected. The Origin Event code therefore must be identified to an Origin Code.

Quotation Loss Reasons

As disappointing as it is to lose a Sales Quotation or Opportunity it is important to know why it was lost. Did a competitor outbid your proposal, did your prospect underestimate their budget or lost interest in your product? Knowing the reason for the loss may be valuable information for dealing with future prospects. The reasons for the loss are defined in this table and when an Opportunity or a Sales Quotation in Astea Alliance is lost, this code can be used to define why.
Roles

This table is used to maintain a list of work Roles. Roles define a job function or type of employee (Chief Accountant, Pre-Sales, Sales Support, Consultants, etc.) that are relevant to the Service Provider.

Sale Year Periods

Alliance Link for Financials uses the table, Fiscal Year Periods, for tracking financial periods. For most users, these periods are normally monthly periods. This is fine for Service processes. However, sales organizations normally use Quarterly periods. This Sale Year Period table stores data for use in Sales Alliance only. Although the table allows for multiple period records, only one record can be active at a time.
Opportunity/Quotation Setup

- General (Opportunity Setup)
- Prompts (Field Quotation)
- Prompts (Sales Quotation)
- Sales Opp. Setup

Opportunity/Quotation Setup (ST 7-5)

The Opportunity Setup module provides tables that are used to create and store codes that will be used in Opportunities and Sales related orders. This provides the Service Provider with ability to track standardized codes that are meaningful and user-defined by the Service Provider.

Field Opp. Setup

This setup table is used to define the parameters that that control behavior of the Field Quotation Opportunity module.

General

This page provides the user the ability to define default Sales Methodologies for each type of Opportunity.

Prompts (Field Quotation)

This setup page is used to set default values and process workflow for Field Quotations. These are global parameters that affect all Field Quotations created in the system.

Prompts (SQ)

This setup page is used to set default values and process workflow for Sales Quotations. These are global parameters that affect all Sales Quotations created in the system.

Sales Opp. Setup

This setup table is used to define the parameters that that control behavior of the Sales Opportunity module.