

Search and Replace Fields for Standard Documents

The list below is of the most commonly used fields, but many other fields (including user defined fields) can be included using a reference in the format: {tablename_fieldname}'. They only work if the document is created in the right place in the heirarchy - i.e. problem fields need to be created in the document from a problem, or quote fields need documents to be created from the quote screen. If the Customiser module is installed, the correct field name can be discovered by opening the Customiser Objects Admin Table with the ProspectSoft record open in which the required field is displayed (Admin>Utilities>System>Customiser Objects).

COMPANY

Company Number	{company_compno}
Company Name	{company_compname}
Company Type code	{company_comptypecd}

CONTACT

Contact Number	{contact_contno}
Division Number	{contact_divno}
Surname	{contact_surname}
Forename	{contact_forename}
Initial	{contact_initial}
Pref'd Name	{contact_prefdname}
Title	{contact_title}
Salutation "Dear....."	{contact_salutation}
Contact Address Number	{contact_addrno}
Email	{contact_email}
Notepad	{contact_notepad}
Job title	{contact_jobtitle}
Role code	{contact_rolecd}
Phone	{contact_primephone}
Fax	{contact_primefax}
Mail	{contact_mailflag}
Created	{contact_createdate}
Swap	{contact_swapmailfg}
Last memo date	{contact_lastmemodt}
Source	{contact_source}
Department	{contact_department}
Fax	{contact_faxflag}
Last Notepad entry	{contact_notepad_temp}
Spoke Code	{contact_spokecd}
Spoke (date)	{contact_spokedate}
Spoke (time)	{contact_spoketime}
Secretary	{contact_secretaryname}
Phone (secretary)	{contact_secretaryphone}
Email (secretary)	{contact_secretaryemail}

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Email: crmsupport@hbpsystems.com



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DIVISION

Division Number	{division_divno}
Company Number	{division_compno}
Division Name	{division_divname}
Address Number	{division_addrno}
Sales Ledger (S/L Account)	{division_oprano}
Purchase Ledger (P/L Account)	{division_pledgerno}
Phone	{division_phone}
Fax	{division_fax}
Number of Employees	{division_employees}
Turnover	{division_turnovercd}
SIC Code	{division_sic}
Type Description	{division_divtypedsc}
Company	{division_opcompany}
Account Manager	{division_account_mgr}
Web	{division_website}
Fiscal Year	{division_fiscalyear}
Ownership	{division_limited}
Last Verified	{division_lastverified}
Notepad	{division_notepad}
Last Notepad Entry	{division_notepad_temp}
Priority	{division_priority}

ADDRESS

Address Number	{address_addrno}
Address Line 1	{address_address1}
Address Line 2	{address_address2}
Address Line 3	{address_address3}
Address Line 4	{address_address4}
Country	{address_country}
Postcode	{address_postcode}
Region Number	{address_regionno}
Type	{address_postcdtype}
Address Block	{address_block}

DIVISION ADDRESS

Address Number	{division_addrno}
Address Line 1	{division_address1}
Address Line 2	{division_address2}
Address Line 3	{division_address3}
Address Line 4	{division_address4}
Country	{division_country}
Postcode	{division_postcode}
Region Number	{division_regionno}
Type	{division_postcdtype}
Division block	{division_address_block}

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USER

User Code	{user_usercode}
User's Name	{user_username}
Email Address	{user_emailaddr}
User Group	{user_group}
E-Prospect by Account Manager	{user_epros_by_acctmgr}
User's Fax	{user_directfax}
User's Phone	{user_directphone}
User's Job Title	{user_jobtitle}

LEAD TABLE

Lead Number	{lead_leadno}
Contact Number	{lead_contno}
Source code	{lead_leadsrccd}
Created (date)	{lead_leaddate}
Created by	{lead_createdby}
Lead status	{lead_leadsttscd}
Lead status detail	{lead_lsttsdtlcd}
Status change date	{lead_stchngdate}
Quote Number	{lead_quoteno}
Lead category code	{lead_cg_code}
Size	{lead_leadsized}
Guttometer	{lead_guttometer}
Postponed	{lead_postponed}
Problems	{lead_probcount}
Spoke	{lead_spokedate}
Spoke code	{lead_spokecd}
Notepad	{lead_notepad}
Spoke time	{lead_spoketime}
Last notepad entry	{lead_notepad_temp}
Estimated close	{lead_estclose}
Description	{lead_lead_desc}
User	{lead_respuser}
Margin	{lead_marginsize}
Account Director	{lead_account_director}
Analysis	{lead_analysis1}

PROBLEM TABLE

Problem Number	{problem_probno}
Owner	{problem_owner}
User	{problem_respuser}
Description	{problem_probdesc}
Notepad	{problem_notepad}
Created	{problem_createdate}
Status code	{problem_probsttscd}
Status detail code	{problem_psttsdtlcd}
Status change date	{problem_sttschgdt}
Problem create time	{problem_createtime}
Status change date	{problem_sttschgmt}
Supplier Reference	{problem_suppref}



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PROBLEM TABLE (continued)

Customer Reference	{problem_custref}
Last Notepad Entry	{problem_notepad_temp}
Serial Reference	{problem_serial_or_version_ref}
Spoke Code	{problem_spokecd}
Spoke (date)	{problem_spokedate}
Spoke (time)	{problem_spoketime}
Priority	{problem_priority}
Source	{problem_source}
Type Code	{problem_probtypecd}
Type Description	{probtype_typedesc}
Analysis	{problem_analysis1}
Analysis Description	{probanal1_analysisdesc}

PROBLEM ANALYSIS MATRIX

Extended Type Codes	{problem_probtypecd2}
	{problem_probtypecd3}
	{problem_probtypecd4}
	{problem_probtypecd5}
Extended Analysis Codes	{problem_analysis2}
	{problem_analysis3}
	{problem_analysis4}
	{problem_analysis5}
Extended Type descriptions	{probtype2_typedesc2}
	{probtype3_typedesc3}
	{probtype4_typedesc4}
	{probtype5_typedesc5}
Extended Analysis descriptions	{probanal2_analysisdesc2}
	{probanal3_analysisdesc3}
	{probanal4_analysisdesc4}
	{probanal5_analysisdesc5}

QUOTE HEADER TABLE

Quote Number	{quotehdr_quoteno}
Lead Number	{quotehdr_leadno}
Create Date	{quotehdr_quotedate}
Expiry Date	{quotehdr_enddate}
Amended	{quotehdr_ammenddate}
Repeat business	{quotehdr_repeat}
Order Date	{quotehdr_orderdate}
Total EValue	{quotehdr_value}
Foreign Currency	{quotehdr_fcurr}
Multi-Currency	{quotehdr_fmuilt}
Foreign Currency Rate	{quotehdr_frate}
Cost Value	{quotehdr_costvalue}
Order Number	{quotehdr_orderNumber}
Contact Number	{quotehdr_contno}
Problem Number	{quotehdr_probno}
Version	{quotehdr_versionno}
Quote Table	{quotation_table}
Quote Net Value	{quotation_value}

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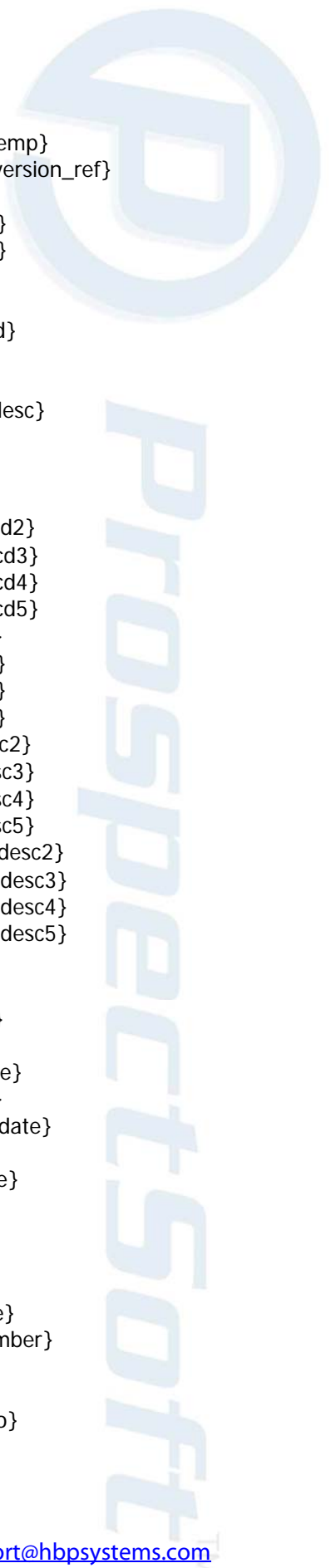
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QUOTE HEADER TABLE (continued)

Quote VAT	{quotation_tax}
Quote Gross Value	{quotation_gross}

DOCUMENT

Document Number	{document_documentno}
Contact Number	{document_contno}
Docment Type Code	{document_doctypecd}
Description	{document_description}
Today's Date (will change daily)	{date_today}
Date	{document_date}
Time	{document_time}
User	{document_user}
Lead Number	{document_leadno}
Problem Number	{document_probno}
Email	{document_email}
Account Manager	{document_account_mgr}
Extranet	{document_extranet}



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