

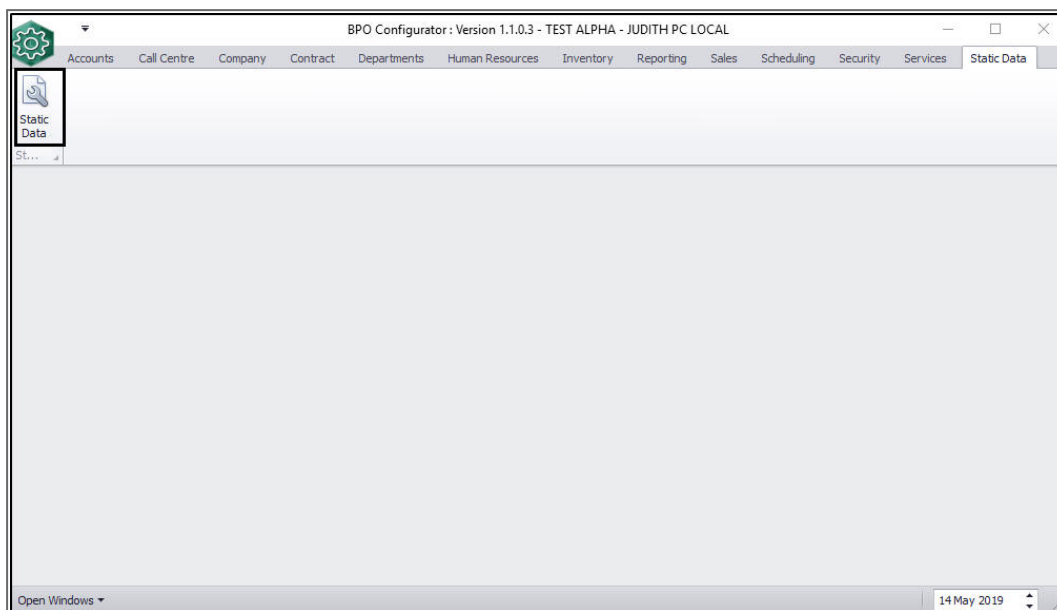
CRM BASICS

GENERAL SETTINGS

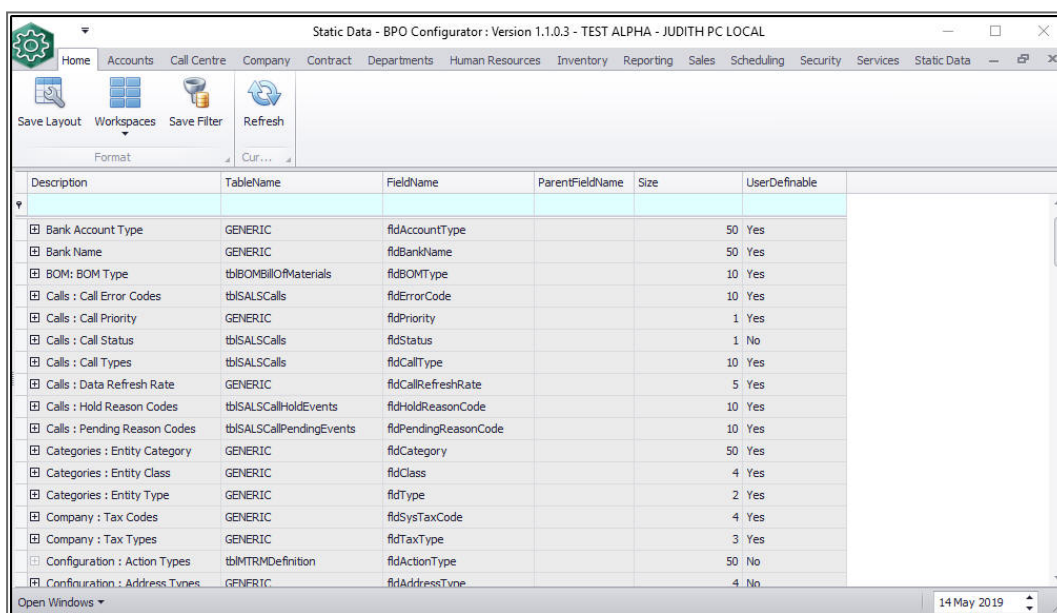
- [BPOCRM General Settings](#) are configuration with BPO's Static Data module.
- These are the options to configure:
 - [Configure Pipeline](#) Chart View in Months
 - [Configure Performance](#) in Months
 - [Set Case Document Upload Size Limit](#)
 - [Set Email Attachment Size Limit](#)
 - [Set whether the Customer Type is required](#) in CRM (note that this field must be set in BPO before the Customer can be authorised)
 - Set the amount of [Past and Future days to display in the CRM Calendar](#)
 - Set the amount of [Past and Future days to display in the iCal Calendar](#)
 - Should ['Send Activity Invites to Attendees' checkbox](#) be marked by default or not
 - [Set Minimum Customer Name filter length](#) (at how many characters the search will start filtering)
 - [Set Maximum number of Customer records to fetch](#) (set a lower amount for larger customer data sets to improve performance).

Ribbon Access: *PO Configurator: > Static Data > Static Data*

CRM GENERAL SETTINGS IN CONFIGURATOR



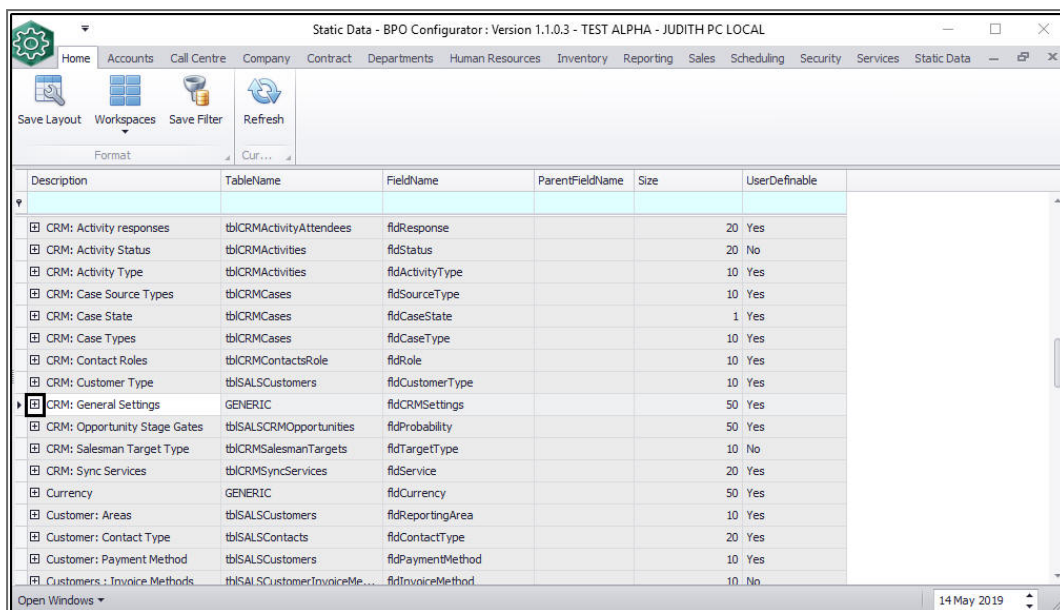
- The **Static Data** screen will be displayed.



Description	TableName	FieldName	ParentFieldName	Size	UserDefinable
Bank Account Type	GENERIC	fldAccountType		50	Yes
Bank Name	GENERIC	fldBankName		50	Yes
BOM: BOM Type	tblBOMBillOfMaterials	fldBOMType		10	Yes
Calls : Call Error Codes	tblSALSCalls	fldErrorCode		10	Yes
Calls : Call Priority	GENERIC	fldPriority		1	Yes
Calls : Call Status	tblSALSCalls	fldStatus		1	No
Calls : Call Types	tblSALSCalls	fldCallType		10	Yes
Calls : Data Refresh Rate	GENERIC	fldCallRefreshRate		5	Yes
Calls : Hold Reason Codes	tblSALSCallHoldEvents	fldHoldReasonCode		10	Yes
Calls : Pending Reason Codes	tblSALSCallPendingEvents	fldPendingReasonCode		10	Yes
Categories : Entity Category	GENERIC	fldCategory		50	Yes
Categories : Entity Class	GENERIC	fldClass		4	Yes
Categories : Entity Type	GENERIC	fldType		2	Yes
Company : Tax Codes	GENERIC	fldSysTaxCode		4	Yes
Company : Tax Types	GENERIC	fldTaxType		3	Yes
Configuration : Action Types	tblMTRMDefinition	fldActionType		50	No
Configuration : Address Types	GENERIC	fldAddressType		4	No

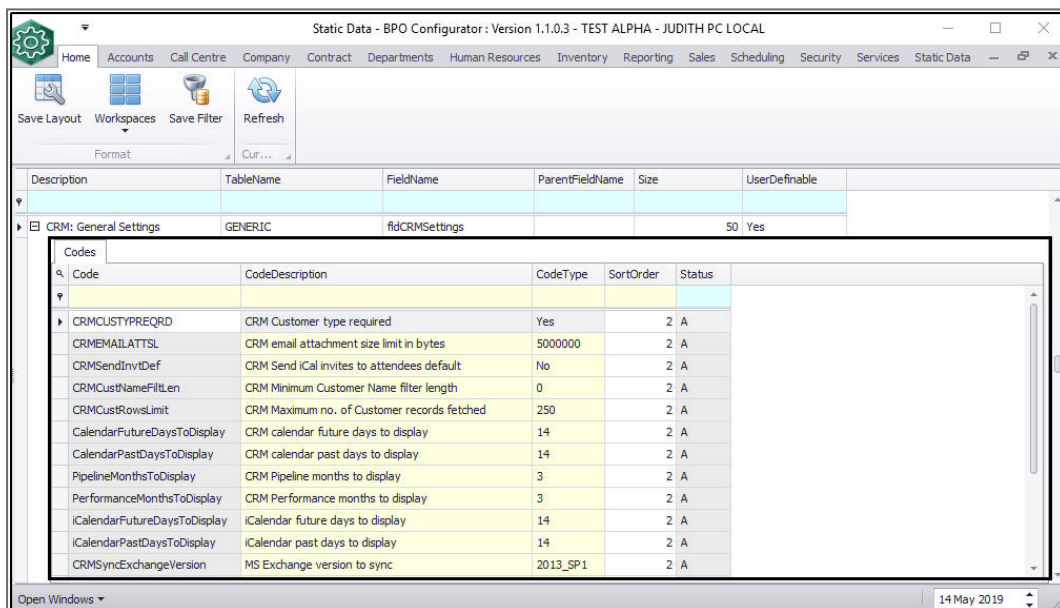
- Use the Search row or scroll down the page until you find **CRM: General Settings**.

- Click on the **Expand** button in front of **CRM: General Settings**.



Description	TableName	FieldName	ParentFieldName	Size	UserDefinable
CRM: Activity responses	tblCRMActivityAttendees	fldResponse		20	Yes
CRM: Activity Status	tblCRMActivities	fldStatus		20	No
CRM: Activity Type	tblCRMActivities	fldActivityType		10	Yes
CRM: Case Source Types	tblCRMCases	fldSourceType		10	Yes
CRM: Case State	tblCRMCases	fldCaseState		1	Yes
CRM: Case Types	tblCRMCases	fldCaseType		10	Yes
CRM: Contact Roles	tblCRMContactsRole	fldRole		10	Yes
CRM: Customer Type	tblSALSCustomers	fldCustomerType		10	Yes
CRM: General Settings	GENERIC	fldCRMSettings		50	Yes
CRM: Opportunity Stage Gates	tblSALSCRMOpportunities	fldProbability		50	Yes
CRM: Salesman Target Type	tblCRMSalesmanTargets	fldTargetType		10	No
CRM: Sync Services	tblCRMSyncServices	fldService		20	Yes
Currency	GENERIC	fldCurrency		50	Yes
Customer: Areas	tblSALSCustomers	fldReportingArea		10	Yes
Customer: Contact Type	tblSALSCustomers	fldContactType		20	Yes
Customer: Payment Method	tblSALSCustomers	fldPaymentMethod		10	Yes
Customers: Invoice Methods	tblSALSCustomerInvoiceMe...	fldInvoiceMethod		10	No

- A **Codes** frame showing a list of general settings will be displayed.

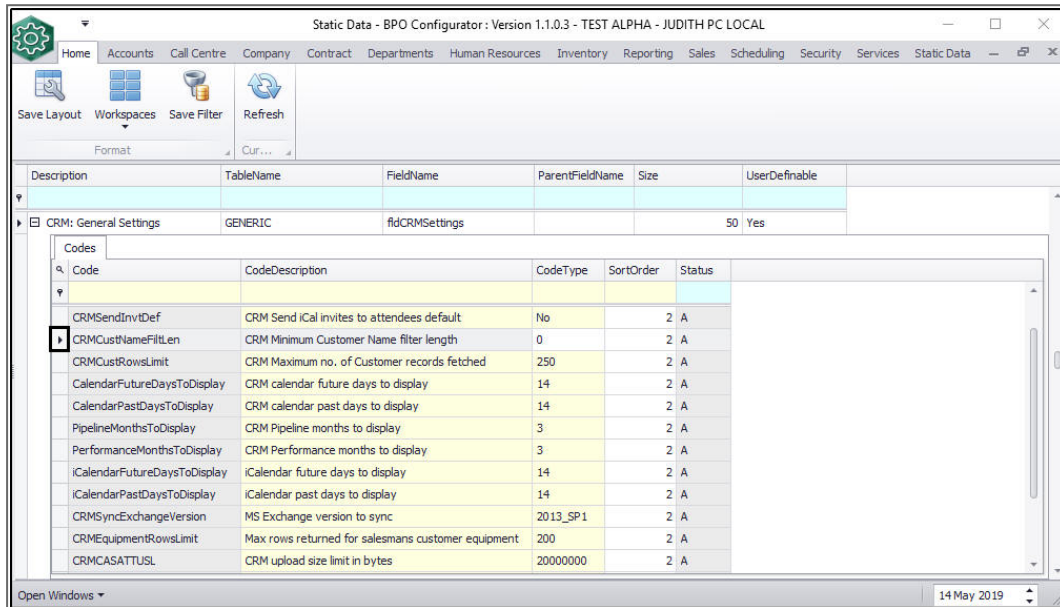


Description	TableName	FieldName	ParentFieldName	Size	UserDefinable
CRM: General Settings	GENERIC	fldCRMSettings		50	Yes

Code	CodeDescription	CodeType	SortOrder	Status
CRM CUSTYPREQRD	CRM Customer type required	Yes	2	A
CRMEMAILATTSL	CRM email attachment size limit in bytes	5000000	2	A
CRMSENDINVDEF	CRM Send iCal invites to attendees default	No	2	A
CRM CUSTNAMEFILLEN	CRM Minimum Customer Name filter length	0	2	A
CRM CUSTROWSLIMIT	CRM Maximum no. of Customer records fetched	250	2	A
CalendarFutureDaysToDisplay	CRM calendar future days to display	14	2	A
CalendarPastDaysToDisplay	CRM calendar past days to display	14	2	A
PipelineMonthsToDisplay	CRM Pipeline months to display	3	2	A
PerformanceMonthsToDisplay	CRM Performance months to display	3	2	A
iCalendarFutureDaysToDisplay	iCalendar future days to display	14	2	A
iCalendarPastDaysToDisplay	iCalendar past days to display	14	2	A
CRMSyncExchangeVersion	MS Exchange version to sync	2013_SP1	2	A

EDITING CRM GENERAL SETTINGS IN STATIC DATA

- For each setting you need to update, you will do the following:
- Select the setting in the **Codes** frame.
- In this image, **CRMCustNameFiltLen** has been selected.



- Make the required changes in the **Code Type** and or **Sort Order** text boxes.

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Home Accounts Call Centre Company Contract Departments Human Resources Inventory Reporting Sales Scheduling Security Services Static Data

Save Layout Workspaces Save Filter Refresh

Format Cur...

Description	TableName	FieldName	ParentFieldName	Size	UserDefinable
CRM: General Settings	GENERIC	fldCRMSettings		50	Yes

Codes

Code	CodeDescription	CodeType	SortOrder	Status
CRMSendInvDef	CRM Send iCal invites to attendees default	No	2	A
CRMCustNameFillLen	CRM Minimum Customer Name filter length	10	1	A
CRMCustRowsLimit	CRM Maximum no. of Customer records fetched	250	2	A
CalendarFutureDaysToDisplay	CRM calendar future days to display	14	2	A
CalendarPastDaysToDisplay	CRM calendar past days to display	14	2	A
PipelineMonthsToDisplay	CRM Pipeline months to display	3	2	A
PerformanceMonthsToDisplay	CRM Performance months to display	3	2	A
iCalendarFutureDaysToDisplay	iCalendar future days to display	14	2	A
iCalendarPastDaysToDisplay	iCalendar past days to display	14	2	A
CRMSyncExchangeVersion	MS Exchange version to sync	2013_SP1	2	A
CRMEquipmentRowsLimit	Max rows returned for salesmans customer equipment	200	2	A
CRMASATTUSL	CRM upload size limit in bytes	20000000	2	A

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- Click away from the text boxes.
- An **Update** message will pop up asking you;
 - *Are you sure you want to save changes to this code?*
- Click on **Yes**.

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Save Layout Workspaces Save Filter Refresh

Format Cur...

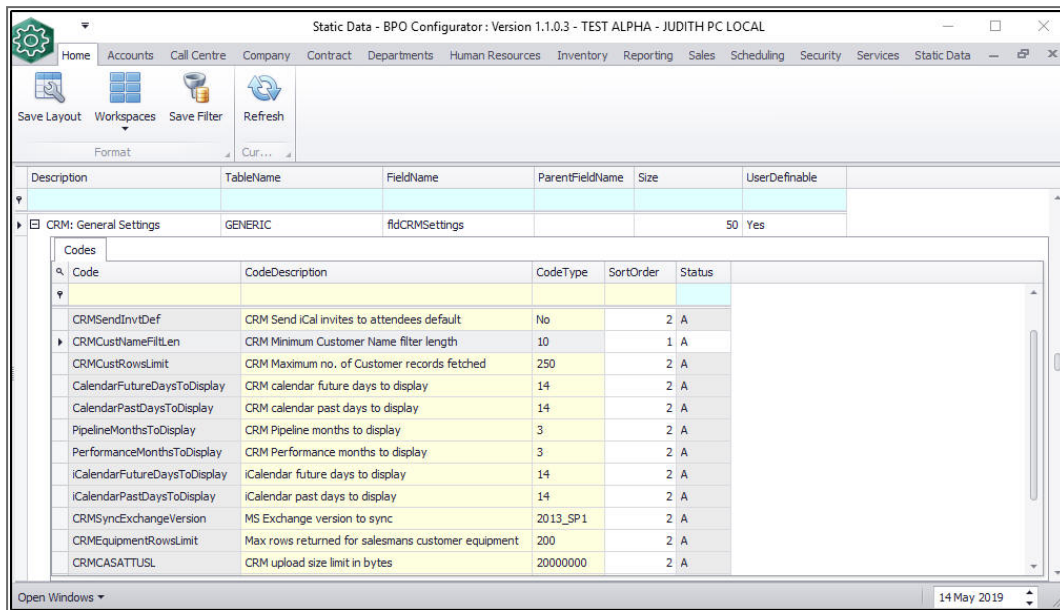
Description	TableName	FieldName	ParentFieldName	Size	UserDefinable
CRM: General Settings	GENERIC	fldCRMSettings		50	Yes

Codes

Code	CodeDescription	CodeType	SortOrder	Status
CRMSendInvDef	CRM Send iCal invites to attendees default	No	2	A
CRMCustNameFillLen	CRM Minimum Customer Name filter length	10	1	A
CRMCustRowsLimit	CRM Maximum no. of Customer records fetched	250	2	A
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CalendarPastDaysToDisplay	CRM calendar past days to display	14	2	A
PipelineMonthsToDisplay	CRM Pipeline months to display	3	2	A
PerformanceMonthsToDisplay	CRM Performance months to display	3	2	A
iCalendarFutureDaysToDisplay	iCalendar future days to display	14	2	A
iCalendarPastDaysToDisplay	iCalendar past days to display	14	2	A
CRMSyncExchangeVersion	MS Exchange version to sync	2013_SP1	2	A
CRMEquipmentRowsLimit	Max rows returned for salesmans customer equipment	200	2	A
CRMASATTUSL	CRM upload size limit in bytes	20000000	2	A

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- The message box will be closed and details will be updated.



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Save Layout Workspaces Save Filter Refresh

Format Cur...

Description	TableName	FieldName	ParentFieldName	Size	UserDefinable
CRM: General Settings	GENERIC	fldCRMSettings		50	Yes

Codes

Code	CodeDescription	CodeType	SortOrder	Status
CRMSendInvDef	CRM Send iCal invites to attendees default	No	2	A
CRMCustNameFillLen	CRM Minimum Customer Name filter length	10	1	A
CRMCustRowsLimit	CRM Maximum no. of Customer records fetched	250	2	A
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CalendarPastDaysToDisplay	CRM calendar past days to display	14	2	A
PipelineMonthsToDisplay	CRM Pipeline months to display	3	2	A
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iCalendarFutureDaysToDisplay	iCalendar future days to display	14	2	A
iCalendarPastDaysToDisplay	iCalendar past days to display	14	2	A
CRMSyncExchangeVersion	MS Exchange version to sync	2013_SP1	2	A
CRMEquipmentRowsLimit	Max rows returned for salesmans customer equipment	200	2	A
CRMCASATTUSL	CRM upload size limit in bytes	20000000	2	A

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EXAMPLES OF DEFAULT CODE SETTINGS

CONFIGURE PIPELINE CHART VIEW IN MONTHS

- **Code:** PipelineMonthsToDisplay
- The default Pipeline Chart view is set to **3** months.

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Save Layout Workspaces Save Filter Refresh

Format Cur...

Description	TableName	FieldName	ParentFieldName	Size	UserDefinable
CRM: General Settings	GENERIC	fldCRMSettings		50	Yes

Codes

Code	CodeDescription	CodeType	SortOrder	Status
CalendarFutureDaysToDisplay	CRM calendar future days to display	14	2	A
CalendarPastDaysToDisplay	CRM calendar past days to display	14	2	A
PerformanceMonthsToDisplay	CRM Performance months to display	3	2	A
ICalendarFutureDaysToDisplay	ICalendar future days to display	14	2	A
ICalendarPastDaysToDisplay	ICalendar past days to display	14	2	A
CRMSyncExchangeVersion	MS Exchange version to sync	2013_SP1	2	A
CRMEquipmentRowsLimit	Max rows returned for salesmans customer equipment	200	2	A
CRMCA\$ATTUSL	CRM upload size limit in bytes	20000000	2	A
CRM\$endInv\$Allowed	CRM Allow user to send iCal invites to attendees	Yes	2	A
CRMCA\$ATTUSL	CRM upload size limit in bytes	10000000	0	A

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CONFIGURE PERFORMANCE IN MONTHS

- **Code:** PerformanceMonthsToDisplay
- The default Performance Chart view is set to **3** months.

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Save Layout Workspaces Save Filter Refresh

Format Cur...

Description	TableName	FieldName	ParentFieldName	Size	UserDefinable
CRM: General Settings	GENERIC	fldCRMSettings		50	Yes

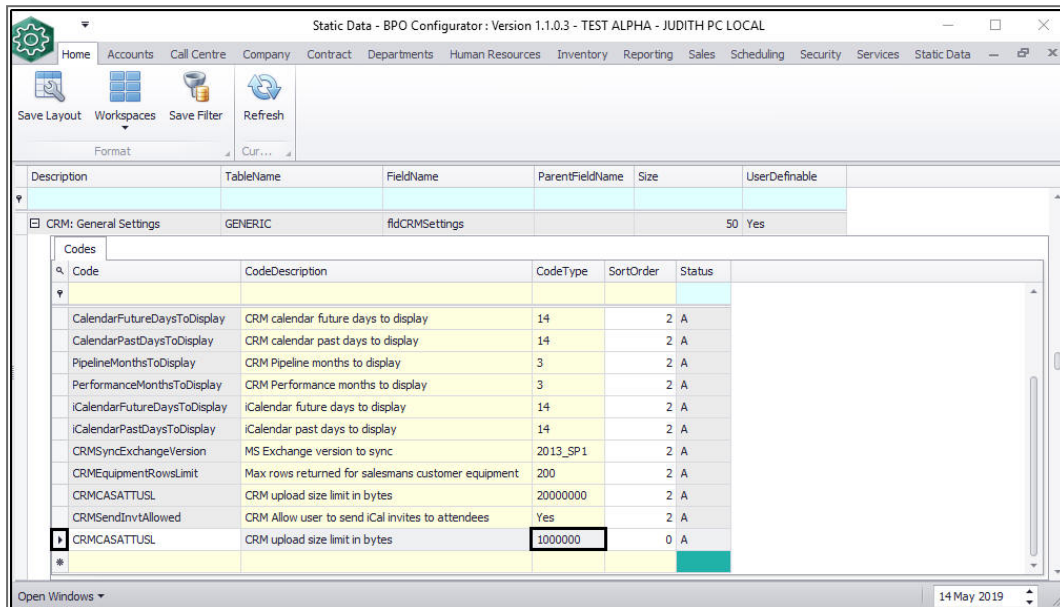
Codes

Code	CodeDescription	CodeType	SortOrder	Status
CalendarFutureDaysToDisplay	CRM calendar future days to display	14	2	A
CalendarPastDaysToDisplay	CRM calendar past days to display	14	2	A
PerformanceMonthsToDisplay	CRM Performance months to display	3	2	A
ICalendarFutureDaysToDisplay	ICalendar future days to display	14	2	A
ICalendarPastDaysToDisplay	ICalendar past days to display	14	2	A
CRMSyncExchangeVersion	MS Exchange version to sync	2013_SP1	2	A
CRMEquipmentRowsLimit	Max rows returned for salesmans customer equipment	200	2	A
CRMCA\$ATTUSL	CRM upload size limit in bytes	20000000	2	A
CRM\$endInv\$Allowed	CRM Allow user to send iCal invites to attendees	Yes	2	A
CRMCA\$ATTUSL	CRM upload size limit in bytes	10000000	0	A

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CASE DOCUMENT UPLOAD SIZE LIMIT

- **Code:** CRMCASATTUSL
- The default Upload Size Limit is set to **1000000** bytes (1MB).



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Save Layout Workspaces Save Filter Refresh

Format Cur...

Description	TableName	FieldName	ParentFieldName	Size	UserDefinable
CRM: General Settings	GENERIC	fldCRMSettings		50	Yes

Codes

Code	CodeDescription	CodeType	SortOrder	Status
CalendarFutureDaysToDisplay	CRM calendar future days to display	14	2	A
CalendarPastDaysToDisplay	CRM calendar past days to display	14	2	A
PipelineMonthsToDisplay	CRM Pipeline months to display	3	2	A
PerformanceMonthsToDisplay	CRM Performance months to display	3	2	A
iCalendarFutureDaysToDisplay	iCalendar future days to display	14	2	A
iCalendarPastDaysToDisplay	iCalendar past days to display	14	2	A
CRMSyncExchangeVersion	MS Exchange version to sync	2013_SP1	2	A
CRMEquipmentRowsLimit	Max rows returned for salesmans customer equipment	200	2	A
CRMCASATTUSL	CRM upload size limit in bytes	20000000	2	A
CRMSendInvAllowed	CRM Allow user to send iCal invites to attendees	Yes	2	A
CRMCASATTUSL	CRM upload size limit in bytes	1000000	0	A

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EMAIL ATTACHMENT SIZE LIMIT

- **Code:** CRMEMAILATTSL
- The default Email Attachment Size Limit is set to **5000000** bytes (5MB).

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Save Layout Workspaces Save Filter Refresh

Format Cur...

Description	TableName	FieldName	ParentFieldName	Size	UserDefinable
CRM: General Settings	GENERIC	fldCRMSettings		50	Yes

Codes

Code	CodeDescription	CodeType	SortOrder	Status
CRMCUSTYPREQRD	CRM Customer type required	Yes	2	A
CRMEMAILATTSL	CRM email attachment size limit in bytes	5000000	2	A
CRMSENDINVTDEF	CRM Send iCal invites to attendees default	No	2	A
CRMCUSTOMNAMEFILLEN	CRM Minimum Customer Name filter length	0	2	A
CRMCUSTOMROWSLIMIT	CRM Maximum no. of Customer records fetched	250	2	A
CalendarFutureDaysToDisplay	CRM calendar future days to display	14	2	A
CalendarPastDaysToDisplay	CRM calendar past days to display	14	2	A
PipelineMonthsToDisplay	CRM Pipeline months to display	3	2	A
PerformanceMonthsToDisplay	CRM Performance months to display	3	2	A
iCalendarFutureDaysToDisplay	iCalendar future days to display	14	2	A
iCalendarPastDaysToDisplay	iCalendar past days to display	14	2	A
CRMSyncExchangeVersion	MS Exchange version to sync	2013_SP1	2	A

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ENFORCE CUSTOMER TYPE REQUIRED

- **Code:** CRMCUSTYPREQRD
- The default for Customer Type Required is **Yes**.

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Save Layout Workspaces Save Filter Refresh

Format Cur...

Description	TableName	FieldName	ParentFieldName	Size	UserDefinable
CRM: General Settings	GENERIC	fldCRMSettings		50	Yes

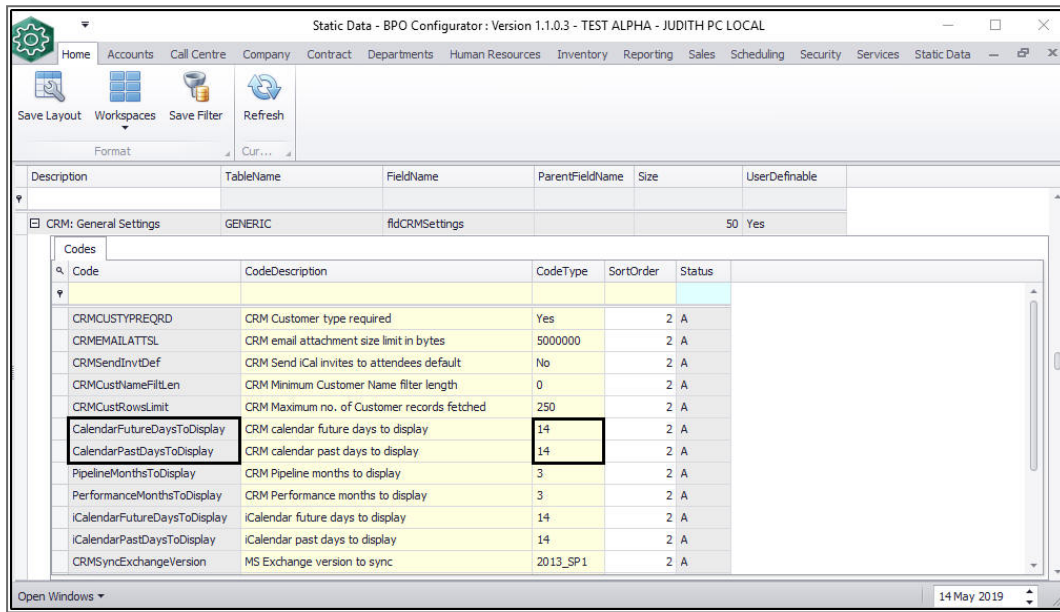
Codes

Code	CodeDescription	CodeType	SortOrder	Status
CRMCUSTYPREQRD	CRM Customer type required	Yes	2	A
CRMEMAILATTSL	CRM email attachment size limit in bytes	5000000	2	A
CRMSENDINVTDEF	CRM Send iCal invites to attendees default	No	2	A
CRMCUSTOMNAMEFILLEN	CRM Minimum Customer Name filter length	0	2	A
CRMCUSTOMROWSLIMIT	CRM Maximum no. of Customer records fetched	250	2	A
CalendarFutureDaysToDisplay	CRM calendar future days to display	14	2	A
CalendarPastDaysToDisplay	CRM calendar past days to display	14	2	A
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PerformanceMonthsToDisplay	CRM Performance months to display	3	2	A
iCalendarFutureDaysToDisplay	iCalendar future days to display	14	2	A
iCalendarPastDaysToDisplay	iCalendar past days to display	14	2	A
CRMSyncExchangeVersion	MS Exchange version to sync	2013_SP1	2	A

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SET PAST AND FUTURE DAYS TO DISPLAY IN CRM CALENDAR

- **Code:** CalendarPastDaysToDisplay | CalendarFutureDaysToDisplay
- The default Days to Display is **14**.



Description	TableName	FieldName	ParentFieldName	Size	UserDefinable
CRM: General Settings	GENERIC	fldCRMSettings		50	Yes

Code	CodeDescription	CodeType	SortOrder	Status
CRMUSTYPEREQRD	CRM Customer type required	Yes	2	A
CRMEMAILATSL	CRM email attachment size limit in bytes	5000000	2	A
CRMSENDINVDEF	CRM Send iCal invites to attendees default	No	2	A
CRMCSSTNAMEFILLEN	CRM Minimum Customer Name filter length	0	2	A
CRMCSSTROWSLIMIT	CRM Maximum no. of Customer records fetched	250	2	A
CalendarFutureDaysToDisplay	CRM calendar future days to display	14	2	A
CalendarPastDaysToDisplay	CRM calendar past days to display	14	2	A
PipelineMonthsToDisplay	CRM Pipeline months to display	3	2	A
PerformanceMonthsToDisplay	CRM Performance months to display	3	2	A
iCalendarFutureDaysToDisplay	iCalendar future days to display	14	2	A
iCalendarPastDaysToDisplay	iCalendar past days to display	14	2	A
CRMSyncExchangeVersion	MS Exchange version to sync	2013_SP1	2	A

SET PAST AND FUTURE DAYS TO DISPLAY IN ICAL CALENDAR

- **Code:** iCalendarPastDaysToDisplay | iCalendarFutureDaysToDisplay
- The default Days to Display is **14**.

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Save Layout Workspaces Save Filter Refresh

Format Cur...

Description	TableName	FieldName	ParentFieldName	Size	UserDefinable
CRM: General Settings	GENERIC	fldCRMSettings		50	Yes

Code	CodeDescription	CodeType	SortOrder	Status
CRMCustomRowsLimit	CRM Maximum no. of Customer records fetched	250	2	A
CalendarFutureDaysToDisplay	CRM calendar future days to display	14	2	A
CalendarPastDaysToDisplay	CRM calendar past days to display	14	2	A
PipelineMonthsToDisplay	CRM Pipeline months to display	3	2	A
PerformanceMonthsToDisplay	CRM Performance months to display	3	2	A
ICalendarFutureDaysToDisplay	ICalendar future days to display	14	2	A
ICalendarPastDaysToDisplay	ICalendar past days to display	14	2	A
CRMSyncExchangeVersion	MS Exchange version to sync	2013_SP1	2	A
CRMEquipmentRowsLimit	Max rows returned for salesmans customer equipment	200	2	A
CRMASATTUSL	CRM upload size limit in bytes	20000000	2	A
CRMSendInvAllowed	CRM Allow user to send iCal invites to attendees	Yes	2	A
CRMASATTUSL	CRM upload size limit in bytes	1000000	0	A

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SEND ACTIVITY INVITES TO ATTENDEES CHECK BOX DEFAULT

- **Code:** CRMSendInvDef
- The default for Send Activity Invites to Attendees is **No**.

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Save Layout Workspaces Save Filter Refresh

Format Cur...

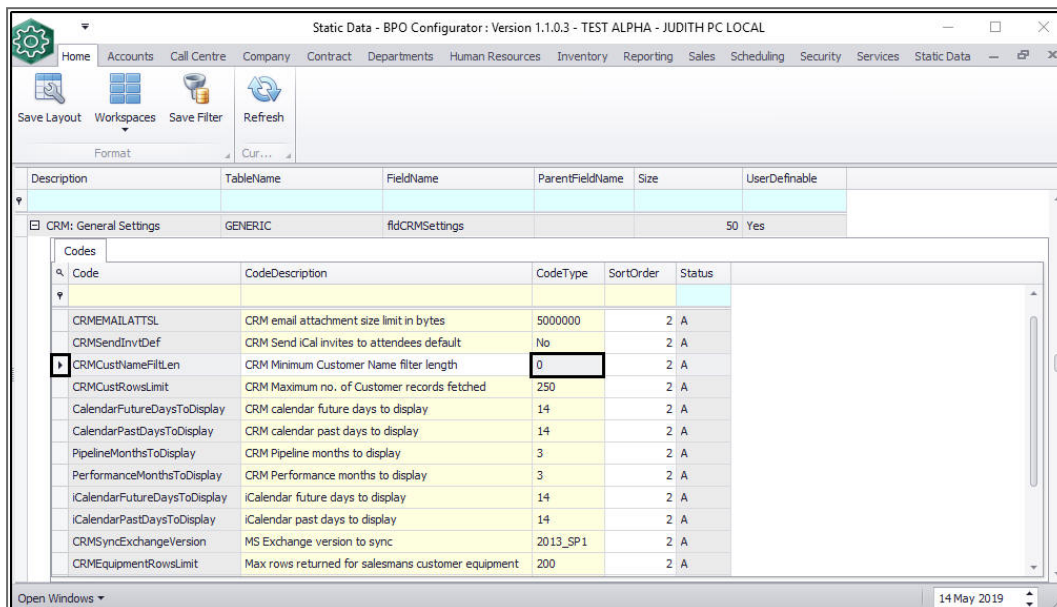
Description	TableName	FieldName	ParentFieldName	Size	UserDefinable
CRM: General Settings	GENERIC	fldCRMSettings		50	Yes

Code	CodeDescription	CodeType	SortOrder	Status
CRMEMAILATTSL	CRM email attachment size limit in bytes	5000000	2	A
CRMSendInvDef	CRM Send iCal invites to attendees default	No	2	A
CRMCustomNameFilterLen	CRM Minimum Customer Name filter length	0	2	A
CRMCustomRowsLimit	CRM Maximum no. of Customer records fetched	250	2	A
CalendarFutureDaysToDisplay	CRM calendar future days to display	14	2	A
CalendarPastDaysToDisplay	CRM calendar past days to display	14	2	A
PipelineMonthsToDisplay	CRM Pipeline months to display	3	2	A
PerformanceMonthsToDisplay	CRM Performance months to display	3	2	A
ICalendarFutureDaysToDisplay	ICalendar future days to display	14	2	A
ICalendarPastDaysToDisplay	ICalendar past days to display	14	2	A
CRMSyncExchangeVersion	MS Exchange version to sync	2013_SP1	2	A
CRMEquipmentRowsLimit	Max rows returned for salesmans customer equipment	200	2	A

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MINIMUM CUSTOMER NAME FILTER LENGTH

- **Code:** CRM CustNameFiltLen
- The default filter length is **0**.



Description	TableName	FieldName	ParentFieldName	Size	UserDefinable
CRM: General Settings	GENERIC	fldCRMSettings		50	Yes

Code	CodeDescription	CodeType	SortOrder	Status
CRMMAILATTSL	CRM email attachment size limit in bytes	5000000	2	A
CRMSEndInvDef	CRM Send iCal invites to attendees default	No	2	A
CRM CustNameFiltLen	CRM Minimum Customer Name filter length	0	2	A
CRM CustRowsLimit	CRM Maximum no. of Customer records fetched	250	2	A
CalendarFutureDaysToDisplay	CRM calendar future days to display	14	2	A
CalendarPastDaysToDisplay	CRM calendar past days to display	14	2	A
PipelineMonthsToDisplay	CRM Pipeline months to display	3	2	A
PerformanceMonthsToDisplay	CRM Performance months to display	3	2	A
iCalendarFutureDaysToDisplay	iCalendar future days to display	14	2	A
iCalendarPastDaysToDisplay	iCalendar past days to display	14	2	A
CRMSyncExchangeVersion	MS Exchange version to sync	2013_SP1	2	A
CRMEquipmentRowsLimit	Max rows returned for salesmans customer equipment	200	2	A

MAXIMUM NUMBER OF CUSTOMER RECORDS TO FETCH

- **Code:** CRM CustRowsLimit
- The default Maximum Customer Records to fetch is **250**.

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Save Layout Workspaces Save Filter Refresh

Format Cur...

Description	TableName	FieldName	ParentFieldName	Size	UserDefinable
CRM: General Settings	GENERIC	fldCRMSettings		50	Yes

Codes

Code	CodeDescription	CodeType	SortOrder	Status
CRMEMAILATTSL	CRM email attachment size limit in bytes	5000000	2	A
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CRM.000.020

