

## **CRM BASICS**

## **GENERAL SETTINGS**

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

32	Ŧ				BPO Configurat	or : Version 1.1.0.3 - 7	FEST ALPHA -	JUDITH PC L	OCAL			32_2		$\times$
Q.2	Accounts	Call Centre	Company	Contract	Departments	Human Resources	Inventory	Reporting	Sales	Scheduling	Security	Services	Static Data	
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Static Data														
Data	l													
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• The *Static Data* screen will be displayed.

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Home Accounts Call Ce	entre Company Contract	Departments Human Resou	rces Inventory F	leporting Sales Si	cheduling Security	Services S	itatic Data	 r 3
21								
Save Layout Workspaces Save F	ilter Refresh							
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Format	a Cur a							
Description	TableName	FieldName	ParentFieldName	Size	UserDefinable			
Bank Account Type	GENERIC	fidAccountType		50	Yes			
🗄 Bank Name	GENERIC	fldBankName		50	Yes			
BOM: BOM Type	tblBOMBillOfMaterials	fldBOMType		10	Yes			
Calls : Call Error Codes	tblSALSCalls	fidErrorCode		10	Yes			
	GENERIC	fldPriority		1	Yes			
Calls : Call Status	tblSALSCalls	fldStatus		1	No			
	tblSALSCalls	fldCallType		10	Yes			
🗄 Calls : Data Refresh Rate	GENERIC	fldCallRefreshRate		5	Yes			
Calls : Hold Reason Codes	tblSALSCallHoldEvents	fldHoldReasonCode		10	Yes			
	tblSALSCallPendingEvents	fldPendingReasonCode		10	Yes			
	GENERIC	fldCategory		50	Yes			
Categories : Entity Class	GENERIC	fldClass		4	Yes			
Categories : Entity Type	GENERIC	fldType		2	Yes			
	GENERIC	fldSysTaxCode		4	Yes			
Company : Tax Types	GENERIC	fldTaxType		3	Yes			
Configuration : Action Types	tblMTRMDefinition	fldActionType		50	No			
F. Configuration : Address Types	GENERIC	fidAddressType		4	No			_

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



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Home Accounts Call Ce	ntre Company Contract I	Departments Human Resou	rces Inventory R	eporting Sales So	cheduling Security	Services Static Data	- 6	9 x
iave Layout Workspaces Save Fi	iter Refresh							
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			
	tblCRMContactsRole	fidRole		10	Yes			
CRM: Customer Type	tblSALSCustomers	fidCustomerType		10	Yes			
CRM: General Settings	GENERIC	fldCRMSettings		50	Yes			
	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	tblSALSContacts	fldContactType		20	Yes			
Customer: Payment Method	tblSALSCustomers	fidPaymentMethod		10	Yes			
F. Customers : Invoice Methods	thISALSCustomerInvoiceMe.	fldInvoiceMethod		10	No			_

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

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

22	Home	Accounts	Call Centre	Company	Contract	Departments	Human Resources	Inventor	v Re	norting	Sales S	cheduling	Security	Services	Static Data	-	æ
eve La	yout	Workspaces	8	Refresh	Conduct	Departmenta	numur resources	Inventor	y N	-por ang	Suics	on counting	Security	30111023		_	-
Descr	iption		-	TableName		FieldName		arentField	lame	Size		UserDefi	nable				
	M: Ger	neral Settings		GENERIC		fldCRMSet	tinos				5	) Yes					
Г	Codes																
0	Code			CodeDescr	intion		(	odeType	Sort	Order	Status						
4																	
	CRM	CUSTYPREOR	D	CRM Custo	mer type re	auired		'es	-	2	A						n
		EMAILATTSL				size limit in byte	s S	000000		2	A						
	CRM	SendInvtDef		CRM Send	iCal invites	to attendees de	fault N	lo		2	A						
	CRM	1CustNameFilt	Len	CRM Minim	um Custome	er Name filter ler	igth (			2	A						
	CRM	CustRowsLimi	t	CRM Maxin	num no. of (	Customer record	s fetched	50		2	A						
	Cale	ndarFutureDa	ysToDisplay	CRM calen	dar future d	lays to display	1	.4		2	A						
	Cale	ndarPastDays	ToDisplay	CRM calen	dar past da	ys to display	1	.4		2	A						
	Pipe	lineMonthsTo	Display	CRM Pipeli	ne months t	o display	3	L.		2	A						U
	Perf	ormanceMont	hsToDisplay	CRM Perfo	rmance mor	ths to display	3			2	A						
	iCale	endarFutureDa	aysToDisplay	iCalendar f	future days	to display	1	.4		2	A						
	iCale	endarPastDay	sToDisplay	iCalendar p	bast days to	display	3	.4		2	A						
	CRM	SyncExchang	eVersion	MS Exchan	ige version	to sync	2	013_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.

33	*	Static	Data - BPO Configurator : Versio	n 1.1.0.3 - TES	ST ALPHA -	JUDITH PC LO	DCAL		<u> 10 – 01</u>		)	×
H	ome Accounts Call Ce	ntre Company Contrac	t Departments Human Resour	es Invento	ry Reportin	ng Sales S	cheduling Security	Services	Static Data	-	8	12.21
ave Layo	out Workspaces Save F	Refresh										
Descrip	tion	TableName	FieldName	ParentField	Name Size		UserDefinable					-
	: General Settings	GENERIC	fidCRMSettings			50	Yes					
0	Codes											1
	Code	CodeDescription		CodeType	SortOrder	Status					_	1
Ŷ												1
	CRMSendInvtDef	CRM Send iCal invite	es to attendees default	No	1	2 A						
	CRMCustNameFiltLen	CRM Minimum Custo	mer Name filter length	0		2 A					n	
	CRMCustRowsLimit		of Customer records fetched	250		2 A						
	CalendarFutureDaysToDis	play CRM calendar future	e days to display	14		2 A						
	CalendarPastDaysToDispla	ay CRM calendar past o	days to display	14		2 A						
	PipelineMonthsToDisplay	CRM Pipeline months	s to display	3		2 A						
	PerformanceMonthsToDisp	olay CRM Performance m	ionths to display	3		2 A						
	iCalendarFutureDaysToDis	splay iCalendar future day	ys to display	14		2 A						
	iCalendarPastDaysToDispl	ay iCalendar past days	to display	14		2 A					U	
	CRMSyncExchangeVersion	MS Exchange versio	n to sync	2013_SP1		2 A						1
	CRMEquipmentRowsLimit	Max rows returned t	for salesmans customer equipment	200		2 A						
	CRMCASATTUSL	CRM upload size limi	t in hyter	20000000		2 A						1

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



~3		Ŧ				Static Da	ata - BPO Conf	igurator : Version	1.1.0.3 - TE	ST ALP	HA - JU	DITH PC I	OCAL			N		>
25	Н	lome	Accounts	Call Centre	Company	Contract	Departments	Human Resourc	es Invento	ry R	eporting	Sales	Scheduling	Security	Services	Static Data	-	8
ive L	~		Norkspaces	Save Filter	Refresh													
Des	crip	tion		-	TableName		FieldName		ParentField	Name	Size		UserDefi	nable				
	RM	: Gene	eral Settings		GENERIC		fldCRMSet	tinas					i0 Yes					
1	C	odes																
1		Code			CodeDescri	iption			CodeType	Sort	Order	Status						
	9																	
		CRMS	SendInvtDef		CRM Send i	iCal invites	to attendees de	fault	No		2	A						
	I	CRMO	CustNameFil	tLen	CRM Minimu	um Custome	er Name filter ler	nath	10		1	A						n
	-	CRMO	CustRowsLin	nit			Customer record	-	250		2	A						
		Caler	ndarFutureD	aysToDisplay	CRM calend	dar future d	lays to display		14		2	A						
		Caler	ndarPastDay	sToDisplay	CRM calend	dar past da	ys to display		14		2	A						
		Pipeli	neMonthsTo	Display	CRM Pipelin	ne months t	o display		3		2	A						
		Perfo	rmanceMon	thsToDisplay	CRM Perfor	mance mor	ths to display		3		2	A						
		iCaler	ndarFutureD	aysToDisplay	iCalendar fi	uture days	to display		14		2	A						
		iCaler	ndarPastDa	sToDisplay	iCalendar p	ast days to	display		14		2	A						U
		CRMS	SyncExchan	geVersion	MS Exchan	ge version	to sync		2013_SP1		2	A						
		CRME	EquipmentRo	owsLimit	Max rows r	eturned for	salesmans cust	omer equipment	200		2	A						
		CRM	CASATTUSL		CRM upload	d size limit ir	n bytes		20000000		2	A						-

- 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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2	Н	ome Accounts Call Centr	re Company Contract	Departments Human Resourc	es Invento	y Re	eporting	Sales Si	cheduling	Security	Services	Static Data	-	в×
Save I	0	ut Workspaces Save Filte	er Refresh											
Des	crip	tion	TableName	FieldName	ParentField	lame	Size		UserDefin	nable				
9														
	CRM	: General Settings	GENERIC	fldCRMSettings				50	Yes					
	C	odes												
	a	Code	CodeDescription		CodeType	Sorto	Order	Status						
	Ŷ													*
		CRMSendInvtDef	CRM Send iCal invites to	attendees default	No		2	A						
	I	CRMCustNameFiltLen	CRM Minimum Customer	Name filter length	10		1	A						1
		CRMCustRowsLimit	CRM Maximum no	φ <u>.</u>										
		CalendarFutureDaysToDispla	CRM calendar fut	ste				~						
		CalendarPastDaysToDisplay	CRM calendar pas											
		PipelineMonthsToDisplay	CRM Pipeline mon	Are you sure you want to a superior of the	o save chang	es to t	his code	?						
		PerformanceMonthsToDisplay	y CRM Performance											
		iCalendarFutureDaysToDispla	ay iCalendar future o		i									
		iCalendarPastDaysToDisplay	iCalendar past da	Yes	No		Cancel	I)						U
		CRMSyncExchangeVersion	MS Exchange version to	sync	2013_5P1	-	2	A						
		CRMEquipmentRowsLimit	Max rows returned for si	alesmans customer equipment	200		2	Α						
		CRMCASATTUSL	CRM upload size limit in b	vtes	20000000		2	A						-

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

3		+				Static Da	ata - BPO Con	igurator : Versio	n 1.1.0.3 - TE	ST ALP	HA - JU	DITH PC L	DCAL					-	×
3	H	lome	Accounts	Call Centre	Company	Contract	Departments	Human Resour	ces Invento	ry Re	porting	Sales S	Scheduling	Security	Services	Static Data	-	Ð	3
Save L	0		Workspaces	Save Filter	Refresh														
Des	crip		National International Interna	1	TableName		FieldName	•	ParentField	Vame	Size		UserDefin	able					-
BC	RM	1: Gen	eral Settings	(	GENERIC		fldCRMSe	ttinas			1	5	) Yes						
	6	Codes																	٦
		Code			CodeDescrip	otion			CodeType	Sorto	Order	Status							1
	9																		
		CRM	SendInvtDef		CRM Send it	Cal invites	to attendees de	fault	No	-	2	A							
		CRM	CustNameFilt	Len	CRM Minimu	m Custome	er Name filter le	nath	10		1	A						n	
		CRM	CustRowsLim	t			Customer record	-	250		2	A							
		Cale	ndarFutureDa	ysToDisplay	CRM calend	ar future d	lays to display		14		2	A							
		Cale	ndarPastDays	ToDisplay	CRM calend	ar past da	ys to display		14		2	A							
		Pipel	ineMonthsTol	Display	CRM Pipelin	e months t	o display		3		2	A							
		Perfe	ormanceMont	hsToDisplay	CRM Perfor	mance mor	nths to display		3		2	A							
		iCale	ndarFutureD	aysToDisplay	iCalendar fu	iture days	to display		14		2	A							
		iCale	ndarPastDay	sToDisplay	iCalendar pa	ast days to	display		14		2	A						U	
		CRM	SyncExchang	eVersion	MS Exchang	e version	to sync		2013_SP1		2	A							1
		CRM	EquipmentRo	wsLimit	Max rows re	eturned for	salesmans cus	omer equipment	200		2	Α							
		CRM	CASATTUSL		CRM upload	size limit ir	n bytes		20000000		2	A						-	

## **EXAMPLES OF DEFAULT CODE SETTINGS**

#### **CONFIGURE PIPELINE CHART VIEW IN MONTHS**

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



Hon	me Accounts Call Ce	ntre Company Co	ntract Departmen	ts Human Resourc	es Invento	ry Rep	orting	Sales S	cheduling	Security	Services	Static Data	-	Ð	
Layout	t Workspaces Save Fi	liter Refresh													
escriptio	m	TableName	FieldNa	me	ParentField	Name S	lize		UserDefin	able					-
CRM: (	General Settings	GENERIC	fldCRM	Settinas				50	Yes						
Co	des			-											-
Q C		CodeDescriptio	n		CodeType	SortOr	der	Status						_	٦
9															
c	CalendarFutureDavsToDis	play CRM calendar	future days to displa	v	14		2	A							
0.0	CalendarPastDaysToDispla		past days to display	8	14		2	A							
-	pelineMonthsToDisplay		onths to display		3	1	2	A							
P	erformanceMonthsToDisp	lay CRM Performa	nce months to displa	1	3	1	2	A						n	
iC	CalendarFutureDaysToDis	play iCalendar futur	e days to display		14		2	A							
iC	CalendarPastDaysToDispla	ay iCalendar past	days to display		14		2	A							
C	RMSyncExchangeVersion	MS Exchange v	ersion to sync		2013_SP1		2	A							l
C	RMEquipmentRowsLimit	Max rows retu	ned for salesmans c	ustomer equipment	200		2	A							
C	RMCASATTUSL	CRM upload siz	e limit in bytes		20000000		2	A							
C	RMSendInvtAllowed	CRM Allow use	to send iCal invites	to attendees	Yes		2	A							
C	RMCASATTUSL	CRM upload siz	e limit in bytes		1000000		0	A							
*								( ) (							

#### **CONFIGURE PERFORMANCE IN MONTHS**

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

3	Home	Accounts	Call Centre	Company	Contract	Departments	Human Resour	es Invento	rv R	eportina	Sales S	chedulina	Security	Services	Static Data	 8
e Lay	out \	Workspaces	8	Refresh												
escri	ption		1	TableName		FieldName		ParentField	Name	Size		UserDefi	nable			
	M: Gen	eral Settings		GENERIC		fldCRMSe	ttings				50	Yes				
	Codes															
a	Code			CodeDescrip	tion			CodeType	Sort	Order	Status					
9																
	Caler	ndarFutureDa	avsToDisplay	CRM calenda	r future d	ays to display		14	-	2	A					
		ndarPastDays		CRM calenda				14			A					
	Pipeli	ineMonthsTol	Display	CRM Pipeline	months to	o display		3		2	A					
	Perfo	ormanceMont	hsToDisplay	CRM Perform	ance mon	ths to display		3	1	2	A					n
	iCale	ndarFutureD	aysToDisplay	iCalendar fut	ure days t	to display		14		2	A					
	iCale	ndarPastDay	sToDisplay	iCalendar pa	st days to	display		14		2	A					
	CRM	SyncExchang	eVersion	MS Exchange	version t	o sync		2013_SP1		2	A					
	CRM	EquipmentRo	wsLimit	Max rows ref	urned for	salesmans cus	omer equipment	200		2	A					
	CRM	CASATTUSL		CRM upload	size limit in	bytes		20000000		2	A					
	CRM	SendInvtAllo	wed	CRM Allow us	er to send	d iCal invites to	attendees	Yes		2	A					
	CRM	CASATTUSL		CRM upload	size limit in	bytes		1000000		0	A					
*																0



#### CASE DOCUMENT UPLOAD SIZE LIMIT

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

3	-				Static Da	ata - BPO Conf	igurator : Version 1	.1.0.3 - TES	T ALPH	IA - JU	DITH PC LO	DCAL					X
5	Home	Accounts	Call Centre	Company	Contract	Departments	Human Resources	Inventor	y Rep	orting	Sales S	cheduling	Security	Services	Static Data	 Ð	19.20
e Layo	out 1	Workspaces	Save Filter	Refresh													
	F	-ormat		a Cur a													
escrip	otion			TableName		FieldName	1	ParentFieldN	ame S	Size		UserDefi	nable				
CRM	4: Gen	eral Settings		GENERIC		fldCRMSet	tings				50	) Yes					
	Codes																-
L.	Code			CodeDescr	ription		0	CodeType	SortOr	der	Status						1
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	Caler	ndarFutureD	aysToDisplay	CRM caler	ndar future d	lays to display		14		2	A						
		ndarPastDav				vs to display		14		2							
-		neMonthsTo			ine months t			3		2							
			thsToDisplay			ths to display	3	3		2	A					n	
	iCale	ndarFutureD	aysToDisplay	iCalendar	future days	to display		14		2	A						
	iCale	ndarPastDa	sToDisplay	iCalendar y	past days to	display		14		2	A						
	CRM	SyncExchan	geVersion	MS Exchar	nge version t	to sync	1	2013_SP1		2	A						
	CRM	EquipmentRo	owsLimit	Max rows	returned for	salesmans cust	omer equipment	200		2	A						
	CRM	CASATTUSL		CRM uploa	ad size limit ir	n bytes	3	20000000		2	A						
	CRM	SendInvtAllo	wed	CRM Allow	user to sen	d iCal invites to	attendees \	'es		2	A						
	CRM	CASATTUSL		CRM uploa	ad size limit in	n bytes	5	1000000	1	0	A						
*	8										1					U	

#### EMAIL ATTACHMENT SIZE LIMIT

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



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Home	Accounts	Call Centre	Company	Contract	Departments	Human Resource	s Inventor	ry Rep	orting	Sales S	cheduling	Security	Services	Static Data	-	8
ve Layout	Workspaces	Save Filter	Refresh													
	Format		Cur "													
Description		Т	ableName		FieldName		ParentField	lame 9	lize		UserDefin	able				
E CRM: Gen	neral Settings	G	ENERIC		fldCRMSet	tings				50	Yes					
Codes																
Q Code	2		CodeDescri	otion			CodeType	SortOr	der	Status						
9																
CRM	CUSTYPREORD	)	CRM Custor	mer type re	equired		Yes	1	2	A						1
105.010	EMAILATTSL				size limit in byte	s	5000000	1	2	A						
	SendInvtDef				to attendees de		No		2	A						
CRM	CustNameFiltL	en	CRM Minimu	m Custome	er Name filter ler	ath	0		2	A						
CRM	CustRowsLimit				Customer record	Section 1	250		2	A						
Cale	ndarFutureDay	sToDisplay	CRM calend	ar future d	lays to display		14		2	A						
0.000	ndarPastDaysT	and the second			ys to display		14		2	A						
100000	, lineMonthsToDi		CRM Pipelin		2		3		2	A						U
1000	ormanceMonth		1.0.0.000.000.000		ths to display		3		2	A						
	ndarFutureDa		iCalendar fi		THE PROPERTY AND A PROPERTY AND A		14		2	A						
	ndarPastDays		iCalendar p				14		2							
10000	SyncExchange		MS Exchance	and the second second	NORTH AND		2013 SP1		2	A.:						

#### **ENFORCE CUSTOMER TYPE REQUIRED**

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

2	-				Static Da	ata - BPO Conf	gurator : Version 1.	1.0.3 - TEST	ALPHA -	JUDI	TH PC L	OCAL			N_0		3	X
2	Home	Accounts	Call Centre	Company	Contract	Departments	Human Resources	Inventory	Reporti	ing	Sales S	Scheduling	Security	Services	Static Data	-	Ð	19.20
Save La	ayout 1	Workspaces	Save Filter	Refresh														
Desc	ription	National Institution	1	TableName		FieldName	P	arentFieldNa	me Size			UserDefi	nable					-
EC	RM: Gen	eral Settings	(	GENERIC		fldCRMSet	tinas				5	0 Yes						
Γ	Codes						-											٦
	۹ Code			CodeDescr	iption		c	odeType	SortOrder	St	tatus							1
	9																	
L f	► CRM	CUSTYPREOF	۶D	CRM Custo	mer type re	auired	Y	es		2 A	1						1	
L F	Contra Co	EMAILATTSL				size limit in byte		000000		2 A								
	CRM	SendInvtDef				to attendees de		0		2 A								
	CRM	CustNameFilt	Len	CRM Minim	um Custome	er Name filter ler	gth 0			2 A								
	CRM	CustRowsLim	it	CRM Maxim	num no. of (	Customer record	s fetched 2	50		2 A								
	Caler	ndarFutureDa	aysToDisplay	CRM calend	dar future d	lays to display	1	4		2 A								
	Caler	ndarPastDays	ToDisplay	CRM calend	dar past da	ys to display	1	4		2 A								
	Pipeli	ineMonthsTol	Display	CRM Pipelin	ne months t	o display	3			2 A							U	
	Perfo	ormanceMont	hsToDisplay	CRM Perfor	rmance mor	ths to display	3			2 A								
	iCale	ndarFutureD	aysToDisplay	iCalendar f	uture days	to display	1	4		2 A								l
	iCale	ndarPastDay	sToDisplay	iCalendar p	ast days to	display	1	4		2 A								
	CRM	SyncExchang	eVersion	MS Exchan	ge version	to sync	2	013 SP1		2 A							-	1



## SET PAST AND FUTURE DAYS TO DISPLAY IN CRM CALENDAR

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

۲۲ کہ	Home Accounts	Call Centre	Company	Contract	Departments	Human Resources	Inventor	v Re	portina	Sales Si	chedulina	Security	Services	Static Data	-	8
/e Layo		Save Filter	Refresh													
Descrip	tion	1	ableName		FieldName	F	arentField	lame	Size		UserDefi	nable				
	1: General Settings	0	SENERIC		fldCRMSet	tings				50	Yes					
	Codes															
a	Code		CodeDescrip	tion		c	CodeType	SortO	rder	Status						
ę																
	CRMCUSTYPREOR	D	CRM Custom	er type re	auired	Y	'es	1	2	A						1
	CRMEMAILATTSL				size limit in byte	s 5	000000		2	A						
	CRMSendInvtDef		CRM Send iC	al invites f	to attendees de	fault N	lo		2	A						
	CRMCustNameFilt	Len	CRM Minimur	n Custome	r Name filter ler	gth C	6		2	A						
	CRMCustRowsLimi	t	CRM Maximu	m no. of C	Customer record	s fetched 2	50		2	A						
	CalendarFutureDa	ysToDisplay	CRM calenda	r future d	ays to display	1	.4	1	2	A						
	CalendarPastDays	ToDisplay	CRM calenda	r past day	s to display	t	.4		2	A						
	PipelineMonthsTo	Display	CRM Pipeline	months to	o display	3	í.		2	A						U
	PerformanceMont	hsToDisplay	CRM Perform	nance mon	ths to display	3	6		2	A						
	iCalendarFutureDa	aysToDisplay	iCalendar fu	ture days	to display	1	.4		2	A						
	iCalendarPastDay	sToDisplay	iCalendar pa	st days to	display	1	.4		2	A						
	CRMSvncExchang	eVersion	MS Exchang	e version t	o sync	2	013_SP1		2	A						-

# SET PAST AND FUTURE DAYS TO DISPLAY IN ICAL CALENDAR

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



05	Ho	me Accounts Call	Centre	Company			igurator : Versio Human Resour						Čerevite.	Services	Static Data		8	>
ave L		t Workspaces Save	1	Refresh	Contract	Departments	Human Kesoun	es invento	ry ket	porting	Sales S	cheduling	Security	Services	Static Data	_	Gr	
Des	criptic	Format	.⊮ Ta	Cur a		FieldName		ParentField	Name S	Size		UserDefina	able					
		General Settings		NERIC		fidCRMSe	19					Yes						
	-		G	INERIC		HUCKMSE	tungs				50	res						-
	Q (	des Code		CodeDescrip	tion			CodeType	SortOr	der	Status							1
	9																	1
	C	RMCustRowsLimit		CRM Maximu	m no. of	Customer record	ls fetched	250		2	A							
	c	CalendarFutureDaysToD	Display	CRM calenda	ar future o	lays to display		14		2	A							
	c	CalendarPastDaysToDis	play	CRM calenda	ar past da	ys to display		14		2	A						n	
	P	ipelineMonthsToDisplay	1	CRM Pipeline	months t	o display		3		2	A							
	F	erformanceMonthsToD	isplay	CRM Perform	nance mor	nths to display		3		2	A							
	je	CalendarFutureDaysTol	Display	iCalendar fu	ture days	to display		14		2	A							
	iC	CalendarPastDaysToDis	play	iCalendar pa	st days to	display		14		2	A							
	C	RMSyncExchangeVersi	on	MS Exchang	e version	to sync		2013_SP1		2	A							
	c	RMEquipmentRowsLimi	t	Max rows re	turned for	salesmans cust	omer equipment	200		2	A							
	c	RMCASATTUSL		CRM upload	size limit i	n bytes		20000000		2	A							
	c	RMSendInvtAllowed		CRM Allow u	ser to ser	d iCal invites to	attendees	Yes		2	A						0	1
	c	RMCASATTUSL		CRM upload	size limit i	n bytes		1000000		0	A							

## SEND ACTIVITY INVITES TO ATTENDEES CHECK BOX DEFAULT

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

Ho	me Accounts	Call Centre	Company	Contract	Departments	Human Resource	s Invento	ry Re	porting	Sales S	Scheduling	Security	Services	Static Data	 8
ve Layou	t Workspaces	Save Filter	Refresh												
Descriptio	10000200	1	TableName		FieldName		ParentField	Name	Size		UserDefi	nable			 _
E CRM:	General Settings	C	SENERIC		fldCRMSet	tinas				5	) Yes				
1	des														
	Code		CodeDescr	intion			CodeType	Sort	Order	Status					
9	2000		Coucococ	puon			courtype	DOI to	- aci	Status					
0	RMEMAILATTSL		CRM email	attachment	size limit in byte	c	5000000	1	2	A					0
105	CRMSendInvtDef				to attendees de	Ø	No	1		A					
-	RMCustNameFilt	en			er Name filter ler		0	-	2						
	RMCustRowsLimi				Customer record	#0.00.	250		2	A					
0	CalendarFutureDa	vsToDisplay	CRM calen	dar future d	lays to display		14		2	A					
C	CalendarPastDays	ToDisplay	CRM calen	dar past da	ys to display		14		2	A					
F	pelineMonthsToE	Display	CRM Pipelir	ne months t	o display		3		2	A					
P	PerformanceMont	nsToDisplay	CRM Perfo	rmance mor	ths to display		3		2	A					
i	CalendarFutureDa	aysToDisplay	iCalendar f	uture days	to display		14		2	A					
i	CalendarPastDay	ToDisplay	iCalendar p	ast days to	display		14		2	A					
C	CRMSyncExchang	eVersion	MS Exchan	ge version	to sync		2013_SP1		2	A					
0	RMEquipmentRo	wsLimit	Max rows r	eturned for	salesmans cust	omer equipment	200		2	A					



#### MINIMUM CUSTOMER NAME FILTER LENGTH

- Code: CRMCustNameFiltLen
- The default filter length is **0**.

3	-				Static Da	ata - BPO Conf	igurator : Version 1	.1.0.3 - TES	I ALPH	HA - JU	DUTH PC LC	CAL					
~5	Home	Accounts	Call Centre	Company	Contract	Departments	Human Resources	Inventor	y Re	porting	Sales S	cheduling	Security	Services	Static Data	-	8
Save La	0	Workspaces	Save Filter	Refresh													
		Format	4	Cur a					_								
	iption		т	ableName		FieldName		ParentFieldN	lame	Size		UserDefi	nable				
8																	
	M: Gen	ieral Settings	G	ENERIC		fldCRMSet	tings				50	Yes					
	Codes	62															
	R Code			CodeDescr	ription		0	CodeType	SortO	rder	Status						
	٩																
	CRM	EMAILATTSL		CRM email	attachment	size limit in byte	s !	5000000		2	A						0
	CRM	SendInvtDef		CRM Send	iCal invites	to attendees de	fault 1	ło		2	A						
L D	CRM	CustNameFil	Len	CRM Minim	um Custome	er Name filter ler	igth (	)	1	2	A						
	CRM	CustRowsLin	it	CRM Maxin	num no. of (	Customer record	s fetched	250		2	A						
	Cale	ndarFutureD	aysToDisplay	CRM calen	dar future d	lays to display		14		2	A						
	Cale	ndarPastDay	sToDisplay	CRM calen	dar past da	ys to display		14		2	A						
	Pipel	ineMonthsTo	Display	CRM Pipeli	ne months t	o display	2	3		2	A						
	Perfe	ormanceMon	thsToDisplay	CRM Perfo	rmance mon	ths to display	1	3		2	A						
	iCale	ndarFutureD	aysToDisplay	iCalendar f	future days	to display		14		2	A						0
	iCale	ndarPastDay	sToDisplay	iCalendar p	past days to	display		14		2	A						
	CRM	SyncExchang	eVersion	MS Exchan	nge version f	to sync		2013_SP1		2	A						
	CRM	EquipmentRo	wsLimit	Max rows	returned for	salesmans cust	omer equipment	200		2	A						1

#### MAXIMUM NUMBER OF CUSTOMER RECORDS TO FETCH

- Code:CRMCustRowsLimit
- The default Maximum Customer Records to fetch is 250.



## General Settings

53	-	31	tatic Data - BPO Configurator : Vers	aon 1.1.0.5 - 1E.	ST ALPHA - J	ODITHPUD	UCAL			ш	×
F CO	Home Accounts Call C	Centre Company Co	ntract Departments Human Reso	urces Invento	ry Reportin	g Sales S	Scheduling Security	Services	Static Data	-	8 )
ave Lay	out Workspaces Save										
Descrip	tion	TableName	FieldName	ParentField	Name Size		UserDefinable				
	1: General Settings	GENERIC	fldCRMSettings			5	) Yes				
	Codes										
a	Code	CodeDescription	n	CodeType	SortOrder	Status					
٩											*
	CRMEMAILATTSL	CRM email atta	chment size limit in bytes	5000000		2 A					n
1	CRMSendInvtDef	CRM Send iCal i	invites to attendees default	No		2 A					
	CRMCustNameFiltLen	CRM Minimum C	Customer Name filter length	0		2 A					
	CRMCustRowsLimit	CRM Maximum	no. of Customer records fetched	250		2 A					
	CalendarFutureDaysToD	isplay CRM calendar f	uture days to display	14	1	2 A					
	CalendarPastDaysToDisp	olay CRM calendar p	past days to display	14		2 A					
	PipelineMonthsToDisplay	CRM Pipeline m	onths to display	3		2 A					
	PerformanceMonthsToDi	splay CRM Performan	nce months to display	3		2 A					
	iCalendarFutureDaysToD	Display iCalendar futur	e days to display	14		2 A					
	iCalendarPastDaysToDis	play iCalendar past	days to display	14		2 A					
	CRMSyncExchangeVersion	on MS Exchange v	ersion to sync	2013_SP1		2 A					
	CRMEquipmentRowsLimit	Max rows retur	ned for salesmans customer equipmer	nt 200		2 A					100

CRM.000.020