

We are currently updating our site; thank you for your patience.

## CRM BASICS

### GENERAL SETTINGS

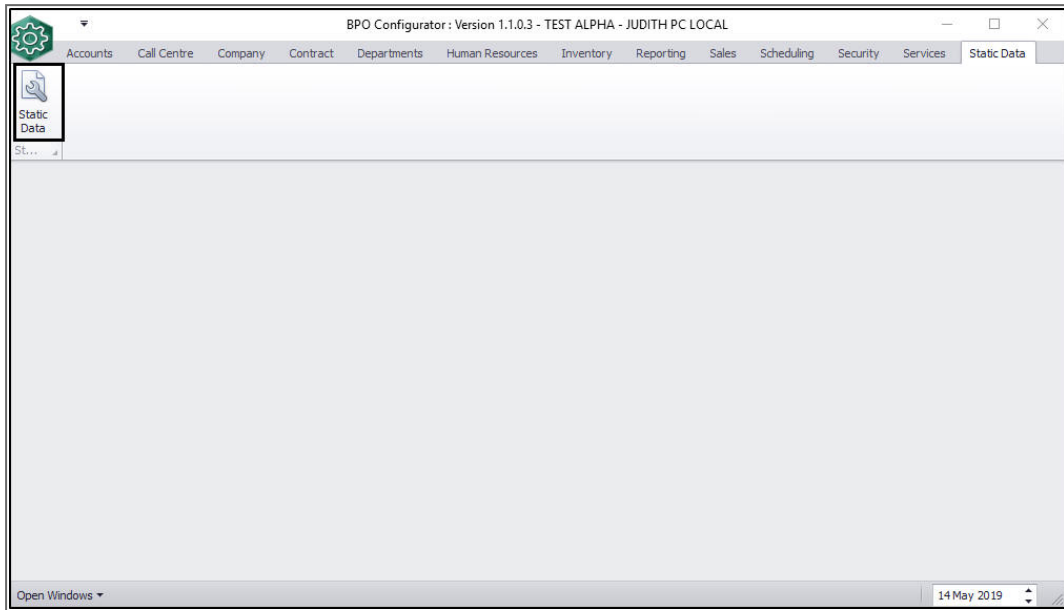
- [BPOCRM General Settings](#) are configuration with BPO's Static Data module.
- These are the options to configure:
  - [Configure Pipeline](#) Chart View in Months
  - [Configure Performance](#) in Months
  - [Set Case Document Upload Size Limit](#)
  - [Set Email Attachment Size Limit](#)
  - [Set 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).

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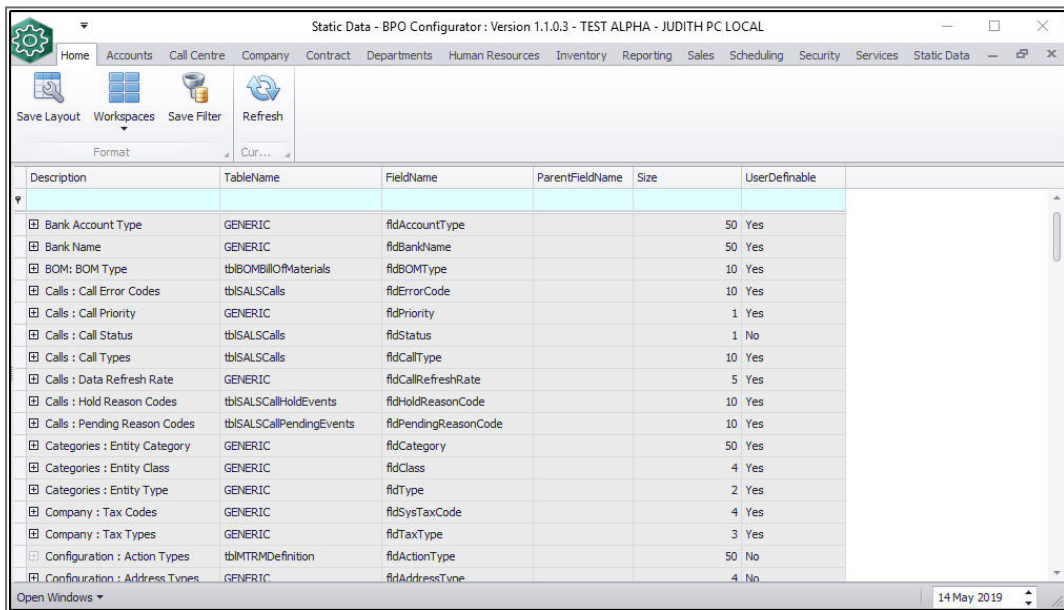
**Ribbon Access:** PO Configurator: > Static Data > Static Data

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## CRM GENERAL SETTINGS IN CONFIGURATOR



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



- 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**.

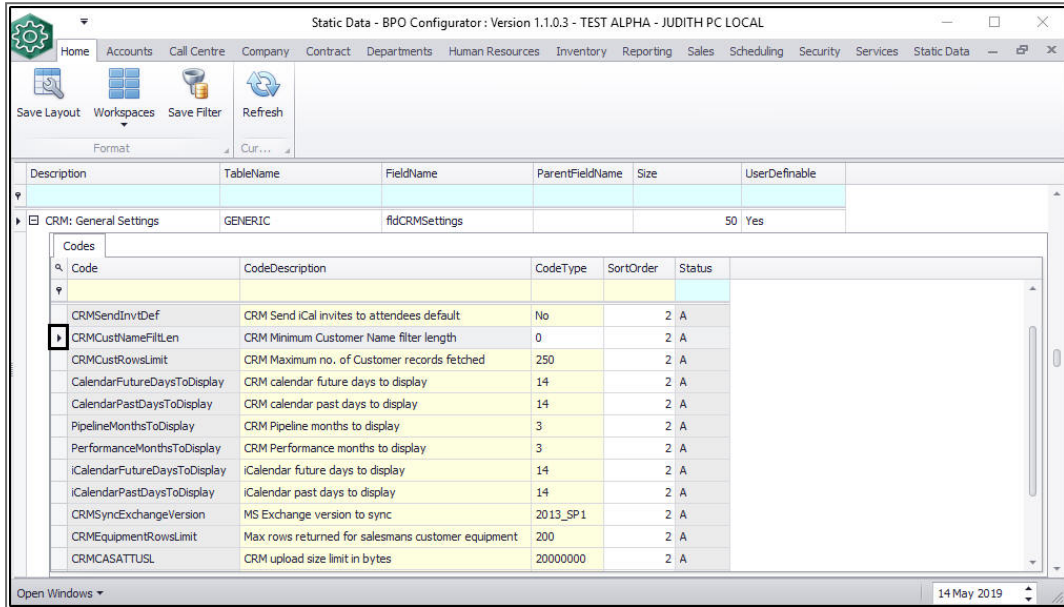
Description	TableName	FieldName	ParentFieldName	Size	UserDefinable
CRM: Activity responses	tblCRMActivityAttendees	fldResponse		20	Yes
CRM: Activity Status	tblCRMActivities	fldStatus		20	No
CRM: Activity Type	tblCRMActivities	fldActivityType		10	Yes
CRM: Case Source Types	tblCRMCases	fldSourceType		10	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
<b>CRM: General Settings</b>	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.

Code	CodeDescription	CodeType	SortOrder	Status
CRM CUSTYPREQRD	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
CRMCUSTNAMEFILLEN	CRM Minimum Customer Name filter length	0	2	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

## 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.



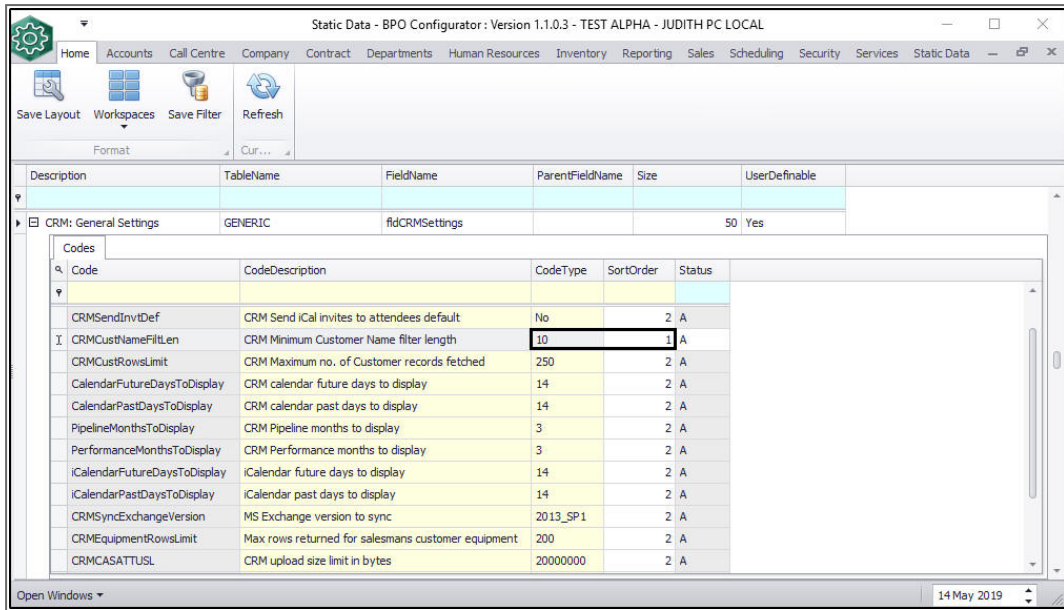
The screenshot shows the 'Static Data - BPO Configurator' application. The main window displays a table of CRM General Settings. The 'Codes' frame is expanded, showing a list of codes. The code 'CRMCustNameFiltLen' is selected, and its details are visible in the table below.

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

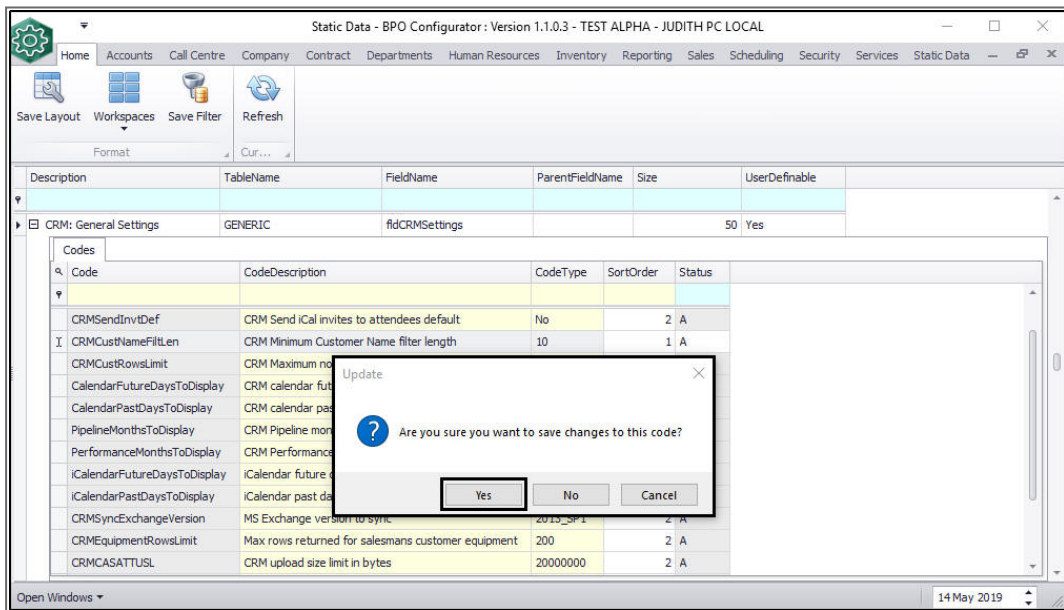
  

Code	CodeDescription	CodeType	SortOrder	Status
CRMSendInvDef	CRM Send iCal invites to attendees default	No	2	A
<b>CRMCustNameFiltLen</b>	<b>CRM Minimum Customer Name filter length</b>	0	2	A
CRMCustRowsLimit	CRM Maximum no. of Customer records fetched	250	2	A
CalendarFutureDaysToDisplay	CRM calendar future 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
CRMCASATTUSL	CRM upload size limit in bytes	20000000	2	A

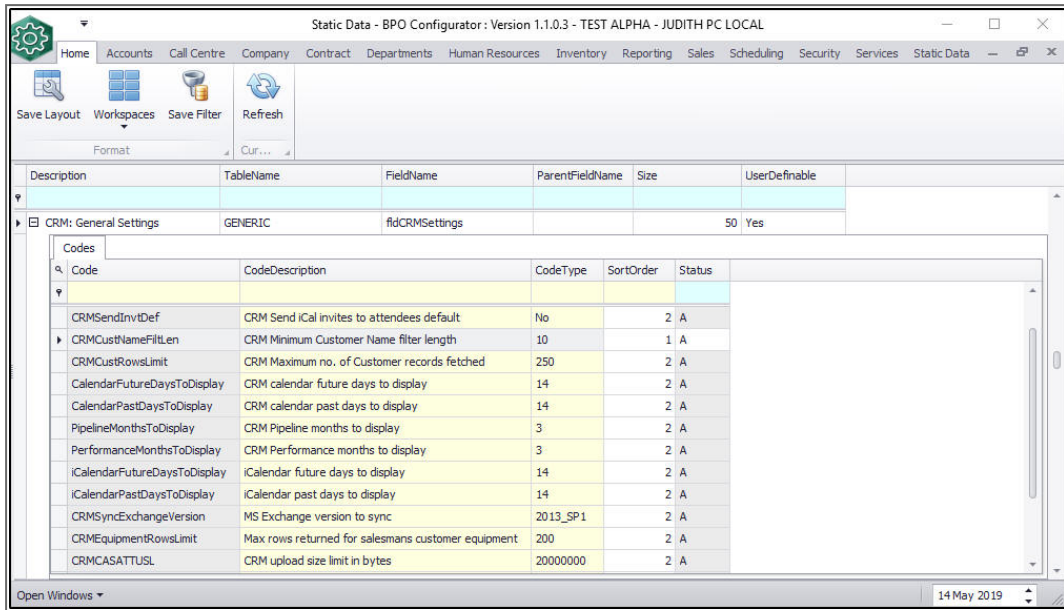
- Make the required changes in the **Code Type** and or **Sort Order** text boxes.



- 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**.



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



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

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
CRMCASATTUSL	CRM upload size limit in 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.

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

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
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

## CONFIGURE PERFORMANCE IN MONTHS

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

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

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 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

## CASE DOCUMENT UPLOAD SIZE LIMIT

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

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	

## EMAIL ATTACHMENT SIZE LIMIT

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



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

Code	CodeDescription	CodeType	SortOrder	Status
CRMCUSTYPREQRD	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
CRMCustNameFillLen	CRM Minimum Customer Name filter length	0		2 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

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## ENFORCE CUSTOMER TYPE REQUIRED

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

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

Code	CodeDescription	CodeType	SortOrder	Status
CRMCUSTYPREQRD	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
CRMCustNameFillLen	CRM Minimum Customer Name filter length	0		2 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

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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
CRMJUSTYPREQRD	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
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

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

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

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

Code	CodeDescription	CodeType	SortOrder	Status
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
CRMCASATTUSL	CRM upload size limit in bytes	20000000	2	A
CRMSendInvtAllowed	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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## SEND ACTIVITY INVITES TO ATTENDEES CHECK BOX DEFAULT

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

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Format Cur...

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

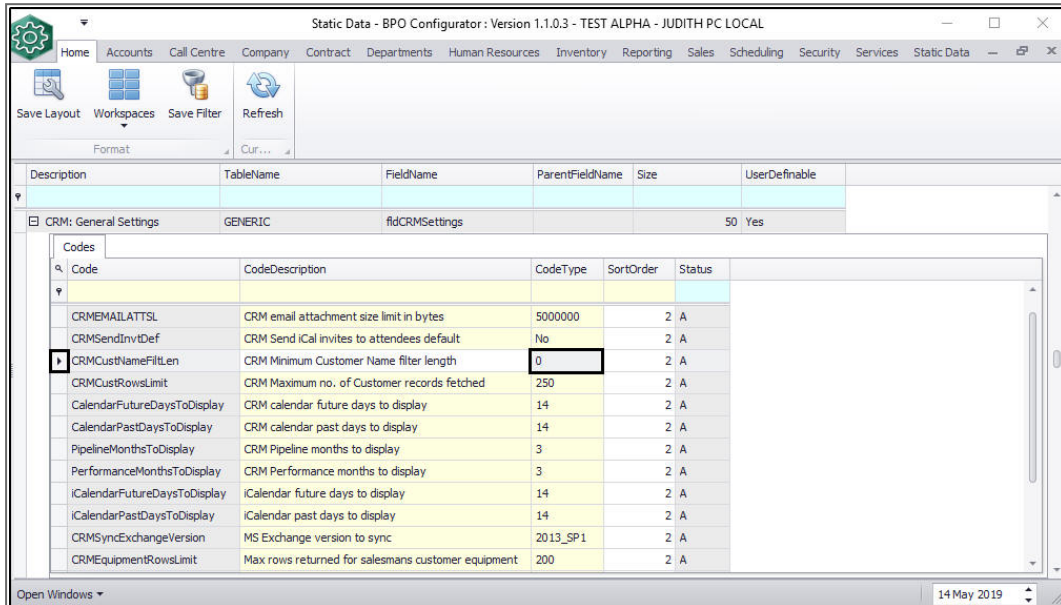
  

Code	CodeDescription	CodeType	SortOrder	Status
CRMEMAILATTSL	CRM email attachment size limit in bytes	5000000	2	A
CRMSendInvtDef	CRM Send iCal invites to attendees default	No	2	A
CRMCustNameFillLen	CRM Minimum Customer Name filter length	0	2	A
CRMCustRowsLimit	CRM Maximum no. of Customer records fetched	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

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## MINIMUM CUSTOMER NAME FILTER LENGTH

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



## MAXIMUM NUMBER OF CUSTOMER RECORDS TO FETCH

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

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

Code	CodeDescription	CodeType	SortOrder	Status
CRMEMAILATSL	CRM email attachment size limit in bytes	5000000	2	A
CRMSENDInvTDef	CRM Send iCal invites to attendees default	No	2	A
CRMCustNameFiltLen	CRM Minimum Customer Name filter length	0	2	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

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CRM.000.020

