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).

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

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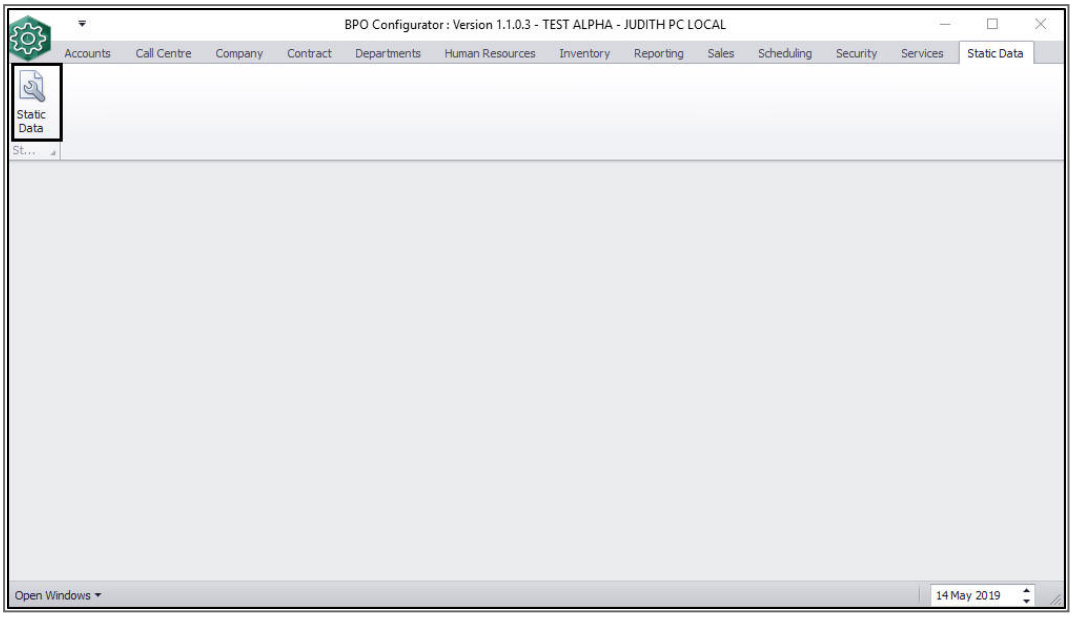
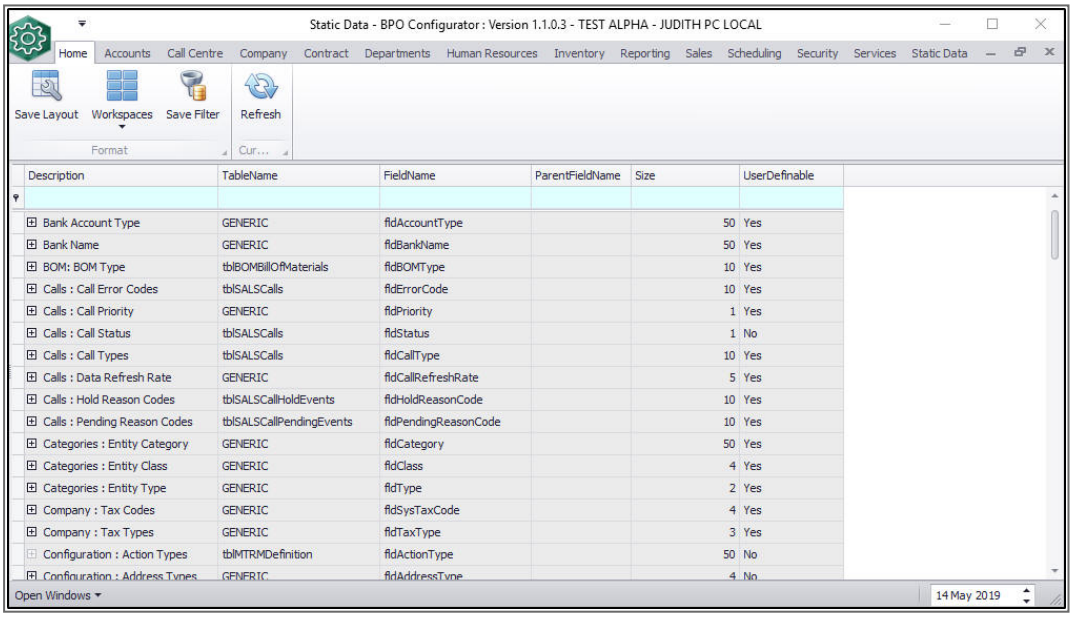
CRM GENERAL SETTINGS IN CONFIGURATOR



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



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

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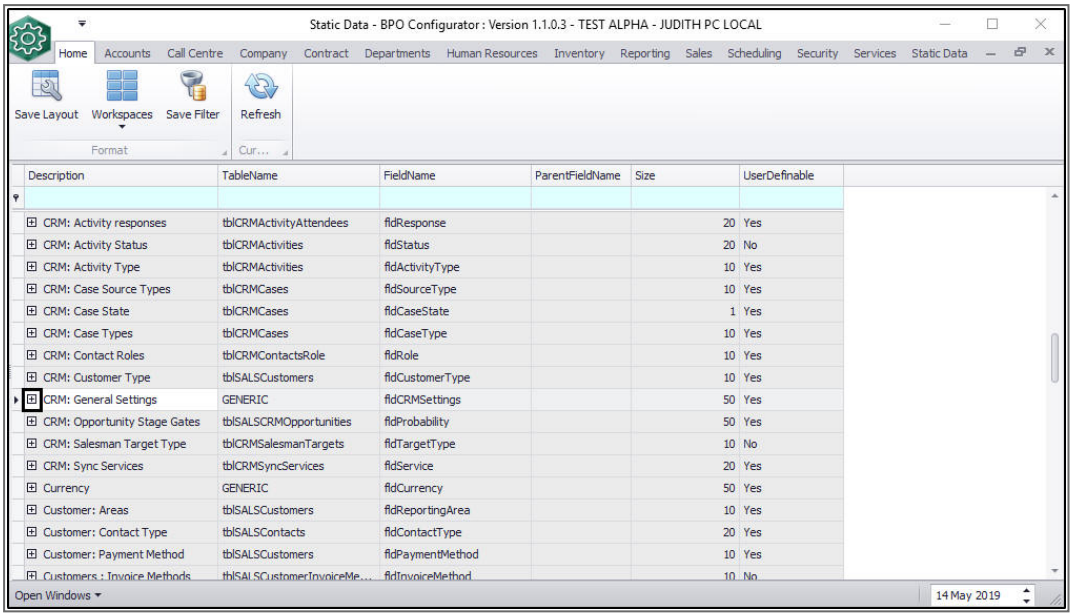
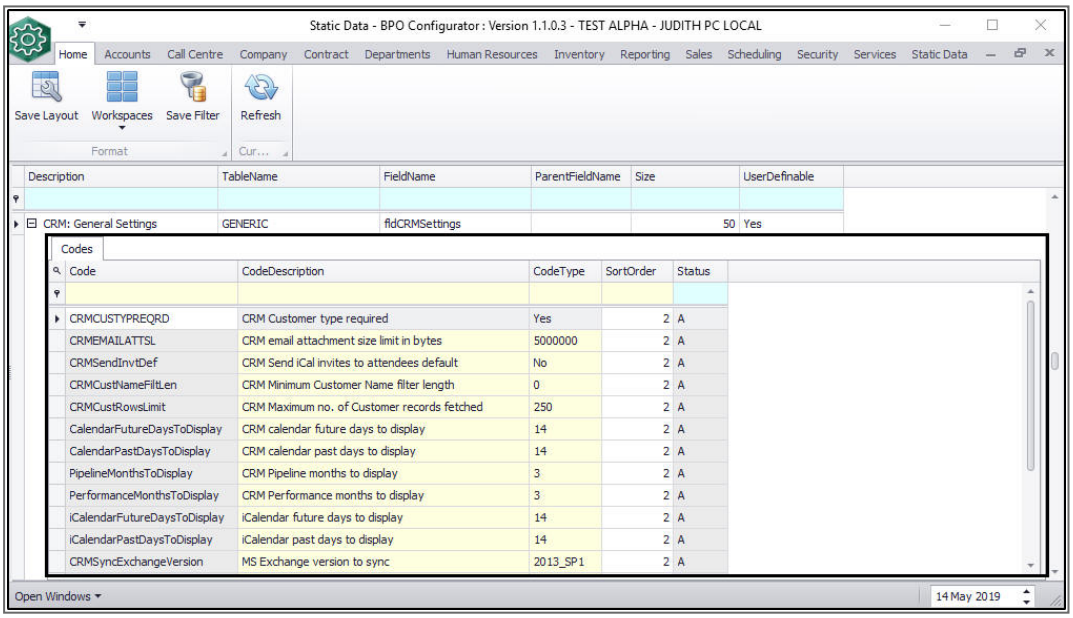
- Click on the **Expand** button in front of **CRM: General Settings**.



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



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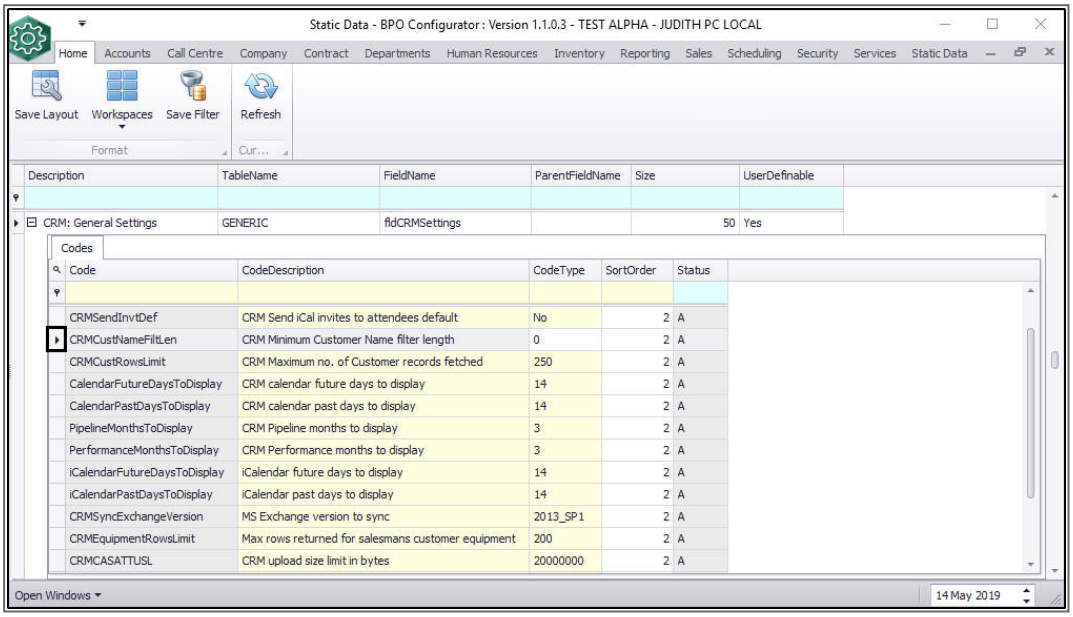
EDITING CRM GENERAL SETTINGS IN STATIC DATA

- 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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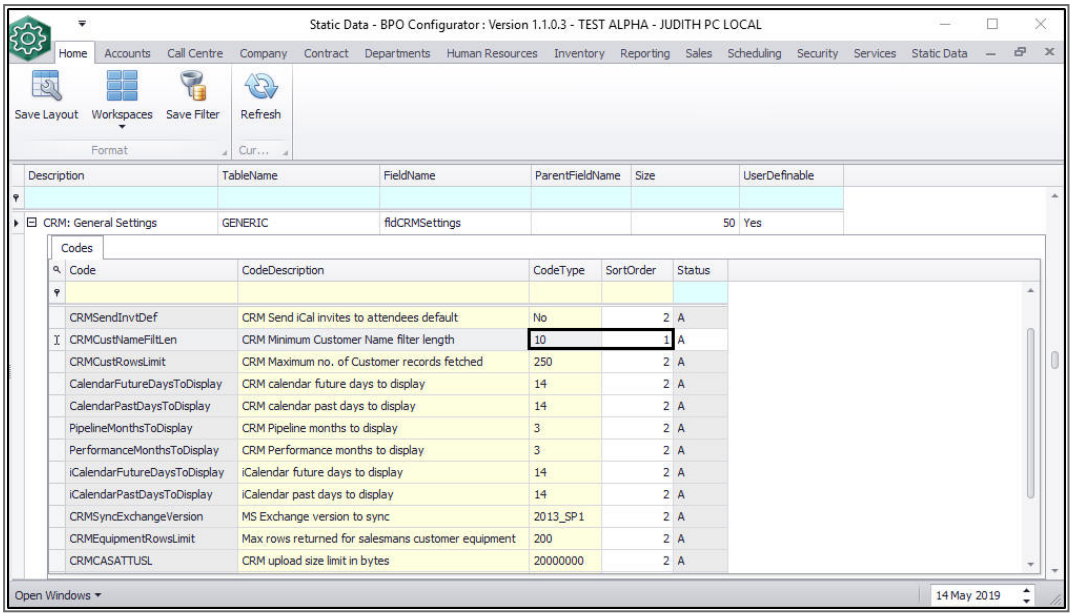
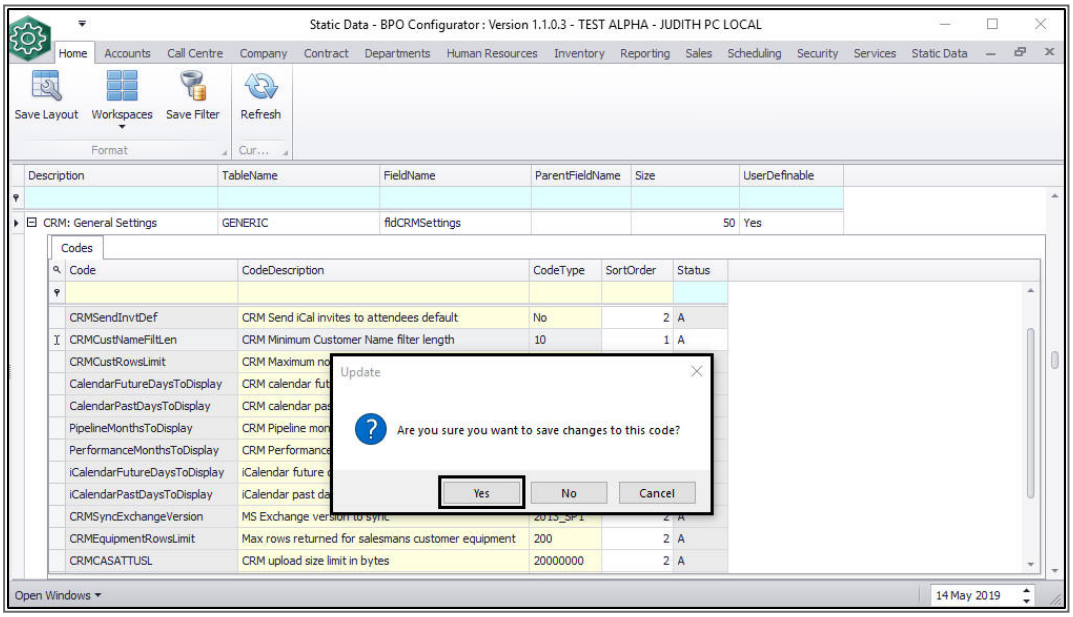


- Click away from the text boxes.
- An **Update** message will pop up asking you;
    - **Are you sure you want to save changes to this code?**
- Click on **Yes**.



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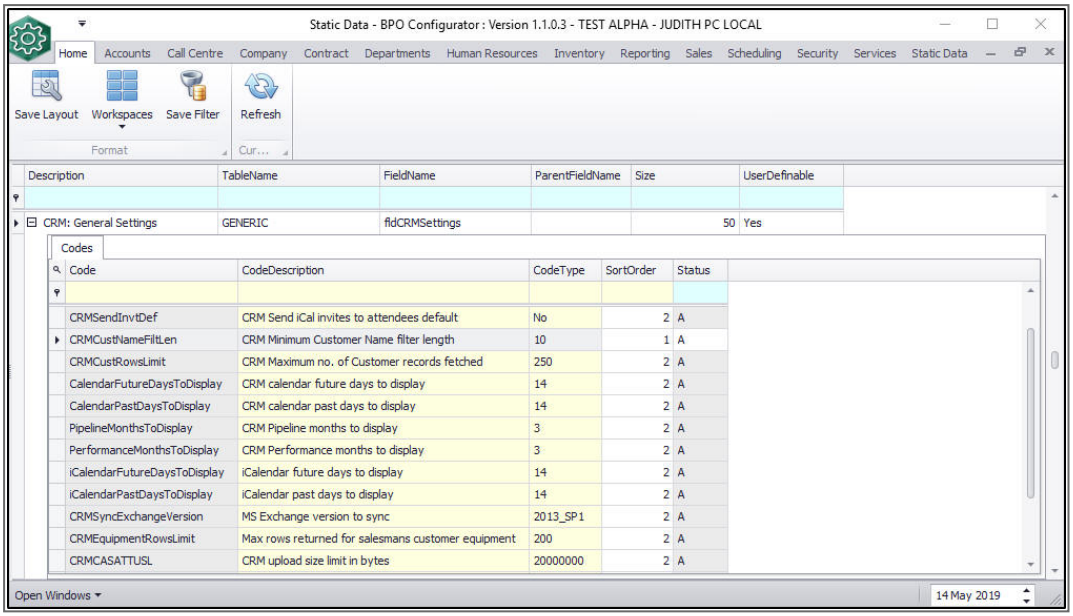
- The message box will be closed and details will be updated.



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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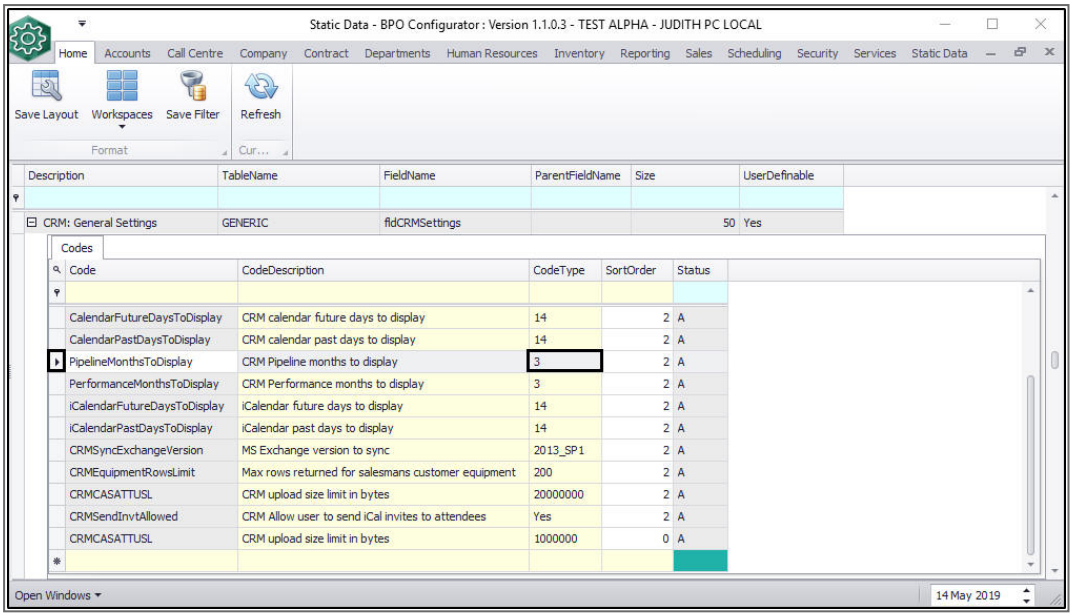
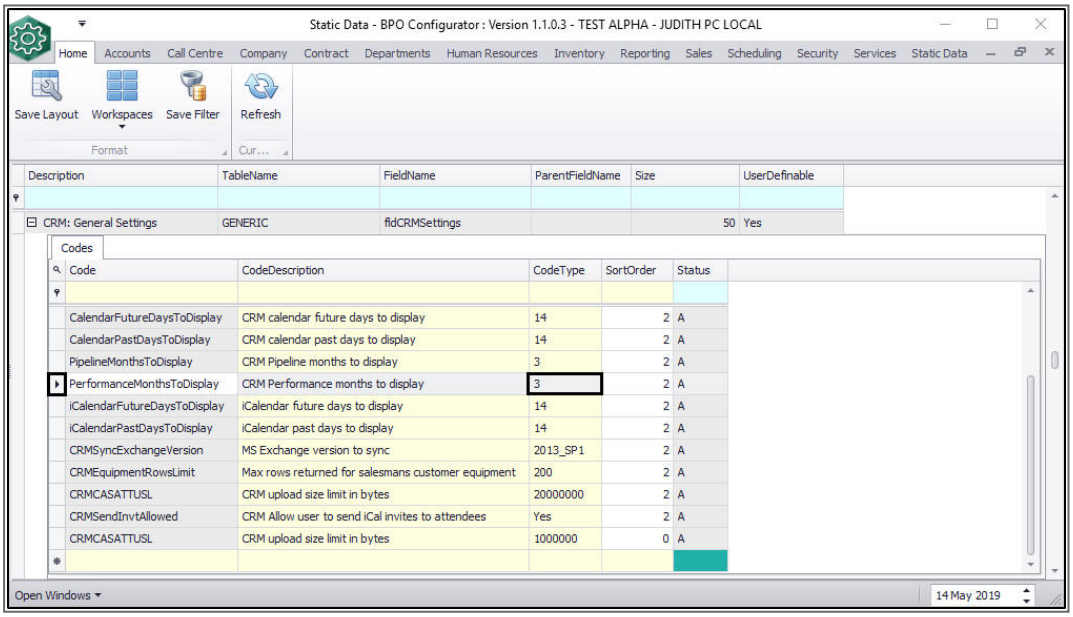


CONFIGURE PERFORMANCE IN MONTHS

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



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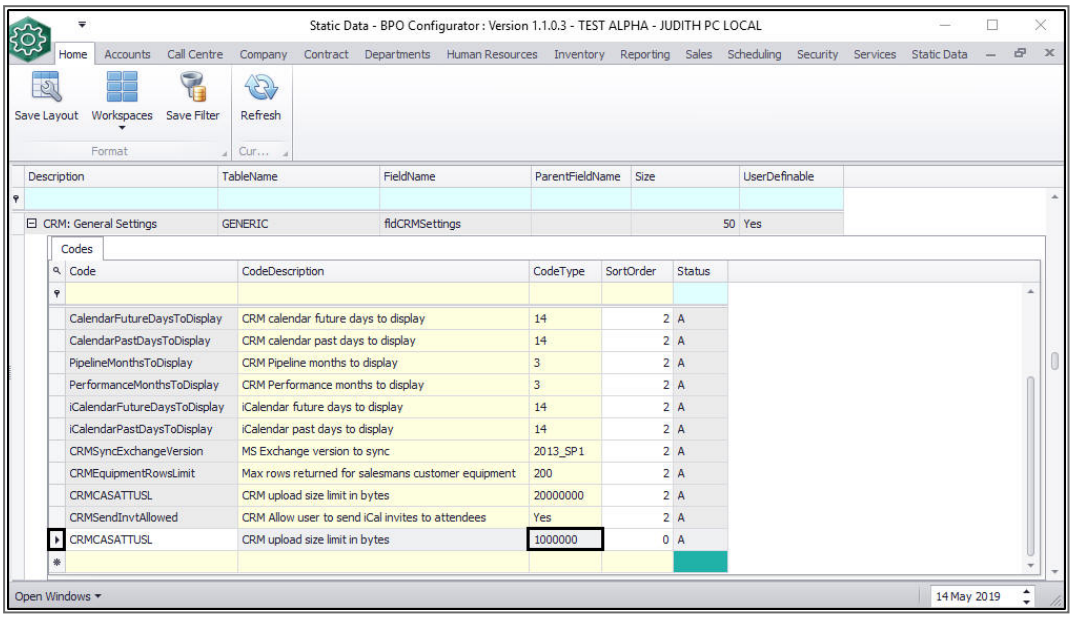
CASE DOCUMENT UPLOAD SIZE LIMIT

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



EMAIL ATTACHMENT SIZE LIMIT

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

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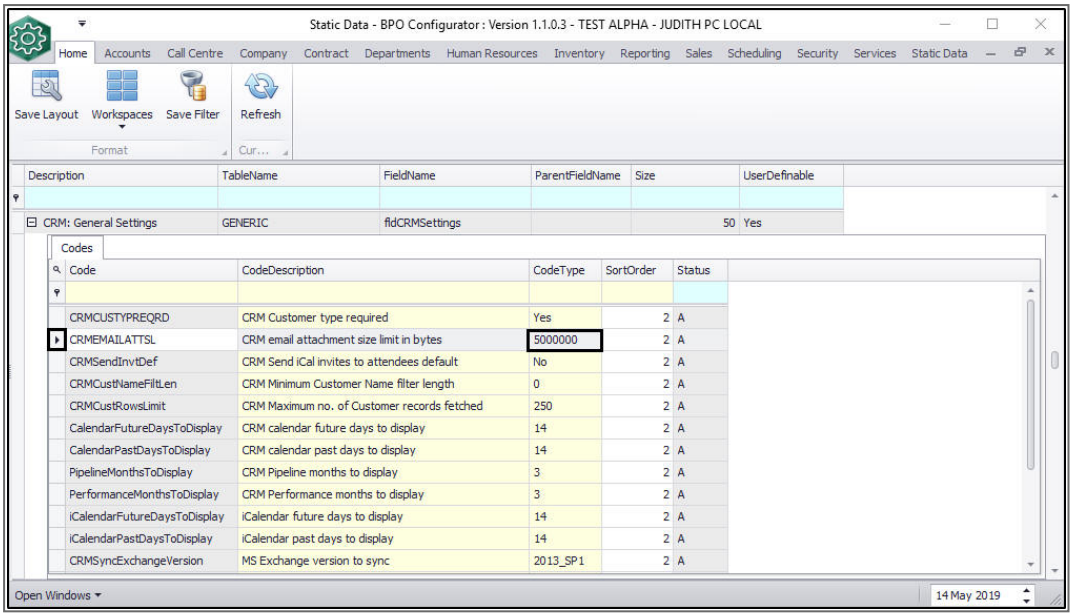
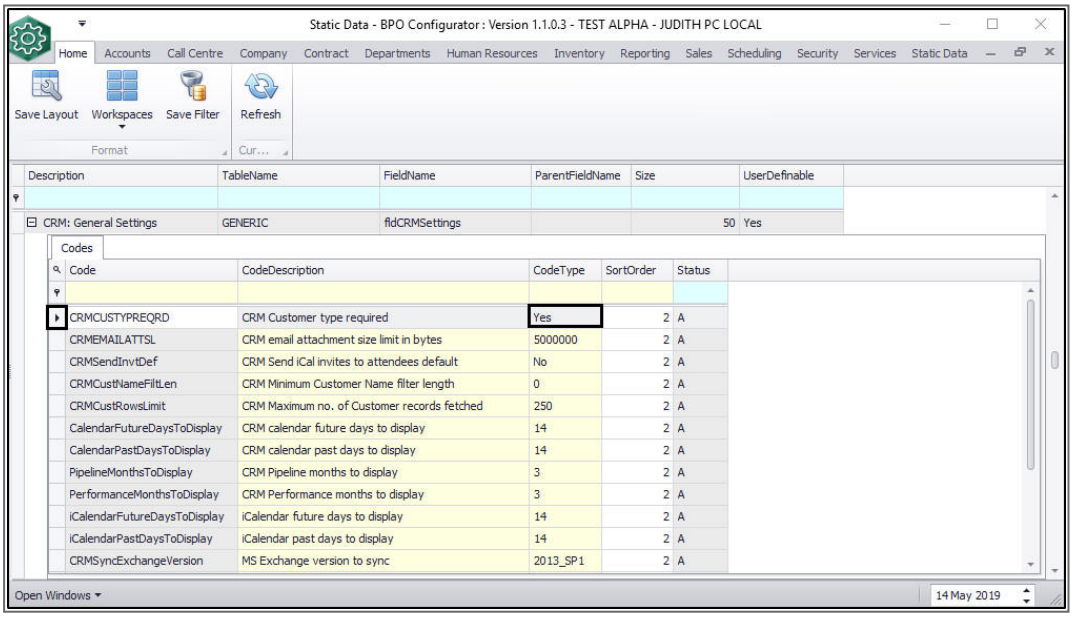


ENFORCE CUSTOMER TYPE REQUIRED

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



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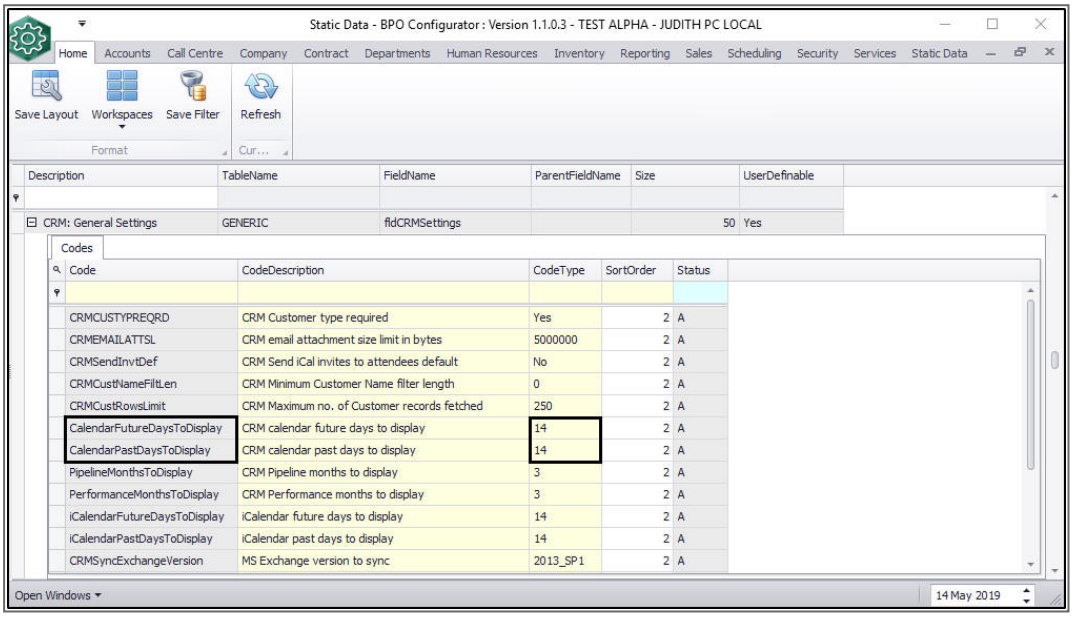
SET PAST AND FUTURE DAYS TO DISPLAY IN CRM CALENDAR

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



SET PAST AND FUTURE DAYS TO DISPLAY IN ICAL CALENDAR

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

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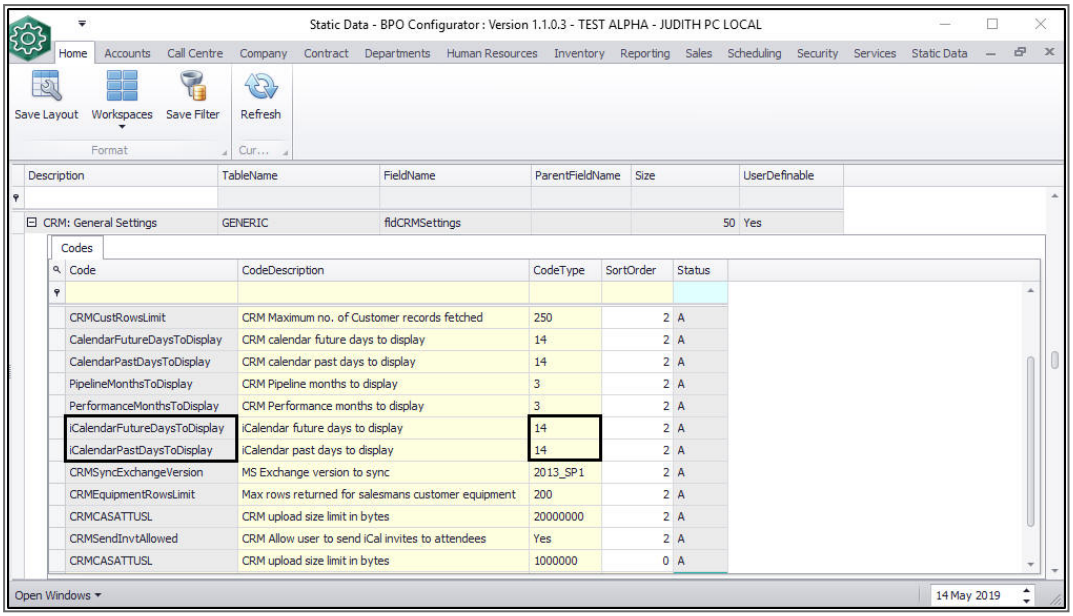
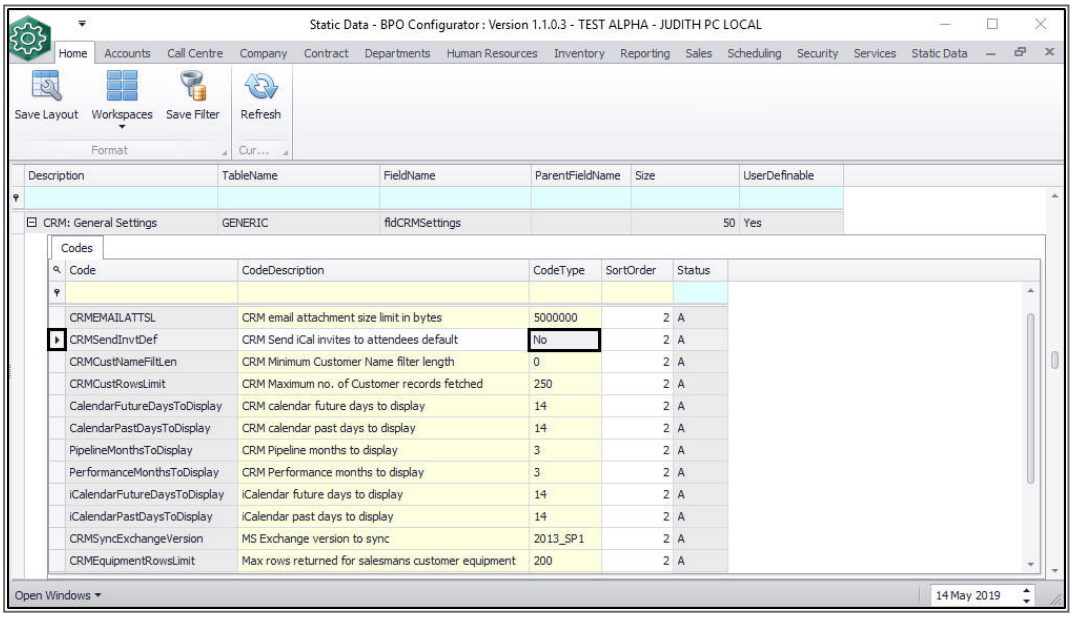


SEND ACTIVITY INVITES TO ATTENDEES CHECK BOX DEFAULT

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



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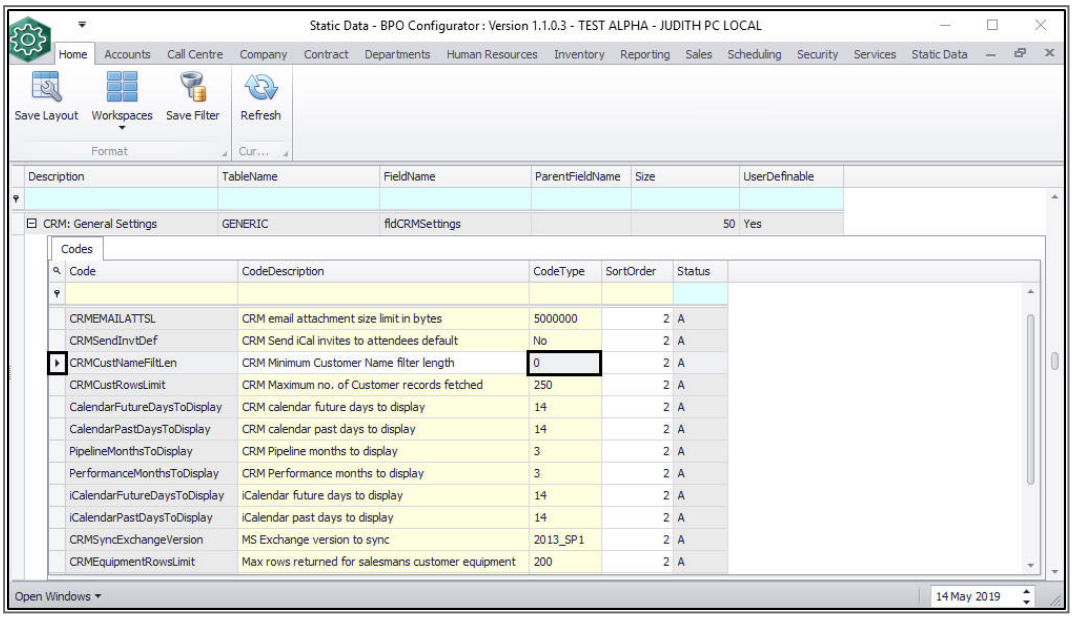
MINIMUM CUSTOMER NAME FILTER LENGTH

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



MAXIMUM NUMBER OF CUSTOMER RECORDS TO FETCH

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

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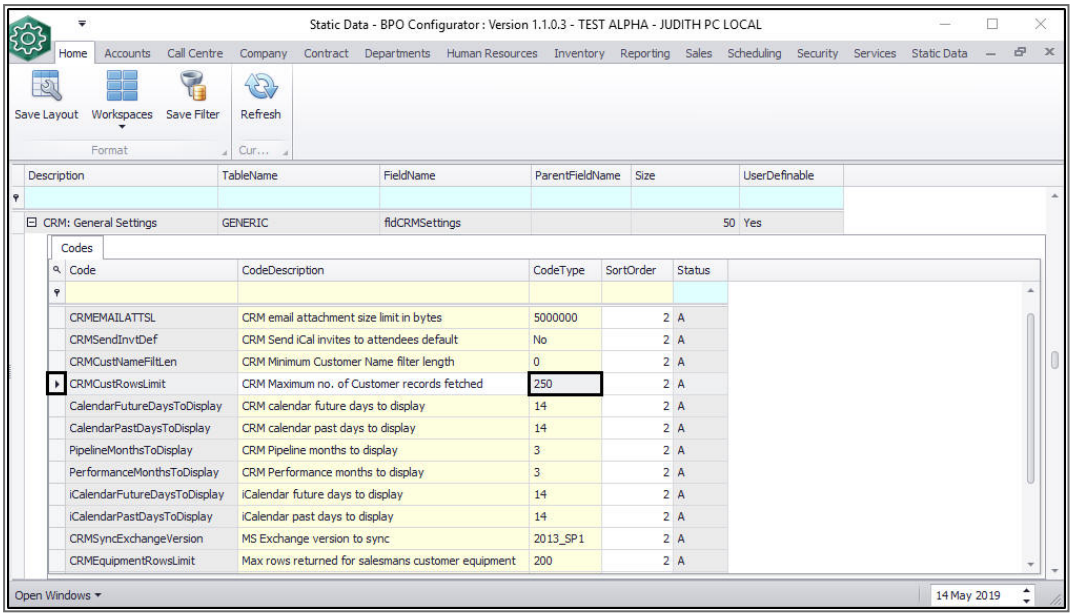

CRM.000.020

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