Configurable Lists

Settings · https://mriacrm.com/docs/configurable-lists/

The lists behind your dropdowns

Six value lists that Deals, Companies and Products choose from are managed in Settings, each on its own tab. They all work the same way, so you learn it once. Each tab opens with a line saying what its list is for.

List	Where	Used by	Starts with
Deal Types	Settings → Deals → Types	The Deal type field on every Deal, its filter, and deal reports.	New business, Cross-sell, Upsell, Renewal, Resell, Partnership, Lost recovery
Reasons for Loss	Settings → Deals → Reasons for Loss	The reason asked for when a Deal is closed Lost, the Lost Deals by Period report and the dashboards' loss reasons.	No budget, Chose competitor, Product fit issue, Timing not right, No decision, No response, Other
Company Size	Settings → Companies → Company Size	The Company size field on Companies.	1-10, 11-50, 51-200, 201-500, 501-1000, 1001-5000, 5001-10000, 10001+
Industries	Settings → Companies → Industries	The Industry field on Companies, the Companies by Industry dashboard widget and the Companies import.	Education, Finance, Government, Healthcare, Manufacturing, Non-profit, Other, Retail, Services, Technology
Product Categories	Settings → Products → Categories	The Category of every Product.	General — a system category that can't be deleted

List	Where	Used by	Starts with
Unit Types	Settings → Products → Unit types	The unit a Product is priced in.	Day, Hour, License, Month, Piece, Project, Service, Session, User, Year

1. Editing a list

- **+ Add** a value at the top right. Names must be unique, ignoring case and surrounding spaces — *new business* next to *New business* reads *Already exists*.
- Rename a value by editing it in place. Records keep their value and show the new name straight away — nothing needs re-importing.
- The middle column counts the records using each value.
- Changes are staged: nothing applies until you click **Save**, and **Cancel** drops them.
- **Deal Types** and **Reasons for Loss** can be dragged into order — dropdowns list them in that order. The other lists are alphabetical.

Deleting a value

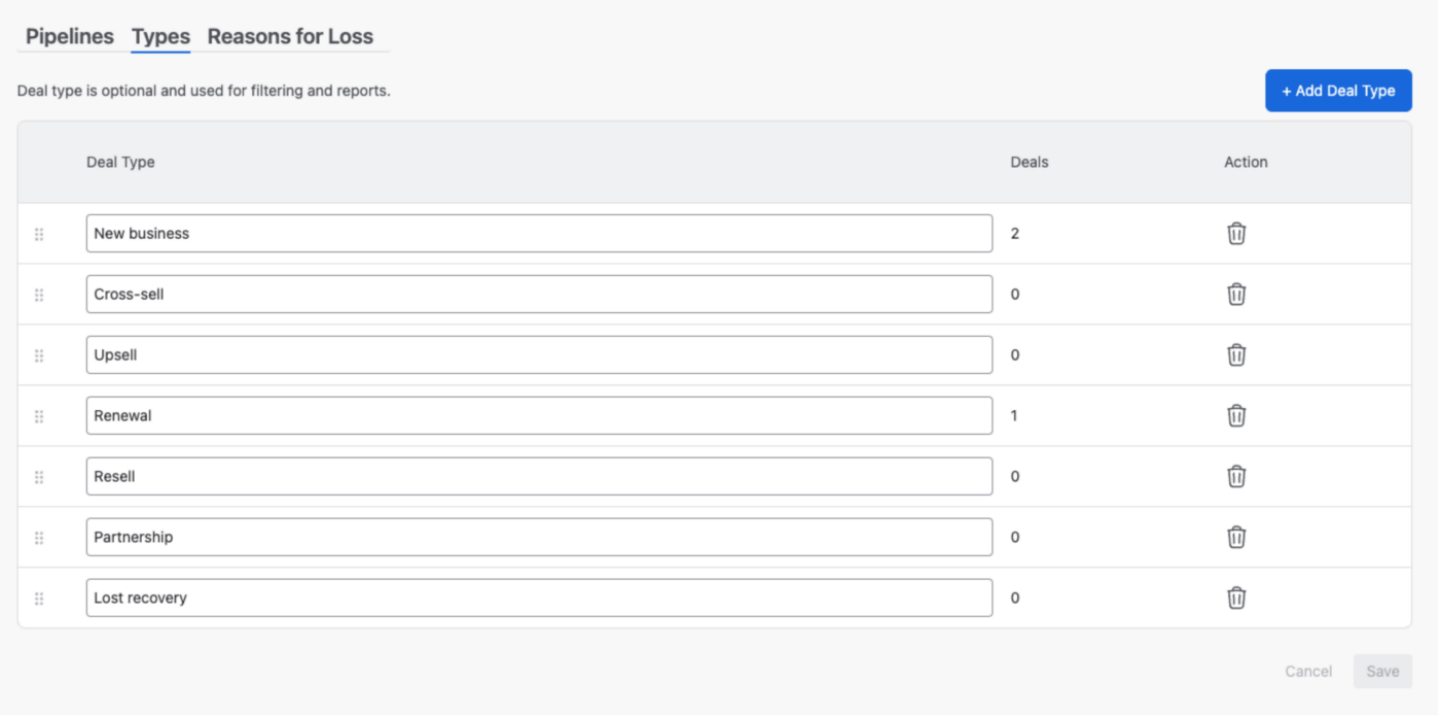
A value nobody uses is deleted after a confirmation. A value in use can't be: the dialog gives the count and the confirm button stays disabled until those records use something else.

> *Are you sure you want to delete the “New business” deal type? Used by 4 deals. Reassign them before deleting.*

Who may edit each list follows the Configuration row for Deals, Companies or Products in Roles & Permissions.

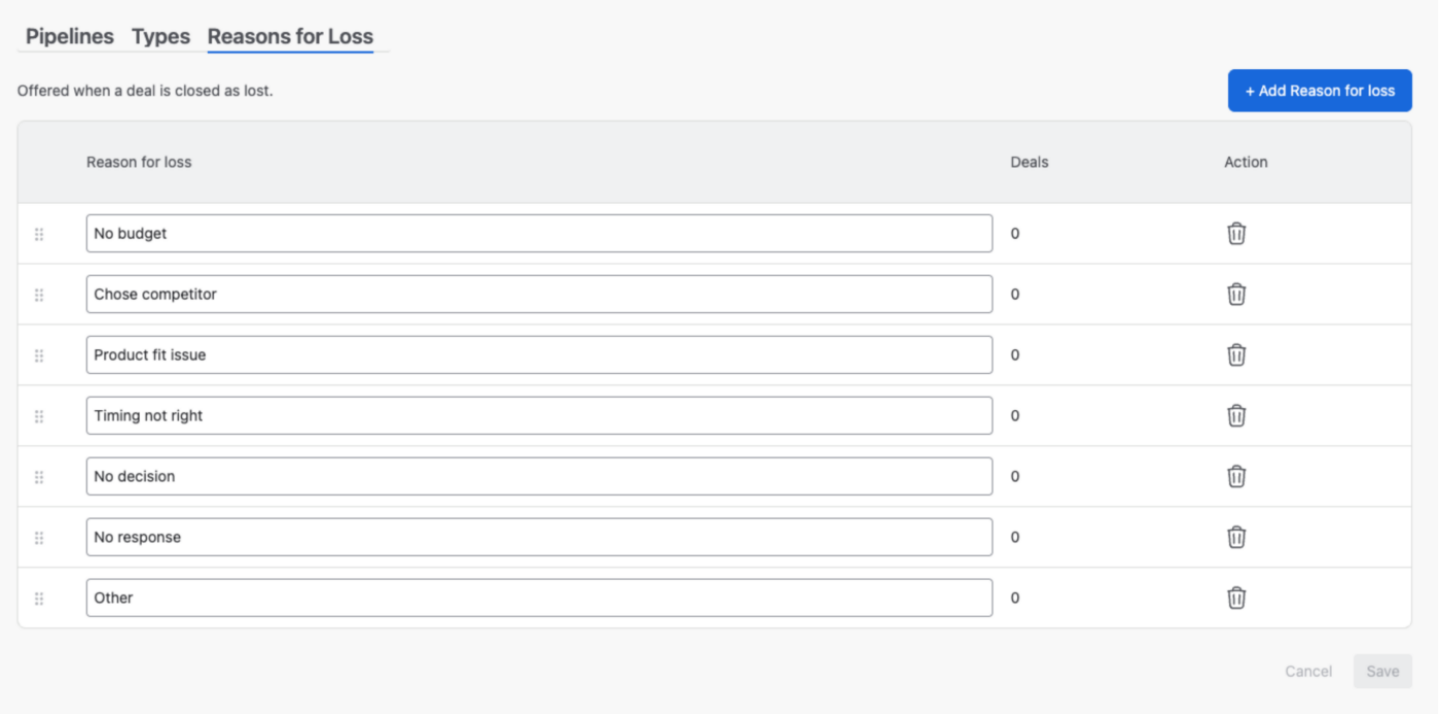
2. Deal Types

Settings → Deals → Types — The Deal type field on every Deal, its filter, and deal reports.



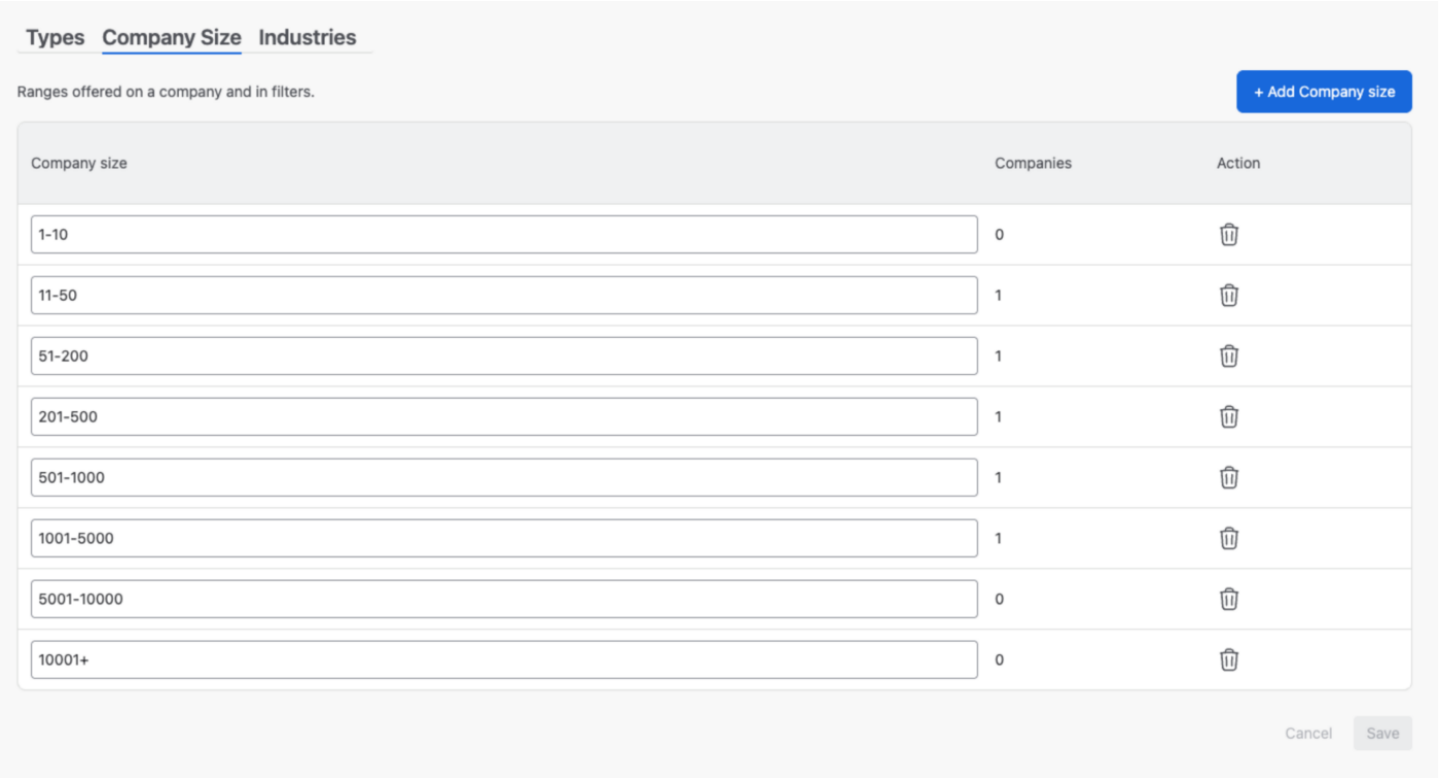
3. Reasons for Loss

Settings → Deals → Reasons for Loss — The reason asked for when a Deal is closed Lost, the Lost Deals by Period report and the dashboards' loss reasons.



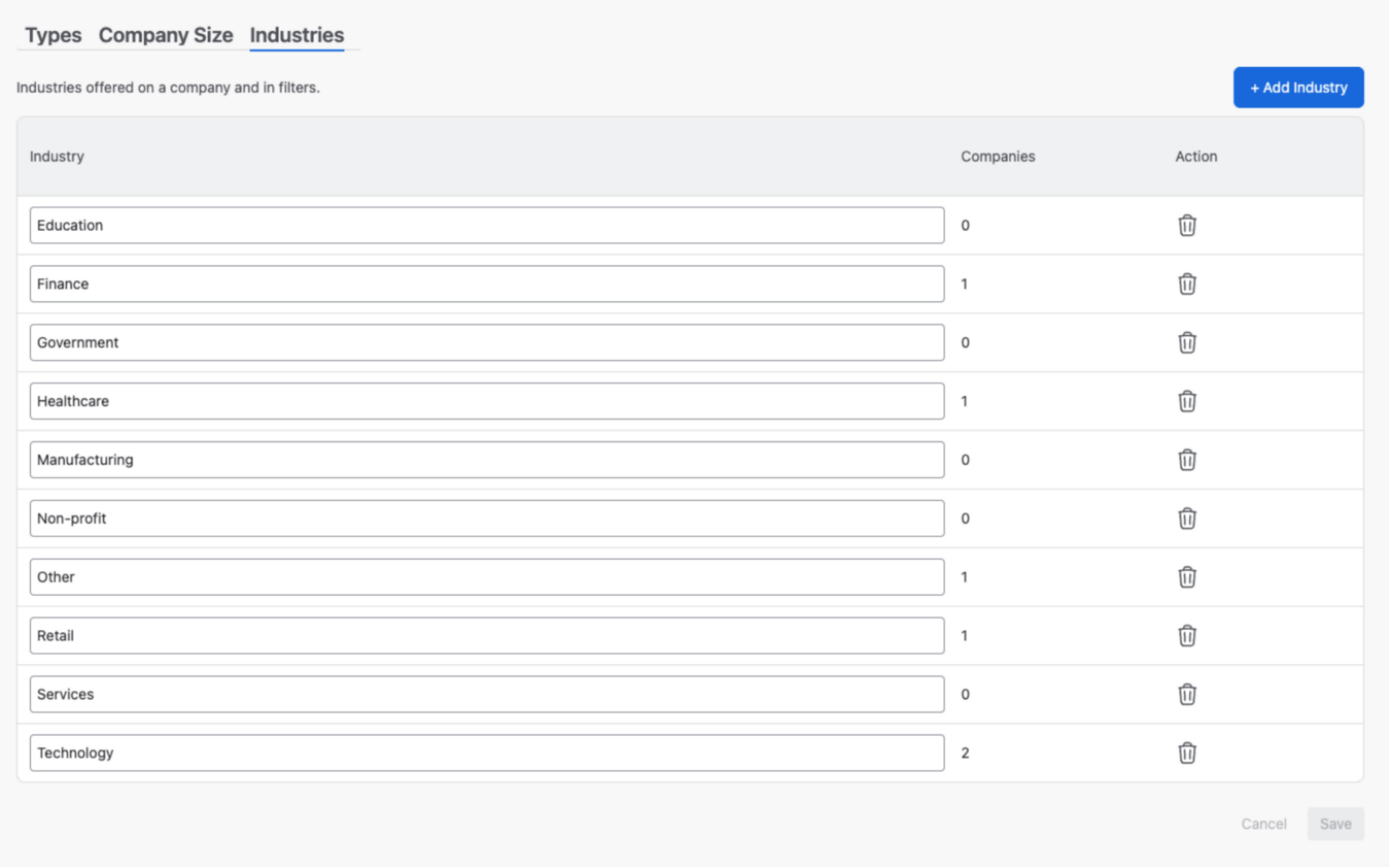
4. Company Size

Settings → Companies → Company Size — The Company size field on Companies.



5. Industries

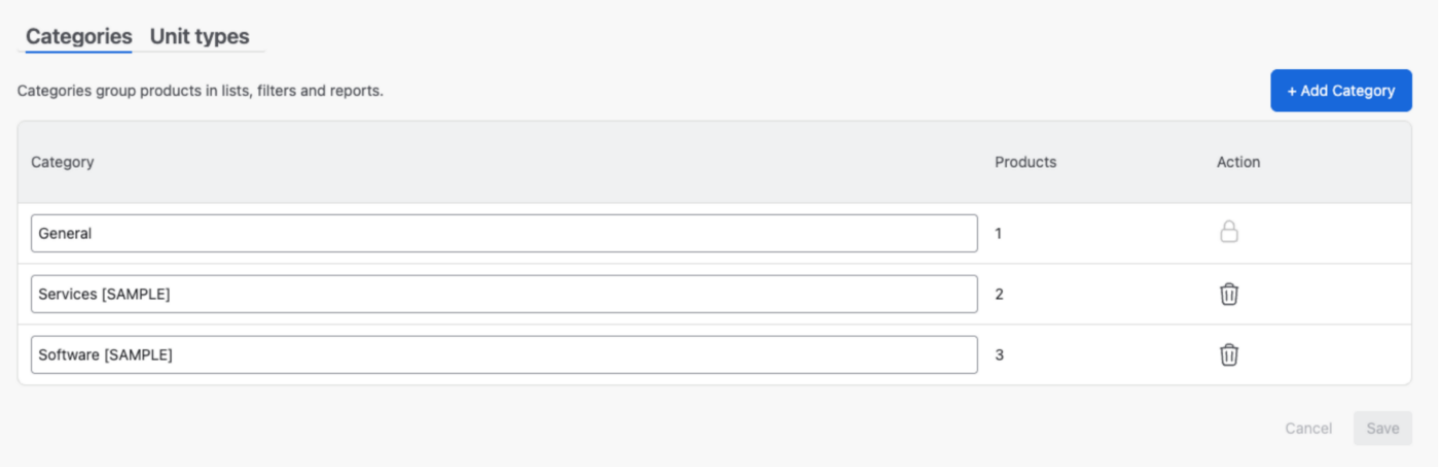
Settings → Companies → Industries — the Industry of every Company. Add the industries your customers are in — Telecommunications, say — and they can be picked on a Company at once, mapped to in the Companies import and counted by the Companies by Industry dashboard widget.



The list is alphabetical. An industry in use can't be deleted — the dialog names how many Companies carry it — so move them first: filter Companies by that industry and change it with **Edit fields** in bulk.

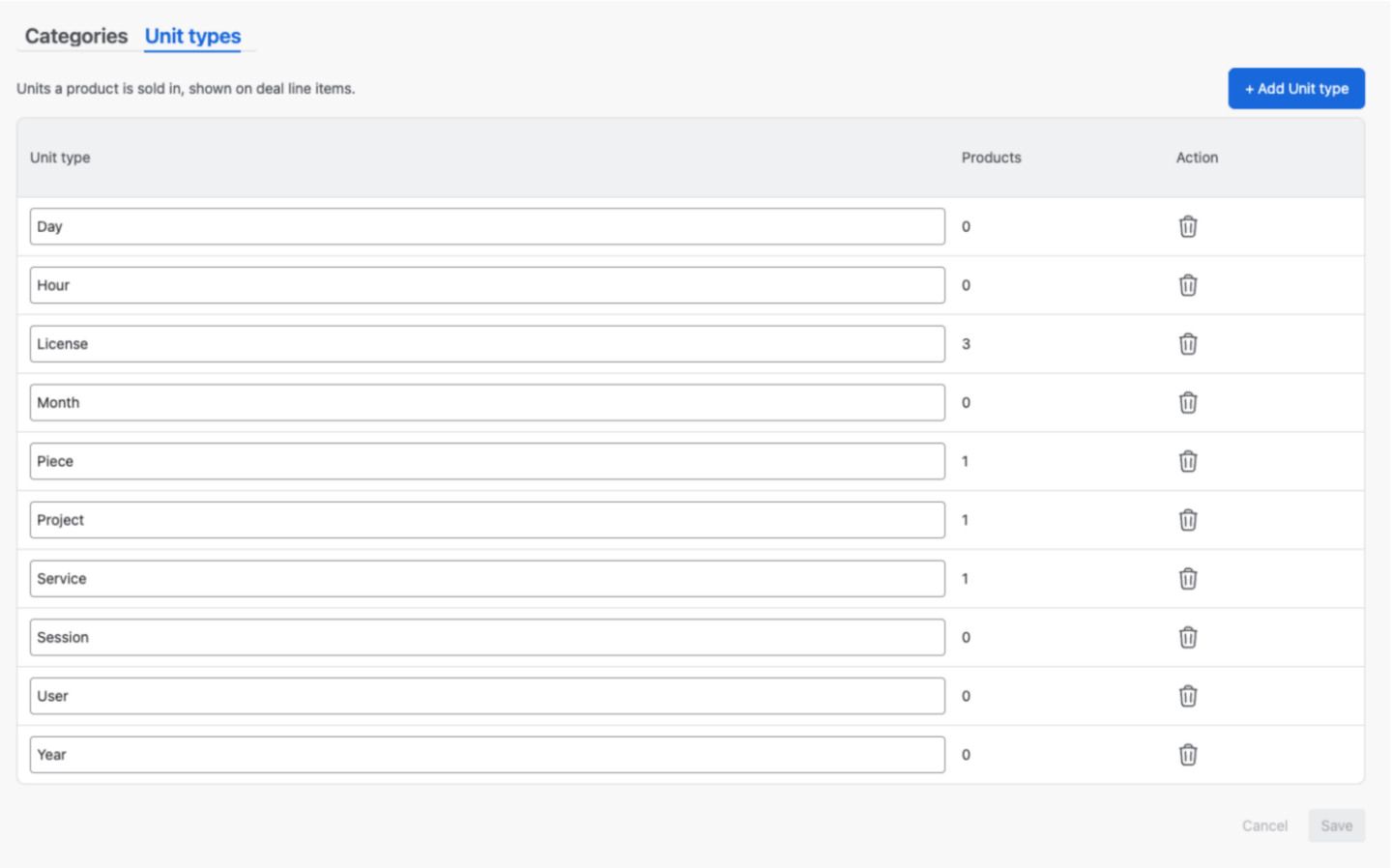
6. Product Categories

Settings → Products → Categories — The Category of every Product.



7. Unit Types

Settings → Products → Unit types — The unit a Product is priced in.



Company and Contact types

The Types tabs next to these lists follow the same rules, and every type — Customer and Other included — can be renamed or deleted. See Company & Contact Types.

Related Pages

- Pipelines Configuration — the other half of Settings → Deals.
- Company & Contact Types — the Types tab next to Company Size.
- Products — categories and unit types on a Product.
- Deals — deal type and the reason for loss on a Deal.