Settings

Settings · https://mriacrm.com/docs/settings/

Settings is where administrators configure how the workspace behaves — roles and access, the pipelines and statuses records move through, the extra fields and tags available on them, reusable email templates, and importing or exporting data. It is reached from **Settings** at the bottom of the left navigation, and opens as a row of tabs.

Settings tab	What you configure there	Guide
General	Workspace-level preferences: the currency amounts are shown in, the date, time and number formats every user sees, and replays of the product overview and What's new.	General Settings
Roles & Permissions	Which roles exist, what each one may do, and who is assigned. Roles can be refreshed from Jira.	Roles & Permissions
Data Administration	Import and export records per module. All five entities are supported: Leads, Deals, Contacts, Companies and Products.	Data Administration
Deals	Pipelines and their stages, with probability and color per stage; the Types (deal types) and Reasons for Loss lists.	Pipelines Configuration · Configurable Lists
Leads	Lead statuses and lead sources, including which count as open or closed.	Leads Configuration
Contacts	The contact type list — names, descriptions, colors and order.	Company & Contact Types
Companies	The company type list, the Company Size list and the Industries list.	Company & Contact Types · Configurable Lists
Products	Product categories and unit types.	Configurable Lists

Settings tab	What you configure there	Guide
Custom Fields	Extra fields for Leads, Deals, Contacts, Companies and Products.	Custom Fields
Layouts	Which blocks and fields each record page shows, where, and in what order — per record type, and per pipeline for Deals.	Layouts
Tags	The tag vocabulary for each module, and how many records use each tag.	Tags Configuration
Email Templates	Reusable email bodies that can be inserted from any record, kept private or shared with the workspace.	Email Templates

Importing and exporting data

Importing and exporting live under the **Data Administration** tab, which keeps a history of past jobs with their status. Imports accept `.XLSX` and `.CSV`; exports are written as `.CSV`.

- Leads Import
- Deals Import
- Contacts Import
- Companies Import
- Products Import

All five entities can be imported. Each module also has an **Import** button on its own list page, which opens the same wizard.