

New entity creation

Apart for the possibility to synchronize events and to dos between Outlook calendar and the one of vtenext, there is also the possibility to create new vtenext entities from Outlook using the Webservices. In the screen LINK EMAIL, the button CREATE AND LINK eases the creation of a new selected object, by proposing the field to fill and if they are mandatory. The values of the lists are recovered in real time by the plugin through a query to vtenext.

Add Email [X]

vtenext

Module Records | Edit Message

Select Module: Accounts [v] [Select Field] [Create new and Link]

Search records in VTENEXT

[james.smith@abcd.com] [Search in VTENEXT] [Recover from clients]

Select record to associate Email(s)

[Select Attachments] [Attach] [Cancel]

The new entity creation screen is set to contain all the information needed to save the record and link the email that generated it.

In the example illustrated below are contained all the information necessary to create a Trouble Ticket in vtenext by maintaining the relation with the email that generated it.

Create Accounts

*Account Name

Phone

Member Of

...

Phone (other)

Employees

Email

Shipping Postal Code

Shipping City

Rating

▼

Type

▼

Billing Country

Description

VAT Registration Number

Shipping Country

External Code

Website

Fax

Billing State

Shipping State

Billing Postal Code

email (other)

Ownership

Industry

▼

Lock Automatic Emails

☐

Billing City

Annual Revenue

Bank Details

Social Security number

Shipping PO Box

Receive newsletter

☐

Save record

Cancel

Revision #5

Created 29 April 2019 14:23:09 by Admin

Updated 27 September 2019 10:28:01 by Admin