17 vtenext customization: advanced settings

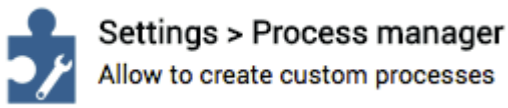
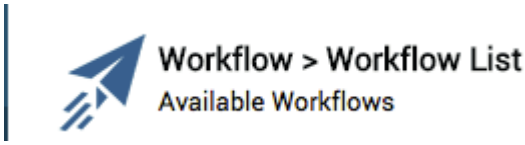
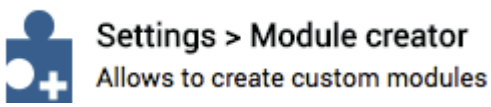
Customisation features are very important because they guarantee the use of vtenext for a wide range of business processes. It is possible to design the data structure for the vtenext modules via easy-to-use web interfaces: for example, it will be you who will define the structure of your Leads, Contacts and Accounts archives or Trouble Ticket information.

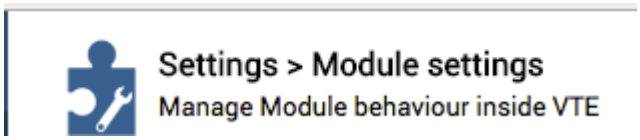
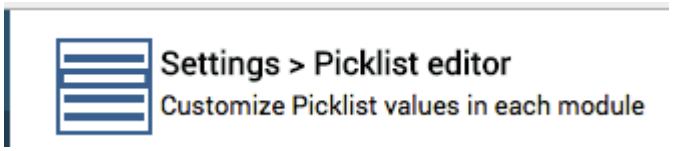
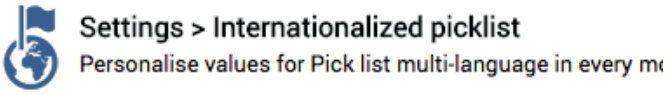
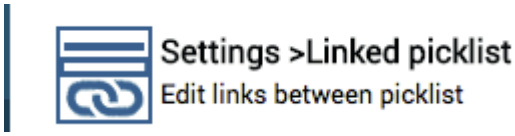
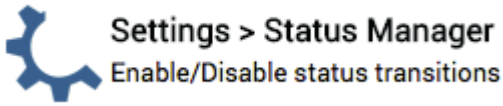
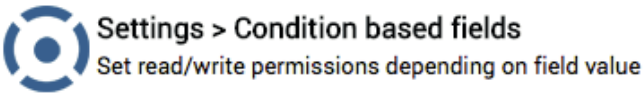
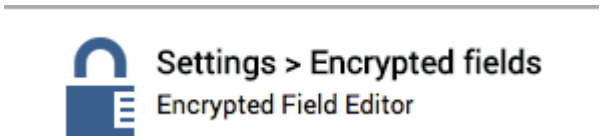
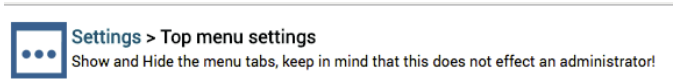
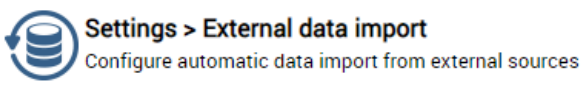
The standard set-up of vtenext presents a wide range of modules that can be subsequently readapted to the needs of specific cases: you can add fields of any kind (text, number, percentage, etc.), compile drop-down menus with values decided by you, set conditions for a greater or lesser restrictive access to fields, set automatic action-reaction mechanisms, and much more.

We recommend that you customise your CRM by following these steps:

- Customise the layout of the modules according to the content you need to load (see Layout Editor);
- Define the lists using the Filters tool (please refer to it for further details) taking into account the custom fields introduced;
- Define (or redefine, if necessary) the access and security privileges of each user, also in the individual field (see Sharing Access, Roles and other tools involved);
- Introduce additional customisations (using the tools listed in this chapter), for example view colouring or workflows.

The tools to customise vtenext can be found in the Business Process Manager section of the General Settings menu:

	Generates the processes that autonomously manage the data flow within the CRM
	Generates automatic actions in the CRM when predefined conditions occur (trigger > action)
	Generates new wizards, which allow the creation and management of records, belonging to different modules and their relationships.
	Generates new modules, manages their content and relationships with other modules, with advanced SDK editing capabilities.

	Accesses the settings of all modules (including extra modules) to enable/disable them and change their layout
	Customises drop-down menus, to add, delete or overwrite values, change their order and visibility by roles
	Manages multi-language drop-down menus
	Creates dependencies between drop-down menus: the choice in the second menu depends on the choice in the first menu
	Management of status changes of CRM items according to constraints and pre-defined authorisations on roles
	Controls the behaviour of fields (visibility, modification, etc.) on the basis of certain conditions
	Protects the values assumed in the fields
	Selects and orders the modules shown in the main navigation menu
	Assigns a colour to the data, based on the values of the picklist fields, which is displayed in the list view of the module, in the Kanban, in the related items and in the dashboards of the homepage. Warning! Only one picklist per module can be assigned to the colours.
	Reads one or more mailboxes and, when a condition occurs, activates automatic mail operations.
	Imports data from CSV files or databases with the option to schedule the process and create advanced queries for data extraction **Warning!** This function is not available in the cloud version.

Revision #1
Created 2022-05-25 17:25:35 UTC by Alberto
Updated 2022-06-06 12:30:15 UTC by Alberto