


17.5 Wizard Creator

The "Wizard Creator" function allows the administrator to create guided procedures (called wizards to be exact).

You can access this function through Settings > Wizard Creator; you can create your own custom wizard following 4 simple steps as you can see in the following screens.

 Settings > Wizard creator

1 Wizard information

2 Main module

3 Fields

4 Relations

Cancel

Next >

Choose the parent module and the wizard's name

Wizard's name

Create Ticket

Parent module


Contacts

Description

Example of Wizard for the creation of a fast ticket assistance

Choose a name for this wizard, for example: "Create Account"

Choose the starting module (optional)

 Settings > Wizard creator

1 Wizard information

2 Main module

3 Fields

4 Relations

Cancel


< Back

Next >

Module

Trouble Tickets

The module to create with this wizard

 Settings > Wizard creator

1 Wizard information

2 Main module

3 Fields

4 Relations

Cancel

< Back

Next >

Choose the fields for the wizard

Fields

☒ M

☒ Title

☒ A

☒ Assigned To

☒ N

☐ Priority

☐ D

☐ Severity

☒ A

☐ Category

☐ T

☐ Project

☒ O

☒ Description

☐ R

☐ Signature

☐ Y

☐ Due Date

☐ F

☐ Reset SLA

☐ I

☐ Mail To

☐ E

☐ Mail Bcc

☐ V

☐ Vtenext From Mail

☒ M

☐ Related To

☒ A

☐ Product Name

☒ N

☒ Status

☐ D

☐ Hours

☐ A

☐ Days

☐ T

☐ Project Task

☐ O

☐ Solution

☐ R

☐ SLA Estimated Time

☐ Y

☐ Due time (hh:mm)

☐ F

☐ Mail From

☐ I

☐ Mail Cc

☐ E

☐ Vtenext From Name

You will be able to view the created wizard at the end of the four steps.

1 Wizard information 2 Main module 3 Fields 4 Relations

Cancel < Back Save

Relations

Choose other linked modules

Documents
Services
Assets
Service Contracts

Once saved, the Wizard can be inserted into a tab in the view by list of a module. In the specific example, a Wizard has been set up for creating technical support tickets. You then go to the specific module and click on the page configuration.

Search...

APERTI - DA GESTIRE LISTA

+ Create Other

Filter Aperti - Da gestire Assigned To All

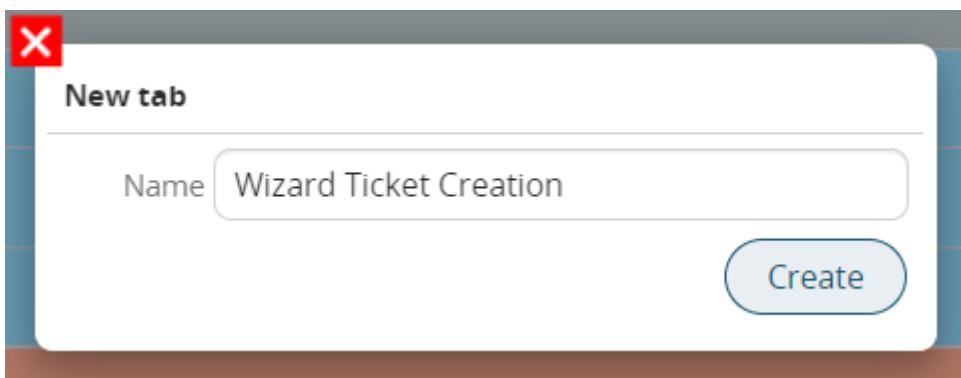
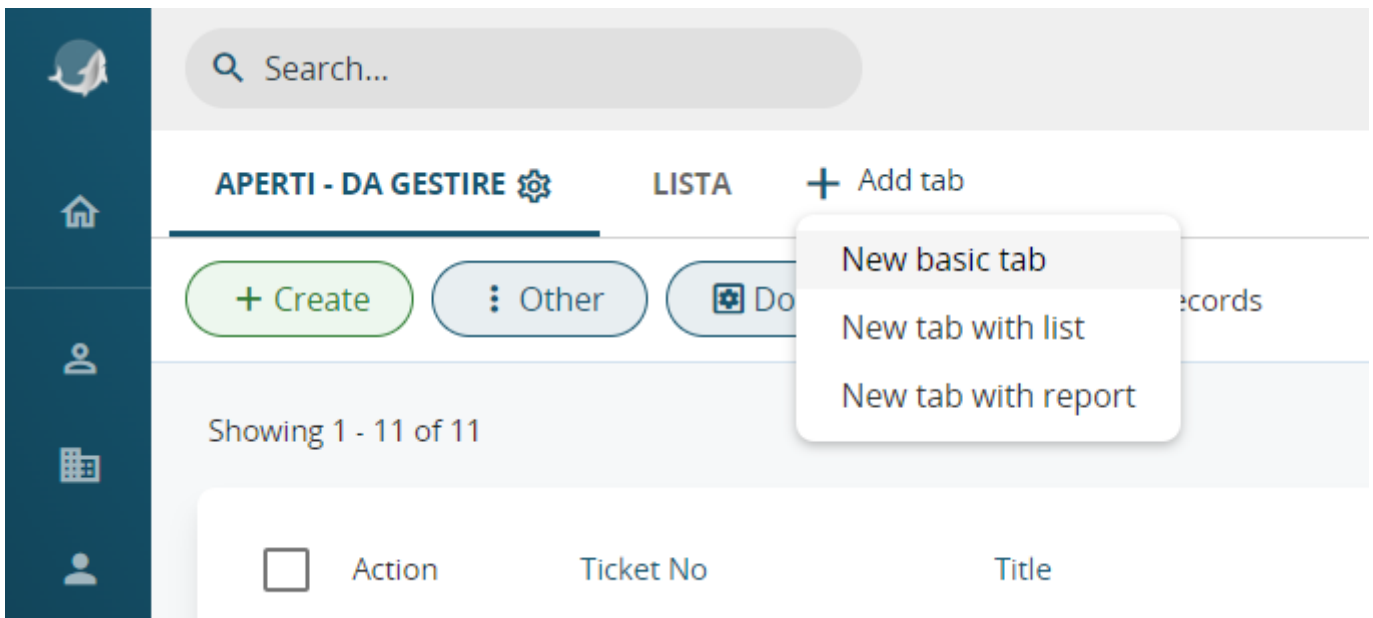
Showing 1 - 11 of 11

Configure page Advanced

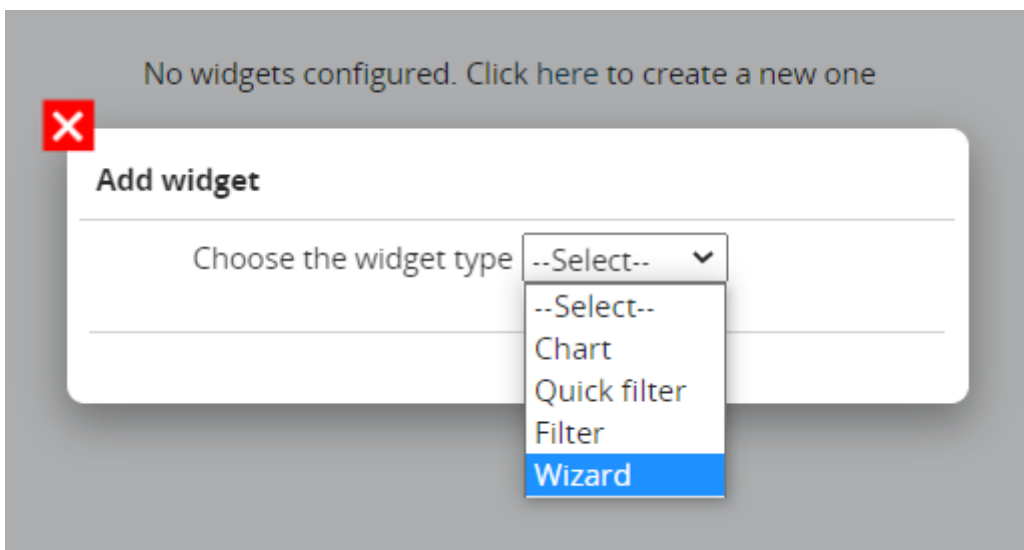
Action	Ticket No	Title	Status	Priority	Assigned To	Description
<input type="checkbox"/>	TT13	Ticket scalo ore	Closed	Low	rpwmhtkhenpbfqhssp@sdvft.com (Tony Stark...	
<input type="checkbox"/>	TT15	Test mail converter DEMO	Open		(Matteo Giarolo)	Test mail converter DEMO ...
<input type="checkbox"/>	TT14	Avviso di sicurezza critico	Open		(Matteo Giarolo)	[Image: Google] L'impostazione Accesso ...
<input type="checkbox"/>	TT9	Dati di registrazione ed accesso	Open	Low	rpwmhtkhenpbfqhssp@sdvft.com (Tony Stark...	Area Riservata www.vtecrm.com Gentil...
<input type="checkbox"/>	TT12	Software issue	Wait For Response		(Matteo Giarolo)	Software issue
<input type="checkbox"/>	TT1	Upload Attachment problem	Closed	Normal	(Matteo Giarolo)	
<input type="checkbox"/>	TT3	Export Output query	Wait For Response	Urgent	(Matteo Giarolo)	
<input type="checkbox"/>	TT2	Individual Customization -Menu and RSS	In Progress	High	(Matteo Giarolo)	
<input type="checkbox"/>	TT6	vtenext Accounts module - customisation	In Progress	Low	(Matteo Giarolo)	
<input type="checkbox"/>	TT4	vtenext - Import Error CSV Leads	Wait For Response	Normal	(Matteo Giarolo)	VTENEXT - Import Error CSV Leads During ...
<input type="checkbox"/>	TT5	How to automatically add a lead from a w...	Answered by customer	Normal	(Matteo Giarolo)	

Showing 1 - 11 of 11

Click on "New simple tab" and choose a name for this new view.



When you click the "Create" button, a blank page will appear with the following sentence: "No widgets configured. Click here to create a new one." This will allow us to choose the Wizard item from among the available options.



Once this is done, the CRM will ask us to choose the Wizard to display in the newly created tab.

No widgets configured. [Click here to create a new one](#)



Add widget

Choose the widget type Wizard ▾

Choose one or more wizards:

- Create ticket
- Create potential
- Create Ticket**

Save

By clicking on the "Save" button, we can obtain the result as shown below. Clearly, several Wizards and dashboards can be placed on the same page at the same time. This is to allow each user to choose how to configure their display.

Wizards



CREATE TICKET

Clicking on the "Create Ticket" button in the Wizard, a popup will appear, with the option of creating a ticket via a number of simple steps.

Wizard

1 Choose Lead

2 Choose Product Name

3 Choose Documents

4 Choose Assets

5 Fields Ticket

Leads

Accounts

Contacts

Filter

All

<<

<

Page 1

of 3

>

>>

Search in Leads

Lead No	Last Name	First Name	Company	Phone
LEA15	COSSTRAVEL	ALDE	Wallback - COSSTRAVEL S.p.A.	3463582373
LEA6	Davis	Jennifer	Vtecrm	(861) 252-2877
LEA17	DONATIELLES	BATTISTE	EffeEsse donatielles s.a.s.	292109719
LEA18	FANTASIA	MARIA	Poligrutte S.p.A.	3385473549
LEA24	GLEARMIN	ADRIAN	Pinnura s.r.l.	329248368
LEA14	GNATABEL	GUIDE	GNATABEL - PolimoRE s.n.c.	445362391

Choose Lead

Next >

VTENEXT 22.05

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Revision #2

Created 25 May 2022 17:25:36 by Alberto

Updated 8 June 2022 14:14:52