

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.

The Wizard Creator interface consists of four steps: 1. Wizard information, 2. Main module, 3. Fields, and 4. Relations. The screenshots show the following details:

- Step 1: Wizard information**
 - Wizard's name: Create Ticket
 - Parent module: Contacts
 - Description: Example of Wizard for the creation of a fast ticket assistance
- Step 2: Main module**
 - Module: Trouble Tickets
- Step 3: Fields**
 - Fields to be included in the wizard:

<input checked="" type="checkbox"/>	M	<input checked="" type="checkbox"/>	Title
<input checked="" type="checkbox"/>	A	<input checked="" type="checkbox"/>	Assigned To
<input checked="" type="checkbox"/>	N	<input type="checkbox"/>	Priority
<input type="checkbox"/>	D	<input type="checkbox"/>	Severity
<input checked="" type="checkbox"/>	A	<input type="checkbox"/>	Category
<input type="checkbox"/>	T	<input type="checkbox"/>	Project
<input checked="" type="checkbox"/>	O	<input checked="" type="checkbox"/>	Description
<input type="checkbox"/>	R	<input type="checkbox"/>	Signature
<input type="checkbox"/>	R	<input type="checkbox"/>	Due Date
<input type="checkbox"/>	Y	<input type="checkbox"/>	Reset SLA
<input type="checkbox"/>	F	<input type="checkbox"/>	Mail To
<input type="checkbox"/>	I	<input type="checkbox"/>	Mail Bcc
<input type="checkbox"/>	E	<input type="checkbox"/>	Vtenext From Mail

 - Fields to be excluded from the wizard:

<input checked="" type="checkbox"/>	M	<input type="checkbox"/>	Related To
<input checked="" type="checkbox"/>	A	<input type="checkbox"/>	Product Name
<input checked="" type="checkbox"/>	N	<input checked="" type="checkbox"/>	Status
<input type="checkbox"/>	D	<input type="checkbox"/>	Hours
<input type="checkbox"/>	A	<input type="checkbox"/>	Days
<input type="checkbox"/>	T	<input type="checkbox"/>	Project Task
<input type="checkbox"/>	O	<input type="checkbox"/>	Solution
<input type="checkbox"/>	R	<input type="checkbox"/>	SLA Estimated Time
<input type="checkbox"/>	Y	<input type="checkbox"/>	Due time (h:mm)
<input type="checkbox"/>	F	<input type="checkbox"/>	Mail From
<input type="checkbox"/>	I	<input type="checkbox"/>	Mail Cc
<input type="checkbox"/>	E	<input type="checkbox"/>	Vtenext From Name

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

Relations

- Documents
- Services
- Assets
- Service Contracts

Choose other linked modules

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.

APERTI - DA GESTIRE LISTA

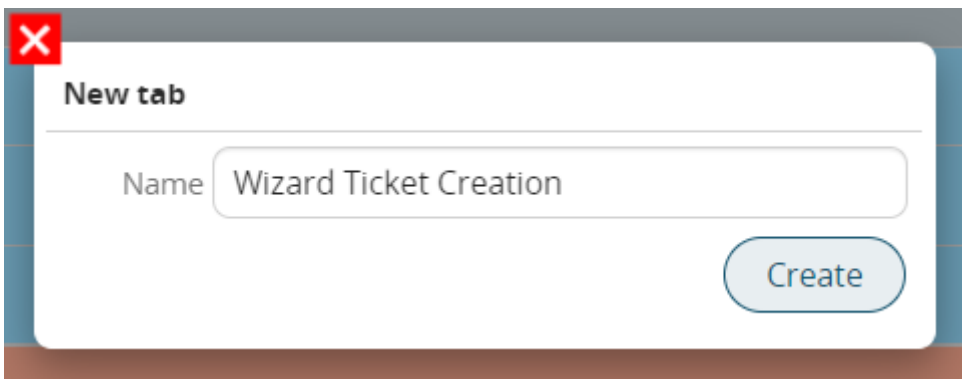
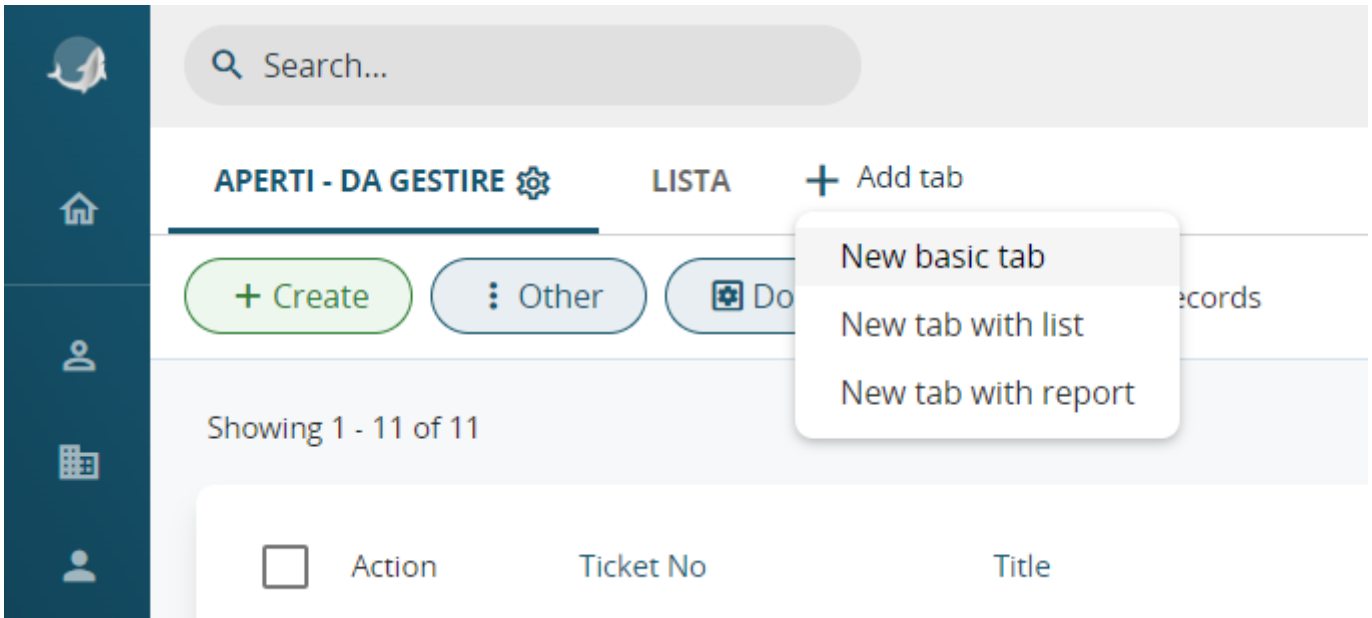
+ Create Other Filter Aperti - Da gestire Assigned To All

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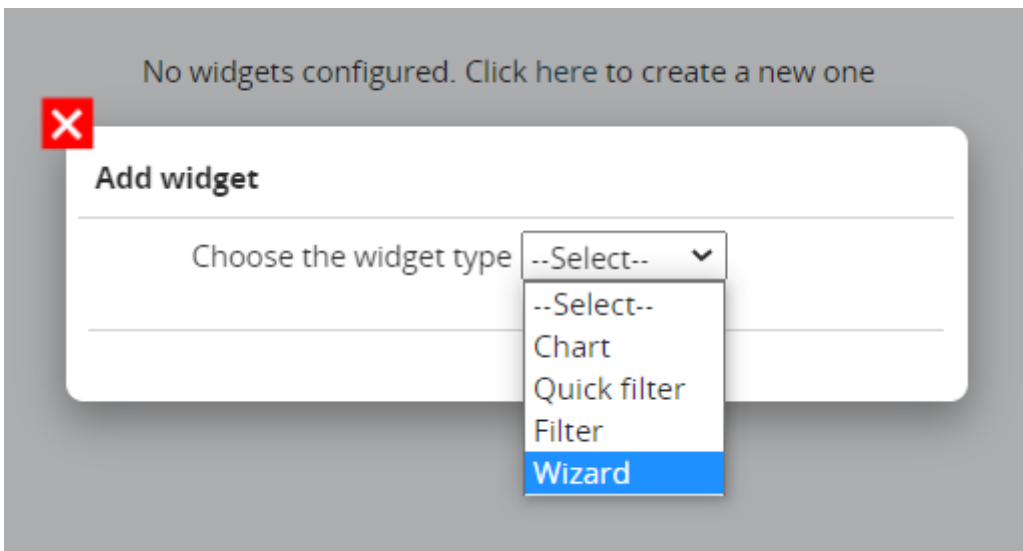
Action	Ticket No	Title	Status	Priority	Assigned To	Description
<input type="checkbox"/>	TT13	Ticket scalo ore	Closed	Low	rpmhktkhenpbfqhssp@sdfvt.com (Tony Stark...)	
<input type="checkbox"/>	TT15	Test mail converter DEMO	Open		(Matteo Giarolo)	Test mail converter DEMO ...
<input type="checkbox"/>	TT14	Avviso di sicurezza critico	Open		(Matteo Giarolo)	[Image: Google] L'impostazione Accesso ...
<input type="checkbox"/>	TT9	Dati di registrazione ed accesso	Open	Low	rpmhktkhenpbfqhssp@sdfvt.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	vtensex Accounts module - customisation	In Progress	Low	(Matteo Giarolo)	
<input type="checkbox"/>	TT4	vtensex - 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)	

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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

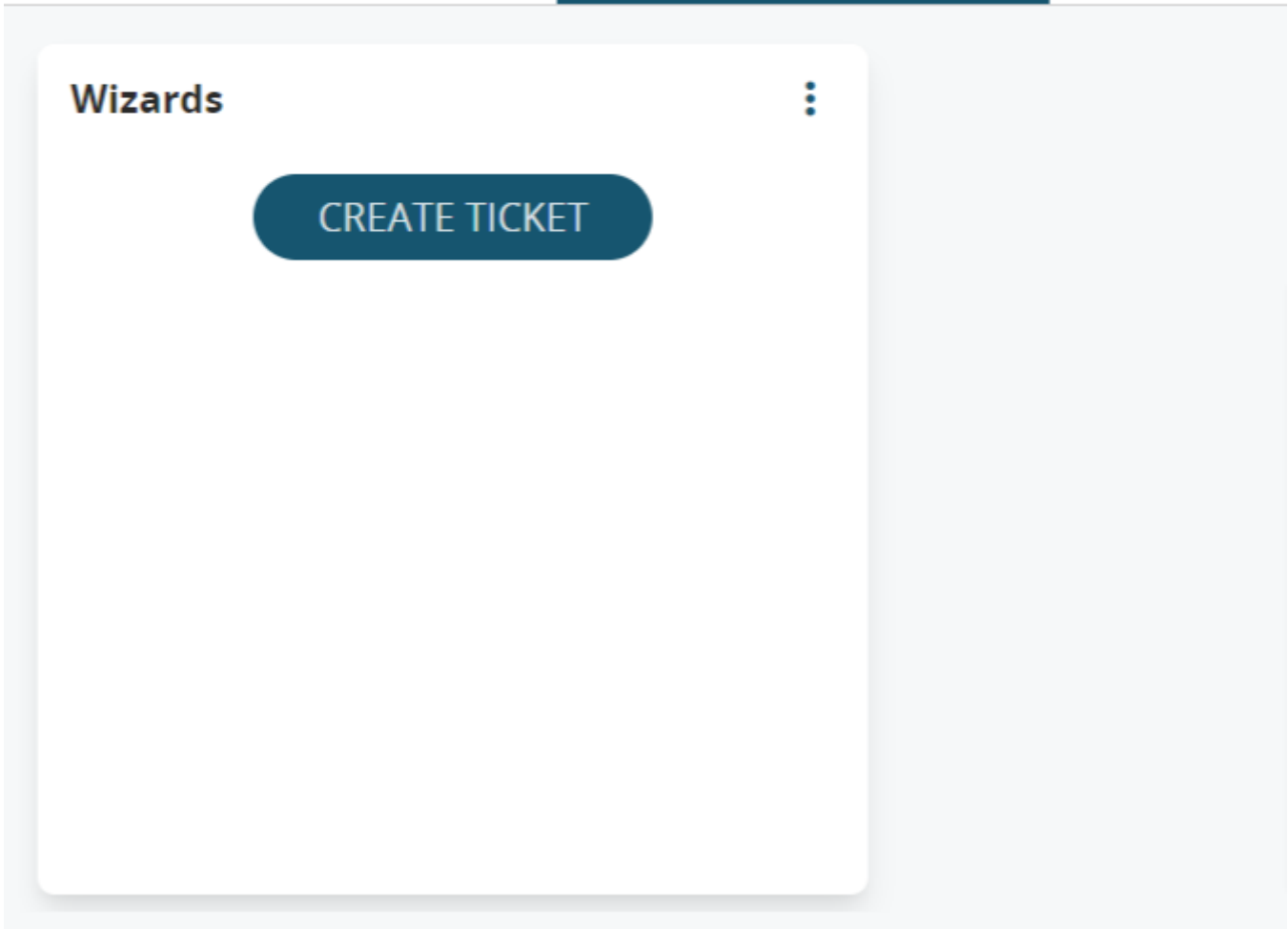
Choose the widget type

Choose one or more wizards:

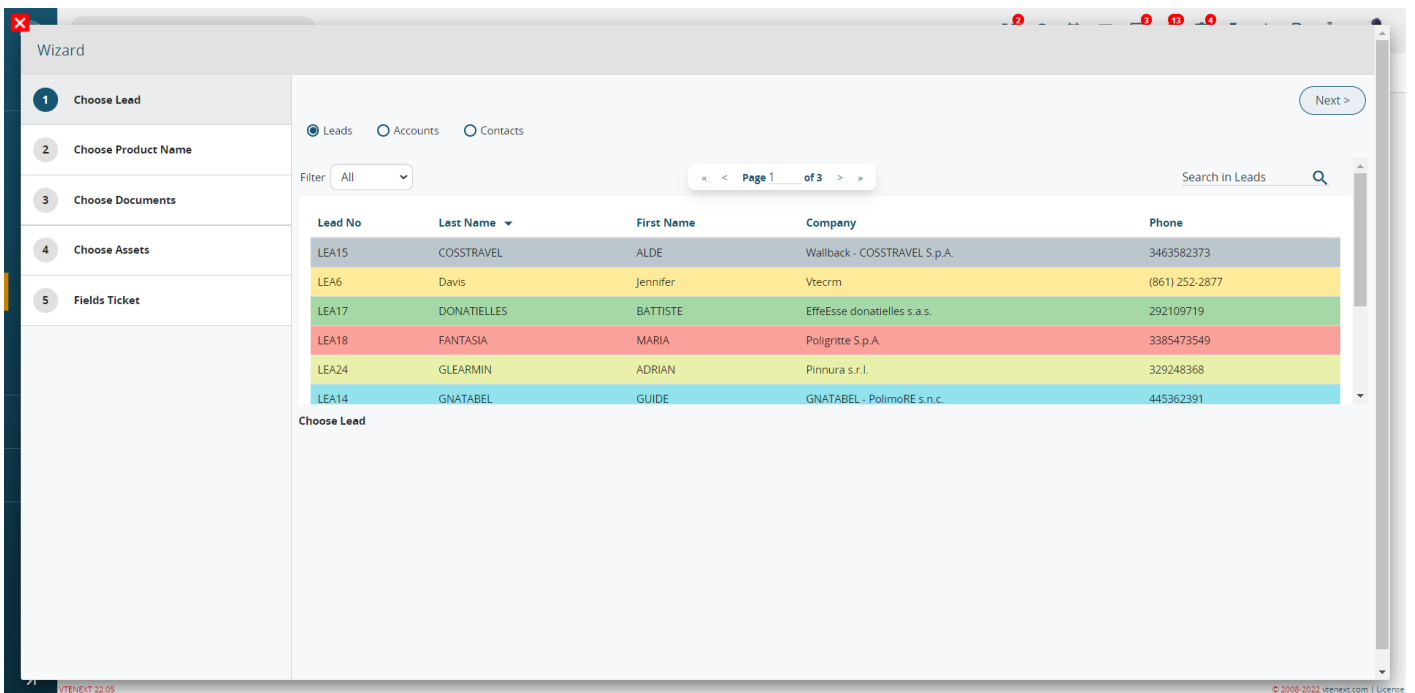
- Create ticket
- Create potential
- Create Ticket**

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.



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.



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