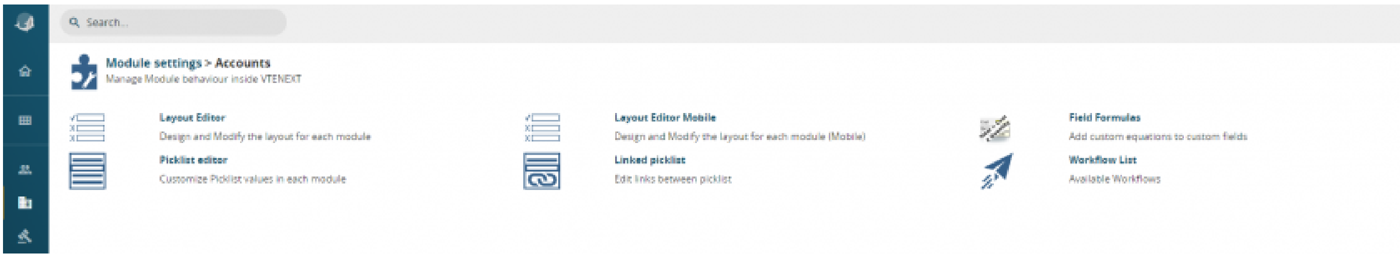
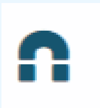
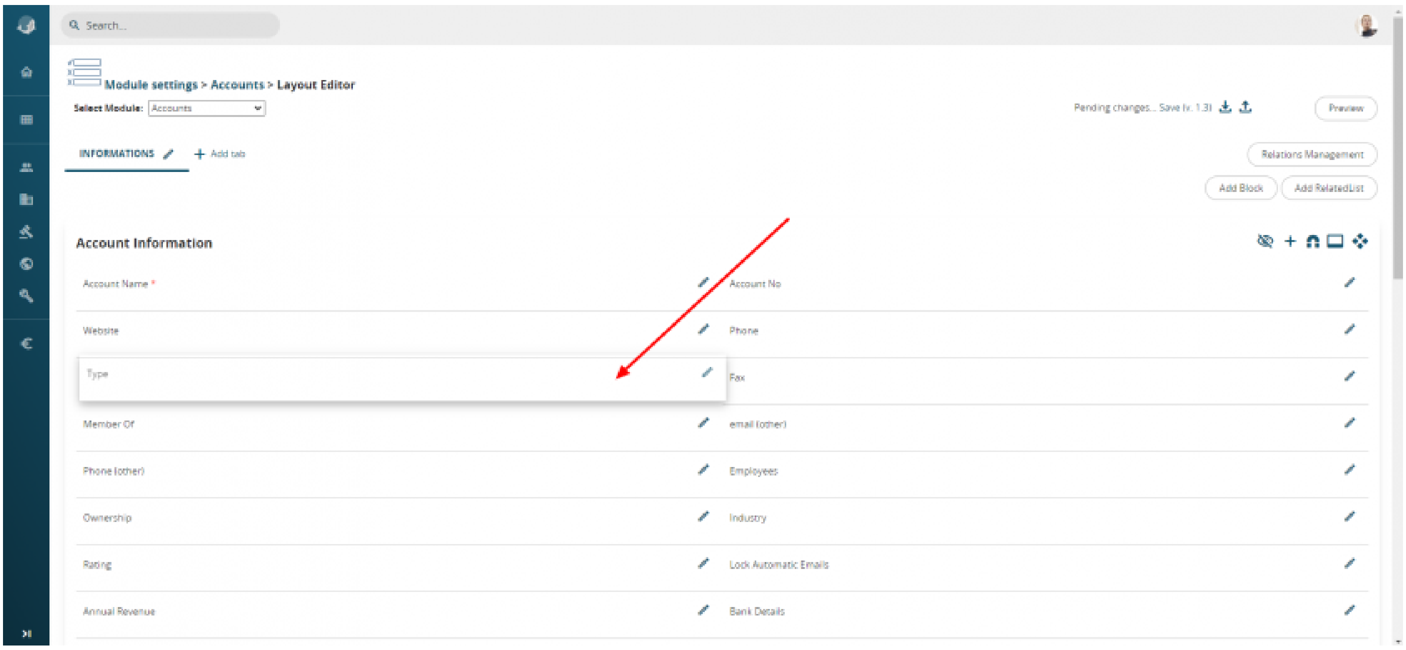
17.7 Layout editor

From Settings > Business Process Manager > Module name (es. Accounts) is possible to access to Layout Editor of any module.



17_7_Layout-Editor_più.PNG	Add cusomized field in the module
	Attract fields coming fom other sections
	Allow to see fields that has been hiden

It is possible to move a field thanks to the drag&drop function, both inside of a blocka and from one block to another one.

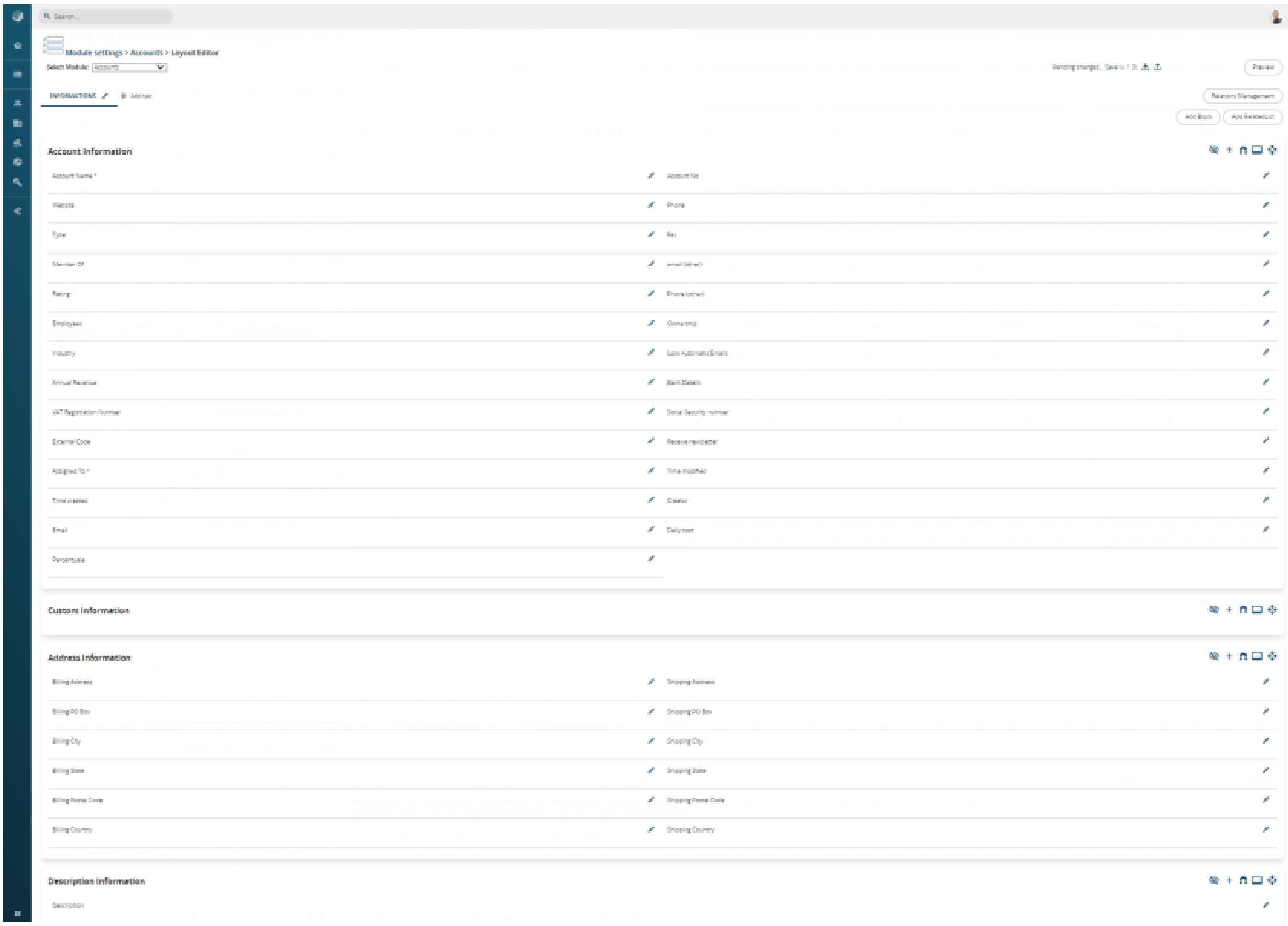


The layout editor allows you to:

- add a custom field within a block

- change the positioning of a field
- edit properties of the field
- display the list of hidden fields, with the option of restoring them
- move fields in other blocks into one block
- add new blocks to the tab (a block is a set of fields, useful for keeping the tab tidy)
- block operations: move above/below, delete (only allowed if the block does not contain fields)
- sort the relationships (serves to define which relationships to keep in the single tab configurator)
- add a new tab with relative blocks and fields

Versioning: all settings for the modules can be saved, generating a version (e.g. v.1.0). Versions can be exported or imported to ensure a higher level of security during setup.



Custom field types

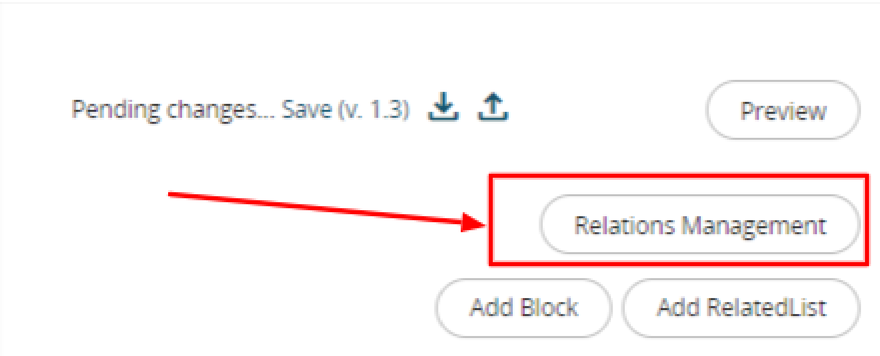
The following are the specifications of the fields available during creation:

Text	It is a field that can contain from 1 to 255 characters (letters and numbers). The desired length and the name to be given therefore need to be defined.

Text Area	Text field with pre-set dimensions, visual width equal to the card and with a maximum number of characters of 66,000 (letters and numbers)
Number	It is a field that can contain from 1 to 64 numbers (including decimals). The desired length, the name to be given and how many decimal places to enter and display therefore need to be defined.
Percentage	The name to be given to the field needs to be defined (it is recommended to insert the % symbol in the label, as a reminder). The field is purely numeric with the impossibility of exceeding 100%
Currency	The name to be given, the desired length and how many decimal places to enter and display need to be defined
Date	The name to be given needs to be defined. Activate the datapicker and autocomplete with today's date in the entity creation phase
Email	The name to be given needs to be defined. Once the email address is saved, if clicked, it will open the predefined composer window to create a new message
Phone	The name to be given needs to be defined. Once the number is saved, if the switchboard is configured, you will be able to use click-to-call
URL	The name to be given to the field needs to be defined. Once saved, the URL address allows you to open it in a new tab
Check Box	This is a YES/ NO flag field. The name to be given needs to be defined
Picklist	To create a drop-down menu with the fields of your interest. The name to be given to the field and to the values (one below the other) of the list needs to be defined
Skype	Define the name to be attributed. Once the Skype ID is saved, it will open the chat directly with the ID setted.
Combo multisection box	To create a drop-down menu where, using the CTRL key, you can select multiple values. The name to be given to the field and to the values (one below the other) of the list needs to be defined
Multilanguage Picklist	To create drop-down menus, whose values will be available for translation into other languages. The name to be given to the field needs to be defined and then the values (with related translations) created through SETTINGS > MULTI-LANGUAGE PICKLIST EDITOR
User	The name to be given needs to be defined. It is used to insert an additional link to the entity with a user

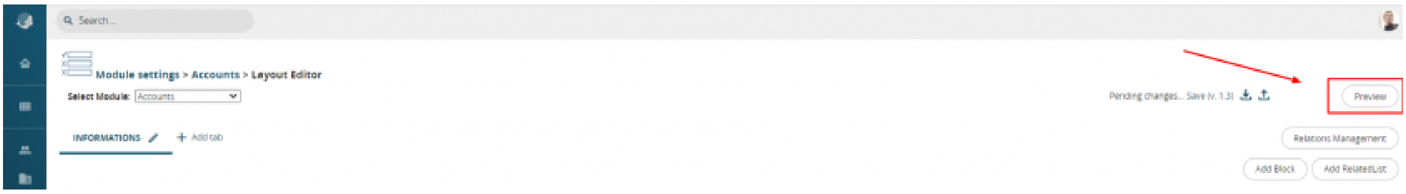
User without filtering permits	The name to be given needs to be defined. It is used to add a link between the entity and a user by bypassing roles and permissions
User from filtered list	The name to be given needs to be defined. It is used to add a link between the entity and one of the users defined upstream
Group	The name to be given needs to be defined. It will provide a drop-down menu with any available groups
Button*	Allows you to create a button that recalls a custom function. You need to enter the code during creation **see also 17.7.1 BUTTON field in vtenext*
Table Field	It allows you to create table fields, which permit you to insert lines with values of choice, recalling them from the modules or creating them specifically
Attach documents	It allows you create a field for adding documents at the same time as creating an entity

In the top right corner of the screen, has been added the button **RELATIONS MANAGEMENT.** This button allows to modify the relations columns present in the record details of all modules in the crm (For example. we are in the Accounts module, we can modify the columns present in Contacts, Potentials, Sales orders, etc.).



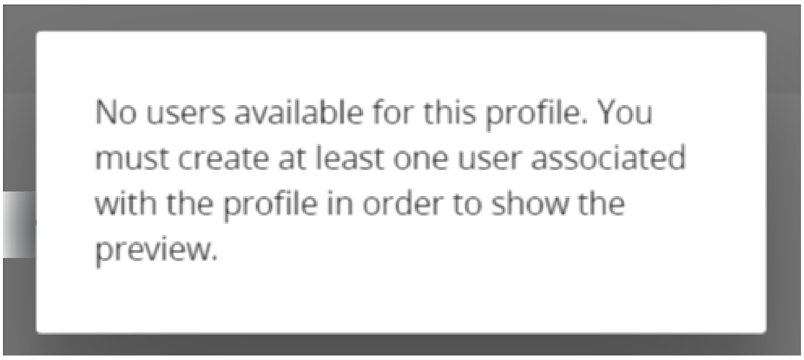
Search...
Module settings > Accounts > Layout Editor
Select Module: Accounts
Pending changes... Save (v. 1.3)
Preview
INFORMATIONS
Add tab
Relations Management
Configuration
Sort by count
Contacts
Last Name
First Name
Title
Account Name
Email
Office Phone
Assigned To
Potentials
Potential
Related To
Sales Stage
Amount
Expected Close Date
Assigned To
Quotes
Quote No
Subject
Quote Stage
Potential Name
Account Name
Grand Total
Assigned To
Sales Order
Order No
Subject
Account Name
Quote Name
Grand Total
Assigned To
Invoice
Invoice No
Subject
Sales Order
Status
Grand Total
Assigned To
Activities
Close
Type
Subject
Contact Name
Related To
Start Date
Start Time
End Date
End Time
Recurring Type
Assigned To
Documents
Title
File Name
Assigned To
Folder Name
Trouble Tickets
Ticket No
Subject
Related To
Status
Priority
Assigned To
Products
Product Name
Part Number / SKU
Commission Rate (%)
Qty/Unit
Unit Price
Campaigns
Campaign Name
Campaign Type
Campaign Status
Expected Revenue
Expected Close Date
Assigned To
Delivery Notes
ddt Name
Assigned To
Services
Service No
Service Name
Commission Rate (%)
Usage Unit
No of Units
Price
Assets
Asset No
Asset Name
Customer Name
Product Name
Project Plans
Project No
Project Name
Start Date
Status
Type
Assigned To
Visit Report
Visit Name
Assigned To
Service Contracts
Subject
Service
Tracking Unit
Total Units
Used Units
Assigned To
Targets
Target Name
Target Type
Target State
End Time
Assigned To
Newsletter Emails
Fax
Subject
Document(s)
Date Sent
Assigned To
Messages
Date
Subject
From
Processes

Lastly is possible to see a **Preview** of the screen based on a certain profile, this function allows to immediately verify if the configuration has be done correctly.

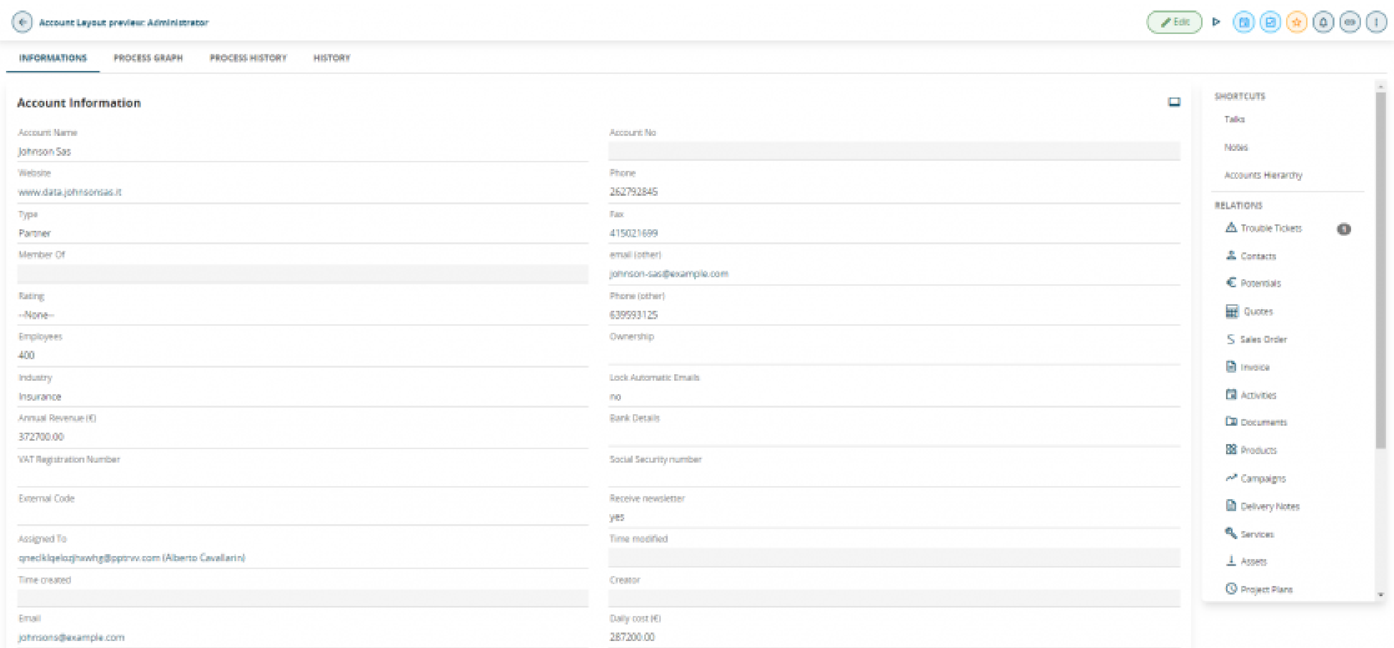


Clicking on Preview, the system will open a pick list

From the opened menu, it will be possible to choose from which profile see the screen preview



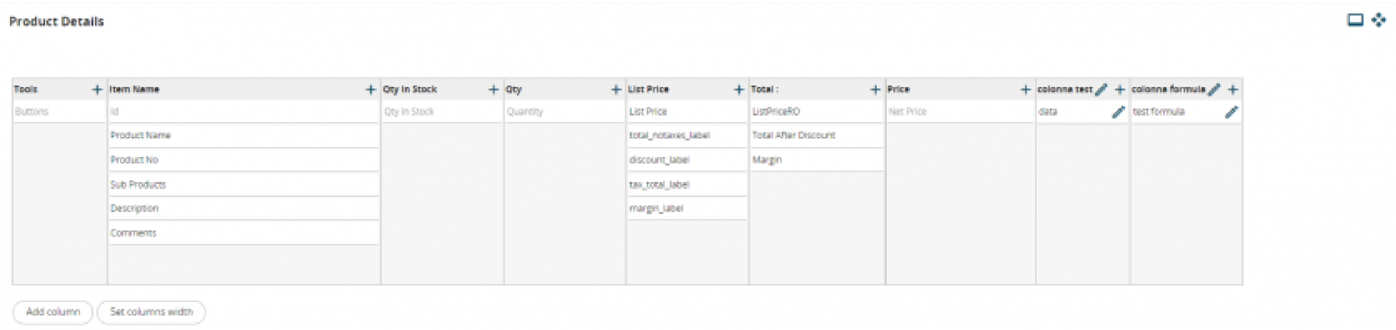
If there will be no available users for the chosed profile, the crm will show the popup above



Example of screen preview

Layout Editor for Products block

There is also the possibility to modify the columns present in the product block in the module **Quote, Sales orders, Purchase order and Invoice.** The configuration, allows to vary the number of columns with customized fields (for example unit of measurement, count per package, checkbox, description field or text fields, currency fields or numeric, etc.). The possibility to modify the columns in product block in addition allows, for each created field, to manage also new formulas, giving the possibility to go beyond the classic but however present, PxQ (Price multiplied Quantity);



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