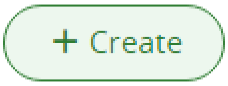
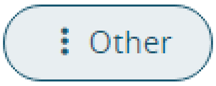
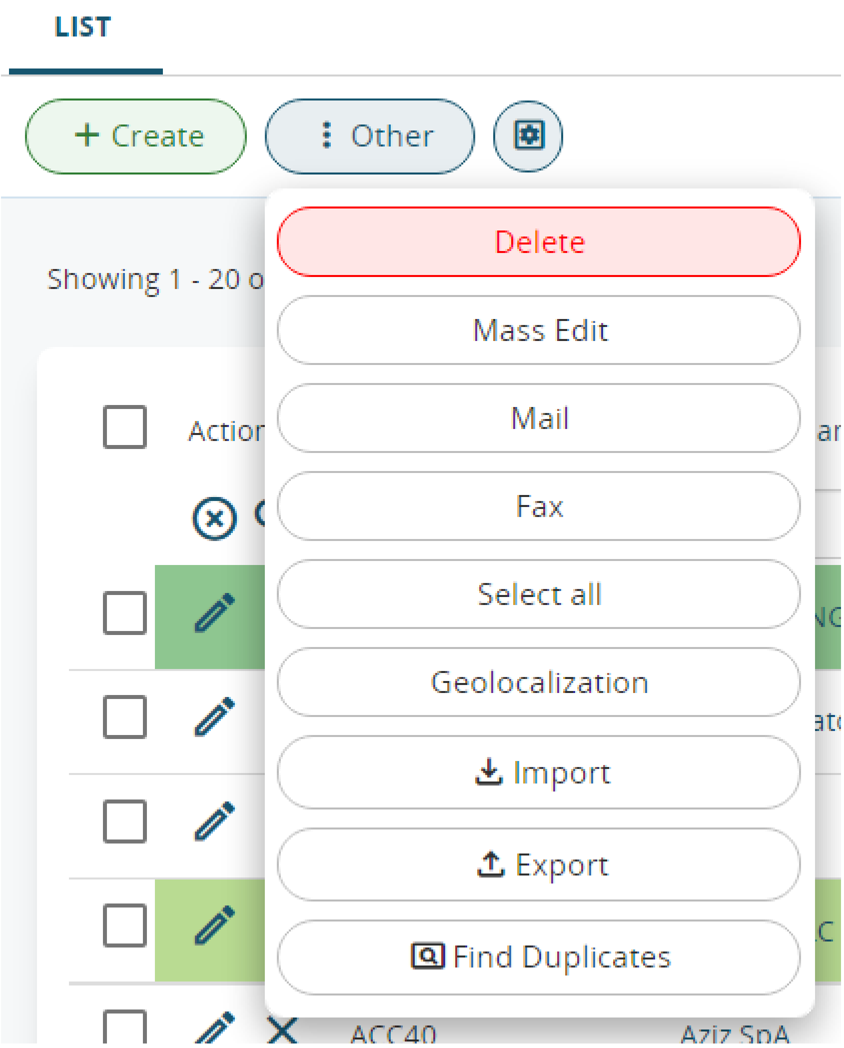
2.3.3 Contextual Icons

The button 

is used to create a new entity in the module in which you are currently positioned.

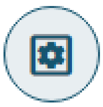
While clicking on 

allows to enter in a sub-menu with the following options:



- **Delete:** it allows to delete all selected records in the list
- **Mass Edit** it allows to edit massively all the selected records
- **Mail:** it allows to send mail massively to the select records in the list (it is suggested for a small number of mail, maximum 20 mail address. For a more consistent number of mail is suggested to use the Newsletter module.)

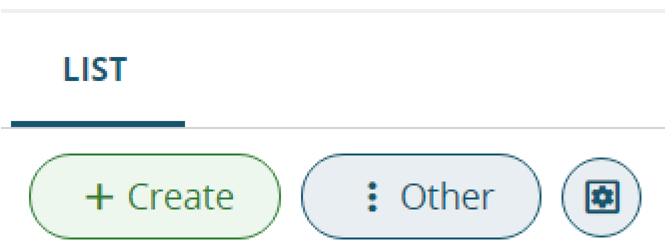
- **FAX:** it allows to send fax massively to the selected records in the list (this function works only if your crm is connected with a fax service)
- **SMS:** it allows to send sms massively to the selected records in the list (this function works only if your crm is connected with a sms service)
- **Select all:** it allows to select all the records available in all the pages of the module (not only the ones displayed in the first page or in the current page)
- **Geolocalization:** it allows to localize in the google map the geographic positions of the selected records.
- **Import** it allows to import data into the CRM from .csv format files (comma separated values).
- **Export:** it allows to export data from the CRM in .csv format files (comma separated values).
- **Find duplicates**: it allows to check for the presence of duplicates based on parametrizable research criteria. In addition it is possible to save the desired fields mapping to prevent duplicates in the creation of new records. The fields mapped, are considered by the CRM with an "and" option (if we map the field Email, the system will check the creation of duplicates only for that field but if we map the fields Name + Email, the duplicate will be detected only if both the fields already exist in a module)


Clicking on the cogwheel in the upper left part of the screen, it is possible to enter in the following sub-menu:

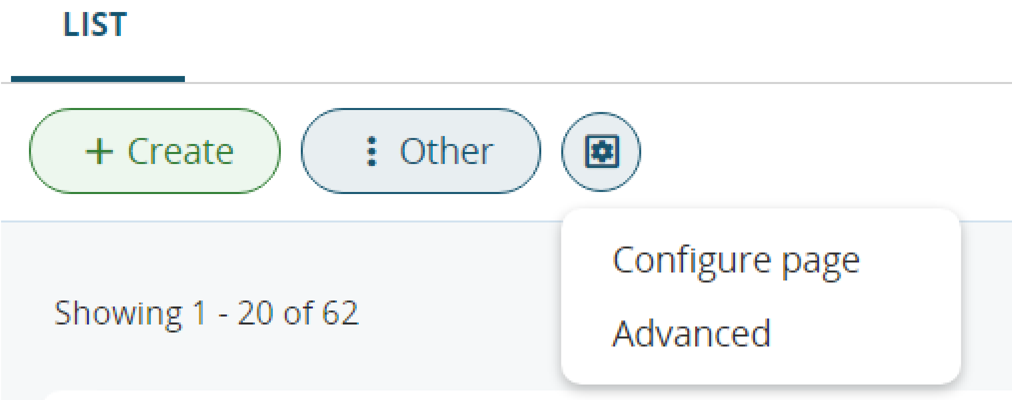
Configure page: it allows to enter in the property of the module to change the layout.
Advanced (available only if the user is a system administrator): it allows to modify the settings (Layout editor, picklist, etc.) of the module where we are.

Use the **“Add tab”** button to access the following sub-menus:

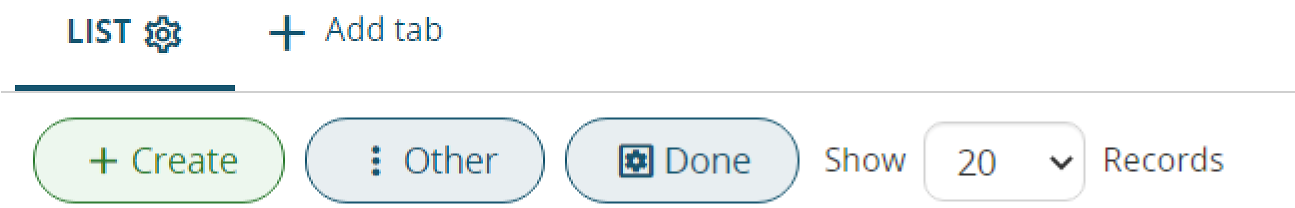
- **New simple tab:** click to insert a new view with a wizard or charts;
- **New list tab:** click to add another view linked to an existing filter;
- **New tab with report:** click to view an existing report in related to the module in question (e.g. if the report is entered in the Contacts module the results of a report created for this Module can be entered and viewed).



1 - Click on the blu cogwheel related to page settings.



2 - Click on "Configure page"



3 - Lastly click on "Add tab" to finalize the configuration and in the end click on DONE

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