

# 2.5 Modules structure

The application is structured according to relations between the various modules, based on the process logic. Each module offers the following access views:

**1. List view:** proposes the list of data (files) present in the module.

Action	Account No	Account Name	Billing City	Website	Phone	Assigned To
<input type="checkbox"/>	ACC38	Abdulan NGO	Orlando	www.info.abdulanngo.org	227718409	gung (Mangrider Gung)
<input type="checkbox"/>	ACC29	Administrator Inc.	Jefferson City	www.administrator.inc.com	921686925	reuben (Volande Reuben)
<input type="checkbox"/>	ACC12	Alegre	Aschenleben	www.info.alegre.net	611551329	xavier (Gurinder Xavier)
<input type="checkbox"/>	ACC37	Atlantic LLC	Rhayader	www.data.atlantic.com	967896329	gung (Mangrider Gung)
<input type="checkbox"/>	ACC48	Atto Spa	Grimma	www.atto_spa.it	570780293	benzie (Megan Benzie)
<input type="checkbox"/>	ACC37	Azmak San	Ceuta	www.azmak-san.com	403911549	moateer (Farica Moateer)
<input type="checkbox"/>	ACC38	Beekens LLC	Limoges	www.beekens.llc.net	759273208	sanderson (Leia Sanderson)
<input type="checkbox"/>	ACC36	Belanger Spa	Wichita	www.belangerspa.org	89854463	fretz (Emelita Fretz)
<input type="checkbox"/>	ACC31	Bennfield Snc	Huntingdon	www.bennfield_snc.net	103977751	xavier (Gurinder Xavier)
<input type="checkbox"/>	ACC39	Calahan NGO	Cordoba	www.calahanngo.com	171024997	moateer (Farica Moateer)
<input type="checkbox"/>	ACC34	Chaaban Snc	Rayetville	www.info.chaaban.snc.co.uk	858427784	frankcom (Barby Frankcom)
<input type="checkbox"/>	ACC32	Crisler Inc.	Santa Cruz de Tenerife	www.info.crisler.inc.co.uk	104214106	xavier (Gurinder Xavier)
<input type="checkbox"/>	ACC6	demoute	San Jose	www.demoute.com	(800) 325-1484	admin (Administrator)
<input type="checkbox"/>	ACC32	Derome Inc.	Cavallino	www.data.derome.inc.it	985748527	reuben (Volande Reuben)
<input type="checkbox"/>	ACC35	Eaton	Armungia	www.eaton.com	859303057	xavier (Gurinder Xavier)
<input type="checkbox"/>	ACC3	EDFG Group Limited	San Francisco	www.edfggrouplimited.com	(474) 829-0460	admin (Administrator)
<input type="checkbox"/>	ACC18	Ferland NGO	Lincoln	www.ferlandngo.org	40134938	fretz (Emelita Fretz)
<input type="checkbox"/>	ACC13	Flakley LLC	Arnone	www.info.flakleyllc.com	826379903	fretz (Emelita Fretz)
<input type="checkbox"/>	ACC8	gooduvite	San Francisco	www.gooduvite.com	(501) 760-1504	admin (Administrator)
<input type="checkbox"/>	ACC26	Grevelling Inc.	Stonehaven	www.data.grevelling.inc.com	277055911	fretz (Emelita Fretz)

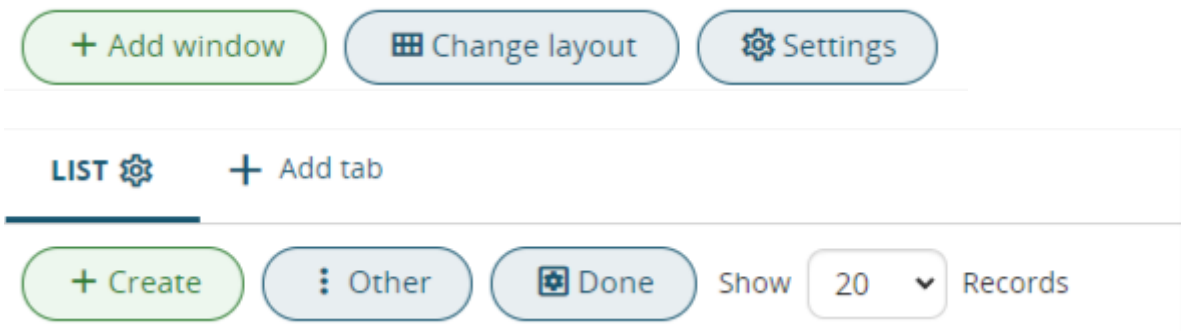
Possible actions from this view are:

<b>Delete</b>	Deletes one or more records by ticking the box at the beginning of the line.
<b>Mass Edit</b>	To modify the data of one or more selected records.
<b>Email</b>	To send emails in a massive way.
<b>Fax</b>	To send fax in a massive way.
<b>SMS</b>	To send SMS in a massive way.
<b>Select all/deselect all</b>	To select/deselect all the records in the filter (in all the pages, not only the displayed ones).
<b>Filter</b>	To define the active view on modules (see Filter chapter).

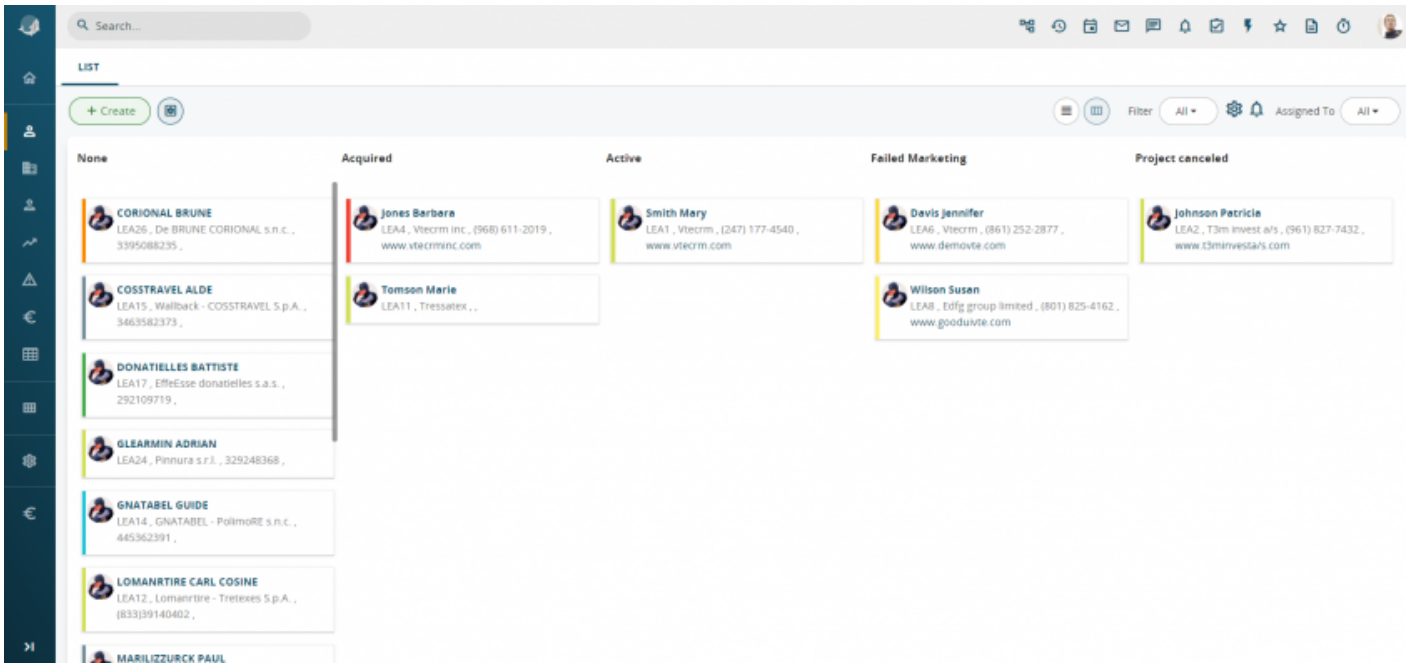
<b>Assigned to</b>	To quickly filter records according to the assigned user.
--------------------	---

The button CREATE is used to add a new empty record to the current module.

**Note.** The Calendar, Report and Documents modules have an alternative view by default. The List button switches to list view.



## 2. Kanban View: columns view.



Makes it possible to operate on a picklist value present in the entity, set in the selected filter. The change will be made by simply dragging the record from one column to the next without having to open the single elements. If the selected picklist values are correlated with a view colour (chapter 16.13, page 210), also the columns in the Kanban will be identified by specific colours.

This view type is configured by editing a filter, selecting the “Kanban Setup” tab.

Search...

Edit Custom View Save Cancel

**Details**

\*View Name:  ☐ Set as Default ☐ List in Metrics ☐ Set as Public ☒ Available in Mobile App

**Choose Columns**

Account No  Account Name \*  Website  Phone

Assigned To \*  None  None  None

None

STANDARD FILTERS ADVANCED FILTERS FILTERS BASED ON REPORT **KANBAN SETTINGS**

Etichetta

Industry  uguale  Banking

Nuova Condizione

☒ Abilita drag here

Industry  Banking

Add column

Add action

**Note.** In general, there is only one field that makes it possible to access a detailed summary window on the right (e.g. Trouble Ticket title in Trouble Tickets module), recognisable by the link style formatting (blue text, bold and underlined on mouse-over).

**3. Detail view:** corresponds to the tab. To gain access, click on the record name.

Search...

Account demovte Edit Share Star Alert More

INFORMATIONS PROCESS GRAPH PROCESS HISTORY HISTORY

**Account Information**

Account Name	demovte	Account No	ACC6
Website	www.demovte.com	Phone	(108) 792-9815
Fax		Member Of	
Phone (other)		Employees	0
email (other)		Ownership	
Industry	Chemicals	Rating	Acquired
Type		Lock Automatic Emails	no
Annual Revenue (€)	0.00	Bank Details	
VAT Registration Number		Social Security number	

**SHORTCUTS**

- Talks
- Notes
- Accounts Hierarchy

**RELATIONS**

- Contacts 1
- Quotes 1
- Potentials 2
- Activities 1
- Sales Order
- Invoice
- Documents
- Trouble Tickets

Revision #1

Created 25 May 2022 17:25:43 by Alberto

Updated 6 June 2022 12:30:15 by Alberto