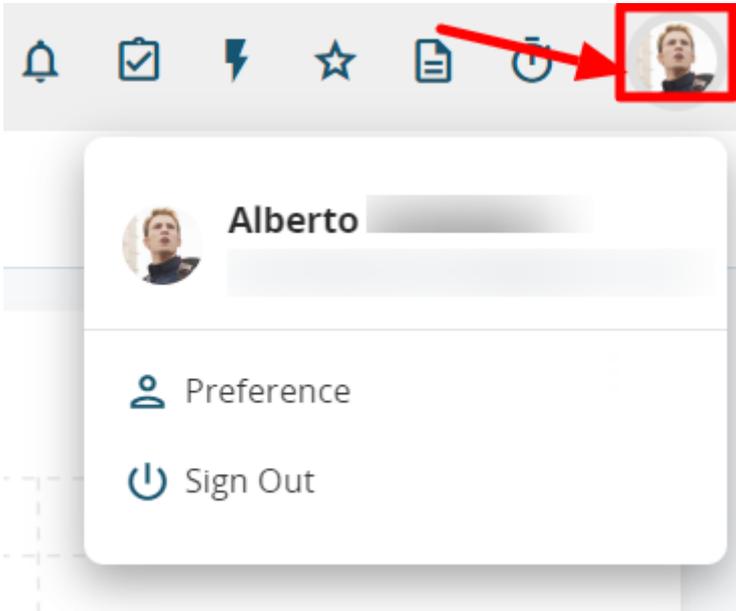
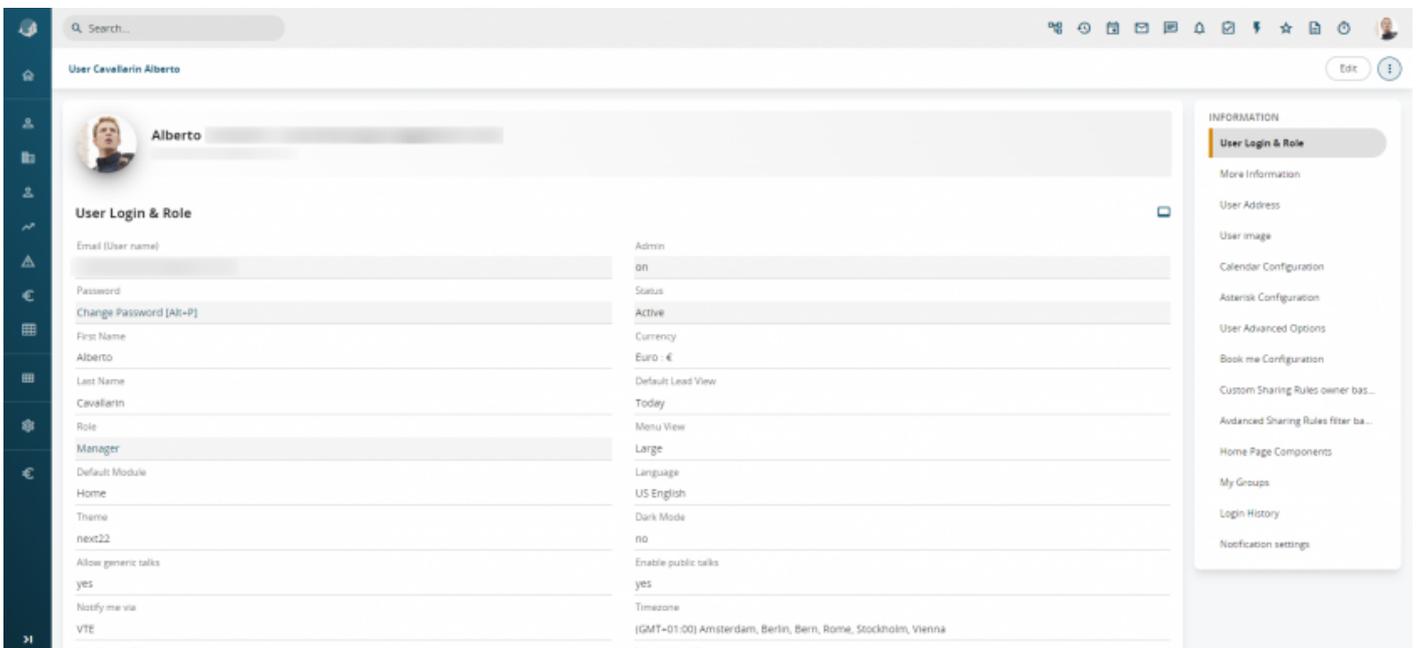


2.7 Users preferences



To access user settings click on the icon of your personal avatar and then click on **PREFERENCES**. The page appears as shown below:

User login and role



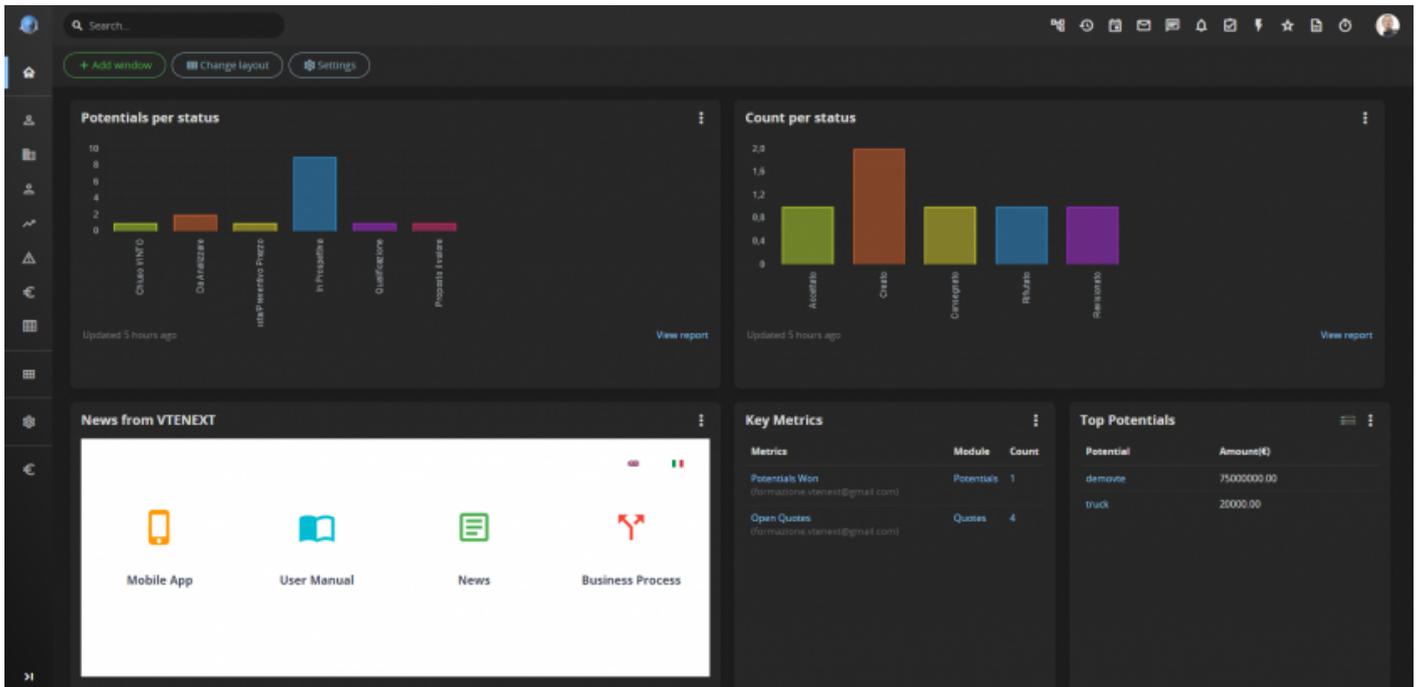
This box is used to:

- change the **password**;

- configure access via **LDAP** (only if available in the company and only for on-premise installations);
- select **currency type**;
- select an **interface language**;
- choose **time zone**;
- **notification settings** for the various modules;
- choose whether or not to **receive notifications** and the method email/vtenext;
- choose **vtenext graphic** mode: softened or next.

From version 19.10 you can select **"Dark Mode"** by accessing User Preferences and ticking the field of the same name. **This option is available exclusively for the next mode.**

Example of Homepage with Dark Mode selected.



More information

<p>Title</p> <hr/> <p>Department</p> <hr/> <p>Office Phone</p> <p>0451234567</p> <hr/> <p>Mobile</p> <p>3491234567</p> <hr/> <p>Home Phone</p> <hr/> <p>Description</p> <hr/> <p>Decimal point separator</p> <p>.</p> <hr/> <p>Decimal places</p> <p>2</p> <hr/>	<p>Fax</p> <hr/> <p>Other Email</p> <hr/> <p>Reports To</p> <hr/> <p>Other Phone</p> <hr/> <p>Internal Mail Composer</p> <p>yes</p> <hr/> <p>Thousands separator</p> <hr/>
--	--

This block is useful for:

- Insert all users personal data, as his/her **Title** (Director, Manager, etc..), **Telephone** number, **Mobile** number, etc;
- The field **Reports to**, indicates which is the head of that person;
- **Internal Email Composer**: if enable, allows use of the vtenext internal email composer. When disabled, the default mail client will open.
- Choose how numbers and decimals should be displayed, through the fields **Decimal point separator** **Thousands separator** **Deciaml places** (**WARNING**: all changes made in this area are applied in all the crm, so all the numeric/ currency fields will be displayed with that logic);

User Address

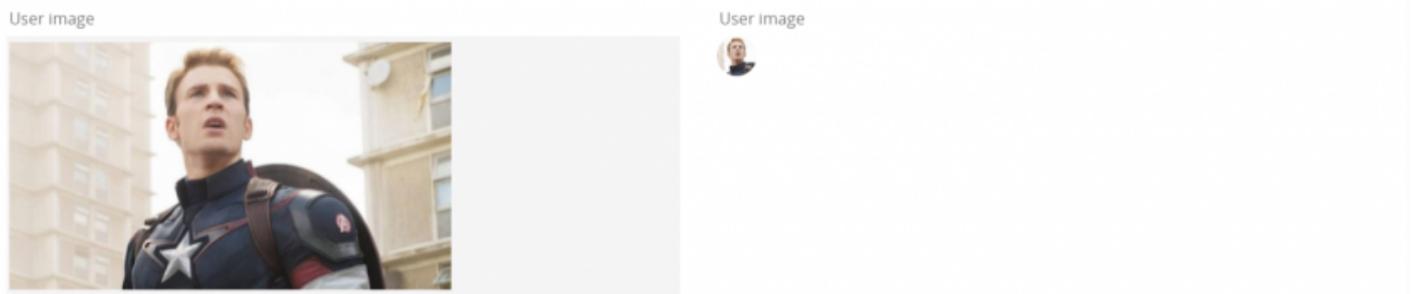
Street Address	Country
City	Postal Code
State	

User photo

Allows a user photo and thumbnail (avatar) to be set. Once you have uploaded the photo, save your changes. Now return to point 4, click on Photo on the right, crop the photo to the square format and save.

- set a thumbnail function to allow immediate recognition of the user;
- change the access module after login (Default module);

User image



Calendar configuration

Default Calendar View This Week	Date Format dd-mm-yyyy
Reminder Interval 1 Minute	Day starts at (hh:mm) 08:00
Disable Sunday in week view yes	First day of week Monday
Holiday Countries it Italy	
Share calendar with 	Share calendar with (only occupation)

Asterisk configuration

Asterisk Extension	Receive Incoming Calls no
---------------------------	-------------------------------------

Asterisk plugin	If vtenext is integrated with an Asterisk switchboard, indicate here your own internal telephone (es: SIP/111).
Receive Incoming Calls	Tick this option to enable incoming calls recognition.

Advanced user option - Web service Access Key

Upcoming Activities	✗	Hidden
Pending Activities	✗	Hidden
Top Accounts	✗	Hidden
Home Page Dashboard	✗	Hidden
Top Potentials	✗	Hidden
Top Quotes	✗	Hidden
Key Metrics	✗	Hidden
Top Trouble Tickets	✗	Hidden
My Group Allocation	✗	Hidden
Top Sales Orders	✗	Hidden
Top Invoices	✗	Hidden
My New Leads	✗	Hidden
Top Purchase Orders	✗	Hidden
My Recent FAQs	✗	Hidden
News from VTECRM	✓	Shown
Help VTENEXT	✗	Hidden
Talks	✗	Hidden
My files	✓	Shown

Identification Token: uses the web service to identify the user password automatically associated with user creation

Webservice Access Key

vyQIXj68NIzSCPi

Notifications: makes it possible to define which notifications you wish to receive based on the specified module, with the exception of those defined by the profile rules.

14. Notification settings

Potentials	✓	Notify the creation	✓	Notify the change
Contacts	✗	Notify the creation	✗	Notify the change
Accounts	✗	Notify the creation	✗	Notify the change
Leads	✗	Notify the creation	✗	Notify the change
Documents	✗	Notify the creation	✗	Notify the change
Calendar	✓	Notify the creation	✓	Notify the change
Trouble Tickets	✓	Notify the creation	✓	Notify the change
Products	✗	Notify the creation	✗	Notify the change
FAQ	✗	Notify the creation	✗	Notify the change
Vendors	✗	Notify the creation	✗	Notify the change
Price Books	✗	Notify the creation	✗	Notify the change
Quotes	✗	Notify the creation	✗	Notify the change
Purchase Order	✗	Notify the creation	✗	Notify the change
Sales Order	✗	Notify the creation	✗	Notify the change

My groups

Shows the groups in which you are a member as defined by the admin user.

#	Group Name	Description
1	Company	My Group

Login History

To check access events

Login History
Showing 1 - 10 of 22

User Name	User IP	Type	Sign in Time	Sign out Time	Status
	5.102.2.153	web	2021-11-26 16:13:46	---	Signed in
	95.110.170.235	ws	2021-11-26 16:13:45	---	Signed in
	5.179.191.157	web	2021-11-25 10:31:38	---	Signed in
	95.110.170.235	ws	2021-11-25 10:31:37	---	Signed in
	5.102.2.153	web	2021-11-23 14:29:59	---	Signed in
	95.110.170.235	ws	2021-11-23 14:29:58	---	Signed in
	93.63.183.62	web	2021-11-19 16:28:49	---	Signed in
	95.110.170.235	ws	2021-11-19 16:28:48	---	Signed in
	93.63.183.62	web	2021-11-18 17:11:48	---	Signed in
	95.110.170.235	ws	2021-11-18 17:11:47	---	Signed in

The OTHER button, which provides access to additional user options, is located at the top right, next to the edit button.

The screenshot displays a user management page for Alberto Cavallarin. The page is divided into several sections: a header with the user's name and email, a 'User Login & Role' section with fields for email, password, and role, and a 'More Information' section with fields for title and fax. On the right side, there is a settings menu with options like 'User image', 'Calendar Configuration', and 'User Advanced options'. A red box highlights the 'View Audit Trail', 'Duplicate', 'Remote wipe', and 'Export Audit Trail' options in the settings menu. A red arrow points from the user's profile picture to the settings menu.

- See user control: see **chapter 16.8**
- Duplicate: allows the user to be duplicated, inheriting all configurations
- Delete remote data: used to delete remote data in the App connected to the specific user. In practice, this function forces a user logout and deletes cached data.
- Delete: remove user.

Revision #1

Created 25 May 2022 17:25:43 by Alberto

Updated 6 June 2022 12:30:15 by Alberto