

2.5.1 Record structure (detail view)

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

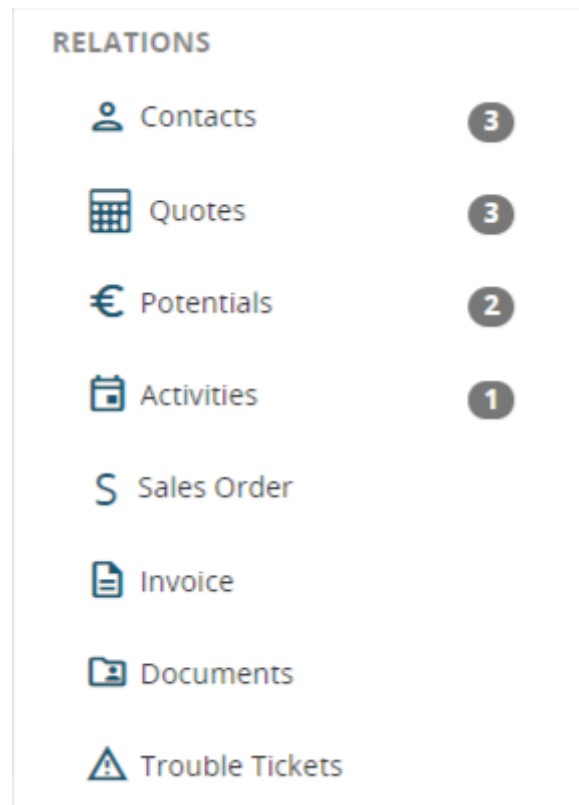
SHORTCUTS

- Talks
- Notes
- Accounts Hierarchy

RELATIONS

- Contacts 3
- Quotes 3
- Potentials 2
- Activities 1
- Sales Order
- Invoice
- Documents
- Trouble Tickets

1. Relations with other modules: positioned on the right of the screen, this function summarises all the relations with other modules of the record in which you are operating by indicating the numbers of related elements. To display a related module click on its name. The admin user can change the order of items, decreasing in accordance with the number of Relations, by means of Modules manager > Layout editor.



For example, clicking on Contacts produces the following view:

Accounts Hierarchy

- No parent
- sampleve

Contacts (3) - List

Showing 1 - 3 of 3

Action	Last Name	First Name	Title	Account Name	Email	Office Phone	Assigned To
	CAMPONALIS	MARINE		sampleve	test123@test123.com	(8796)7296999	formazione.vtenext@gmail.com (Francesco Villani)
	DE BALLIS	SEVERINE		sampleve	test123@test123.com	(889)97644396	formazione.vtenext@gmail.com (Francesco Villani)
	Smith	Mary	Director Operations	sampleve	test123@test123.com	(995) 212-8772	formazione.vtenext@gmail.com (Francesco Villani)

SHORTCUTS

- Talks
- Notes
- Accounts Hierarchy

RELATIONS

- Contacts** **3**
- Products **2**
- Invoice **1**
- Potentials **1**
- Quotes **1**
- Sales Order **1**
- Activities
- Documents

To create a record of the selected module, in relation to the currently active tab, click “Add” in the relations box.

N.B.: All related modules, have default columns that may be changed using interface. Going to Settings > Module settings > Interested Modue (es. Accounts) > Layout Editor > Relations management (button on the top right part of the screen). It will be possible, using interface, to manage the relation with each module choosing the columns and the order of each element.

Contacts

Contacts (3) - List

Showing 1 - 3 of 3

Add Contact

Action	Last Name	First Name	Title	Account Name	Email	Office Phone	Assigned To
<div><div></div><div></div></div>	Davis	Jennifer	IT Developer	demovte	test1211223@libero.com	(915) 291-5192	formazione.vtenext@gmail.com (Francesco Villani)
<div><div></div><div></div></div>	SARVITOL	BRUNE		demovte	test123@test123.com	(9986)95088235	formazione.vtenext@gmail.com (Francesco Villani)
<div><div></div><div></div></div>	VICENZUL	RENOUS		demovte	test123@test123.com	(9909)92109719	formazione.vtenext@gmail.com (Francesco Villani)

By default, the relations menu proposes all the existing modules related to the module you are manage.

Certain actions available in the module are accessible by clicking the “Other” button.

The actions are partly general and partly contextual. For example, the **Convert Lead** option is only present in the **Leads** module.

Finally, below we provide a list of standard icons located at the top right of the page before the “Other” button:

<div><div></div><div>Modifica</div></div>	- Edit
<div><div></div></div>	- Tracking
<div><div></div></div>	- Add Event
<div><div></div></div>	- New Task
<div><div></div></div>	- Link new email
<div><div></div></div>	- Favourite
<div><div></div></div>	- Notify me of changes

	- Link
	- Other

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