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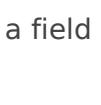
It is possible to move a field thanks to the drag&drop function, both inside of a blocka and from one block to another one.
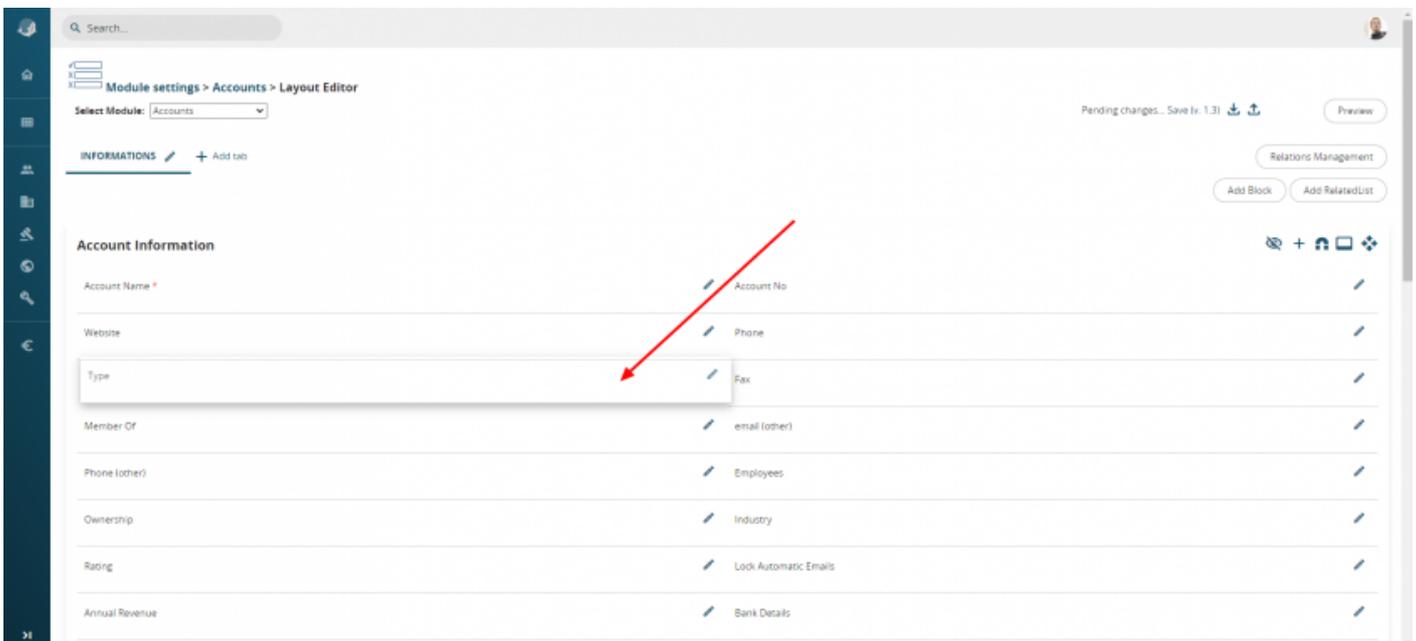
The layout editor allows you to:

- 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.
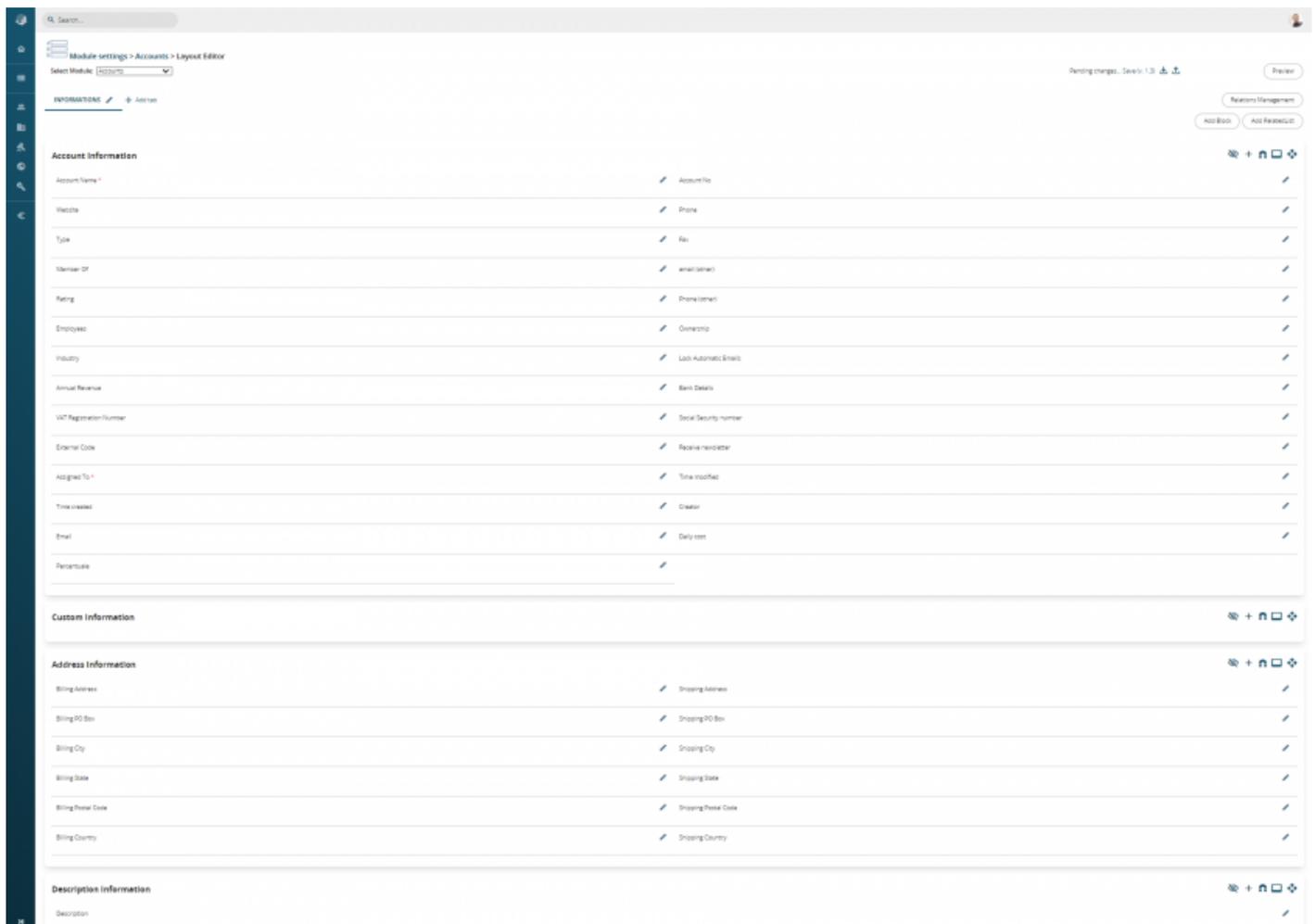
Custom field types
The following are the specifications of the fields available during creation:

|	
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 **Note: For better usability of the table field, it is advisable not to exceed 60 rows during its use.**
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.).

Module settings > Accounts > Layout Editor
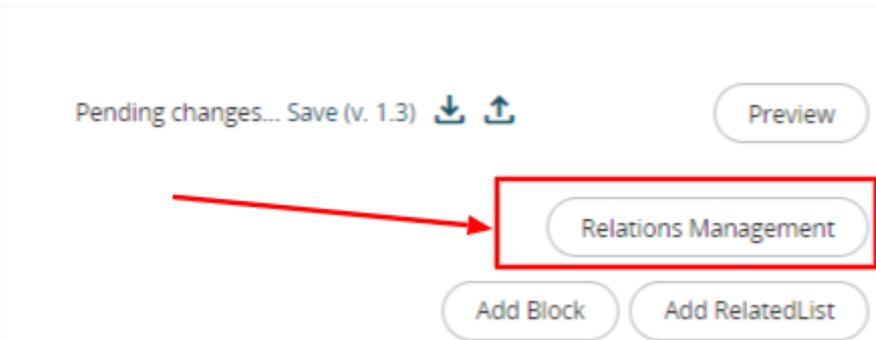
Select Module: Accounts

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 ✕ |

S **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 ✕ |

S **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**   + 🕘 ▢

| Newsletter Name ✕ | Date scheduled ✕ | Time scheduled (hh:mm) ✕ | Assigned To ✕ | Scheduled ✕ |

🖨 **Fax**   + 🕘 ▢

| Subject ✕ | Document(s) ✕ | Date Sent ✕ | Assigned To ✕ |

✉ **Messages**   + 🕘 ▢

| Date ✕ | Subject ✕ | From ✕ |

🔳 **Processes**   + 🕘 ▢

| Process Name ✕ | Status ✕ | Assigned To ✕ |

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.
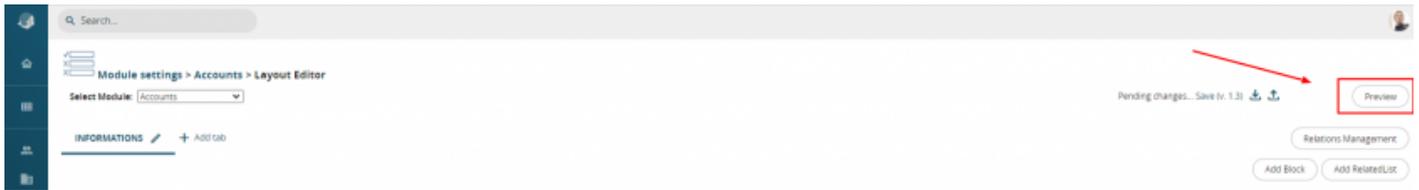

Clicking on Preview, the system will open a pick list

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

No users available for this profile. You must create at least one user associated with the profile in order to show the preview.
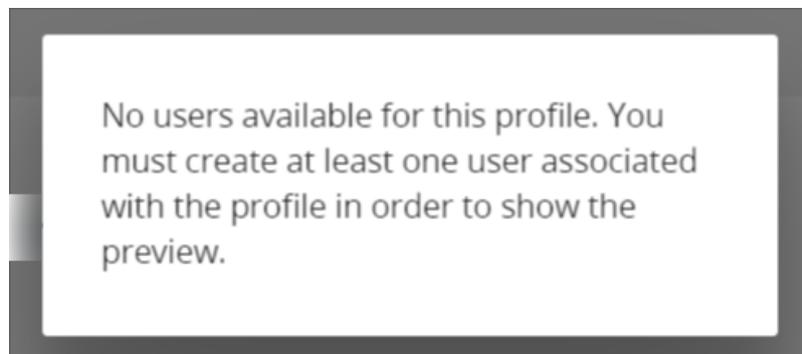
If there will be no available users for the chosed profile, the crm will show the popup above
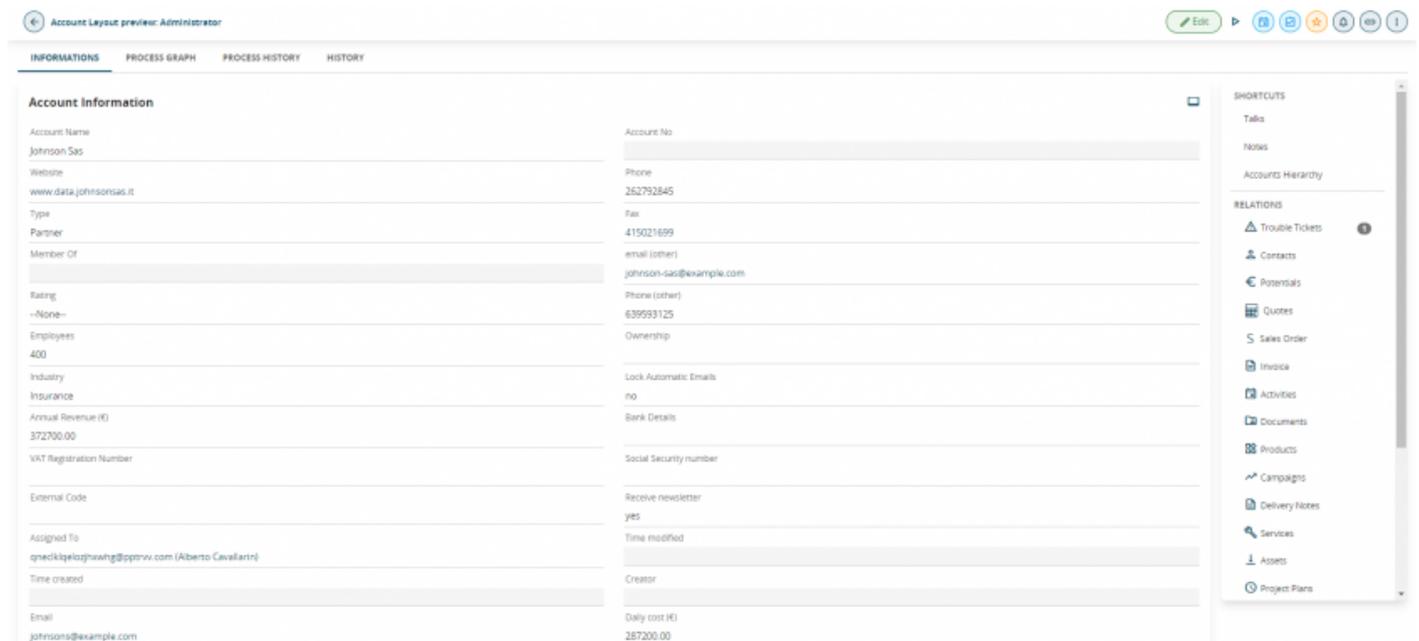
Example of screen preview

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);

Revision #3
Created 23 August 2023 07:23:36 by Thomas
Updated 6 December 2023 10:04:32 by Admin