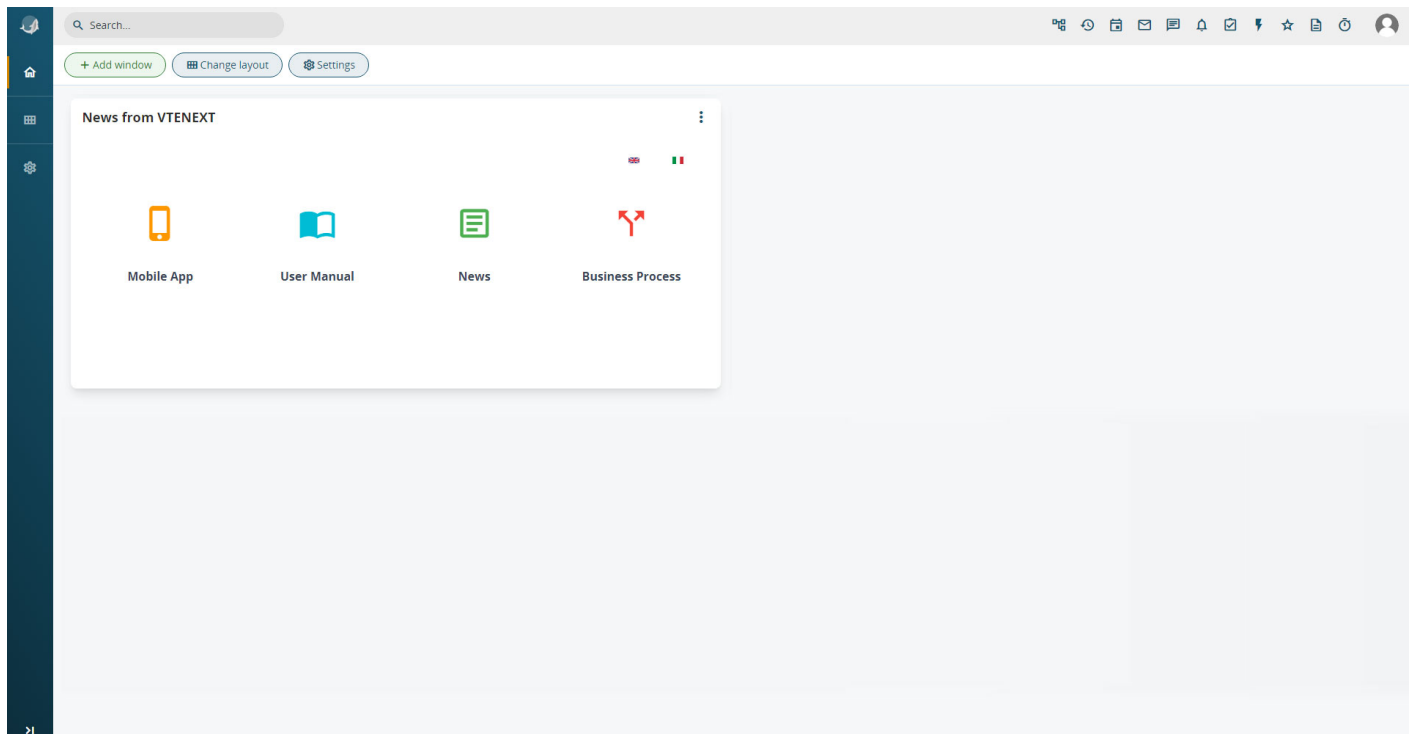


2.2 Home

When the user logs in to the CRM the user-specific home page can be displayed (this setting is editable by individual users in User Preferences).




The Home page is composed of a set of elements (dashboards) that retrieve information from vtenext. The dashboards can be composed of:

- filters from modules
- RSS to receive feeds from your favourite channel
- the graphics from reports
- windows that allow you to view websites

The configuration is at the discretion of the user, who can enable default elements or create new ones. Each user must create his/her own dashboards, which cannot be made public. To enable or

disable a preset dashboard click on the

 Settings

icon to access “my preferences”.

ATTENTION: home graphics have a 24h cache memory so they DON'T refresh everytime the homepage is refreshed.

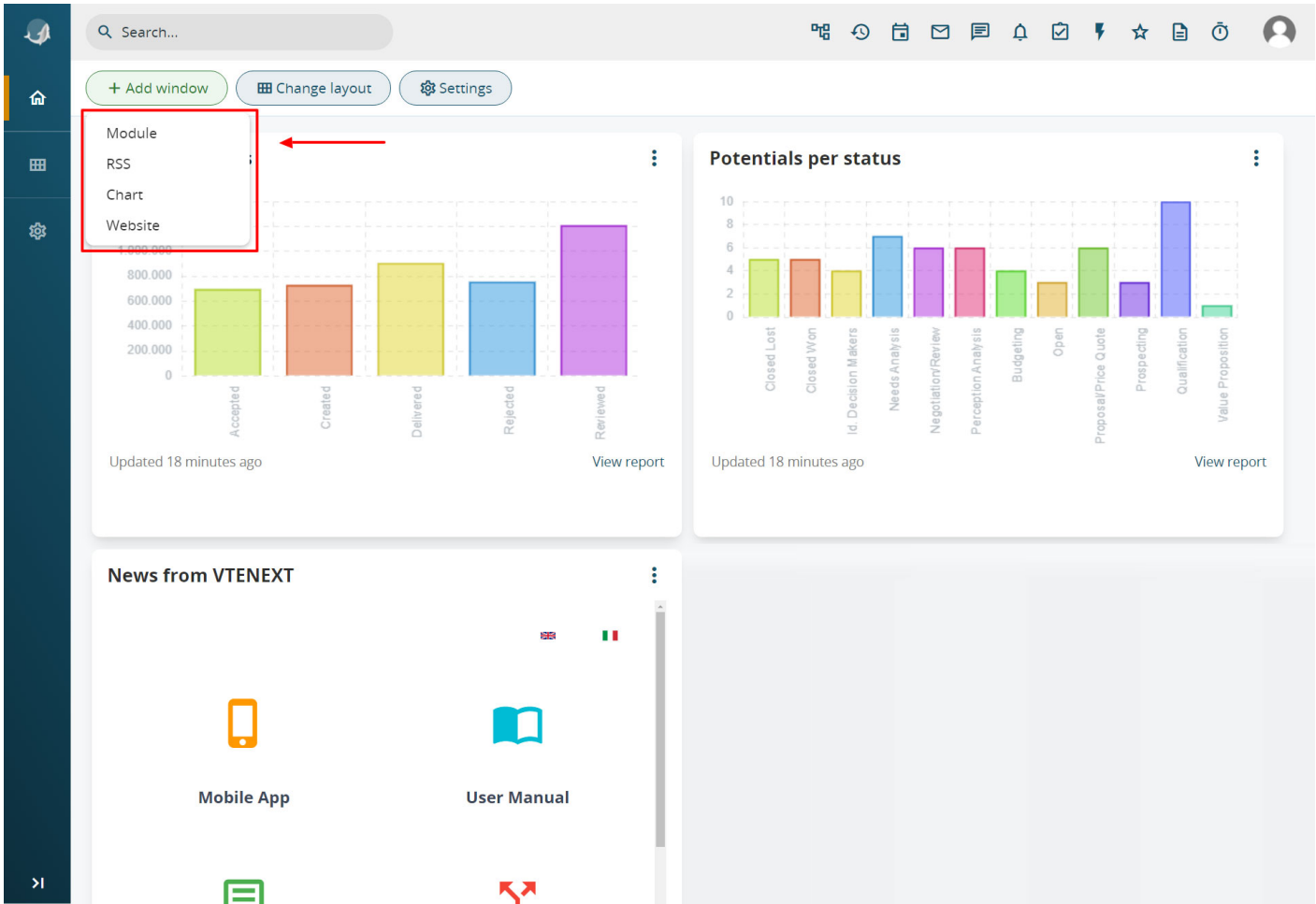
The following is a list of the available blocks (which can be activated from "User preferences"):

News and Manual	The latest vtenext updates box and a link to the Online Manual
------------------------	--

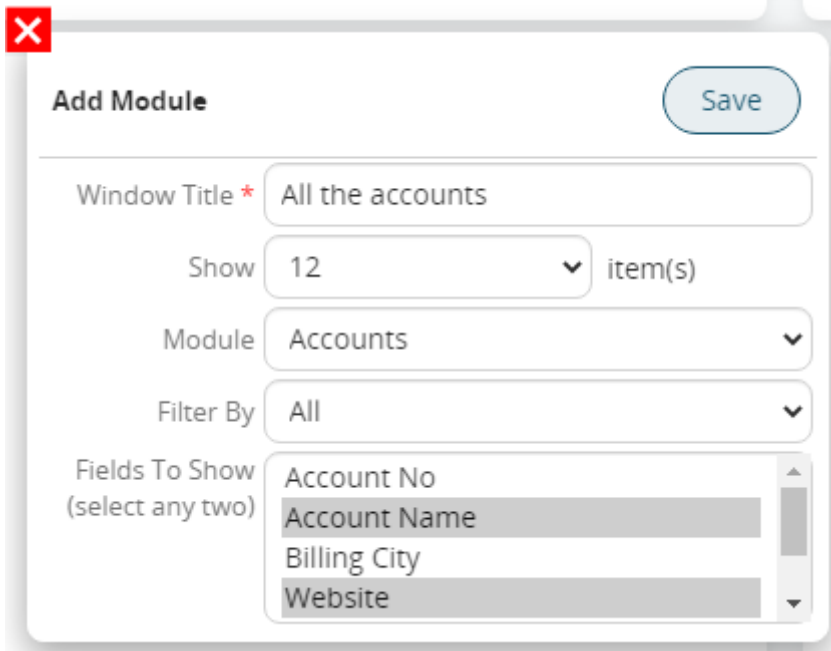
N.B.: My files has been eliminated from the Homepage, all present files were moved in the folder "My private files" inside the module Documents.

+ Add window

To create a new customised element click on and choose the type of element to add.



For example, if you wish to add a new Module, you will be presented with a screen similar to the following:

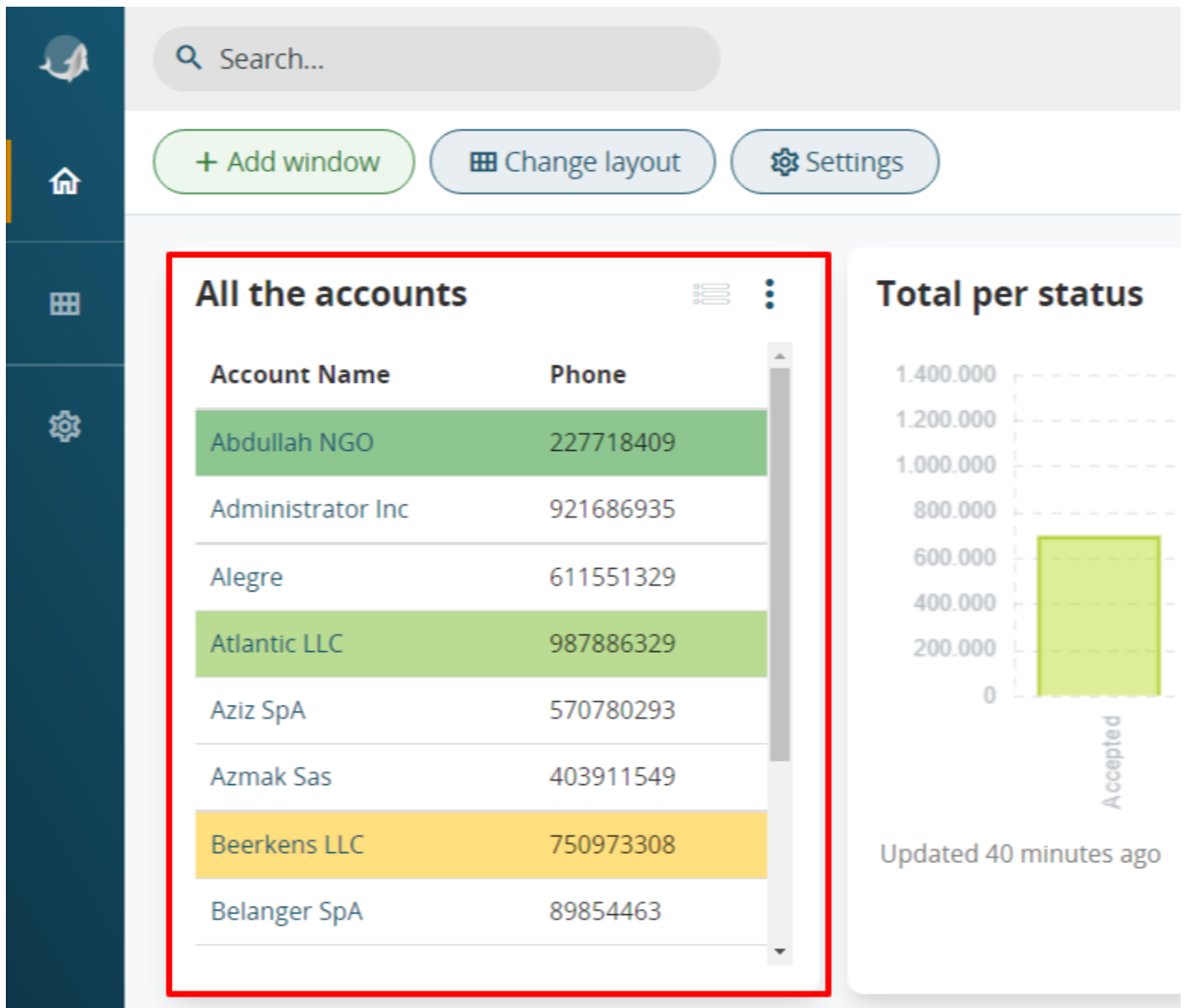


The image shows a configuration window titled "Add Module" with a red close button in the top-left corner. A "Save" button is located in the top-right corner. The form contains the following fields:

- Window Title ***: A text input field containing "All the accounts".
- Show**: A dropdown menu showing "12" and a unit label "item(s)".
- Module**: A dropdown menu showing "Accounts".
- Filter By**: A dropdown menu showing "All".
- Fields To Show (select any two)**: A list box containing four options: "Account No", "Account Name", "Billing City", and "Website". The "Account Name" and "Website" options are highlighted with grey bars.

You must enter a title for this new window (e.g. All companies), indicate the number of elements to display (e.g. 10), which filter to use for displaying that dashboard (e.g. All filter) and finally, establish which fields are to be displayed, with a maximum of 2 (e.g. Company Name and Phone number).

The result of this configuration can be seen in the following screen:



The order of the boxes can be changed by dragging them to the required position with the mouse.

Revision #5

Created 23 August 2023 07:23:43 by Thomas

Updated 12 March 2024 09:52:43 by Admin