

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	759773208	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.calahan-ngo.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"/>	ACC8	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.ferland-ngo.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"/>	ACC28	Greveling Inc.	Stonehaven	www.data.greveling-inc.com	277055911	fretz (Emelita Fretz)

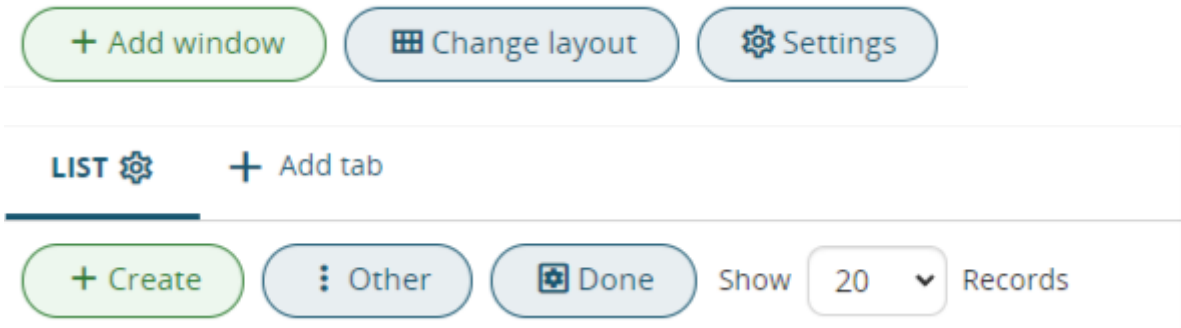
Possible actions from this view are:

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

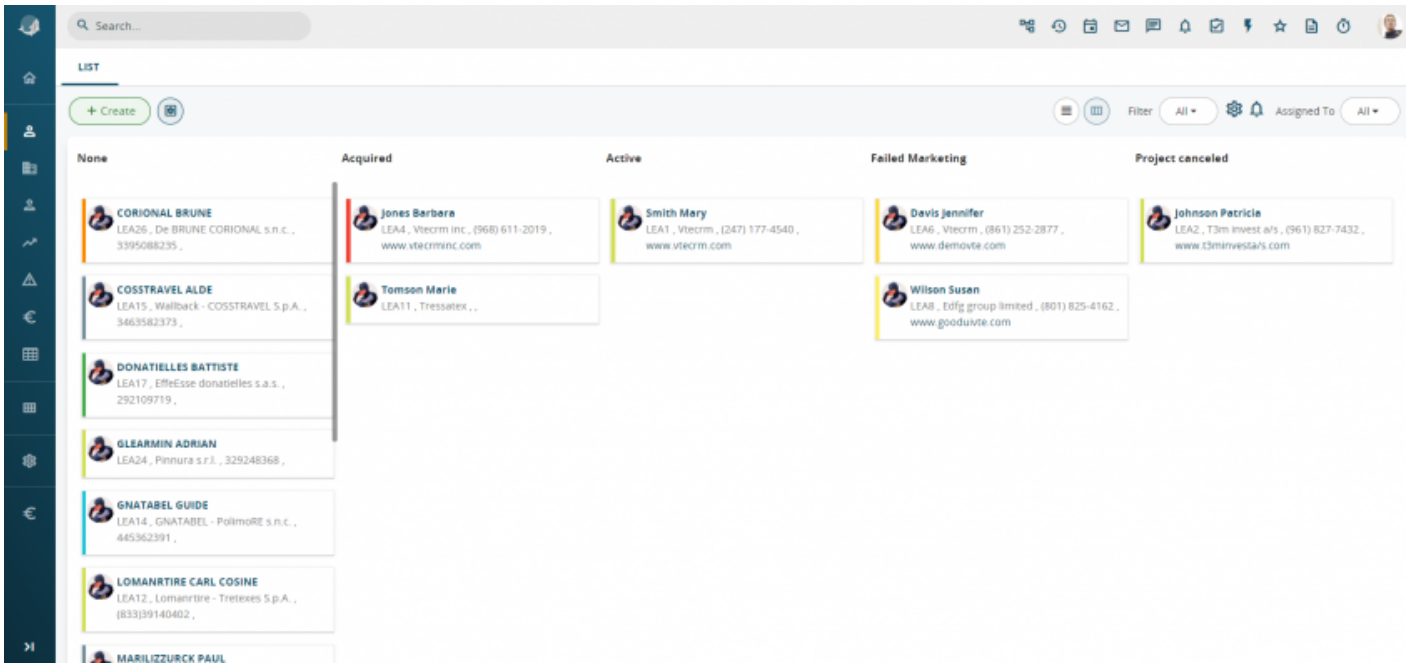
Assigned to	To quickly filter records according to the assigned user.
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The button CREATE is used to add a new empty record to the current module.

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**

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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 Process Graph Process History History

Account Information

Account Name: demovte

Website: www.demovte.com

Fax:

Phone (other):

email (other):

Industry: Chemicals

Type:

Annual Revenue (€): 0.00

VAT Registration Number:

Account No: ACC6

Phone: (108) 792-9815

Member Of:

Employees: 0

Ownership:

Rating: Acquired

Lock Automatic Emails: no

Bank Details:

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

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