

17 vtenext customization: advanced settings



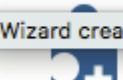

Customisation features are very important because they guarantee the use of vtenext for a wide range of business processes. It is possible to design the data structure for the vtenext modules via easy-to-use web interfaces: for example, it will be you who will define the structure of your Leads, Contacts and Accounts archives or Trouble Ticket information.












The standard set-up of vtenext presents a wide range of modules that can be subsequently readapted to the needs of specific cases: you can add fields of any kind (text, number, percentage, etc.), compile drop-down menus with values decided by you, set conditions for a greater or lesser restrictive access to fields, set automatic action-reaction mechanisms, and much more.

We recommend that you customise your CRM by following these steps:

- Customise the layout of the modules according to the content you need to load (see Layout Editor);
- Define the lists using the Filters tool (please refer to it for further details) taking into account the custom fields introduced;
- Define (or redefine, if necessary) the access and security privileges of each user, also in the individual field (see Sharing Access, Roles and other tools involved);
- Introduce additional customisations (using the tools listed in this chapter), for example view colouring or workflows.

The tools to customise vtenext can be found in the Business Process Manager section of the General Settings menu:

 Settings > Process manager Allow to create custom processes	Generates the processes that autonomously manage the data flow within the CRM
 Workflow > Workflow List Available Workflows	Generates automatic actions in the CRM when predefined conditions occur (trigger > action) - Workflows are available read-only.
 Settings > Wizard creator	Generates new wizards, which allow the creation and management of records, belonging to different modules and their relationships.
 Settings > Module creator Allows to create custom modules	Generates new modules, manages their content and relationships with other modules, with advanced SDK editing capabilities.

 Settings > Module settings Manage Module behaviour inside VTE	Accesses the settings of all modules (including extra modules) to enable/disable them and change their layout
 Settings > Picklist editor Customize Picklist values in each module	Customises drop-down menus, to add, delete or overwrite values, change their order and visibility by roles
 Settings > Internationalized picklist Personalise values for Pick list multi-language in every module	Manages multi-language drop-down menus
 Settings > Linked picklist Edit links between picklist	Creates dependencies between drop-down menus: the choice in the second menu depends on the choice in the first menu
 Settings > Status Manager Enable/Disable status transitions	Management of status changes of CRM items according to constraints and pre-defined authorisations on roles
 Settings > Condition based fields Set read/write permissions depending on field value	Controls the behaviour of fields (visibility, modification, etc.) on the basis of certain conditions
 Settings > Encrypted fields Encrypted Field Editor	Protects the values assumed in the fields
 Settings > Top menu settings Show and Hide the menu tabs, keep in mind that this does not effect an administrator!	Selects and orders the modules shown in the main navigation menu
 Settings > Listview colors Configure colours of List Views	Assigns a colour to the data, based on the values of the picklist fields, which is displayed in the list view of the module, in the Kanban, in the related items and in the dashboards of the homepage. Warning! Only one picklist per module can be assigned to the colours.
 Settings > Mail Converter Configure mailbox for scanning	Reads one or more mailboxes and, when a condition occurs, activates automatic mail operations.
 Settings > External data import Configure automatic data import from external sources	Imports data from CSV files or databases with the option to schedule the process and create advanced queries for data extraction Warning! This function is not available in the cloud version.

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