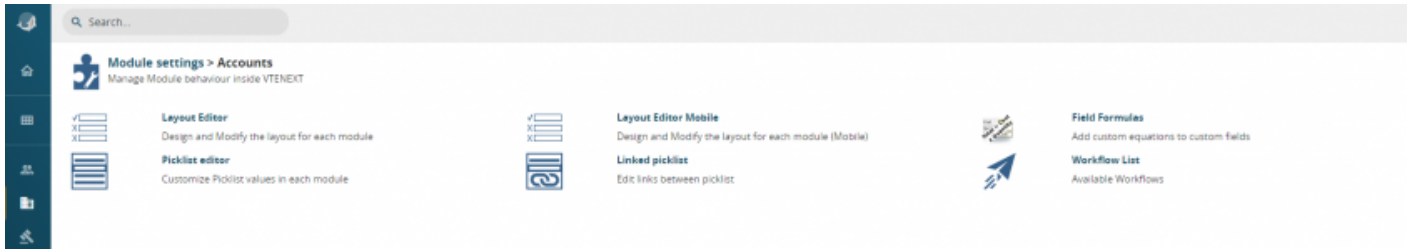





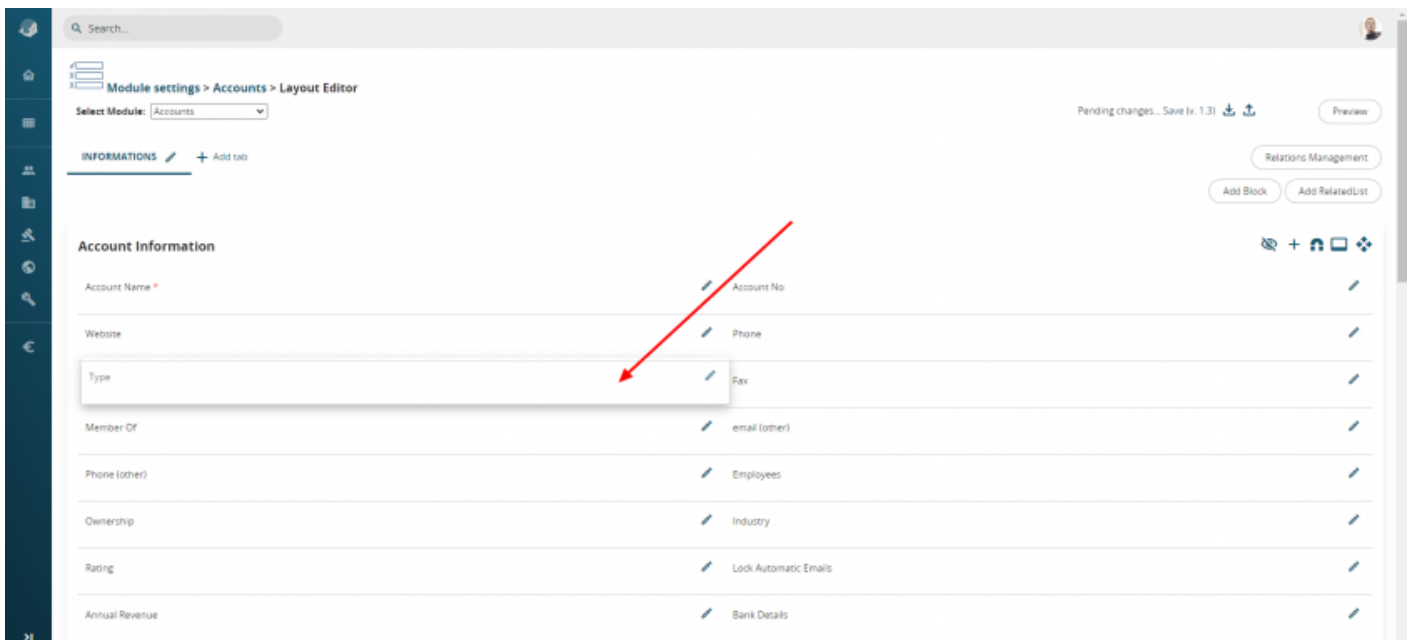
# 17.7 Layout editor

From Settings > Business Process Manager > Module name (es. Accounts) is possible to access to Layout Editor of any module.



	Add customized field in the module
	Attract fields coming fom other sections
	Allow to see fields that has been hidden

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.

The screenshot displays the 'Account settings > Accounts > Layout Editor' interface. It features a sidebar with navigation icons, a top search bar, and a main content area. The 'Account Information' section is expanded, showing a list of fields with their corresponding data types and edit icons. Below this, there are sections for 'Custom Information', 'Address Information', and 'Description Information'.

Field Name	Data Type	Edit Icon
Account Name *	Account Type	✎
Website	Phone	✎
Type	Role	✎
Identifier ID	email (email)	✎
Rating	Phone (email)	✎
Employee	Company	✎
Industry	Look Automatic Emails	✎
Annual Revenue	Bank Details	✎
VAT Registration Number	Social Security number	✎
External Code	Reactive newsletter	✎
Assigned To *	Time modified	✎
Time created	Creator	✎
Email	Daily item	✎
Permissions		✎

Below the 'Account Information' section, there are sections for 'Custom Information', 'Address Information', and 'Description Information'. Each section has a list of fields with their corresponding data types and edit icons.

## Custom field types

The following are the specifications of the fields available during creation:

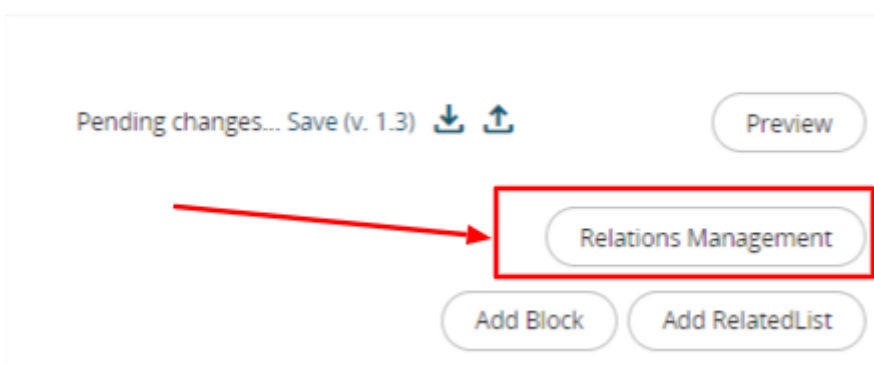
Text	It is a field that can contain from 1 to 255 characters (letters and numbers). The desired length and the name to be given therefore need to be defined.
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<b>Text Area</b>	Text field with pre-set dimensions, visual width equal to the card and with a maximum number of characters of 66,000 (letters and numbers)
<b>Number</b>	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.
<b>Percentage</b>	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%
<b>Currency</b>	The name to be given, the desired length and how many decimal places to enter and display need to be defined
<b>Date</b>	The name to be given needs to be defined. Activate the datapicker and autocomplete with today's date in the entity creation phase
<b>Hour</b>	It allows for the creation of a time field, with the option to assign a name, and provides the ability to click on a clock icon to select the time directly from a clock face.
<b>Datetime</b>	It allows for the creation of a field that captures both the date and the full time. The format will be dd-mm-yyyy - hh:mm, with the option to assign a name.
<b>Email</b>	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
<b>Phone</b>	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
<b>URL</b>	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

<b>Check Box</b>	This is a YES/ NO flag field. The name to be given needs to be defined
<b>Picklist</b>	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
<b>Skype</b>	Define the name to be attributed. Once the Skype ID is saved, it will open the chat directly with the ID setted.
<b>Combo multisection box</b>	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
<b>Multilanguage Picklist</b>	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
<b>Skype</b>	It allows for a direct link with the Skype application, typically used to call the Skype contact entered in that field, with the option to assign a name.
<b>Related to</b>	It allows the creation of a relationship field within a module, but it will not be possible to reference the same module multiple times.
<b>User</b>	The name to be given needs to be defined. It is used to insert an additional link to the entity with a user
<b>User without filtering permits</b>	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
<b>User from filtered list</b>	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

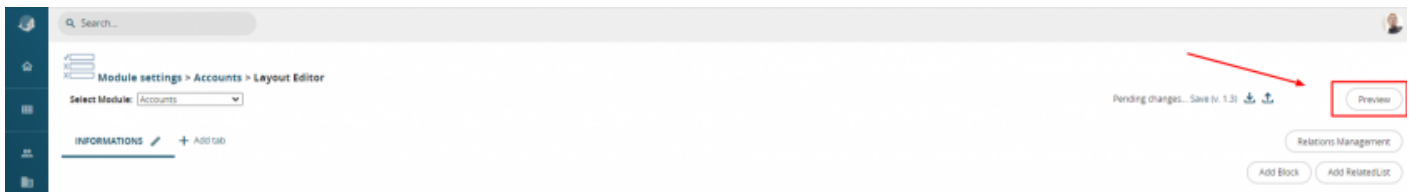
<b>Group</b>	The name to be given needs to be defined. It will provide a drop-down menu with any available groups
<b>Button*</b>	Allows you to create a button that recalls a custom function. You need to enter the code during creation <i>*see also 17.7.1 BUTTON field in vtenext</i>
<b>Table Field</b>	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 <b>Note: For better usability of the table field, it is advisable not to exceed 60 rows during its use.</b>
<b>Attach documents</b>	It allows you create a field for adding documents at the same time as creating an entity
<b>Signature</b>	It allows the creation of a signature field, to which a name can be assigned, and can be used both via the app and as a variable to be called in PDF Maker.
<b>Rating</b>	It allows the display of a rating system from 1 to 5 stars, to which a name can be assigned.
<b>Media</b>	It allows the upload of images/videos/audio and displays a preview (if the connected source permits) in the detail view of a record. When filling in this type of field, it is also possible to specify a remote URL.

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.).





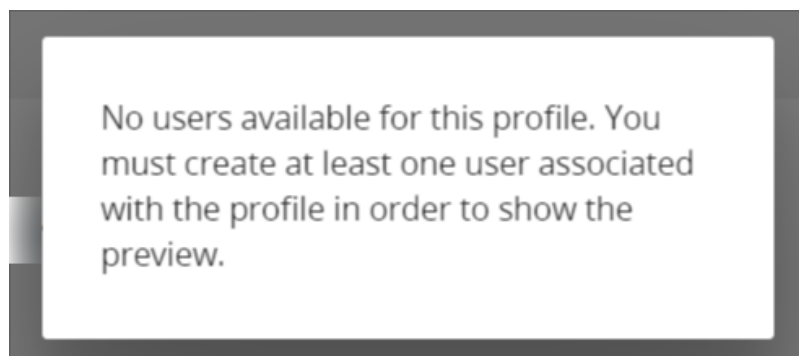
Lastly is possible to see a **Preview** of the screen based on a certain profile, this function allows to immediately verify if the configuration has be done correctly.



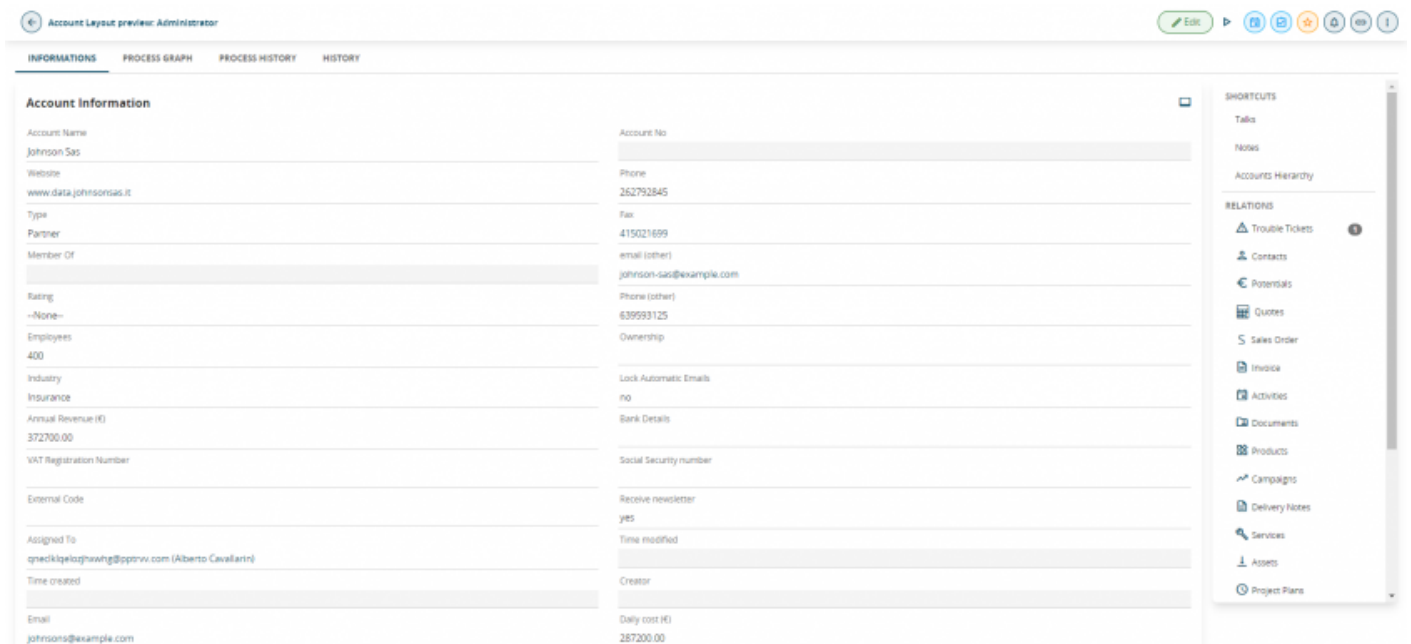
*Clicking on Preview, the system will open a pick list*



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



*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);

Product Details

Tools	+	Item Name	+	Qty In Stock	+	Qty	+	List Price	+	Total :	+	Price	+	colonna test	+	colonna formula	+
Buttons	id	Qty In Stock	Quantity	List Price	ListPriceRO	Net Price	data	test formula									
	Product Name			total_notaxes_label	Total After Discount												
	Product No			discount_label	Margin												
	Sub Products			tax_total_label													
	Description			margin_label													
	Comments																

Add column

Set columns width

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