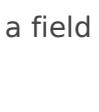


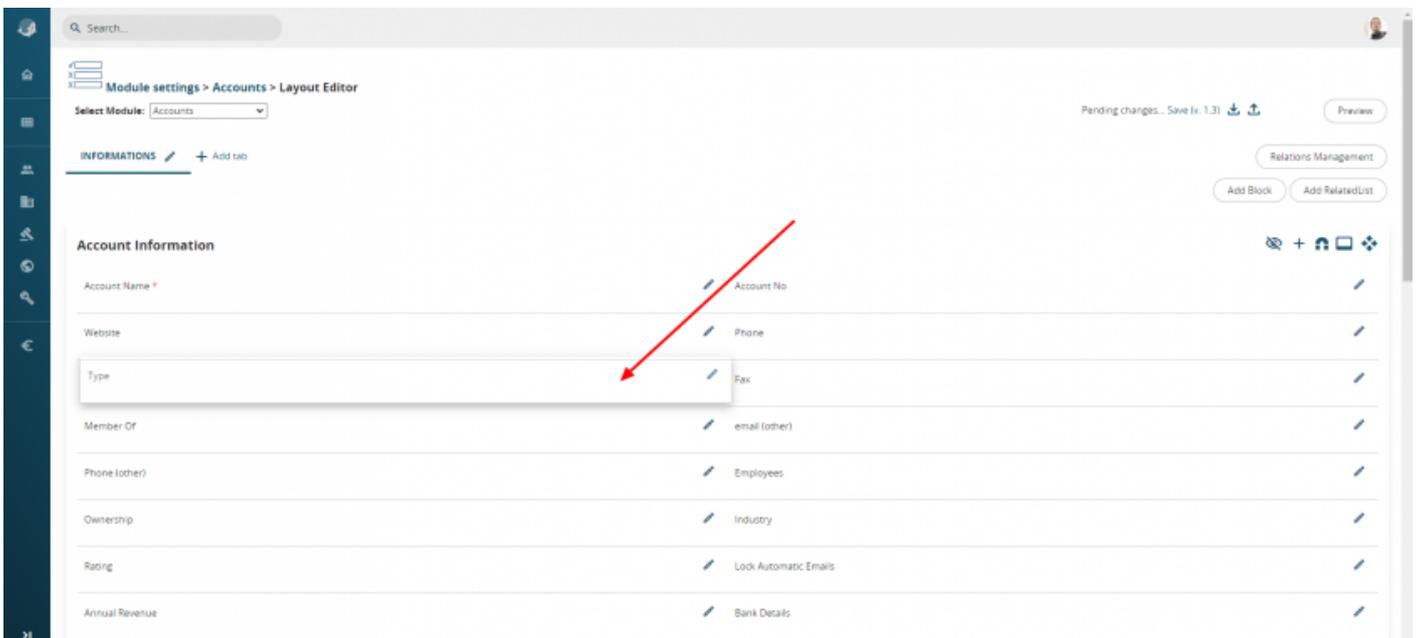
17.7 Layout editor

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 from 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 block and from one block to another one.

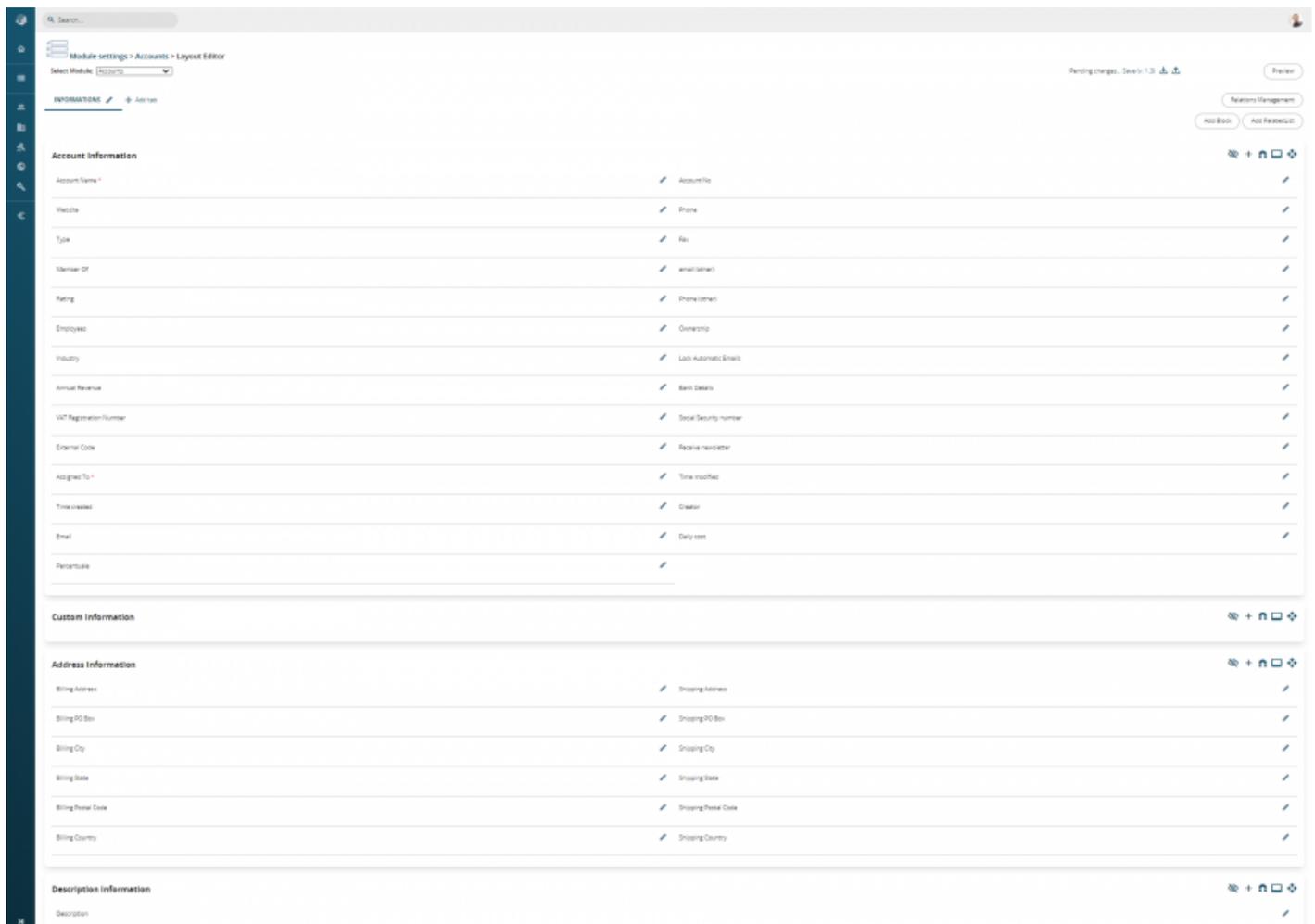


The layout editor allows you to:

- 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:

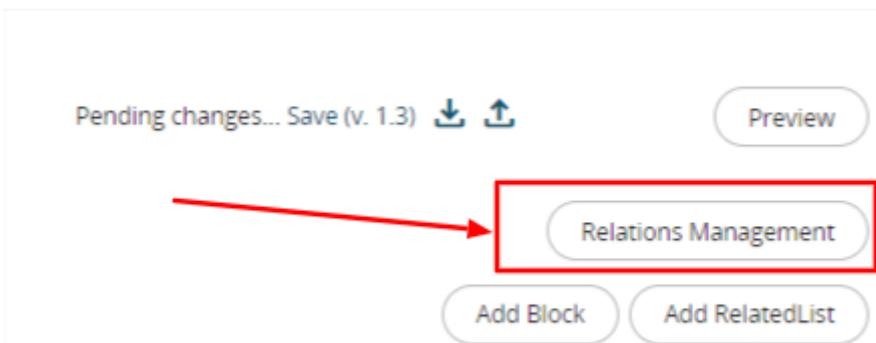
<p>Text</p>	<p>It is a field that can contain from 1 to 255 characters (letters and numbers). The desired length and the name to be given therefore need to be defined.</p>
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Text Area	Text field with pre-set dimensions, visual width equal to the card 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
Hour	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.
Datetime	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.
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
Skype	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.
Related to	It allows the creation of a relationship field within a module, but it will not be possible to reference the same module multiple times.
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 <i>*see also 17.7.1 BUTTON field in vtenext</i>
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
Signature	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.
Rating	It allows the display of a rating system from 1 to 5 stars, to which a name can be assigned.
Media	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.).



Select Module: ACCOUNTS

Relations Management

INFORMATION + Add tab

Configuration

Sort by count

Contacts

Last Name X First Name X Title X Account Name X Email X Office Phone X Assigned To X

Potentials

Potential X Related To X Sales Stage X Amount X Expected Close Date X Assigned To X

Quotes

Quote No X Subject X Quote Stage X Potential Name X Account Name X Grand Total X Assigned To X

Sales Order

Order No X Subject X Account Name X Quote Name X Grand Total X Assigned To X

Invoice

Invoice No X Subject X Sales Order X Status X Grand Total X Assigned To X

Activities

Close X Type X Subject X Contact Name X Related To X Start Date X Start Time X End Date X End Time X Recurring Type X Assigned To X

Documents

Title X File Name X Assigned To X Folder Name X

Trouble Tickets

Ticket No X Subject X Related To X Status X Priority X Assigned To X

Products

Product Name X Part Number / SKU X Commission Rate (%) X Qty/Unit X Unit Price X

Campaigns

Campaign Name X Campaign Type X Campaign Status X Expected Revenue X Expected Close Date X Assigned To X

Delivery Notes

ddr Name X Assigned To X

Services

Service No X Service Name X Commission Rate (%) X Usage Unit X No of Units X Price X

Assets

Asset No X Asset Name X Customer Name X Product Name X

Project Plans

Project No X Project Name X Start Date X Status X Type X Assigned To X

Visit Report

Visit Name X Assigned To X

Service Contracts

Subject X Service X Tracking Unit X Total Units X Used Units X Assigned To X

Targets

Target Name X Target Type X Target State X End Time X Assigned To X

Newsletter Emails

Newsletter Name X Time to reach start X Time to reach end (in min) X Assignment To X Check start X

Fax

Subject X Document(s) X Date Sent X Assigned To X

Messages

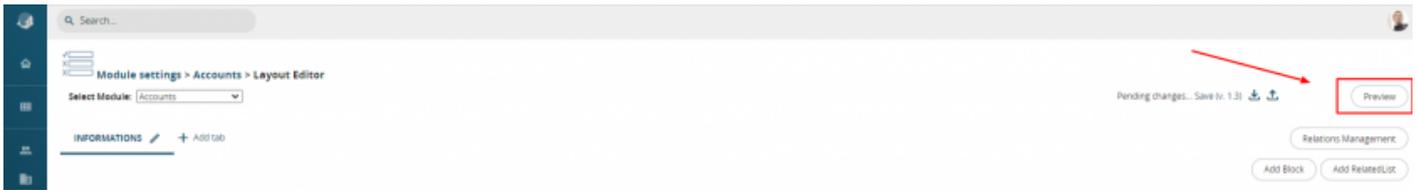
Date X Subject X From X

Processes

Document Name X Owner X Assignment To X



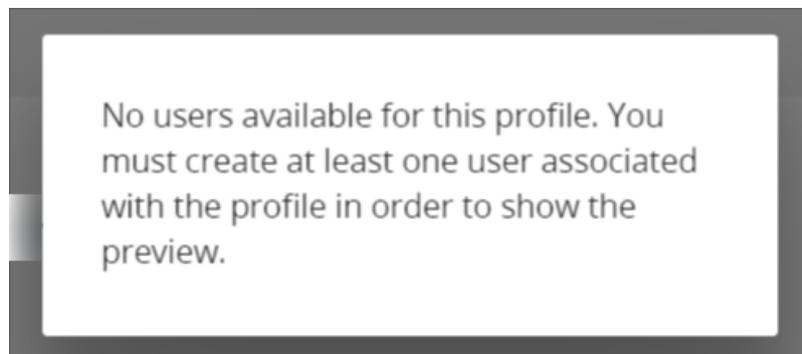
Lastly is possible to see a **Preview** of the screen based on a certain profile, this function allows to immediately verify if the configuration has be done correctly.



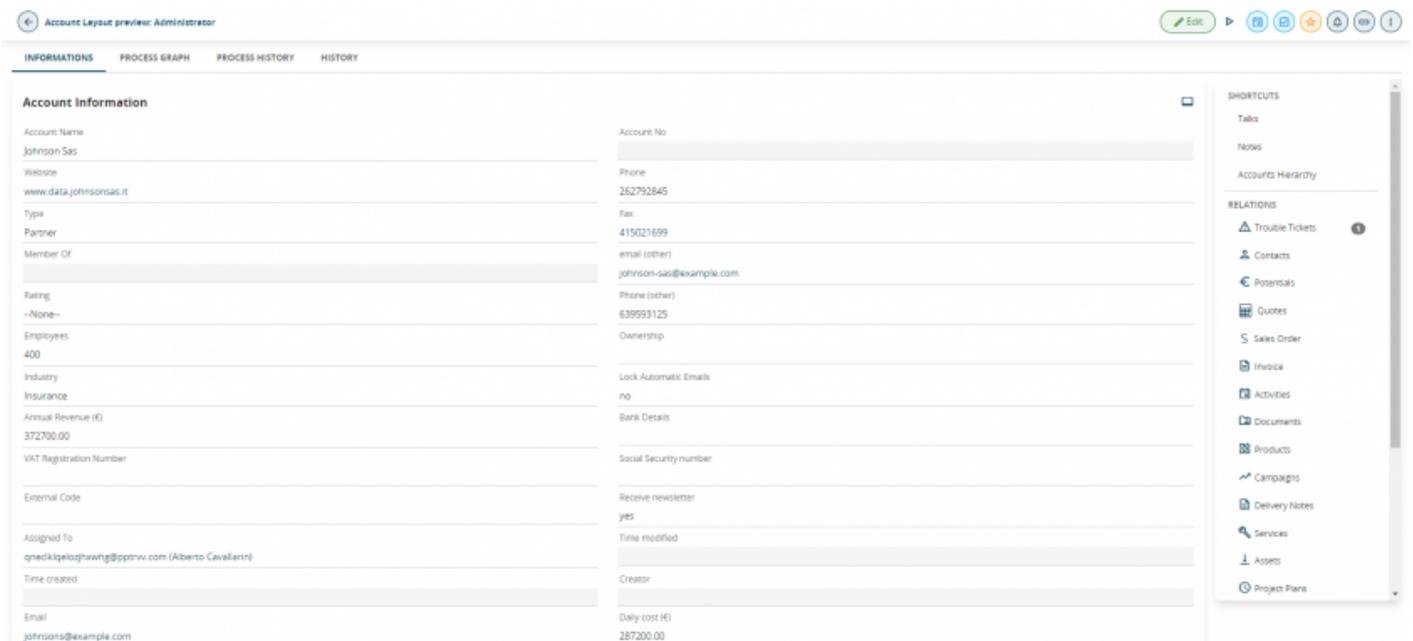
Clicking on Preview, the system will open a pick list



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															

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