

2.5.1 Record structure (detail view)

Account Information

Account Name	Account No
demovte	ACC6
Website	Phone
www.demovte.com	(108) 792-9815
Fax	Member Of
Phone (other)	Employees
	0
email (other)	Ownership
Industry	Rating
Chemicals	Acquired
Type	Lock Automatic Emails
	no
Annual Revenue (K)	Bank Details
0.00	
VAT Registration Number	Social Security number

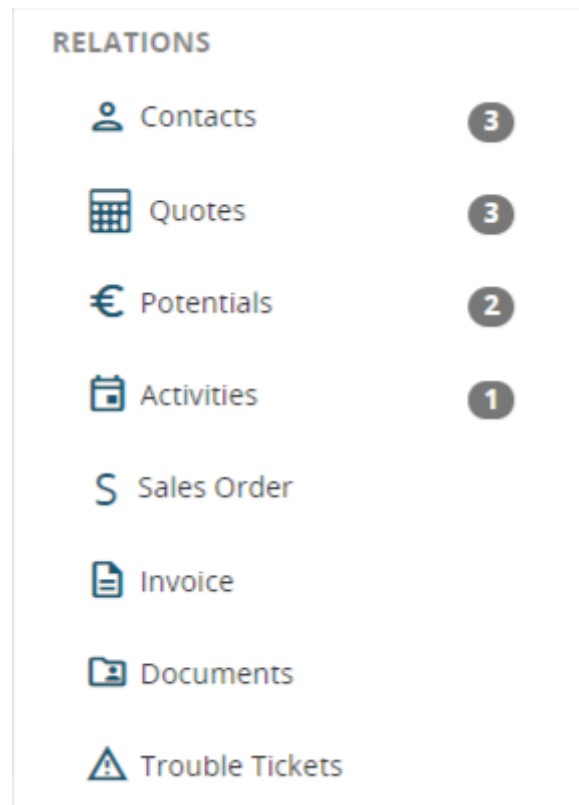
SHORTCUTS

- Talks
- Notes
- Accounts Hierarchy

RELATIONS

- Contacts 3
- Quotes 3
- Potentials 2
- Activities 1
- Sales Order
- Invoice
- Documents
- Trouble Tickets

1. Relations with other modules: positioned on the right of the screen, this function summarises all the relations with other modules of the record in which you are operating by indicating the numbers of related elements. To display a related module click on its name. The admin user can change the order of items, decreasing in accordance with the number of Relations, by means of Modules manager > Layout editor.



For example, clicking on Contacts produces the following view:

Accounts Hierarchy

- No parent
- samplevte

Contacts (3) - List

Showing 1 - 3 of 3

Action	Last Name	First Name	Title	Account Name	Email	Office Phone	Assigned To
	CAMPONALIS	MARINE		samplevte	test123@test123.com	(8796)7296999	formazione.vtenext@gmail.com (Francesco Villani)
	DE BALLIS	SEVERINE		samplevte	test123@test123.com	(889)97644396	formazione.vtenext@gmail.com (Francesco Villani)
	Smith	Mary	Director Operations	samplevte	test123@test123.com	(995) 212-8772	formazione.vtenext@gmail.com (Francesco Villani)

SHORTCUTS

- Talks
- Notes
- Accounts Hierarchy

RELATIONS

- Contacts** **3**
- Products **2**
- Invoice **1**
- Potentials **1**
- Quotes **1**
- Sales Order **1**
- Activities
- Documents

To create a record of the selected module, in relation to the currently active tab, click “Add” in the relations box.

N.B.: All related modules, have default columns that may be changed using interface. Going to Settings > Module settings > Interested Modue (es. Accounts) > Layout Editor > Relations management (button on the top right part of the screen). It will be possible, using interface, to manage the relation with each module choosing the columns and the order of each element.

Search...

Module settings > Accounts > Layout Editor

Select Module: Accounts

Pending changes... Save (v. 1.1)

Preview

INFORMATION + Add tab

Relations Management

Configuration

Sort by count

Contacts

Last NameFirst NameTitleAccount NameEmailOffice PhoneAssigned To

Potentials

PotentialRelated ToSales StageAmountExpected Close DateAssigned To

Quotes

Quote NoSubjectQuote StagePotential NameAccount NameGrand TotalAssigned To

Sales Order

Screen that shows how relations of one module can be manage by the user.

Examples of related modules are shown below.

Planned calendar activities

Calendar (1) - List

Showing 1 - 1 of 1

Add To DoAdd Event

Action	Close	Type	Subject	Related To	Start Date	Start Time	End Date	End Time	Assigned To	Contact Name
<div><div></div><div></div></div>										
<div><div></div><div></div></div>	X	Call	Meeting - Conference Partnership	demovte	02-05-2018	09:00	02-05-2018	13:00	formazione.vtenext@gmail.com (Francesco Villani)	

Quotes

Quotes (3) - List

Showing 1 - 3 of 3

Add Quote

Action	Quote No	Subject	Quote Stage	Potential Name	Account Name	Grand Total	Assigned To
<div><div></div><div></div></div>							
<div><div></div><div></div></div>	QUO1	Davis - vtenext Total	Created	vtenext- 1000 units	demovte	€ 160.00	formazione.vtenext@gmail.com (Francesco Villani)
<div><div></div><div></div></div>	QUO3	vtenext - X-CEED 1000units	Delivered	X-CEED INC 99 - 1000 units - vtenext	demovte	€ 270.00	formazione.vtenext@gmail.com (Francesco Villani)
<div><div></div><div></div></div>	QUO9	test	Created		demovte	€ 9763.00	qnecklqelozjhxxwhg@pptrvv.com (Alberto Cavallarin)

Contacts

Contacts (3) - List

Showing 1 - 3 of 3

Add Contact

Action	Last Name	First Name	Title	Account Name	Email	Office Phone	Assigned To
<div><div></div><div></div></div>	Davis	Jennifer	IT Developer	demovte	test1211223@libero.com	(915) 291-5192	formazione.vtenext@gmail.com (Francesco Villani)
<div><div></div><div></div></div>	SARVITOL	BRUNE		demovte	test123@test123.com	(9986)95088235	formazione.vtenext@gmail.com (Francesco Villani)
<div><div></div><div></div></div>	VICENZUL	RENOUS		demovte	test123@test123.com	(9909)92109719	formazione.vtenext@gmail.com (Francesco Villani)

By default, the relations menu proposes all the existing modules related to the module you are manage.

Certain actions available in the module are accessible by clicking the “Other” button.

The actions are partly general and partly contextual. For example, the **Convert Lead** option is only present in the **Leads** module.

Finally, below we provide a list of standard icons located at the top right of the page before the “Other” button:

<div><div></div><div>Modifica</div></div>	- Edit
<div><div></div></div>	- Tracking
<div><div></div></div>	- Add Event
<div><div></div></div>	- New Task
<div><div></div></div>	- Link new email
<div><div></div></div>	- Favourite
<div><div></div></div>	- Notify me of changes

	- Link
	- Other

Revision #1
Created 2 September 2024 07:58:55 by Admin
Updated 2 September 2024 07:58:55 by Admin