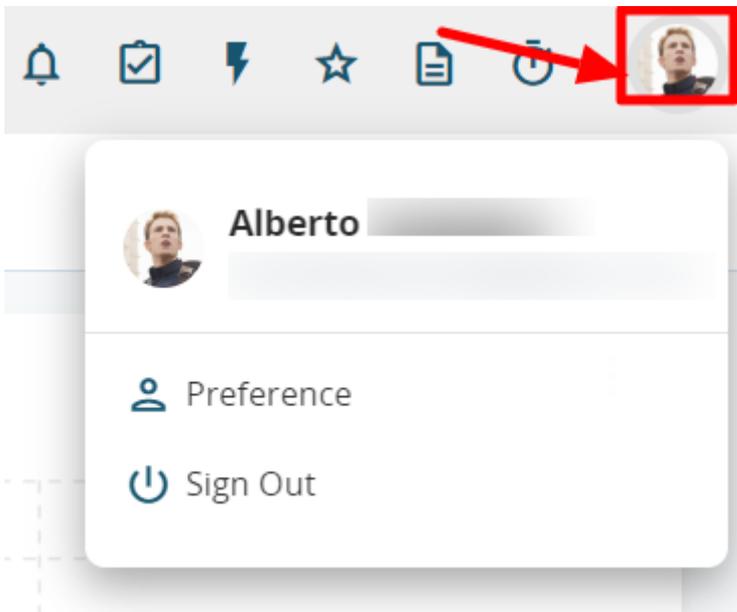
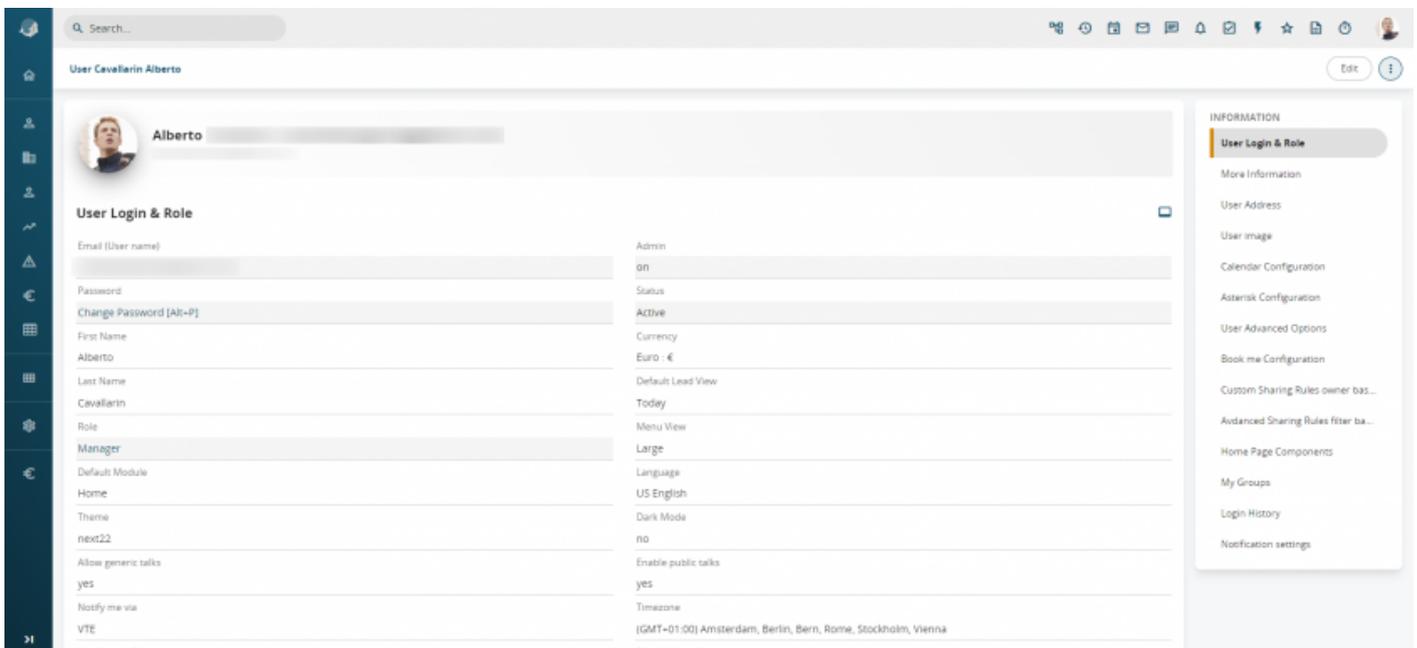


# 2.7 Users preferences



To access user settings click on the icon of your personal avatar and then click on **PREFERENCES**. The page appears as shown below:

## User login and role



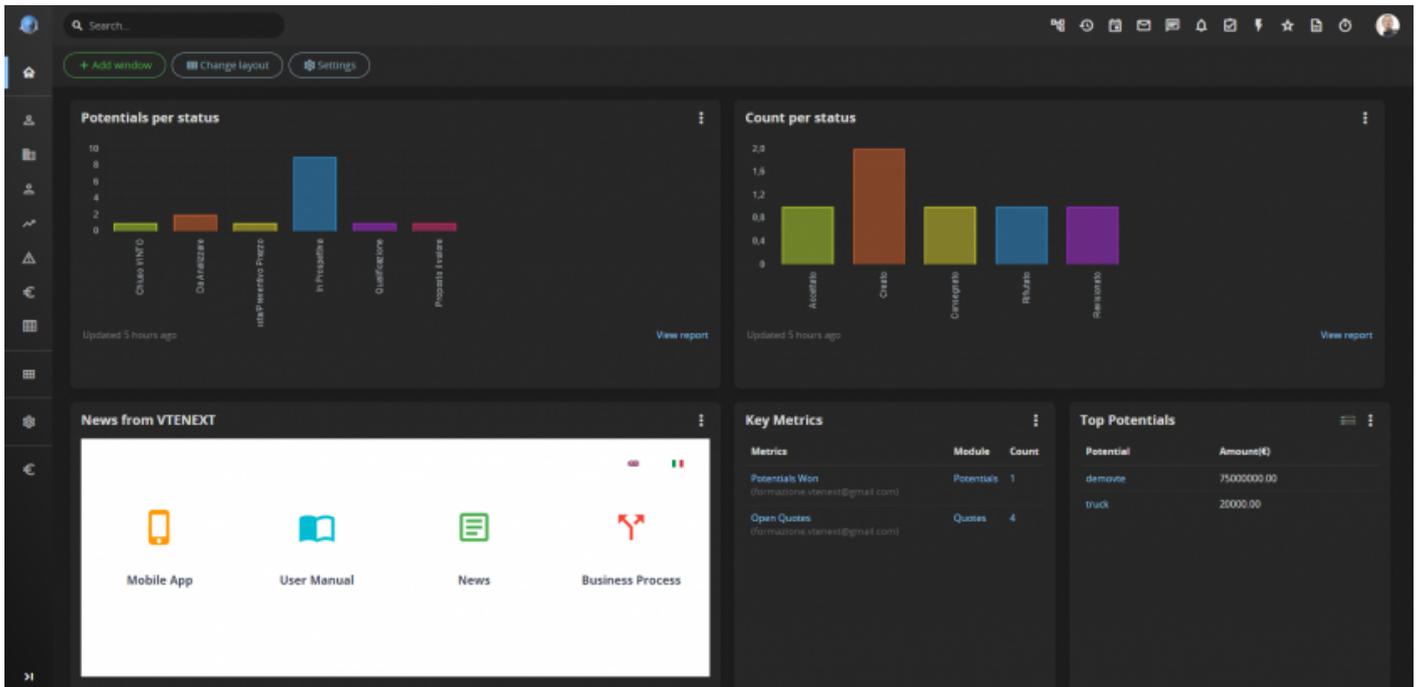
This box is used to:

- change the **password**;

- configure access via **LDAP** (only if available in the company and only for on-premise installations);
- select **currency type**;
- select an **interface language**;
- choose **time zone**;
- **notification settings** for the various modules;
- choose whether or not to **receive notifications** and the method email/vtenext;
- choose **vtenext graphic** mode: softened or next.

From version 19.10 you can select "**Dark Mode**" by accessing User Preferences and ticking the field of the same name. **This option is available exclusively for the next mode.**

**Example of Homepage with Dark Mode selected.**



**More information**

<p>Title</p> <hr/> <p>Department</p> <hr/> <p>Office Phone</p> <p>0451234567</p> <hr/> <p>Mobile</p> <p>3491234567</p> <hr/> <p>Home Phone</p> <hr/> <p>Description</p> <hr/> <p>Decimal point separator</p> <p>.</p> <hr/> <p>Decimal places</p> <p>2</p> <hr/>	<p>Fax</p> <hr/> <p>Other Email</p> <hr/> <p>Reports To</p> <hr/> <p>Other Phone</p> <hr/> <p>Internal Mail Composer</p> <p>yes</p> <hr/> <p>Thousands separator</p> <hr/>
--	--

**This block is useful for:**

- Insert all users personal data, as his/her **Title** ( Director, Manager, etc..), **Telephone** number, **Mobile** number, etc;
- The field **Reports to**, indicates which is the head of that person;
- **Internal Email Composer**: if enable, allows use of the vtenext internal email composer. When disabled, the default mail client will open.
- Choose how numbers and decimals should be displayed, through the fields **Decimal point separator** **Thousands separator** **Deciaml places** (**WARNING**: all changes made in this area are applied in all the crm, so all the numeric/ currency fields will be displayed with that logic);

## User Address

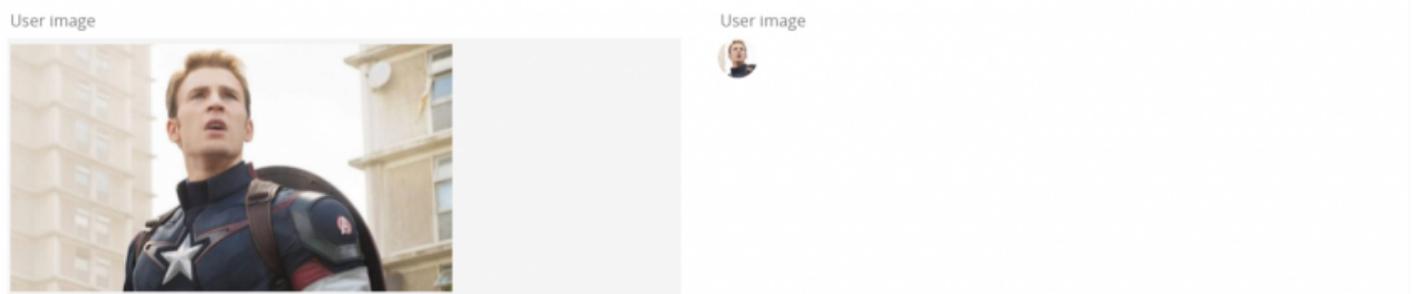
Street Address	Country
City	Postal Code
State	

## User photo

Allows a user photo and thumbnail (avatar) to be set. Once you have uploaded the photo, save your changes. Now return to point 4, click on Photo on the right, crop the photo to the square format and save.

- set a thumbnail function to allow immediate recognition of the user;
- change the access module after login (Default module);

## User image



## Calendar configuration

<b>Default Calendar View</b> This Week	<b>Date Format</b> dd-mm-yyyy
<b>Reminder Interval</b> 1 Minute	<b>Day starts at (hh:mm)</b> 08:00
<b>Disable Sunday in week view</b> yes	<b>First day of week</b> Monday
<b>Holiday Countries</b> it Italy	
<b>Share calendar with</b> 	<b>Share calendar with (only occupation)</b>

## Asterisk configuration

<b>Asterisk Extension</b>	<b>Receive Incoming Calls</b> no
---------------------------	-------------------------------------

<b>Asterisk plugin</b>	If vtenext is integrated with an Asterisk switchboard, indicate here your own internal telephone (es: SIP/111).
<b>Receive Incoming Calls</b>	Tick this option to enable incoming calls recognition.

## REST webservice configuration

**Access key ID token** which through webservices identifies automatically the password associated to the user.

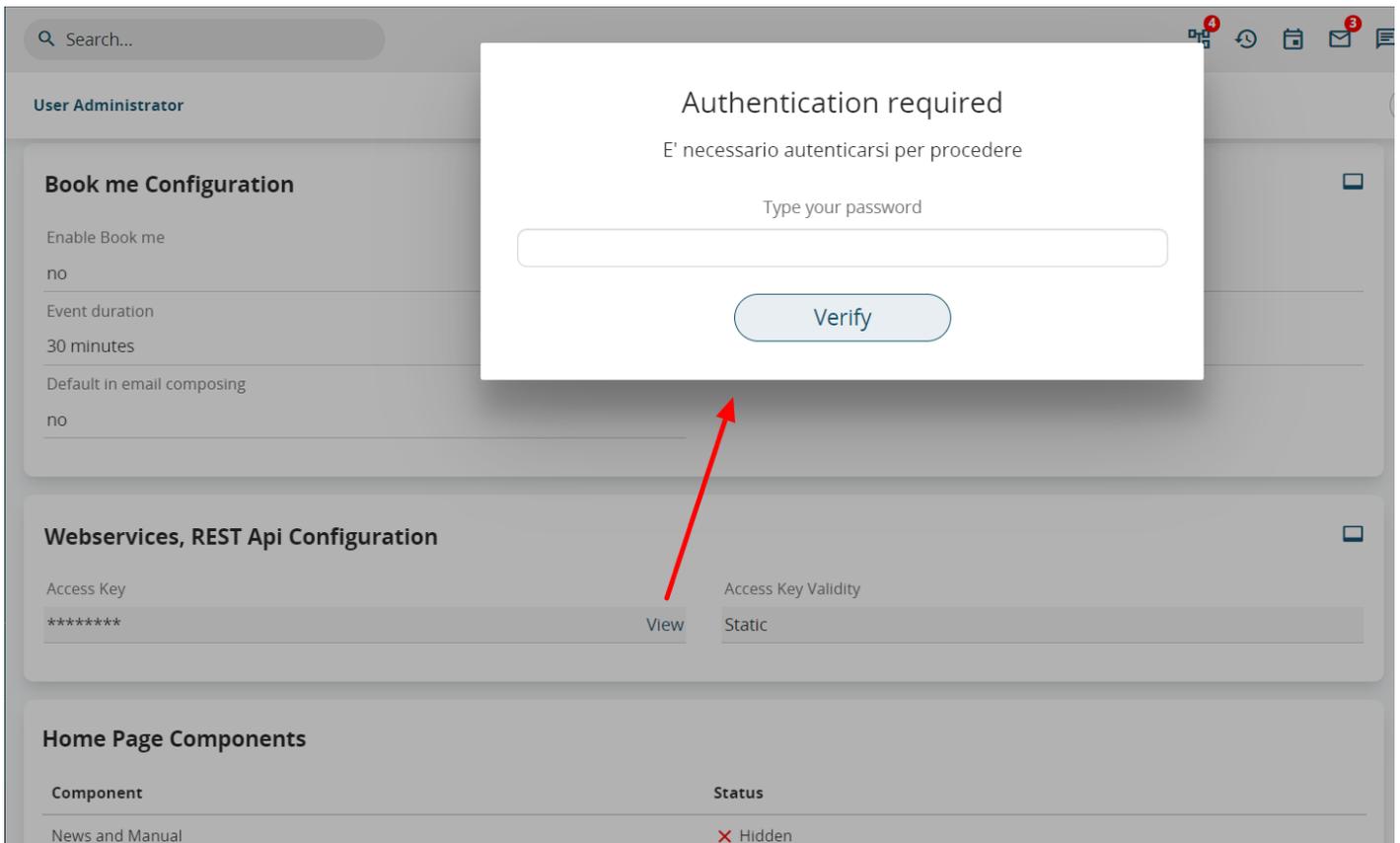
<b>Access Key</b> ***** <a href="#">View</a>	<b>Access Key Validity</b> Static
---	--------------------------------------

Because of the sensitive information held by that field, it requires the user password to be unlocked. Once the field is unlocked it is possible to regenerate the token by clicking the "Rigenerate" button. Through the picklist "Access key validity" you can define the behavior of the token.

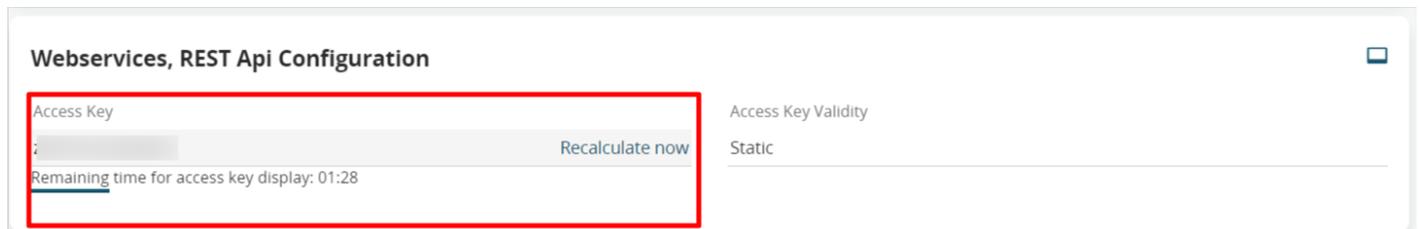
These are the values selectable on the picklist:

<b>Static</b>	the access key remains unchanged forever
<b>Automatically update on password change</b>	the access key is recalculated every time you change the password
<b>Disabled</b>	the access key does not allow any web service access

**PAY ATTENTION: Once the token is regenerated you must login again in Wilson App**



*Screen obtained by clicking on "VIEW" in the Access Key field*



*Screen obtained after entering the password. Notice the remaining time to regenerate the Access Key and the "Recalculate Now" button.*

**Advanced user option - Web service Access Key**

Upcoming Activities	✗	Hidden
Pending Activities	✗	Hidden
Top Accounts	✗	Hidden
Home Page Dashboard	✗	Hidden
Top Potentials	✗	Hidden
Top Quotes	✗	Hidden
Key Metrics	✗	Hidden
Top Trouble Tickets	✗	Hidden
My Group Allocation	✗	Hidden
Top Sales Orders	✗	Hidden
Top Invoices	✗	Hidden
My New Leads	✗	Hidden
Top Purchase Orders	✗	Hidden
My Recent FAQs	✗	Hidden
News from VTECRM	✓	Shown
Help VTENEXT	✗	Hidden
Talks	✗	Hidden
My files	✓	Shown

**Identification Token:** uses the web service to identify the user password automatically associated with user creation

#### Webservice Access Key

vyQIXj68NIzSCPi

**Notifications:** makes it possible to define which notifications you wish to receive based on the specified module, with the exception of those defined by the profile rules.

#### 14. Notification settings

Potentials	✓	Notify the creation	✓	Notify the change
Contacts	✗	Notify the creation	✗	Notify the change
Accounts	✗	Notify the creation	✗	Notify the change
Leads	✗	Notify the creation	✗	Notify the change
Documents	✗	Notify the creation	✗	Notify the change
Calendar	✓	Notify the creation	✓	Notify the change
Trouble Tickets	✓	Notify the creation	✓	Notify the change
Products	✗	Notify the creation	✗	Notify the change
FAQ	✗	Notify the creation	✗	Notify the change
Vendors	✗	Notify the creation	✗	Notify the change
Price Books	✗	Notify the creation	✗	Notify the change
Quotes	✗	Notify the creation	✗	Notify the change
Purchase Order	✗	Notify the creation	✗	Notify the change
Sales Order	✗	Notify the creation	✗	Notify the change

### My groups

Shows the groups in which you are a member as defined by the admin user.

#	Group Name	Description
1	Company	My Group

### Login History

To check access events

Login History  
Showing 1 - 10 of 22

User Name	User IP	Type	Sign in Time	Sign out Time	Status
	5.102.2.153	web	2021-11-26 16:13:46	---	Signed in
	95.110.170.235	ws	2021-11-26 16:13:45	---	Signed in
	5.179.191.157	web	2021-11-25 10:31:38	---	Signed in
	95.110.170.235	ws	2021-11-25 10:31:37	---	Signed in
	5.102.2.153	web	2021-11-23 14:29:59	---	Signed in
	95.110.170.235	ws	2021-11-23 14:29:58	---	Signed in
	93.63.183.62	web	2021-11-19 16:28:49	---	Signed in
	95.110.170.235	ws	2021-11-19 16:28:48	---	Signed in
	93.63.183.62	web	2021-11-18 17:11:48	---	Signed in
	95.110.170.235	ws	2021-11-18 17:11:47	---	Signed in

The OTHER button, which provides access to additional user options, is located at the top right, next to the edit button.

The screenshot displays a user management page for Alberto Cavallarin. The user's profile includes a name, email address (qneckiqelazjhxwhg@pptrvv.com), and a profile picture. Below the profile, there are sections for 'User Login & Role' and 'More Information'. The 'User Login & Role' section contains various fields such as 'email (user name)', 'password', 'first name', 'last name', 'role', 'manager', 'default module', 'home', 'theme', 'new22', 'allow generic tasks', 'yes', 'notify me via', 'VTE', and 'notification summary'. The 'More Information' section includes 'title' and 'fax'. On the right side, there is a settings menu with options like 'View Audit Trail', 'Duplicate', 'Remote wipe', and 'Export Audit Trail'. A red box highlights these four options, and a red arrow points from the user's name to the settings menu.

- See user control: see **chapter 16.8**
- Duplicate: allows the user to be duplicated, inheriting all configurations
- Delete remote data: used to delete remote data in the App connected to the specific user. In practice, this function forces a user logout and deletes cached data.
- Delete: remove user.

Revision #1

Created 2 September 2024 07:58:55 by Admin

Updated 2 September 2024 07:58:55 by Admin