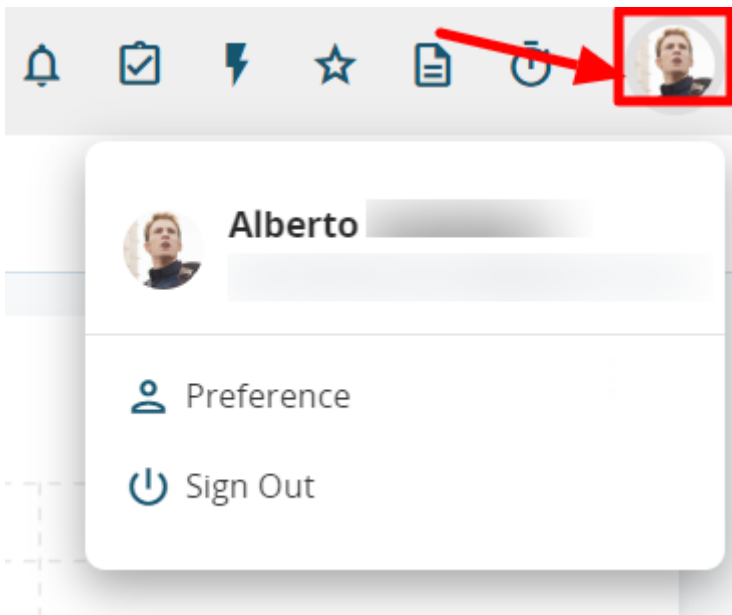


## 2.7 Users preferences



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

A screenshot of a web application's settings page for a user named 'Alberto'. The page has a dark blue sidebar on the left with various icons. The main content area is titled 'User Login & Role' and contains a form with two columns of settings. The first column includes fields for Email, Password, First Name, Last Name, Role, Default Module, Theme, and Notification settings. The second column includes fields for Admin status, Status, Currency, Default Lead View, Menu View, Language, Dark Mode, Enable public tasks, and Timezone. A right-hand sidebar titled 'INFORMATION' contains a list of links including 'User Login & Role', 'More Information', 'User Address', 'User image', 'Calendar Configuration', 'Asternik Configuration', 'User Advanced Options', 'Book me Configuration', 'Custom Sharing Rules owner bas...', 'Advanced Sharing Rules filter ba...', 'Home Page Components', 'My Groups', 'Login History', and 'Notification settings'.

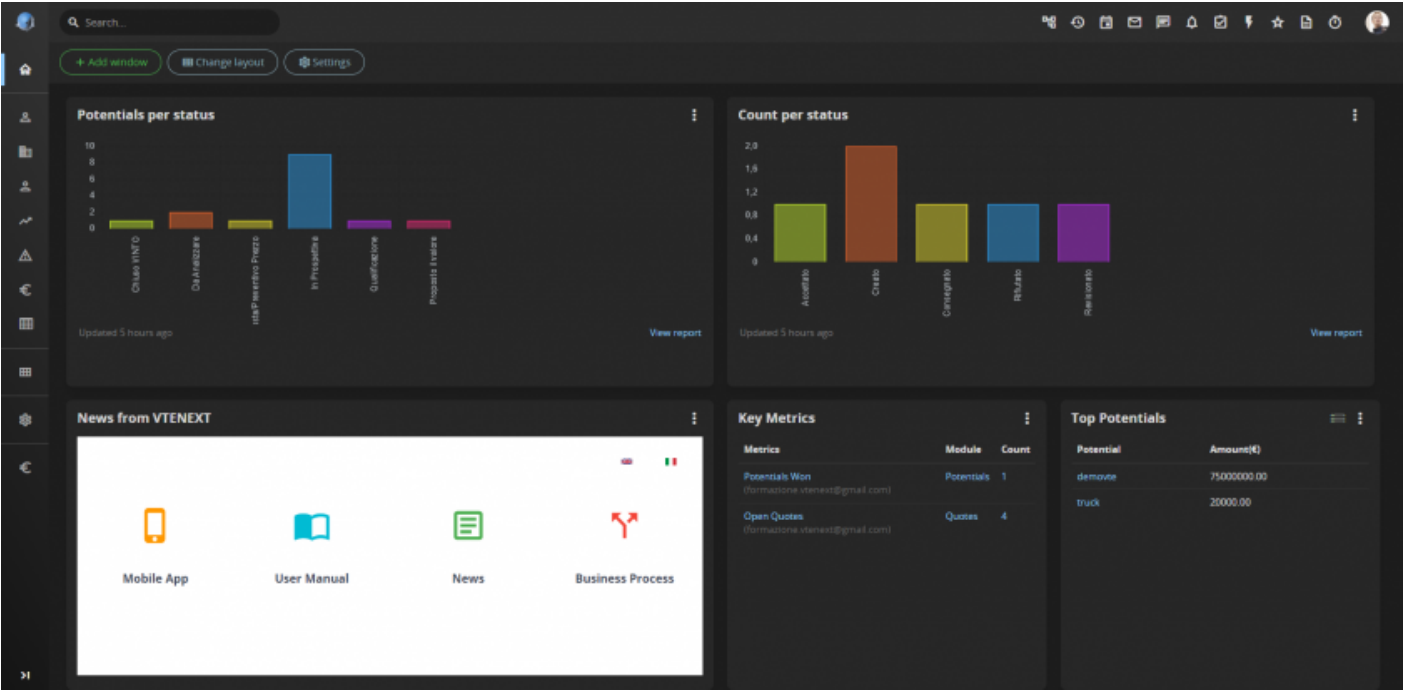
This box is used to:

- 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**

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

**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	

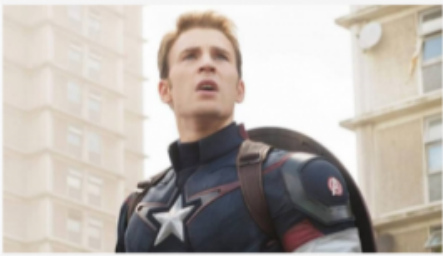
### User photo

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


User image



User image



### Calendar configuration

<b>Default Calendar View</b>	<b>Date Format</b>
This Week	dd-mm-yyyy
<b>Reminder Interval</b>	<b>Day starts at (hh:mm)</b>
1 Minute	08:00
<b>Disable Sunday in week view</b>	<b>First day of week</b>
yes	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.

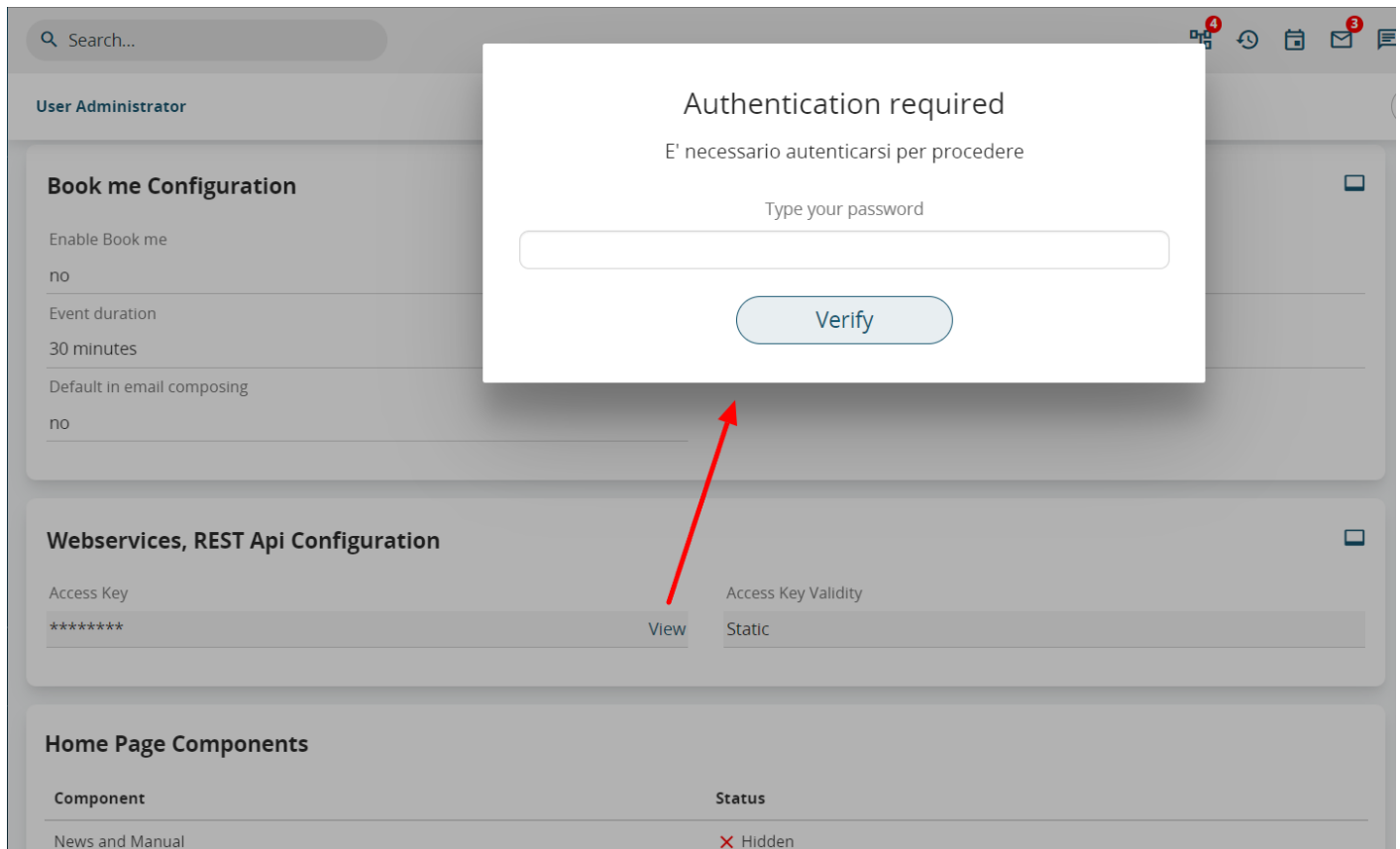
<b>Access Key</b>	<b>Access Key Validity</b>
***** <a href="#">View</a>	Static

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.

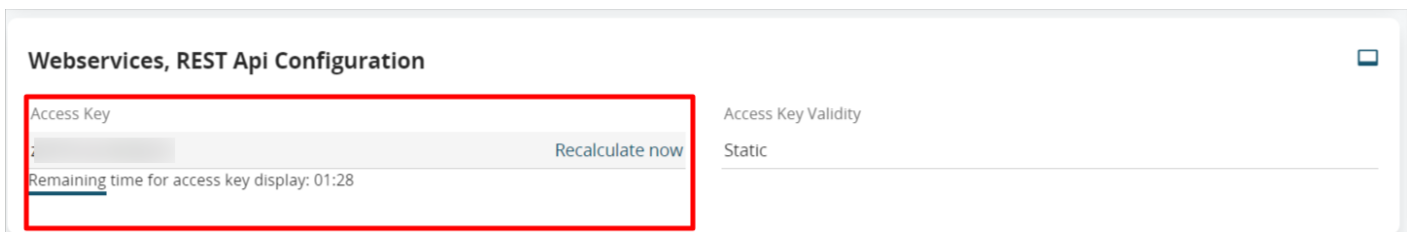
These are the values selectable on the picklist:

<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						⌵ ⌵ 1 2 3 ⌵ ⌵
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.

Search...

User Cavallarin Alberto

Alberto Cavallarin - qnecikqelazjhwhg@pptrvv.com  
qnecikqelazjhwhg@pptrvv.com

User Login & Role

Email (user name)	Admin
qnecikqelazjhwhg@pptrvv.com	on
Password	Status
Change Password (Act+P)	Active
First name	Currency
Alberto	Euro, €
Last name	Default unit view
Cavallarin	Today
Role	Menu view
Manager	Large
Default module	Language
Home	US English
Theme	Dark mode
new22	no
Allow generic tasks	Enable public tasks
yes	yes
notify me via	timezone
VTE	(GMT+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna
notification summary	enable activitylog
Never	no

More information

Title	Fax
-------	-----

View Audit Trail  
Duplicate  
Remote wipe  
Export Audit Trail

User image  
Calendar Configuration  
Address Configuration  
User Advanced options  
Book me configuration  
Custom sharing rules owner bas...  
Advanced sharing rules filter ba...  
Home Page Components  
My groups  
Login history  
notification settings

- 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.

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