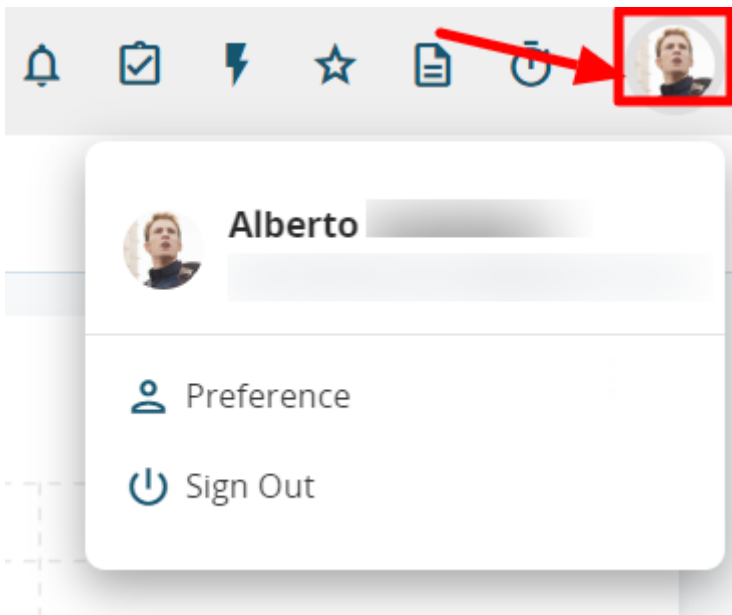


2.7 Users preferences



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 showing the 'User Login & Role' settings page for a user named Alberto Cavallerin. The page has a dark sidebar on the left with various icons. The main content area is divided into two columns. The left column contains fields for 'Email (User name)', 'Password', 'First Name', 'Last Name', 'Role', 'Default Module', 'Theme', 'Allow generic talks', 'Notify me via', and 'VTE'. The right column contains fields for 'Admin', 'Status', 'Currency', 'Default Lead View', 'Menu View', 'Language', 'Dark Mode', 'Enable public tasks', and 'Timezone'. A right sidebar titled 'INFORMATION' lists various settings categories, with 'User Login & Role' currently selected. The user's name 'Alberto' is displayed at the top left of the main content area, and the user's full name 'User Cavallerin Alberto' is displayed at the top of the page.

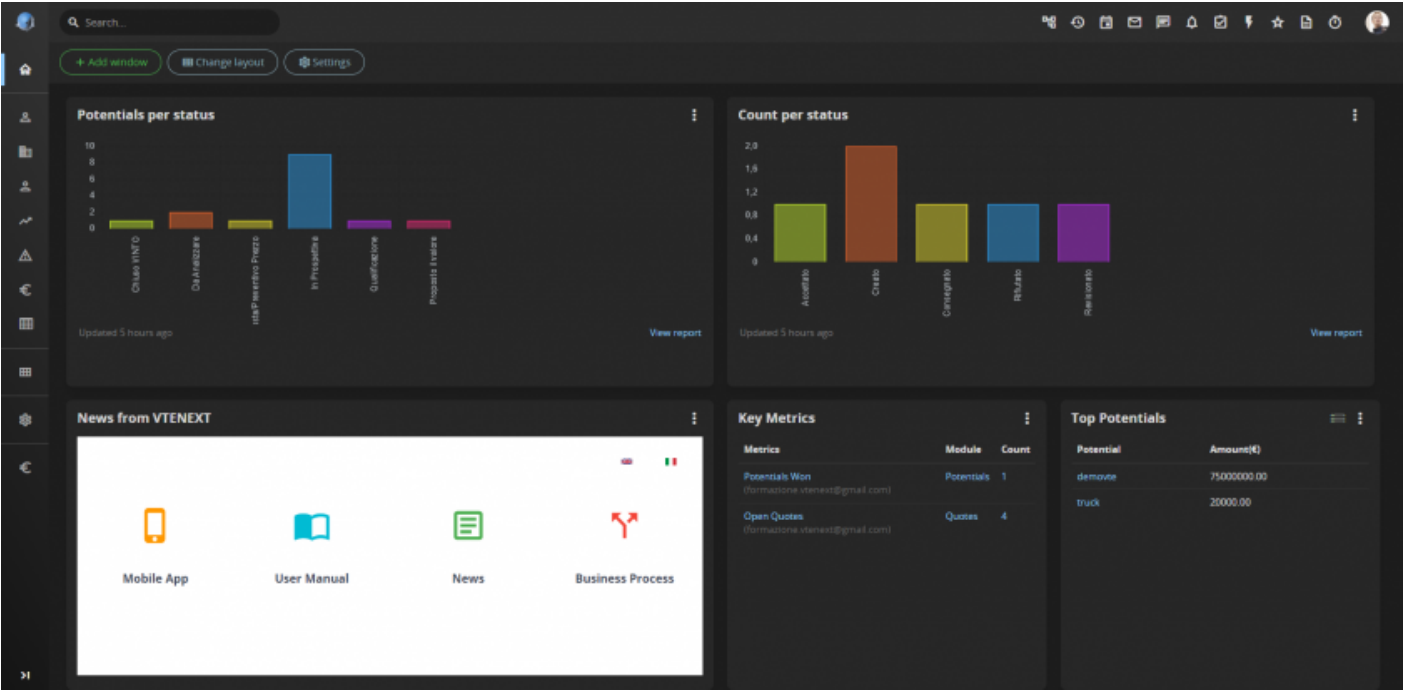
This box is used to:

- 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 3491234567	Reports To
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		

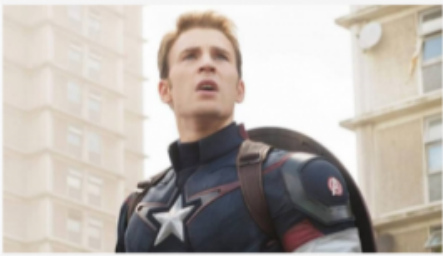
User photo

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

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

Asterisk configuration

Asterisk Extension	Receive Incoming Calls
	no

Asterisk plugin	If vtenext is integrated with an Asterisk switchboard, indicate here your own internal telephone (es: SIP/111).
Receive Incoming Calls	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.

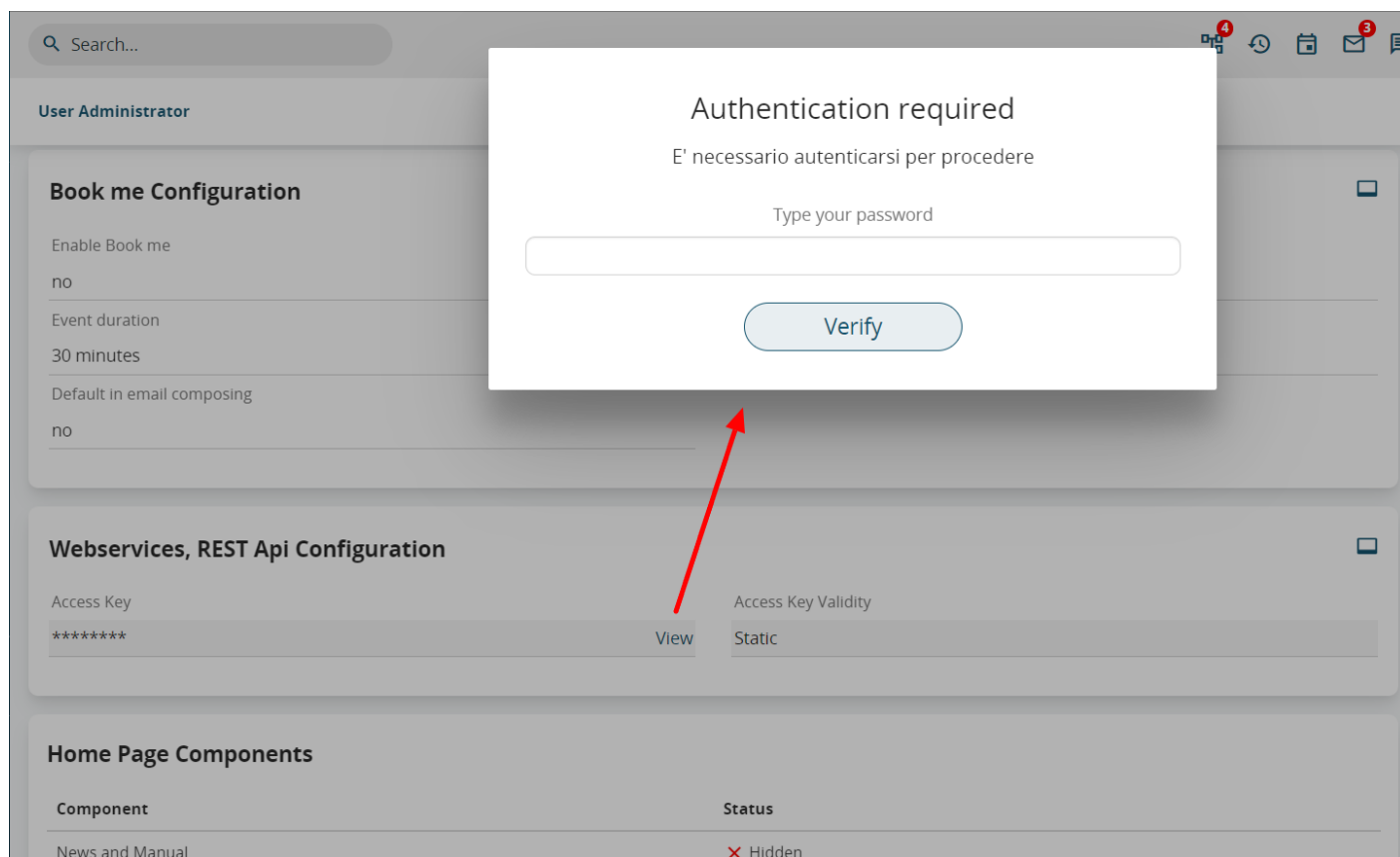
Access Key	Access Key Validity
***** View	Static

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.

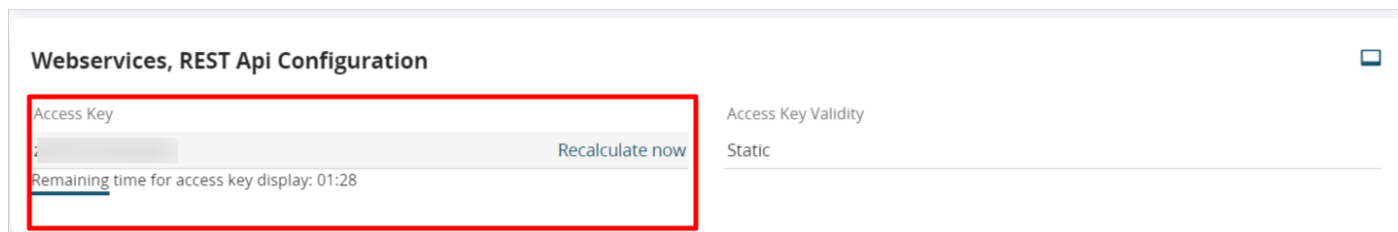
These are the values selectable on the picklist:

Static	the access key remains unchanged forever
Automatically update on password change	the access key is recalculated every time you change the password
Disabled	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 4
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 'User: Cavallarin Alberto'. The page includes a search bar at the top, a user profile section with a photo and email, and a 'User Login & Role' section with fields for email, password, and role. A red arrow points from the 'User Login & Role' section to the sidebar. The sidebar contains a list of configuration options, with a red box highlighting the 'View Audit Trail', 'Duplicate', 'Remote wipe', and 'Export Audit Trail' buttons.

- 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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