

17.5 Wizard Creator

The "Wizard Creator" function allows the administrator to create guided procedures (called wizards to be exact).

You can access this function through Settings > Wizard Creator; you can create your own custom wizard following 4 simple steps as you can see in the following screens.

Settings > Wizard creator

1 Wizard information 2 Main module 3 Fields 4 Relations

Cancel Next >

Choose the parent module and the wizard's name

Wizard's name: Crea Ticket
Parent module: Contacts
Description: Example wizard to create a trouble ticket

Choose a name for this wizard, for example: "Create Account"
Choose the starting module (optional)

Settings > Wizard creator

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Cancel < Back Next >

Module: Trouble Tickets The module to create with this wizard

Settings > Wizard creator

1 Wizard information 2 Main module 3 Fields 4 Relations

Cancel < Back Next >

Choose the fields for the wizard

| Fields | | | |
|-------------------------------------|---|-------------------------------------|-------------------|
| <input checked="" type="checkbox"/> | M | <input checked="" type="checkbox"/> | Title |
| <input checked="" type="checkbox"/> | A | <input checked="" type="checkbox"/> | Status |
| <input type="checkbox"/> | N | <input type="checkbox"/> | Product Name |
| <input type="checkbox"/> | D | <input type="checkbox"/> | Hours |
| <input type="checkbox"/> | A | <input type="checkbox"/> | Days |
| <input type="checkbox"/> | T | <input type="checkbox"/> | Project Task |
| <input checked="" type="checkbox"/> | D | <input checked="" type="checkbox"/> | Description |
| <input type="checkbox"/> | O | <input type="checkbox"/> | Signature |
| <input type="checkbox"/> | R | <input type="checkbox"/> | Due Date |
| <input type="checkbox"/> | Y | <input type="checkbox"/> | Reset SLA |
| <input type="checkbox"/> | F | <input type="checkbox"/> | Mail To |
| <input type="checkbox"/> | I | <input type="checkbox"/> | Mail Bcc |
| <input type="checkbox"/> | E | <input type="checkbox"/> | Vtenext From Mail |

| | | | |
|-------------------------------------|---|-------------------------------------|--------------------|
| <input checked="" type="checkbox"/> | M | <input checked="" type="checkbox"/> | Related To |
| <input checked="" type="checkbox"/> | A | <input checked="" type="checkbox"/> | Priority |
| <input type="checkbox"/> | N | <input type="checkbox"/> | Severity |
| <input checked="" type="checkbox"/> | D | <input type="checkbox"/> | Category |
| <input type="checkbox"/> | A | <input type="checkbox"/> | Project |
| <input checked="" type="checkbox"/> | T | <input checked="" type="checkbox"/> | Assigned To |
| <input type="checkbox"/> | O | <input type="checkbox"/> | Solution |
| <input type="checkbox"/> | R | <input type="checkbox"/> | SLA Estimated Time |
| <input type="checkbox"/> | Y | <input type="checkbox"/> | Due time (h:mm) |
| <input type="checkbox"/> | F | <input type="checkbox"/> | Mail From |
| <input type="checkbox"/> | F | <input type="checkbox"/> | Mail Cc |
| <input type="checkbox"/> | I | <input type="checkbox"/> | Vtenext From Name |
| <input type="checkbox"/> | E | | |

You will be able to view the created wizard at the end of the four steps.

Relations

Documents

Services

Assets

Service Contracts

Choose other linked modules

Once saved, the Wizard can be inserted into a tab in the view by list of a module. In the specific example, a Wizard has been set up for creating technical support tickets. You then go to the specific module and click on the page configuration.

| Action | Ticket No | Title | Status | Priority | Assigned To | Description |
|-------------------|-----------|---|-------------------|----------|-------------|---|
| > [edit] [delete] | TT15 | Test mail converter DEMO | Open | | | Test mail converter DEMO |
| > [edit] [delete] | TT43 | Delivery Status Notification (Failure) | Open | | | ** Indirizzo non trovato ** Il tuo me... |
| > [edit] [delete] | TT42 | Richiesta di manutenzione | Open | Low | | Ho bisogno che veniate a verificare il c... |
| > [edit] [delete] | TT41 | Delivery Status Notification (Failure) | Open | | | ** Indirizzo non trovato ** Il tuo me... |
| > [edit] [delete] | TT5 | How to automatically add a lead from a w... | Wait For Response | Normal | | Qui troviamo la descrizione del problema |
| > [edit] [delete] | TT19 | Email di recupero verificata per il tuo ... | In Progress | | | [image: Google] È stata verificata l'em... |
| > [edit] [delete] | TT16 | Il tuo Account Google è stato recuperato... | Open | | | [image: Google] Account recuperato corr... |
| > [edit] [delete] | TT14 | Avviso di sicurezza critico | Open | | | [image: Google] L'impostazione Accesso ... |
| > [edit] [delete] | TT2 | Individual Customization -Menu and RSS | In Progress | High | | |
| > [edit] [delete] | TT12 | Software issue | Wait For Response | Normal | | Software issue |
| > [edit] [delete] | TT22 | Avviso di sicurezza | Open | | | [image: Google] È stata creata una pass... |
| > [edit] [delete] | TT18 | Avviso di sicurezza | Open | | | [image: Google] La tua password è stata... |
| > [edit] [delete] | TT9 | Dati di registrazione ed accesso | Open | Low | | Area Riservata www.vitecrm.com Gentil... |

Click on "New basic tab" and choose a name for this new view.

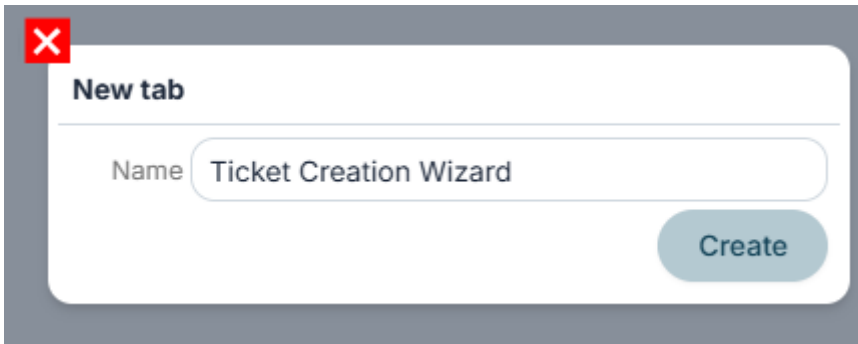
Search...

OPEN - TO BE MANAGED TICKETS LIST WIZARD + Add tab

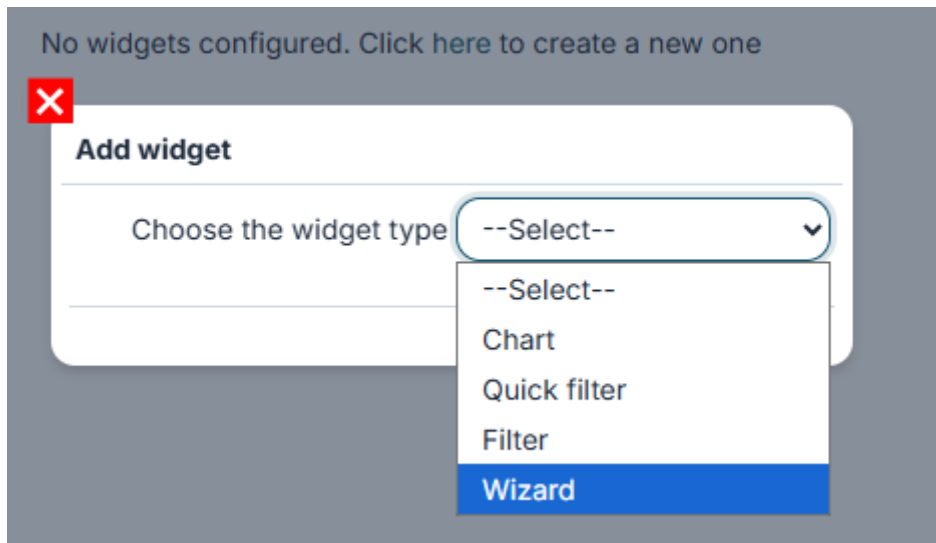
+ Create Other Done Show 20 Re...

Showing 1 - 20 of 20

- New basic tab
- New tab with list
- New tab with report



When you click the "Create" button, a blank page will appear with the following sentence: "No widgets configured. Click here to create a new one." This will allow us to choose the Wizard item from among the available options.



Once this is done, the CRM will ask us to choose the Wizard to display in the newly created tab.

No widgets configured. Click [here](#) to create a new one



Add widget

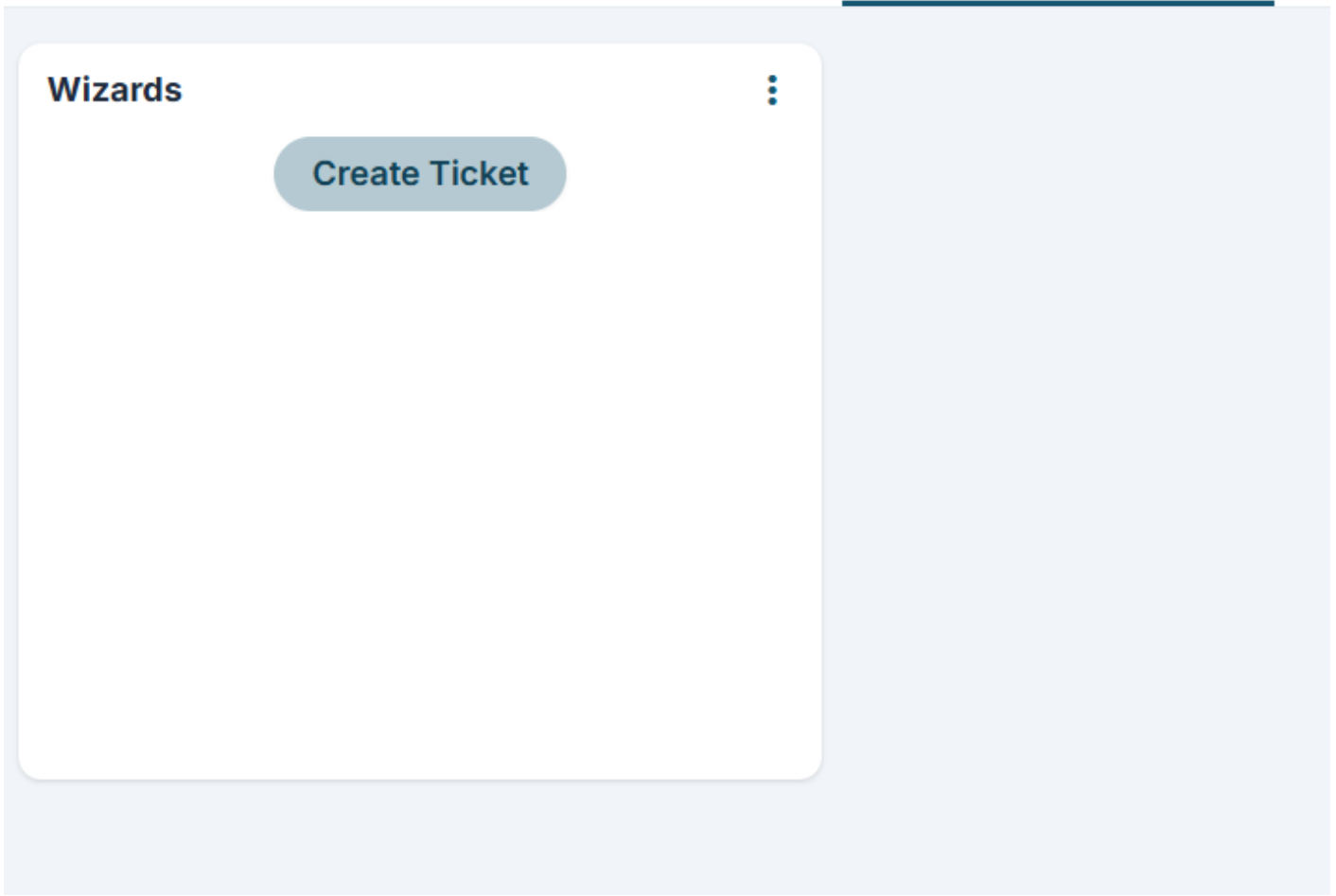
Choose the widget type

Choose one or more wizards:

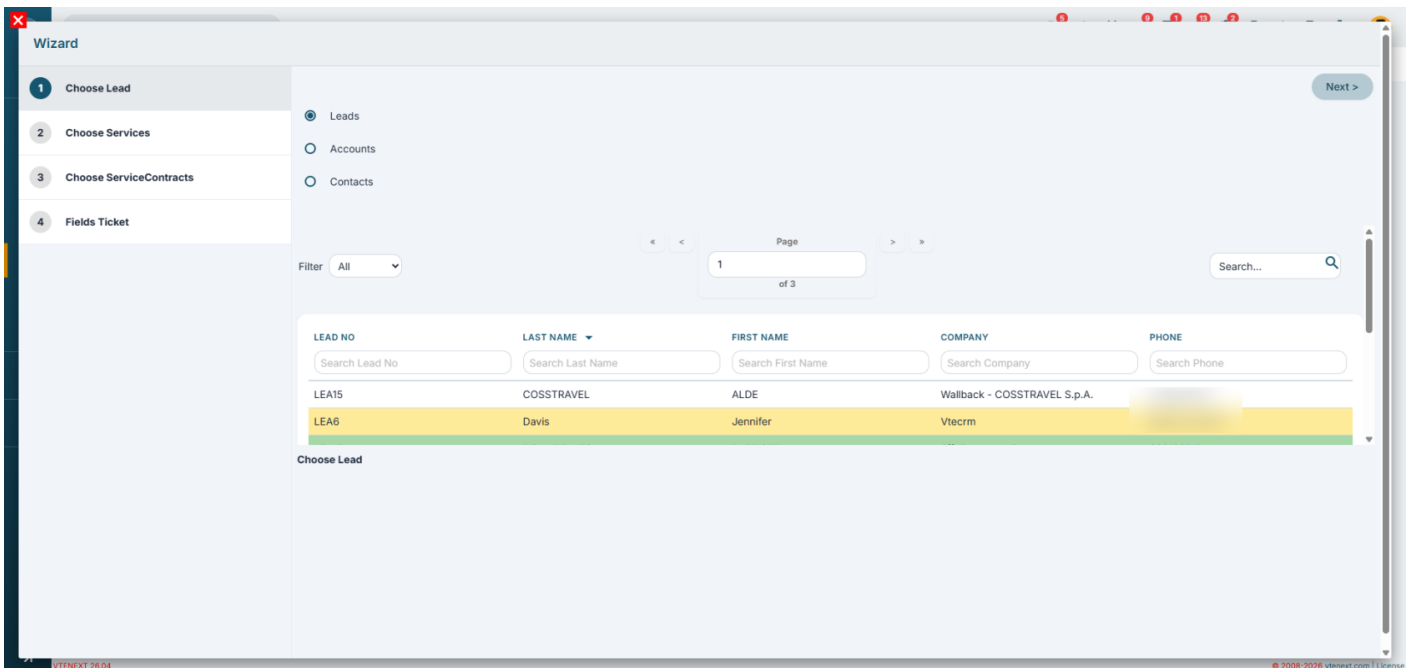
- Create Ticket
- Create Potential
- Create Lead
- Create Contact
- Create Account

Save

By clicking on the "Save" button, we can obtain the result as shown below. Clearly, several Wizards and dashboards can be placed on the same page at the same time. This is to allow each user to choose how to configure their display.



Clicking on the "Create Ticket" button in the Wizard, a popup will appear, with the option of creating a ticket via a number of simple steps.



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