

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

1 Wizard information 2 Main module 3 Fields 4 Relations

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

☒	M	☒	Title
☒	A	☒	Status
☐	N	☐	Product Name
☐	D	☐	Hours
☐	A	☐	Days
☐	T	☐	Project Task
☒	O	☒	Description
☐	R	☐	Signature
☐	Y	☐	Due Date
☐	F	☐	Reset SLA
☐	I	☐	Mail To
☐	E	☐	Mail Bcc
☐		☐	Vtenext From Mail

☒	M	☒	Related To
☒	A	☒	Priority
☐	N	☐	Severity
☒	D	☐	Category
☐	A	☐	Project
☒	T	☒	Assigned To
☐	O	☐	Solution
☐	R	☐	SLA Estimated Time
☐	Y	☐	Due time (hh:mm)
☐	F	☐	Mail From
☐	I	☐	Mail Cc
☐	E	☐	Vtenext From Name

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

Cancel

< Back

Save

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.

Search...

OPEN - TO BE MANAGED TICKETS LIST WIZARD

+ Create Other

Filter Aperti - Da gestire Assigned To All

Showing 1 - 20 of 20

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

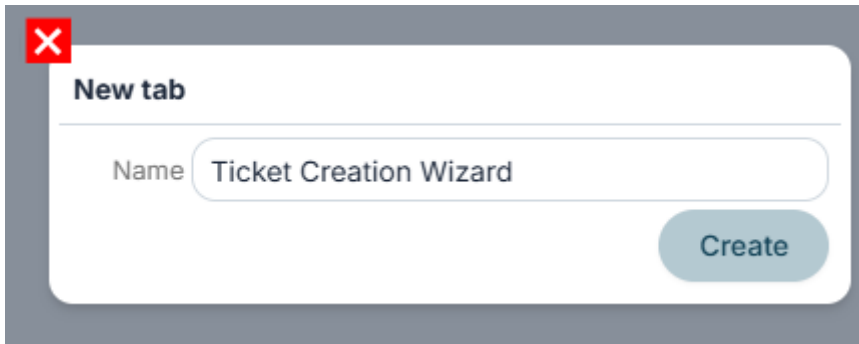
Search...

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

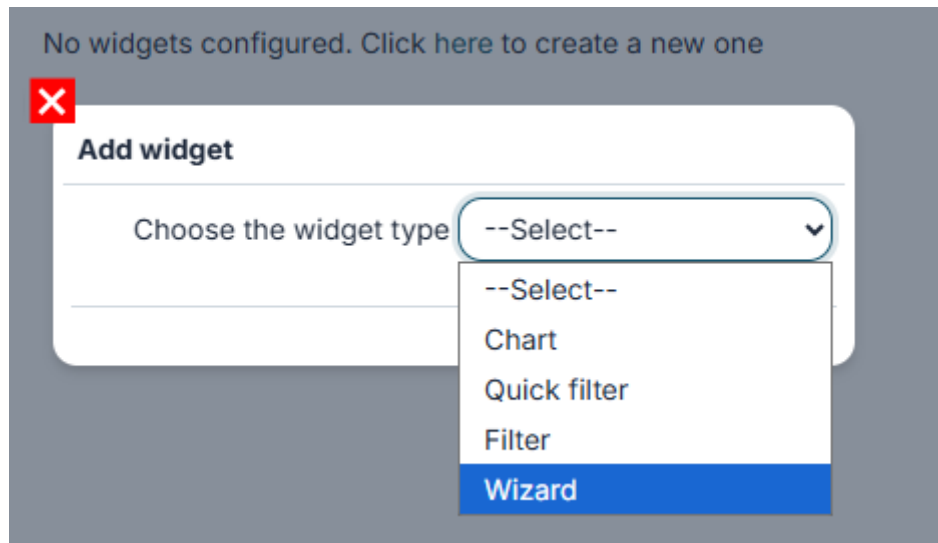


New tab

Name

Create

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.



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

Add widget

Choose the widget type

- Select--
- Chart
- Quick filter
- Filter
- Wizard**

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

Wizard



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.

Wizards

[Create Ticket](#)

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.

Wizard

1 Choose Lead

2 Choose Services

3 Choose ServiceContracts

4 Fields Ticket

☒ Leads

☐ Accounts

☐ Contacts

Filter

All

Page

1

of 3

Search...

LEAD NO	LAST NAME	FIRST NAME	COMPANY	PHONE
LEA15	COSSTRAVEL	ALDE	Wallback - COSSTRAVEL S.p.A.	
LEA6	Davis	Jennifer	Vtecrm	

Choose Lead

Next >

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