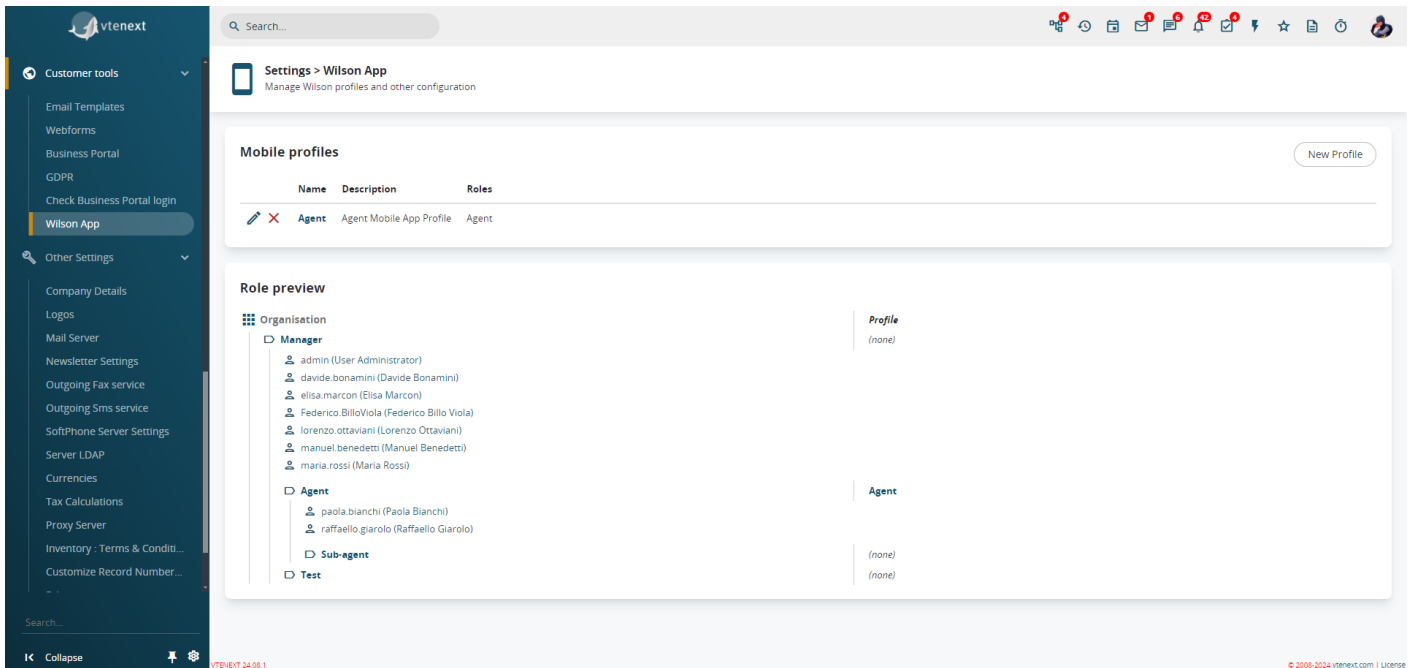


5.5 Mobile Profiles

From the **vtenext** administration panel, it is possible to set up different profiles that will make work even smarter on the **Wilson Mobile App**. There is an administration interface for these profiles that allows you to precisely configure the type of display within the app.

By navigating to **SETTINGS > WILSON APP**, the following screen will appear:



As you can see, there are two sections: one called **Mobile Profiles**, which will show us the list of profiles set up for the Wilson App, and the other, **Role Preview**, which will allow us to view the list of all users divided by role, with details of the mobile profile linked to them.

By clicking on the **New Profile** button in the top right corner, we will access the configuration, which follows the same procedure already explained in *Chapter 16.1.1 Creating a New Profile*.

vteneXt

Search...

Settings > Wilson App
Manage Wilson profiles and other configuration

Step 1 of 2: Welcome to Privilege Profile Creator
Select how to create the new profile

* Profile Name : Agent

Description : Agent Mobile App Profile

☒ I would like to setup a base profile and edit privileges (**Recommended**)
Base Profile:

(OR)

☐ I will choose the privileges from scratch (**Advanced Users**)

Next > Cancel

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Enter the Mobile Profile name, an optional description, and choose the base profile from which to start the configuration (in case a similar profile has already been set up). Finally, click on the **Next** button at the bottom right.

Manage Wilson profiles and other configuration

Manage Wilson profiles and other configuration

Save Cancel

☐ **Edit all**
Allows "Agent" to edit all information / modules of VTENEXT

Warning: selecting a role will reassign it to this profile

Agent

	modules to be shown	Edit Permissions			Fields & Tools Settings
		Create/Edit	View	Delete	
<input checked="" type="checkbox"/>	Accounts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	▼
<input type="checkbox"/>	Actions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▼
<input type="checkbox"/>	Answers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▼
<input type="checkbox"/>	Assets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▼
<input type="checkbox"/>	BUMC				
<input checked="" type="checkbox"/>	Calendar	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	▼
<input checked="" type="checkbox"/>	Campaigns	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	▼
<input type="checkbox"/>	Change Log	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	Charts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	▼
<input checked="" type="checkbox"/>	Conditionals				
<input checked="" type="checkbox"/>	Configurable products	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	▼
<input type="checkbox"/>	Consegna dispositivo	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▼
<input checked="" type="checkbox"/>	Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	▼
<input type="checkbox"/>	Courses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▼
<input type="checkbox"/>	CustomerPortal				
<input type="checkbox"/>	Delivery Notes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▼
<input checked="" type="checkbox"/>	Documents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	▼
<input type="checkbox"/>	Employees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▼
<input checked="" type="checkbox"/>	FAQ	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	▼
<input type="checkbox"/>	Fax	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▼
<input checked="" type="checkbox"/>	Folders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	▼
<input checked="" type="checkbox"/>	Geolocalization				
<input checked="" type="checkbox"/>	Invoice	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	▼
<input type="checkbox"/>	Job Orders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▼
<input type="checkbox"/>	Klondike Topic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▼
<input checked="" type="checkbox"/>	Leads	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	▼
<input type="checkbox"/>	Lista Prodotti Ordine	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▼
<input checked="" type="checkbox"/>	M				
<input type="checkbox"/>	Manutenzioni ordinarie	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▼
<input checked="" type="checkbox"/>	Messages	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	▼
<input checked="" type="checkbox"/>	Messages (Compose)				
<input checked="" type="checkbox"/>	Mobile				
<input checked="" type="checkbox"/>	Mobile Scans	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	▼
<input type="checkbox"/>	My Sites				
<input checked="" type="checkbox"/>	Newsletter	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	▼
<input checked="" type="checkbox"/>	Notes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	▼
<input checked="" type="checkbox"/>	PBX Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	▼
<input checked="" type="checkbox"/>	PDAPLugin				
<input checked="" type="checkbox"/>	PDFMaker	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	Potentials	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	▼
<input checked="" type="checkbox"/>	Price Books	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	▼
<input checked="" type="checkbox"/>	Processes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	▼
<input checked="" type="checkbox"/>	Product lines	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	▼
<input checked="" type="checkbox"/>	Products	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	▼
<input type="checkbox"/>	Project Milestones	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▼

modules to be shown		Edit Permissions			Fields & Tools Settings
		Create/Edit	View	Delete	
<input checked="" type="checkbox"/>	Accounts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	▼

Fields					
V <input checked="" type="checkbox"/>	M <input checked="" type="checkbox"/>	Account Name	V <input type="checkbox"/>	M <input type="checkbox"/>	Account No
I <input type="checkbox"/>	A <input type="checkbox"/>	Website	I <input type="checkbox"/>	A <input type="checkbox"/>	Member Of
S <input type="checkbox"/>	N <input type="checkbox"/>	Employees	S <input type="checkbox"/>	N <input type="checkbox"/>	email (other)
I <input type="checkbox"/>	D <input type="checkbox"/>	Rating	I <input checked="" type="checkbox"/>	D <input checked="" type="checkbox"/>	Industry
B <input checked="" type="checkbox"/>	A <input checked="" type="checkbox"/>	Annual Revenue	B <input checked="" type="checkbox"/>	A <input checked="" type="checkbox"/>	Bank Details
L <input checked="" type="checkbox"/>	T <input checked="" type="checkbox"/>	Social Security number	L <input checked="" type="checkbox"/>	T <input type="checkbox"/>	External Code
E <input checked="" type="checkbox"/>	O <input type="checkbox"/>	Receive newsletter	E <input checked="" type="checkbox"/>	O <input type="checkbox"/>	Assigned To
<input type="checkbox"/>	Y <input type="checkbox"/>	Time modified	<input type="checkbox"/>	Y <input type="checkbox"/>	Creator
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Shipping Address	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Billing City
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Billing State	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Shipping State
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Shipping Postal Code	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Billing Country
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Description	<input type="checkbox"/>	<input type="checkbox"/>	Status
<input type="checkbox"/>	<input type="checkbox"/>	Numero dipendenti	<input type="checkbox"/>	<input type="checkbox"/>	Contacted
<input type="checkbox"/>	<input type="checkbox"/>	Access Count	<input type="checkbox"/>	<input type="checkbox"/>	Formato
<input type="checkbox"/>	<input type="checkbox"/>	Business Unit	<input type="checkbox"/>	<input type="checkbox"/>	Personal Data Class
<input type="checkbox"/>	<input type="checkbox"/>	Valutazione cliente	<input type="checkbox"/>	<input type="checkbox"/>	Stato azienda
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Data Fine	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Intervallo Temporale
V <input checked="" type="checkbox"/>	M <input checked="" type="checkbox"/>	Phone	V <input checked="" type="checkbox"/>	M <input checked="" type="checkbox"/>	Email
I <input checked="" type="checkbox"/>	A <input checked="" type="checkbox"/>	Ownership	I <input checked="" type="checkbox"/>	A <input checked="" type="checkbox"/>	Type
S <input type="checkbox"/>	N <input type="checkbox"/>	VAT Registration Number	S <input type="checkbox"/>	N <input type="checkbox"/>	Lock Automatic Emails
I <input checked="" type="checkbox"/>	D <input type="checkbox"/>	Time created	I <input type="checkbox"/>	D <input type="checkbox"/>	Billing Address
B <input checked="" type="checkbox"/>	A <input checked="" type="checkbox"/>	Shipping City	B <input checked="" type="checkbox"/>	A <input checked="" type="checkbox"/>	Billing Postal Code
L <input checked="" type="checkbox"/>	T <input checked="" type="checkbox"/>	Shipping Country	L <input type="checkbox"/>	T <input type="checkbox"/>	Daily cost
E <input type="checkbox"/>	O <input type="checkbox"/>	Mail Viewed	E <input type="checkbox"/>	O <input type="checkbox"/>	tipologia cliente
<input type="checkbox"/>	Y <input type="checkbox"/>	Sedi	<input type="checkbox"/>	Y <input type="checkbox"/>	Data Inizio

You will then be able to choose which modules to display, which ones to set as read-only, whether a user can create or delete records from that module, which fields are mandatory, and finally, decide which fields of each individual module will be visible from the mobile app.

Mobile profiles

Name	Description	Roles
Agent	Agent Mobile App Profile	Agent

New Profile

Once saved, the mobile profile will be available in the list of profiles we initially saw. Now it is possible to assign that profile to a specific user. Simply go to **SETTINGS > ROLES**, click on the desired profile (Agent profile for the example we're using), and modify it by selecting the mobile profile in the bottom left corner. Finally, click the **SAVE** button in the top right corner.

Settings > Roles > Editing "Agent"
 Editing Properties of "Agent" Role

Properties of "Agent"

***Role Name**

Reports to

Profiles Available

Assigned Profiles

Profile (Mobile)

Finally, by returning to **SETTINGS > APP WILSON**, it is possible to view the Agent's mobile profile connected to their role in the Role Preview section.

Role preview

Organisation

Manager

admin (User Administrator)

davide.bonamini (Davide Bonamini)

elisa.marcon (Elisa Marcon)

Federico.BilloViola (Federico Billo Viola)

lorenzo.ottaviani (Lorenzo Ottaviani)

manuel.benedetti (Manuel Benedetti)

maria.rossi (Maria Rossi)

Agent

paola.bianchi (Paola Bianchi)

raffaello.giarolo (Raffaello Giarolo)

Sub-agent

Test


Profile

(none)

Agent

(none)

(none)



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