

# 5.5 Mobile Profiles

From the **vtnext** 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:

The screenshot shows the 'Settings > Wilson App' page in the vtnext administration panel. The page has a dark blue sidebar on the left with navigation options like 'Customer tools', 'Wilson App', and 'Other Settings'. The main content area is white and contains the following sections:

- Mobile profiles:** A table with columns 'Name', 'Description', and 'Roles'. It lists one profile: 'Agent' with description 'Agent.Mobile App Profile' and role 'Agent'. A 'New Profile' button is in the top right.
- Role preview:** A section showing a hierarchy of roles and their associated profiles. It is organized into an 'Organisation' tree:
  - Manager:** Profile '(none)'. Includes users: 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:** Profile 'Agent'. Includes users: paola.bianchi (Paola Bianchi), raffaello.giarolo (Raffaello Giarolo).
  - Sub-agent:** Profile '(none)'.
  - Test:** Profile '(none)'.

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*.

The screenshot shows the 'Settings > Wilson App' configuration page in the vtenext application. The page is titled 'Step 1 of 2: Welcome to Privilege Profile Creator' and instructs the user to 'Select how to create the new profile'. There are two input fields: 'Profile Name' with the value 'Agent' and 'Description' with the value 'Agent Mobile App Profile'. Below these fields, there are two radio button options: 'I would like to setup a base profile and edit privileges (Recommended)' which is selected, and 'I will choose the privileges from scratch (Advanced Users)'. A dropdown menu for 'Base Profile' is visible under the first option. At the bottom right, there are 'Next >' and 'Cancel' buttons. Red arrows highlight the 'Profile Name' field and the 'Next >' button.

**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.

- Home
- Modules
- User permissions
  - Users
  - Roles
  - Profiles
  - Groups
  - Sharing Access
  - Fields Access
  - Advanced Sharing Access
  - Audit Trails
  - User Login History
  - Check User Login
- Business Process Manager
  - Process manager
  - Basic workflows
  - Mail Converter
  - External data import
  - Synchronizations
  - Status fields permissions
  - Condition based fields
  - Wizard creator
  - Module creator
  - Module settings
  - Picklist editor
  - Internationalized picklist
  - Linked picklist
  - Encrypted fields
  - Top menu settings
  - Listview colors
  - REST Webservices
  - External applications
- Klondike AI
  - KlondikeAI configuration
- Customer tools
  - Email Templates
  - Webforms
  - Business Portal
  - GDPR
  - Check Business Portal login
  - Wilson App**
- Other Settings
  - Company Details
  - Logos
  - Mail Server
  - Newsletter Settings
  - Outgoing Fax service
  - Outgoing Sms service
  - SoftPhone Server Settings
  - Server LDAP
  - Currencies
  - Tax Calculations
  - Proxy Server
  - Inventory - Terms & Conditio...
  - Customize Record Numbering
  - Privacy
  - System logs
  - Oauth2 token configuration
  - Push notifications

**Settings > Wilson App**  
Manage Wilson profiles and other configuration

**Define Privileges for <Agent>**  
Use the options below to set privileges

Save Cancel

Global Privileges

- View all**  
Allows "Agent" to view all information / modules of VTENEXT
- Edit all**  
Allows "Agent" to edit all information / modules of VTENEXT

Roles

Warning: selecting a role will reassign it to this profile.

Agent

Set Privileges for each Module

	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"/>	PDAPugin				
<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	V <input checked="" type="checkbox"/>	M <input checked="" type="checkbox"/>	Phone
I <input type="checkbox"/>	A <input type="checkbox"/>	Website	I <input type="checkbox"/>	A <input type="checkbox"/>	Member Of	I <input checked="" type="checkbox"/>	A <input checked="" type="checkbox"/>	Email
S <input type="checkbox"/>	N <input type="checkbox"/>	Employees	S <input type="checkbox"/>	N <input type="checkbox"/>	email (other)	S <input type="checkbox"/>	N <input type="checkbox"/>	Ownership
I <input type="checkbox"/>	D <input type="checkbox"/>	Rating	I <input checked="" type="checkbox"/>	D <input checked="" type="checkbox"/>	Industry	I <input checked="" type="checkbox"/>	D <input checked="" type="checkbox"/>	Type
B <input checked="" type="checkbox"/>	A <input checked="" type="checkbox"/>	Annual Revenue	B <input checked="" type="checkbox"/>	A <input checked="" type="checkbox"/>	Bank Details	B <input checked="" type="checkbox"/>	A <input checked="" type="checkbox"/>	VAT Registration Number
L <input checked="" type="checkbox"/>	T <input checked="" type="checkbox"/>	Social Security number	L <input checked="" type="checkbox"/>	T <input checked="" type="checkbox"/>	External Code	L <input checked="" type="checkbox"/>	T <input checked="" type="checkbox"/>	Lock Automatic Emails
E <input checked="" type="checkbox"/>	O <input type="checkbox"/>	Receive newsletter	E <input type="checkbox"/>	O <input type="checkbox"/>	Assigned To	E <input type="checkbox"/>	O <input type="checkbox"/>	Time created
<input type="checkbox"/>	Y <input type="checkbox"/>	Time modified	<input type="checkbox"/>	Y <input type="checkbox"/>	Creator	<input checked="" type="checkbox"/>	Y <input type="checkbox"/>	Billing Address
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Shipping Address	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Billing City	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Shipping 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"/>	Billing Postal Code
<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"/>	Shipping Country
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Description	<input type="checkbox"/>	<input type="checkbox"/>	Status	<input type="checkbox"/>	<input type="checkbox"/>	Daily cost
<input type="checkbox"/>	<input type="checkbox"/>	Numero dipendenti	<input type="checkbox"/>	<input type="checkbox"/>	Contacted	<input type="checkbox"/>	<input type="checkbox"/>	Mail Viewed
<input type="checkbox"/>	<input type="checkbox"/>	Access Count	<input type="checkbox"/>	<input type="checkbox"/>	Formato	<input type="checkbox"/>	<input type="checkbox"/>	tipologia cliente
<input type="checkbox"/>	<input type="checkbox"/>	Business Unit	<input type="checkbox"/>	<input type="checkbox"/>	Personal Data Class	<input type="checkbox"/>	<input type="checkbox"/>	Sedi
<input type="checkbox"/>	<input type="checkbox"/>	Valutazione cliente	<input type="checkbox"/>	<input type="checkbox"/>	Stato azienda	<input type="checkbox"/>	<input type="checkbox"/>	Data Inizio
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Data Fine	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Intervallo Temporale	<input type="checkbox"/>	<input type="checkbox"/>	

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

New Profile

Name	Description	Roles
<b>Agent</b>	Agent Mobile App Profile	Agent

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**  
Agent

**Reports to**  
Manager

**Profile**

Save Cancel

**Profiles Available**

Members

- Administrator
- Sales Profile
- Admin x Witor's
- test

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**Assigned Profiles**

Members of "Agent"

- Sales Profile

**Profile (Mobile)**

Agent

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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