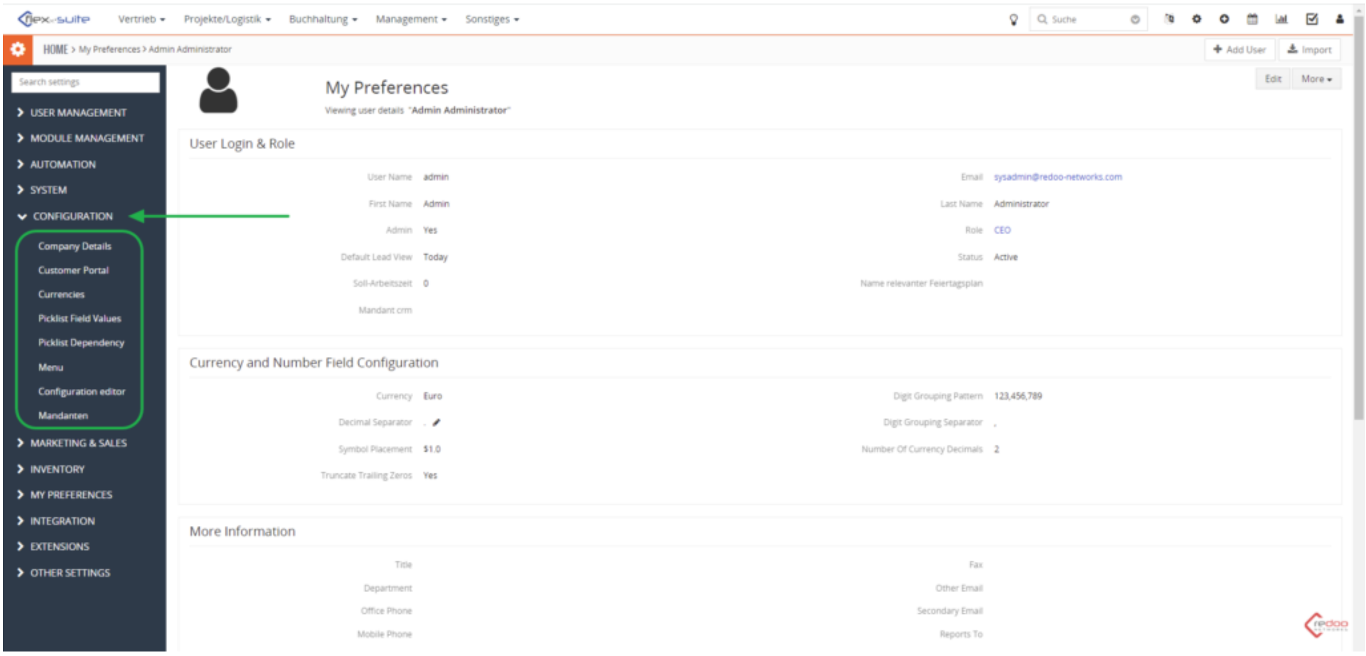
Flexx.Suite

11.Configuration

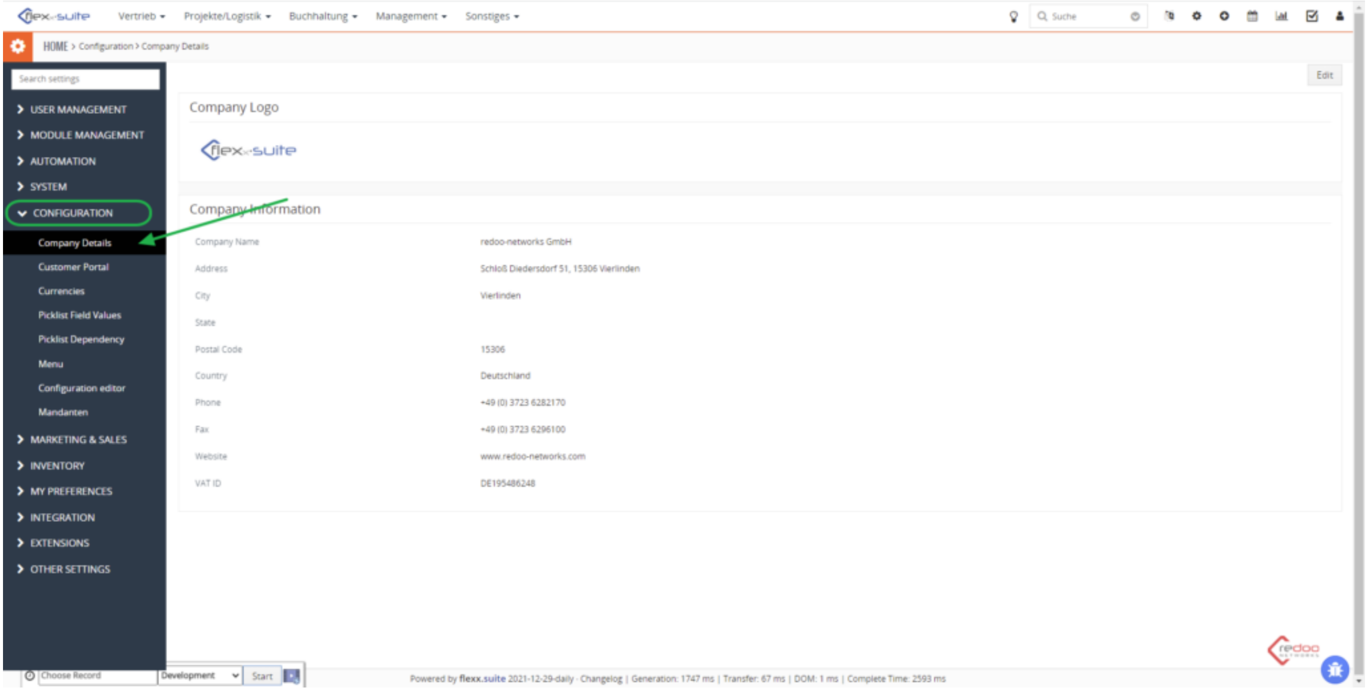
Next important section is Configuration which consists of the following parts:

- Company Details
- Customer Portal
- Currencies
- Picklist Field
- Picklist Dependency
- Menu
- Configuration editor
- Mandanten



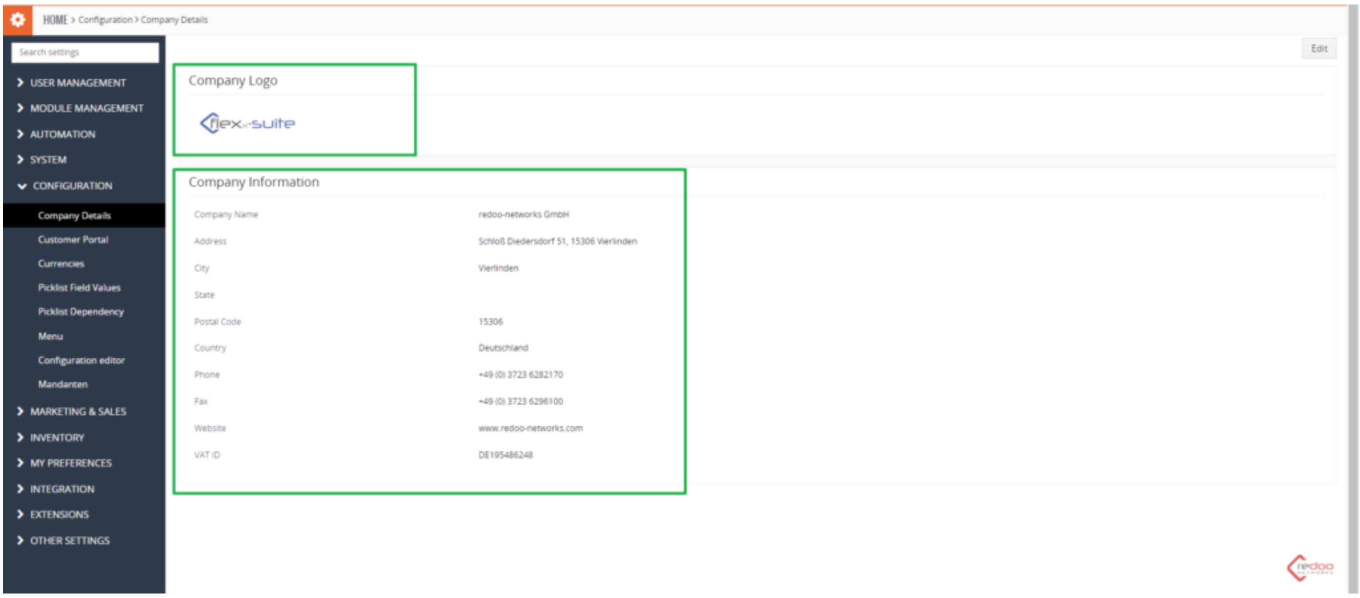
Company Details

On Company Details page you can see all the essential information about your company

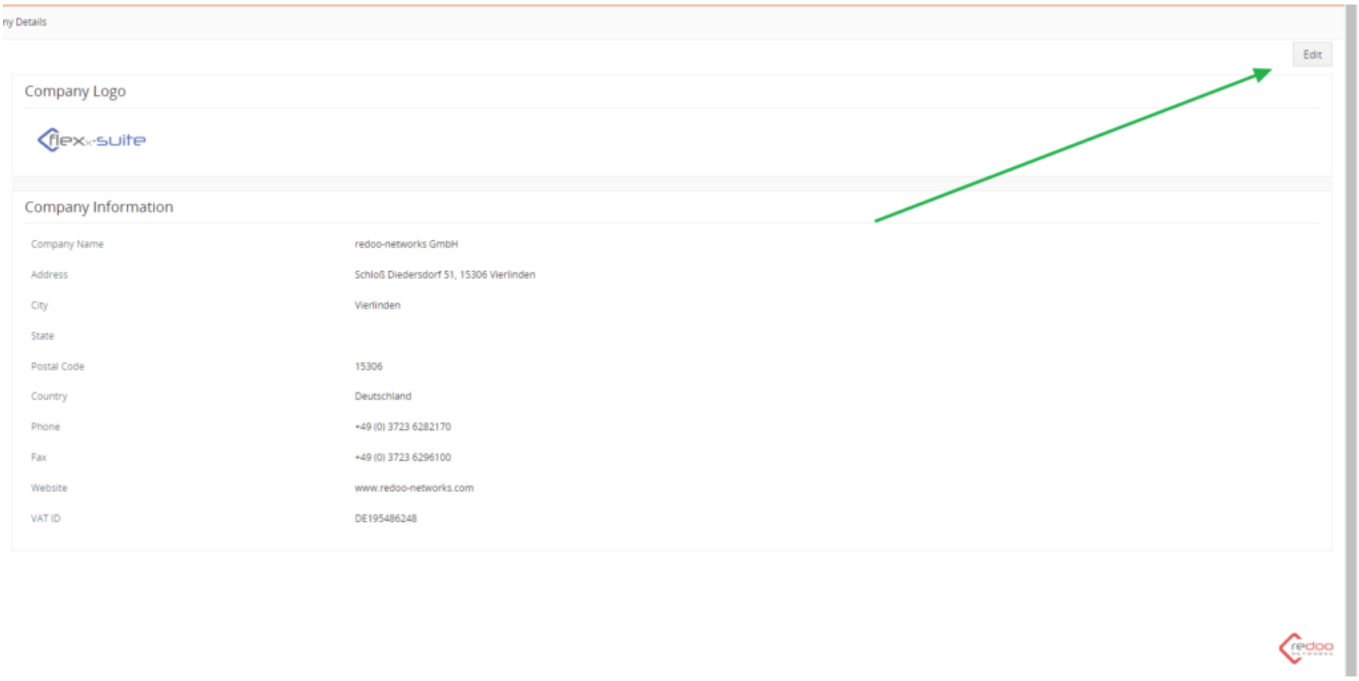


Here you can see Company Logo and Company information including:

- Company Name
- Address
- City
- State
- Postal Code
- Country
- Phone
- Fax
- Website
- VAT ID



To edit the information press “Edit” button in the upper right corner of the page



On the edit page you can change the logo and any information from the list

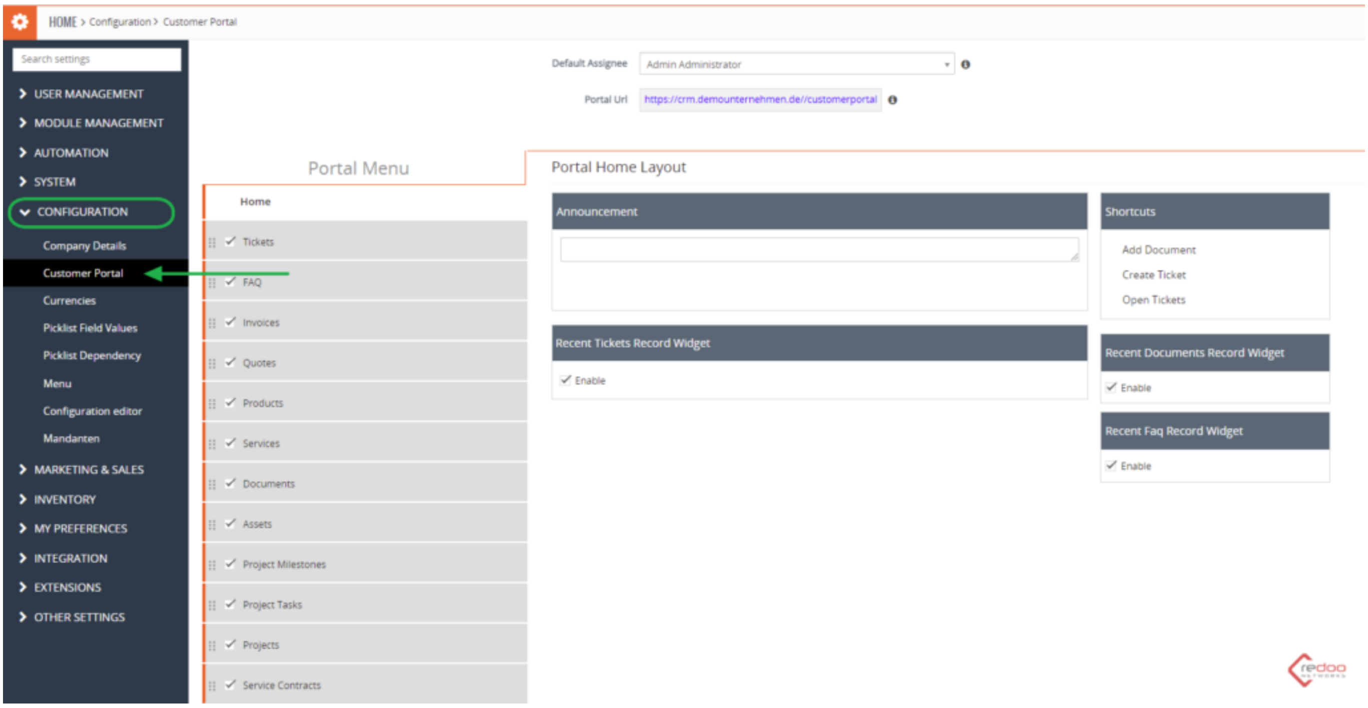
Press “Save” button below to continue

Customer Portal

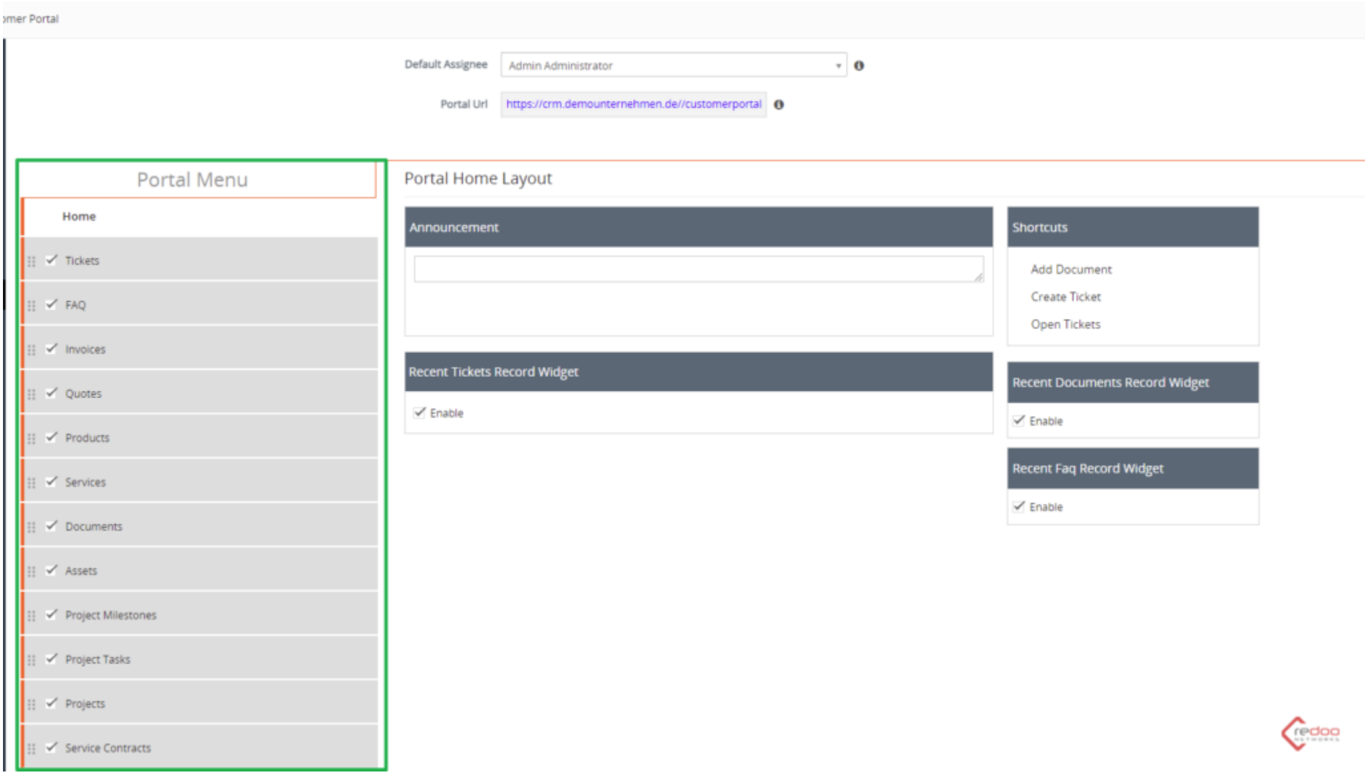
Another part of Configuration block is Customer Portal

Here you are able to configure a customer portal where your customers will be able to view module records you share with them, keep an eye on important announcements and use important widgets

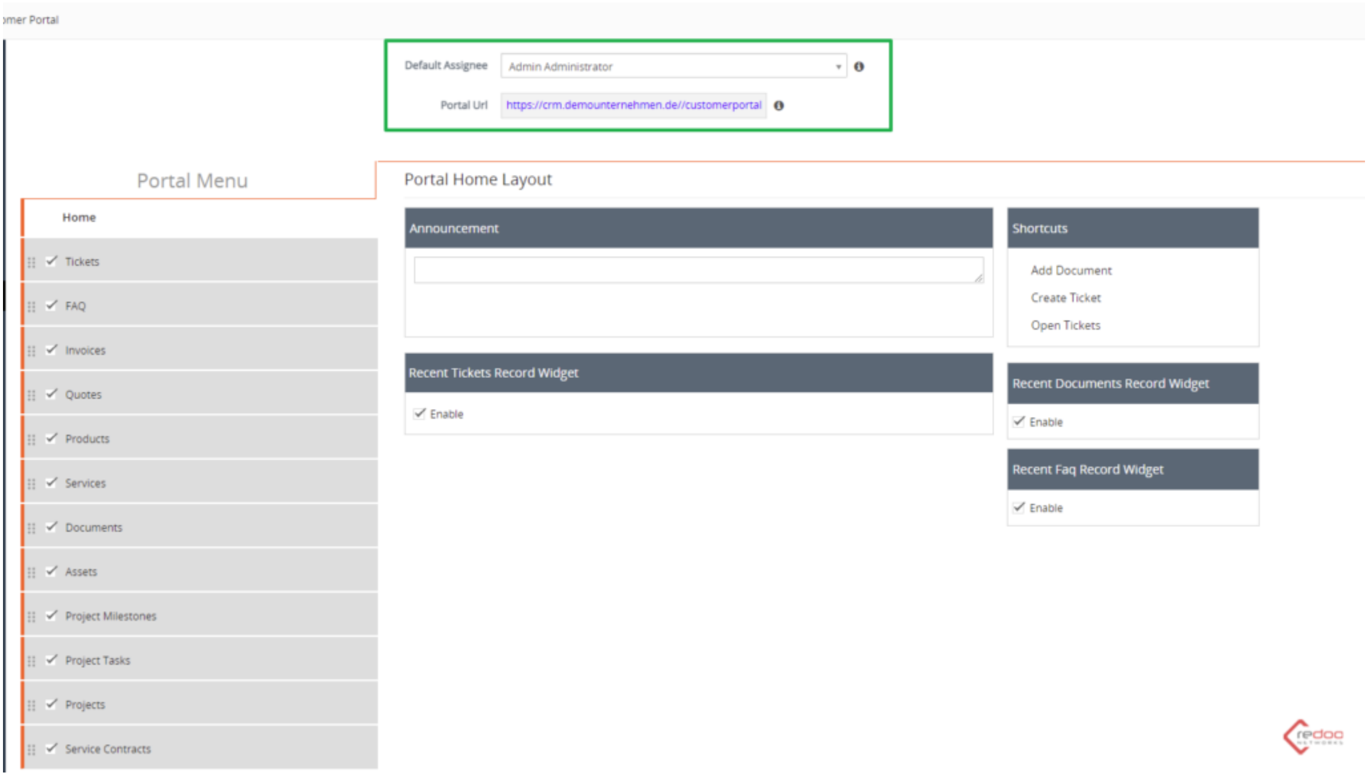
Im linken Block können Sie durch Ankreuzen Module festlegen, die für Kunden sichtbar sein sollen



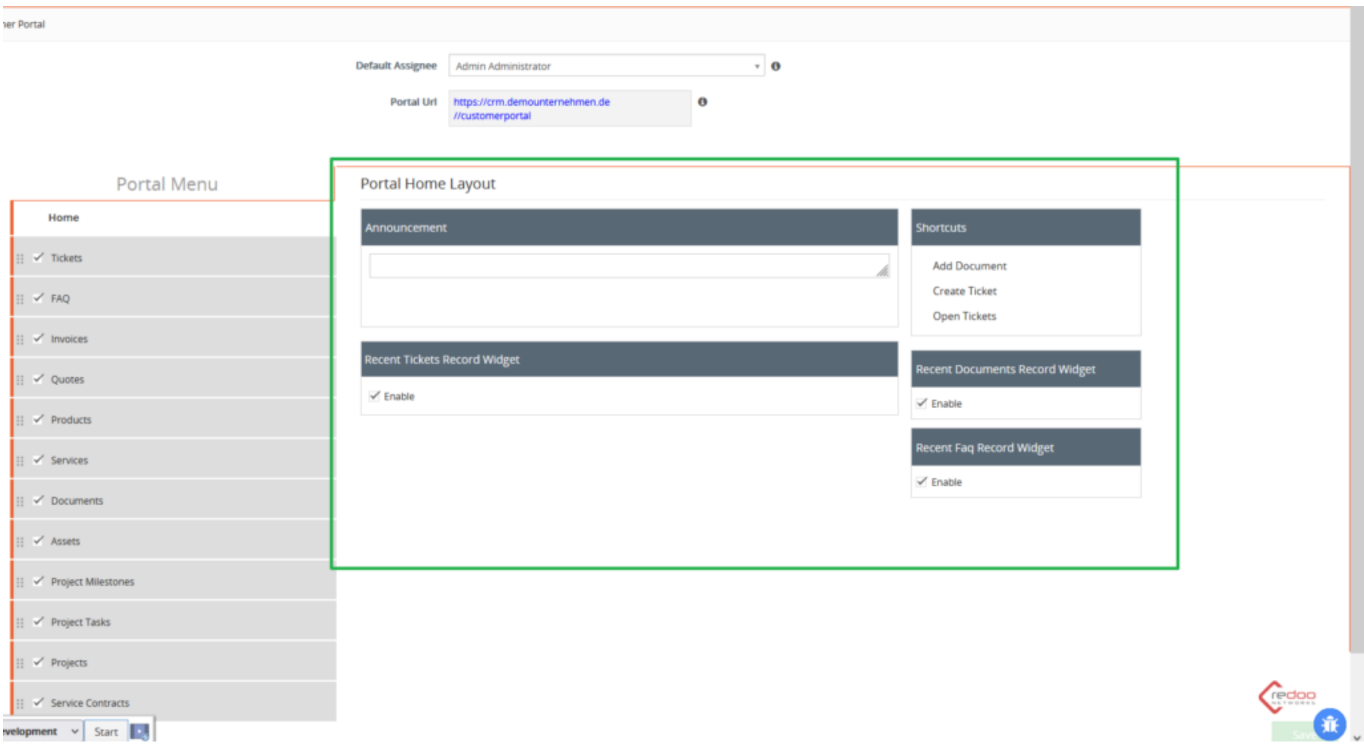
In the left block you can set modules via check marks that will be available for customers to view



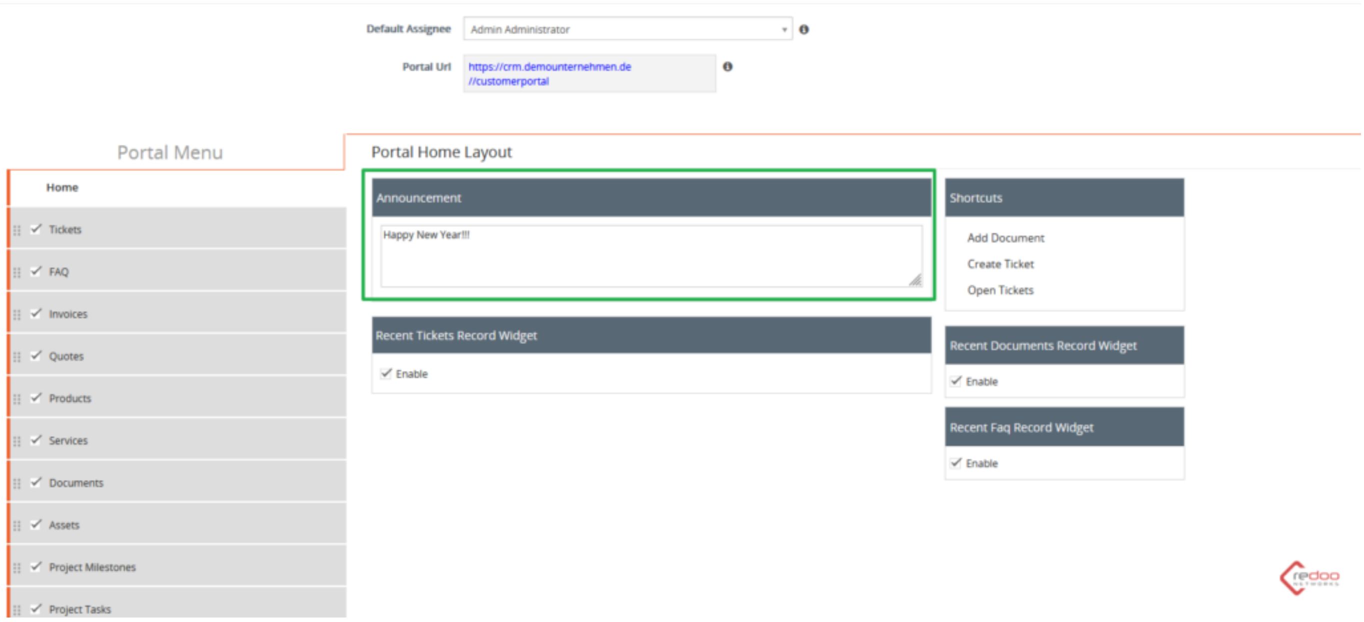
But firstly you set a default assignee for the customer portal and set the Portal Url



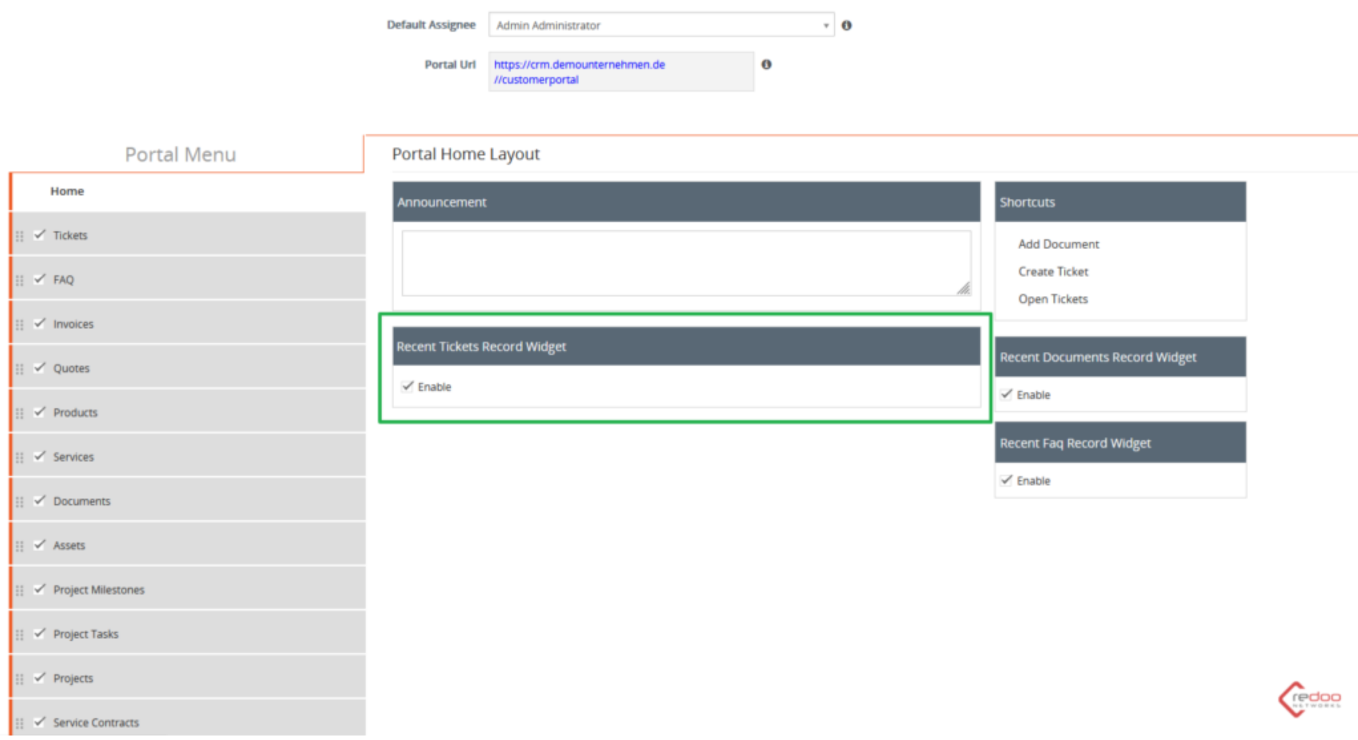
Next block is used for Portal Home Layout customization



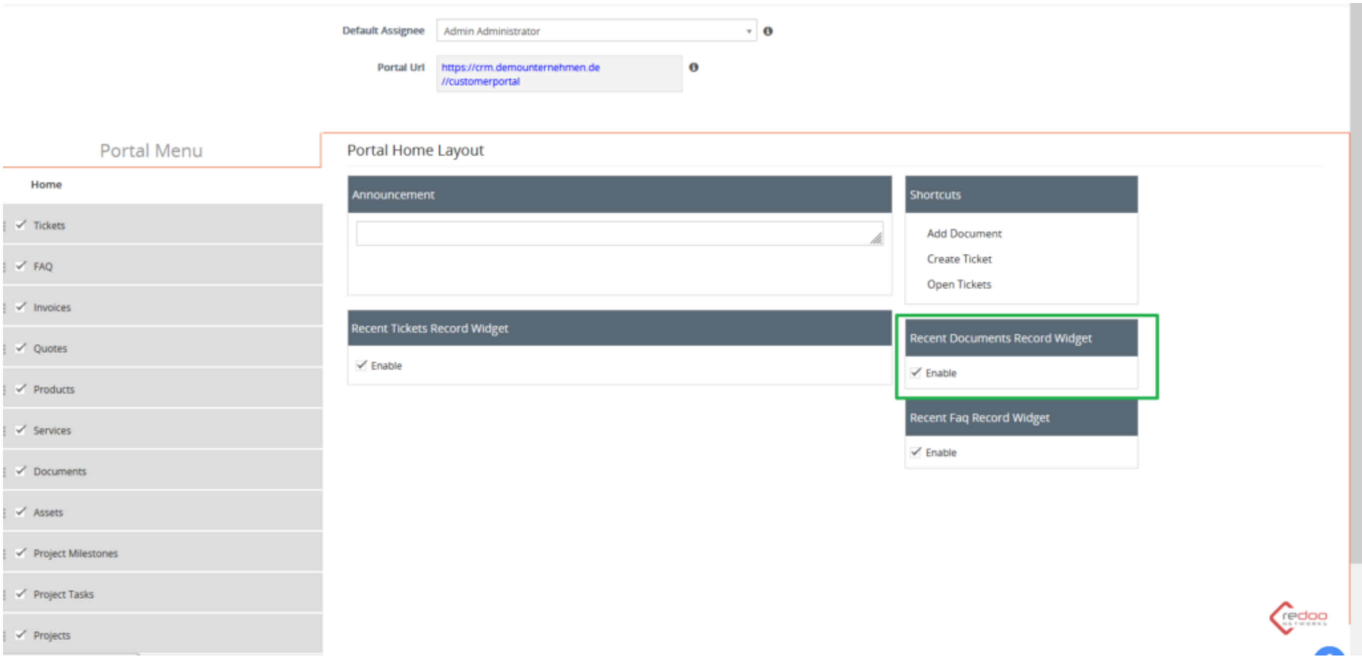
In Announcement window you can upload some important news



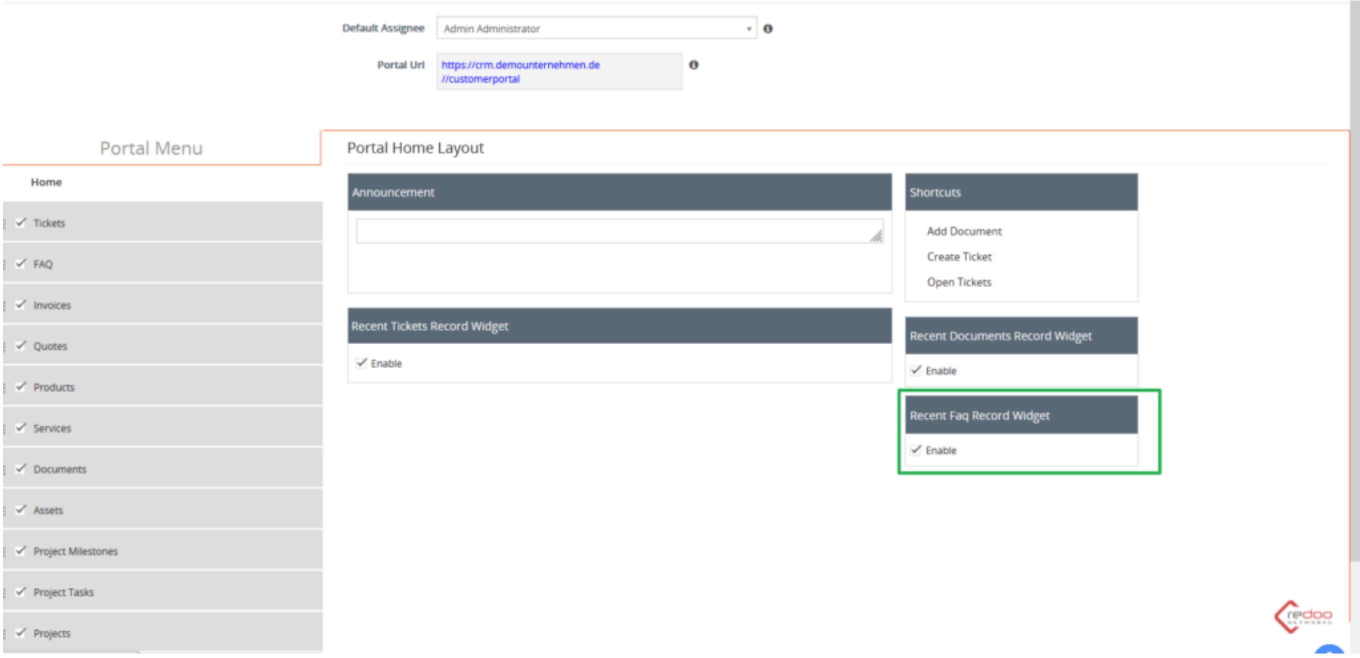
Right below there is a place where you can enable Recent Tickets Record Widget via check mark



Next one is Recent Documents Widget which you can enable or disable via check mark which shows the recent documents added to the CRM

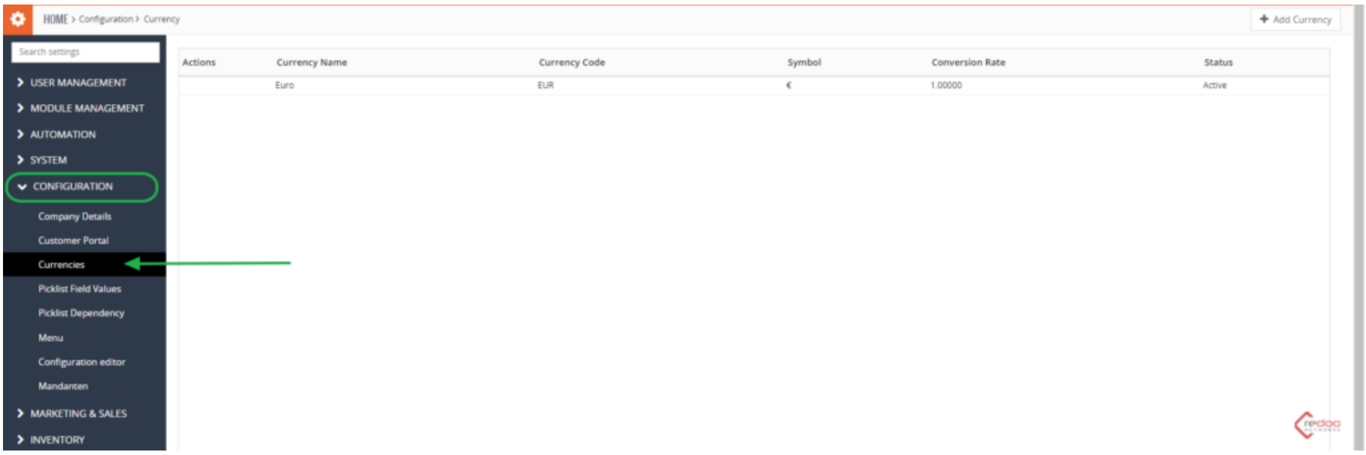


Below there is another widget you can enable via check mark which shows the latest FAQs records in the CRM

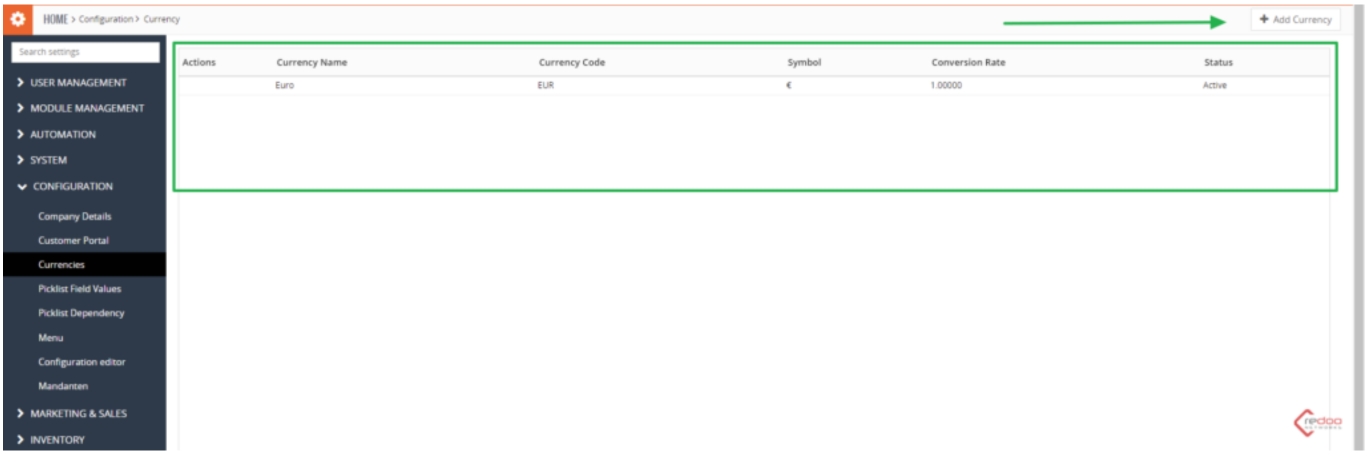


Currencies

On Currencies page you can see the list of currencies that are used within your CRM system



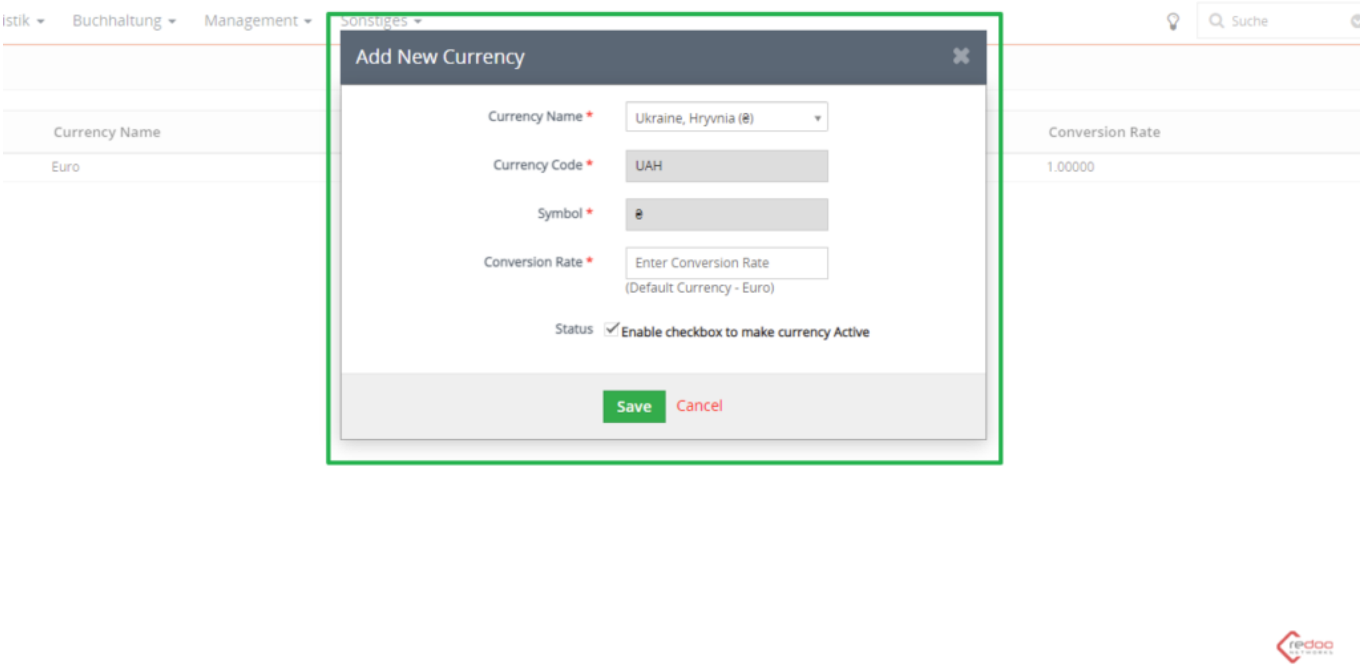
To add a new currency press the “Add Currency” button like shown in the image



After that a window opens where you select a Currency Name from the list of all currencies available in the world

Currency Code and Symbol will then be set automatically accordingly to the Currency you had set before

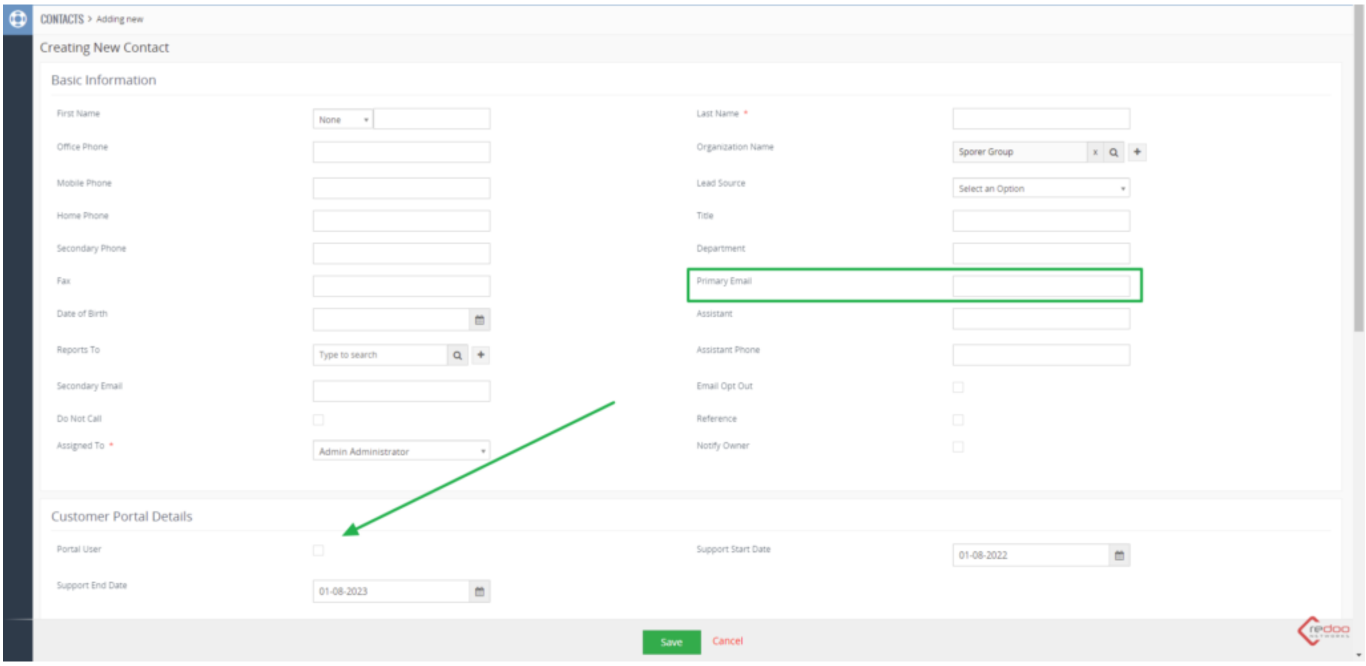
Then you should set the Conversion Rate and a Status.



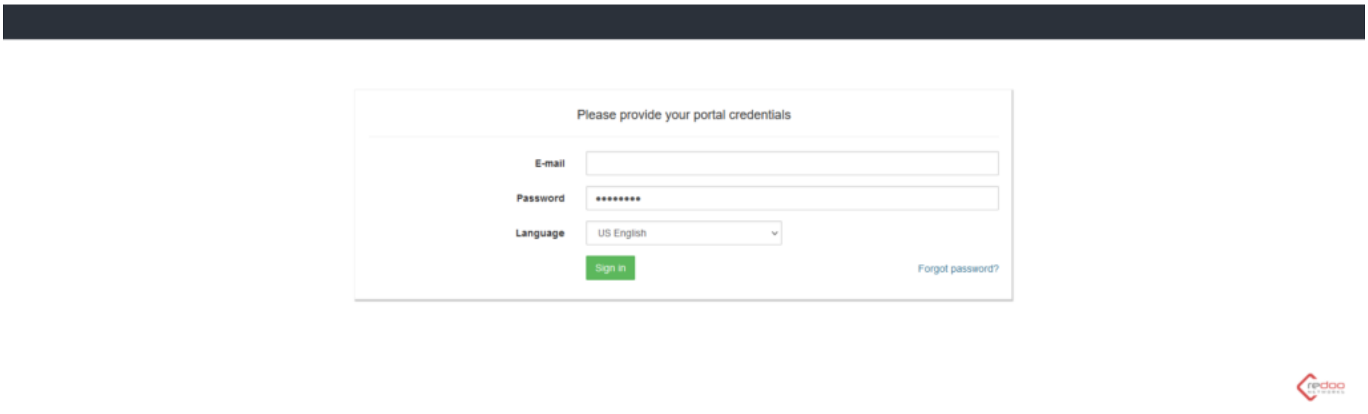
Press “Save” button below to add the Currency to your CRM

Customer Portal User view

To give a customer and access to Customer portal you have to create a Contact record for the particular customer, enter his e-mail and set a check mark in “Portal User” field



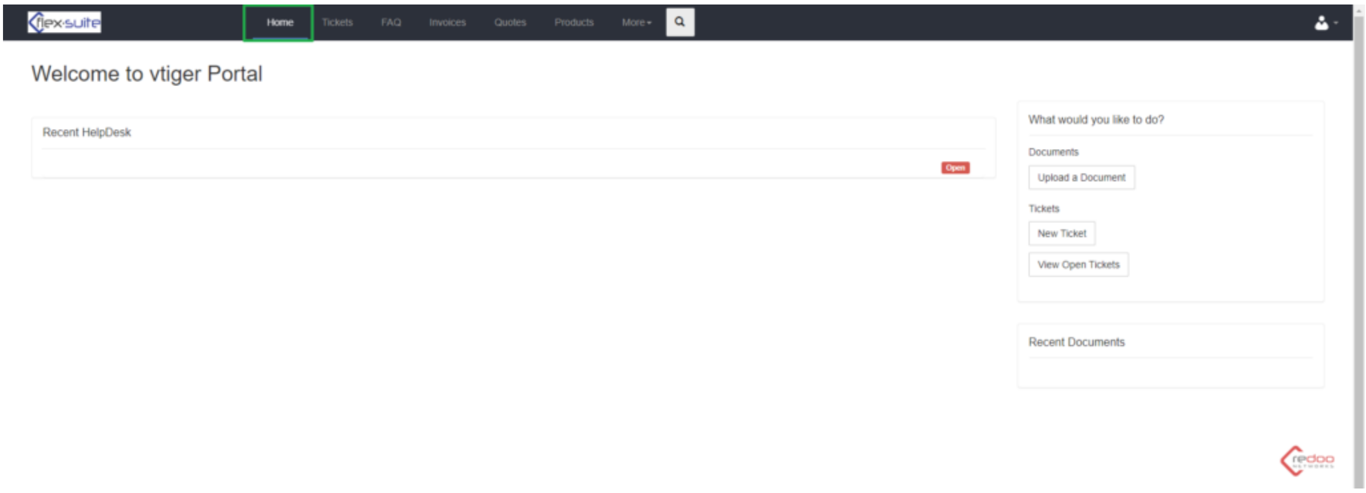
As you register you will get login and password sent to the user`s email



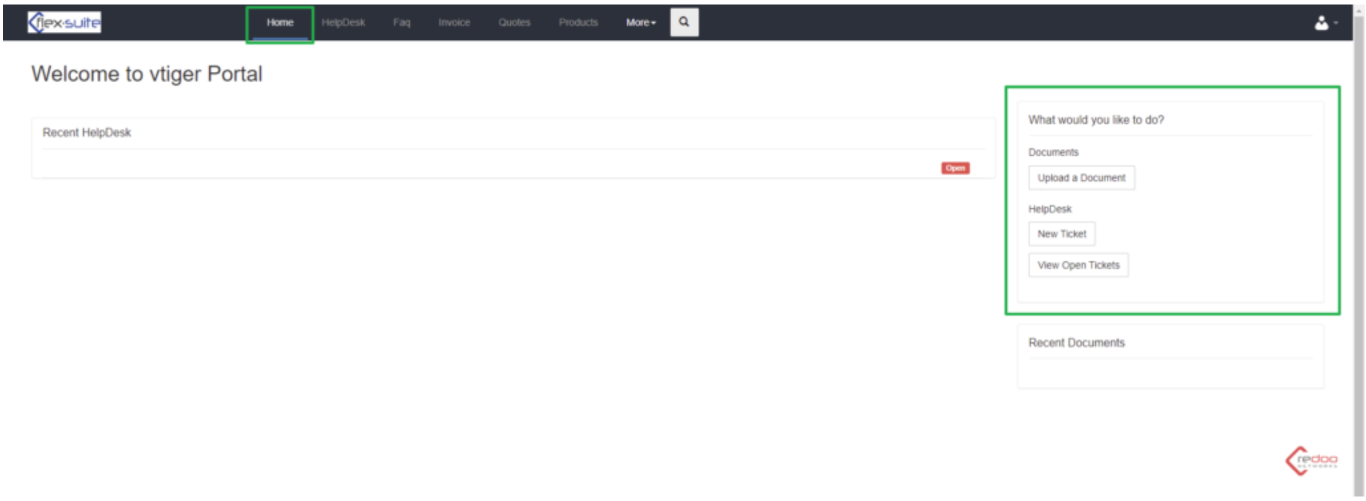
This is Customer Portal from user perspective

At the Home page you can see a quick access to Document and HelpDesk functions

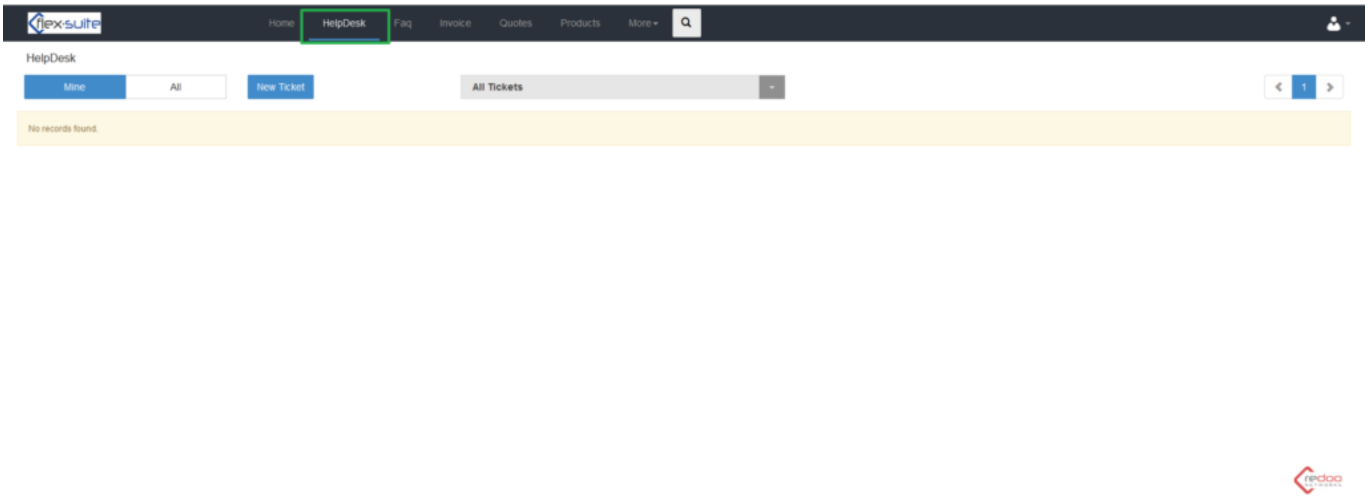
From this page you can enter other parts of Customer Portal



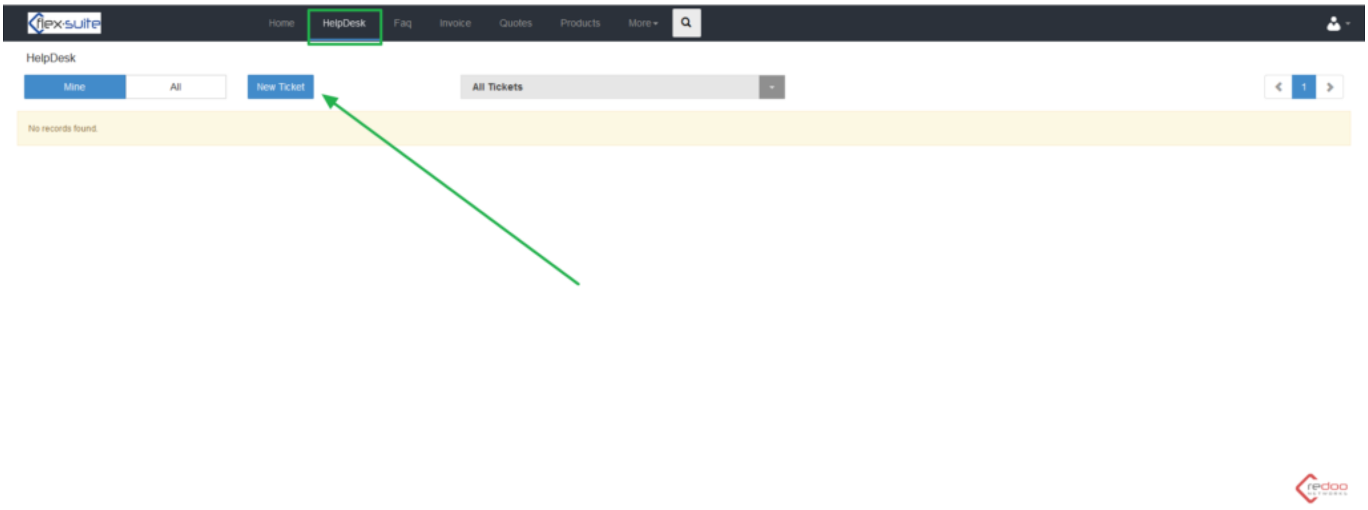
There is a quick-create block "What would you like to do?" where you can in a fast way upload a document, add a new ticket or view already opened ones.



At HelpDesk page you can view the list of Tickets

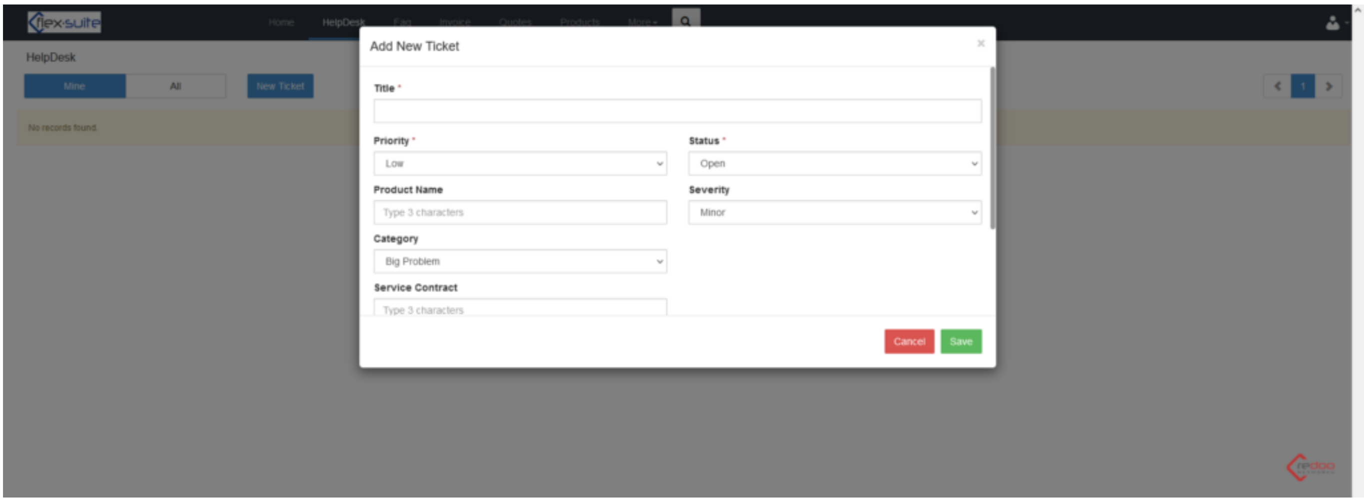


From here you can add new tickets by pressing the “New Ticket” button

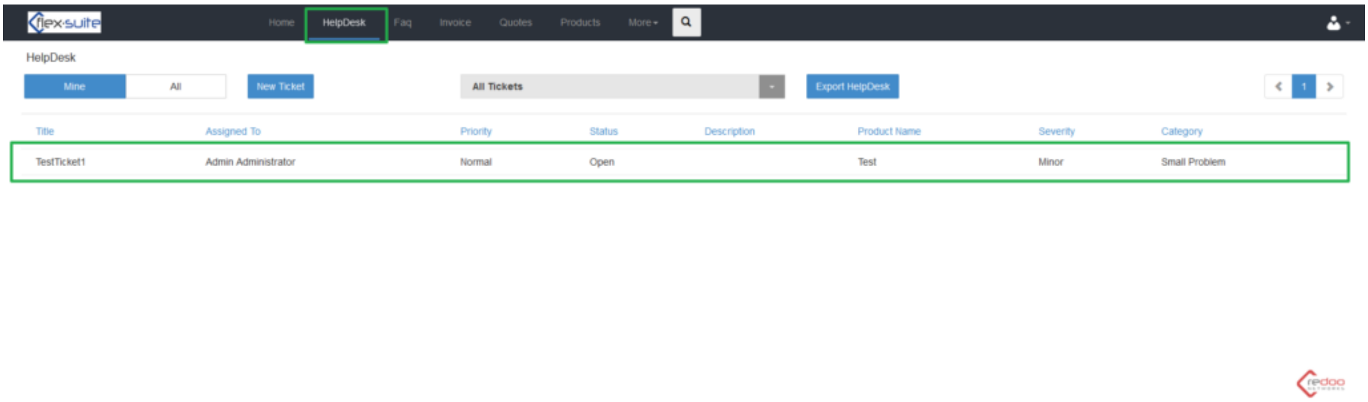


In the opened window you can add all the needed information about the ticket:

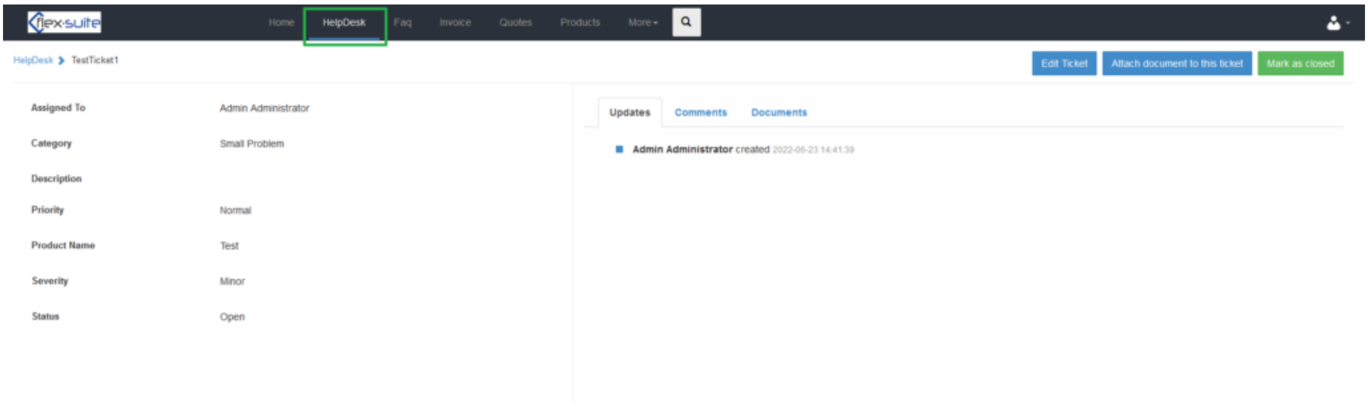
- Title
- Priority
- Status
- Product Name
- Severity
- Category
- Service Contract
- Description



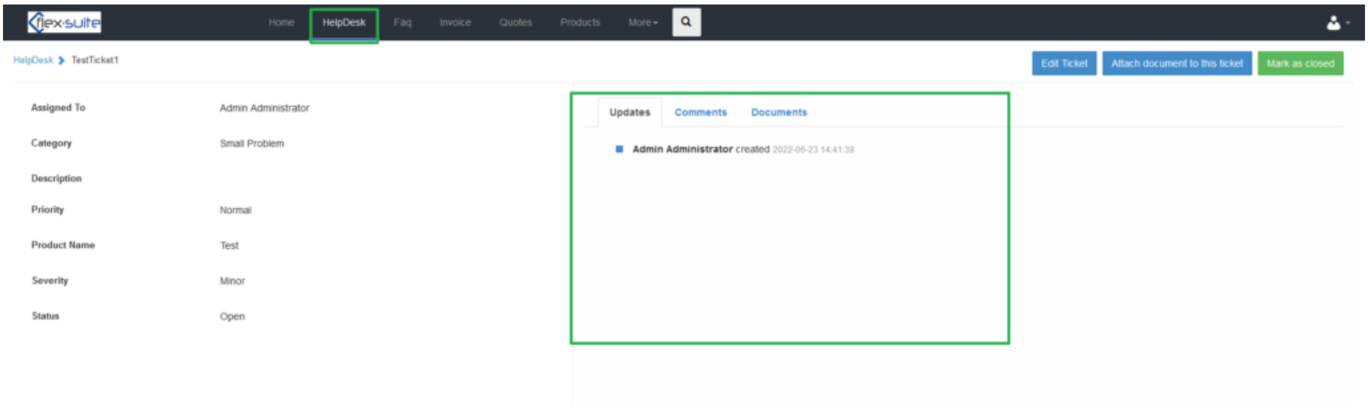
As you pressed “Save” new ticket will be displayed on the page

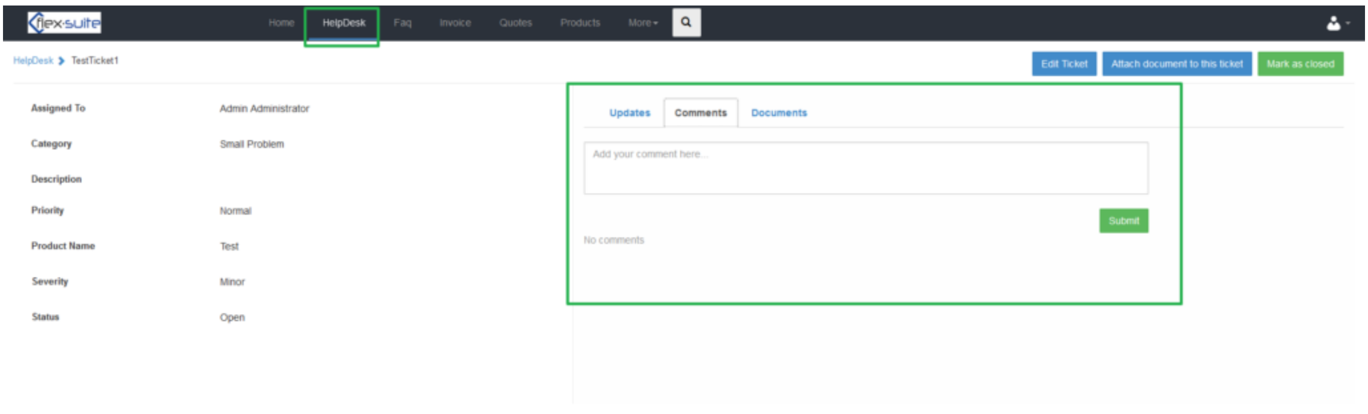


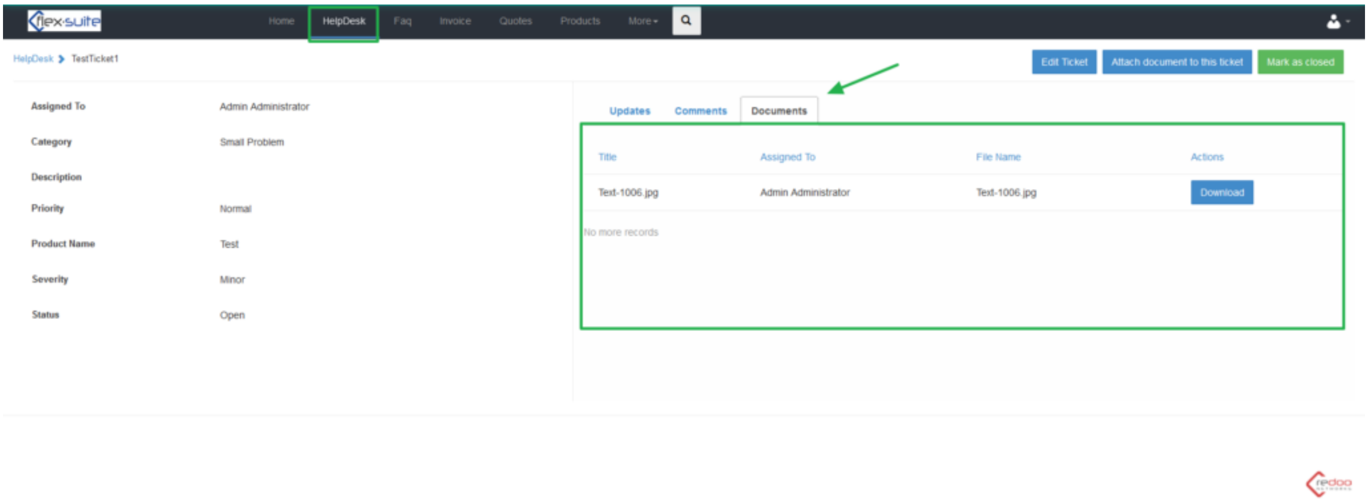
By opening ticket’s page you will see all basic information displayed



In the right corner you may see an Update, Comments and Documents section

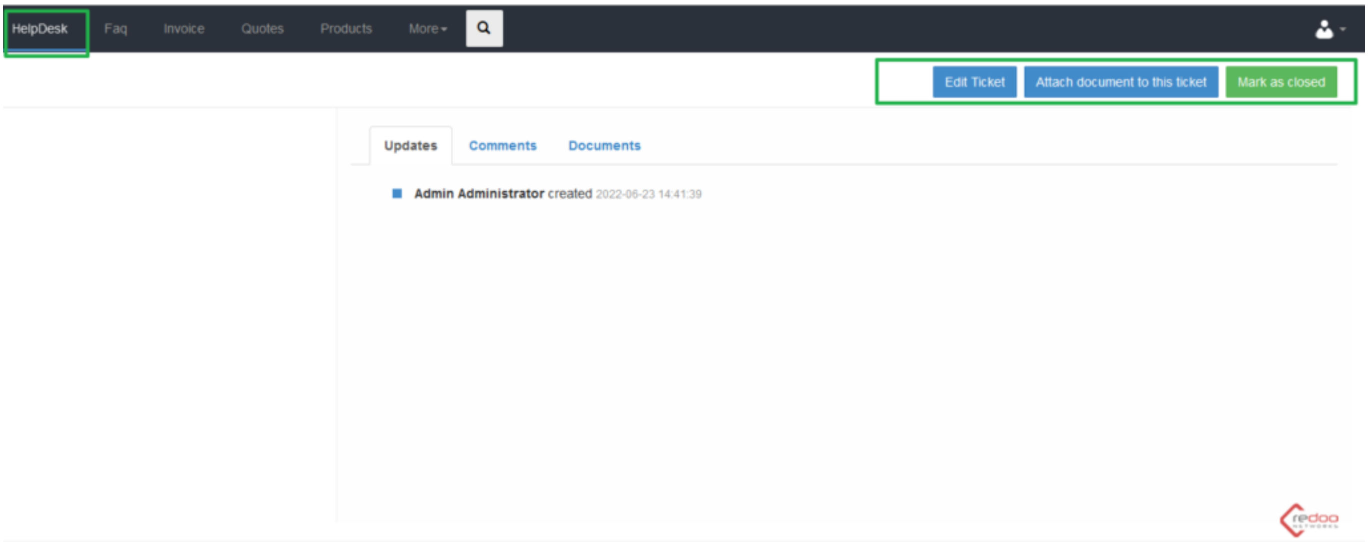






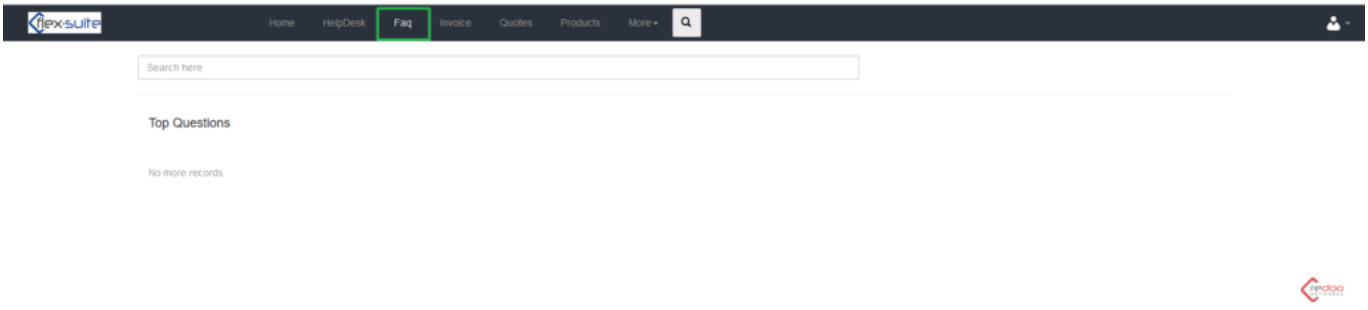
In the upper right corner of the page you can see an “Edit Ticket” button for editing the ticket and “Attach document to this ticket” which will allow to add document to the ticket

There is also a green “Mark as closed” button which you can use if the ticket was finished

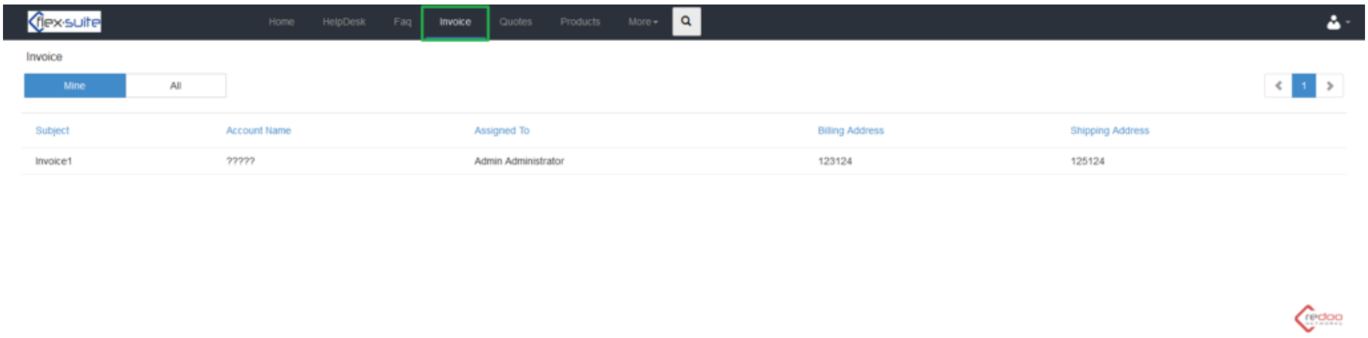


Next section of the Customer Portal is **Faq**

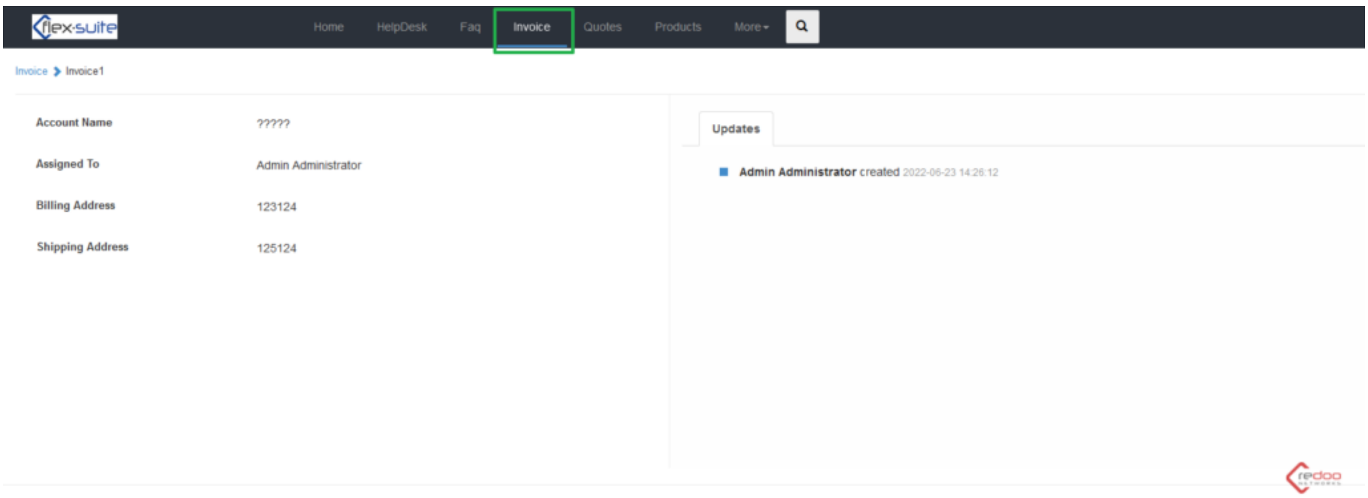
Here you can search for any top questions recorded in the CRM



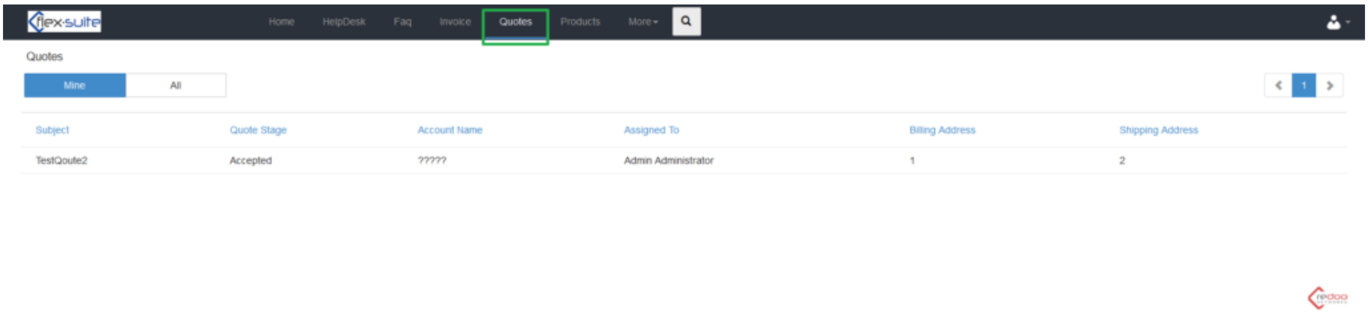
On the **Invoice** page you can see the list of all available Invoices connected to your user profile



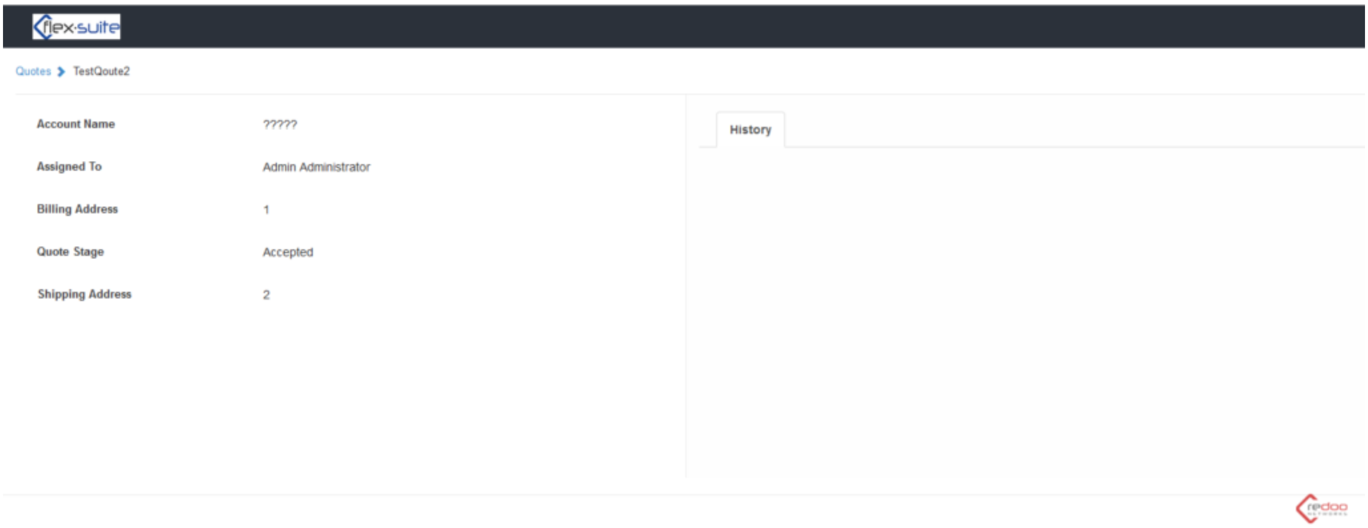
By clicking on the Invoice name you will see the page corresponding to it



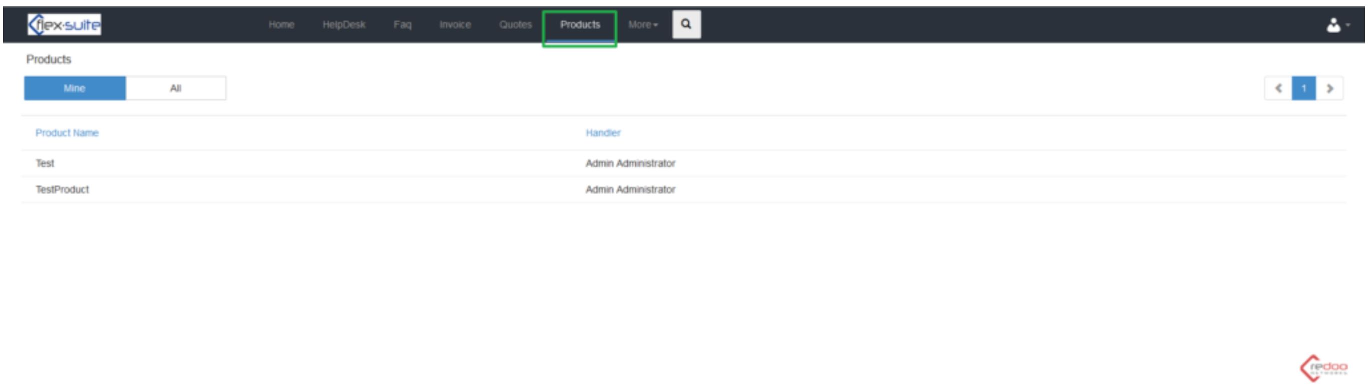
Next one is a Quotes page where all quotes connected to your account are available

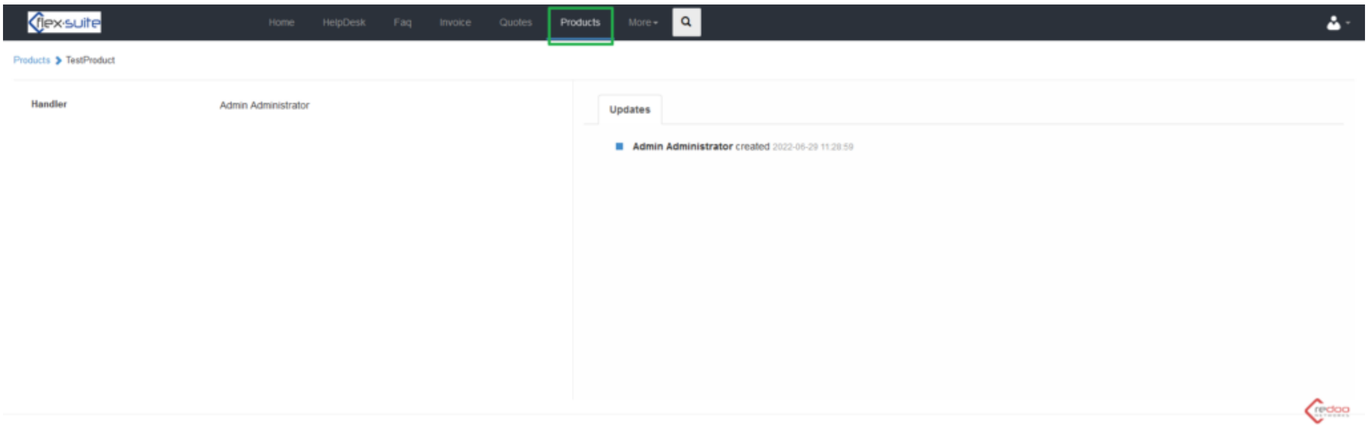


On the quote page itself you can see some basic information and History block



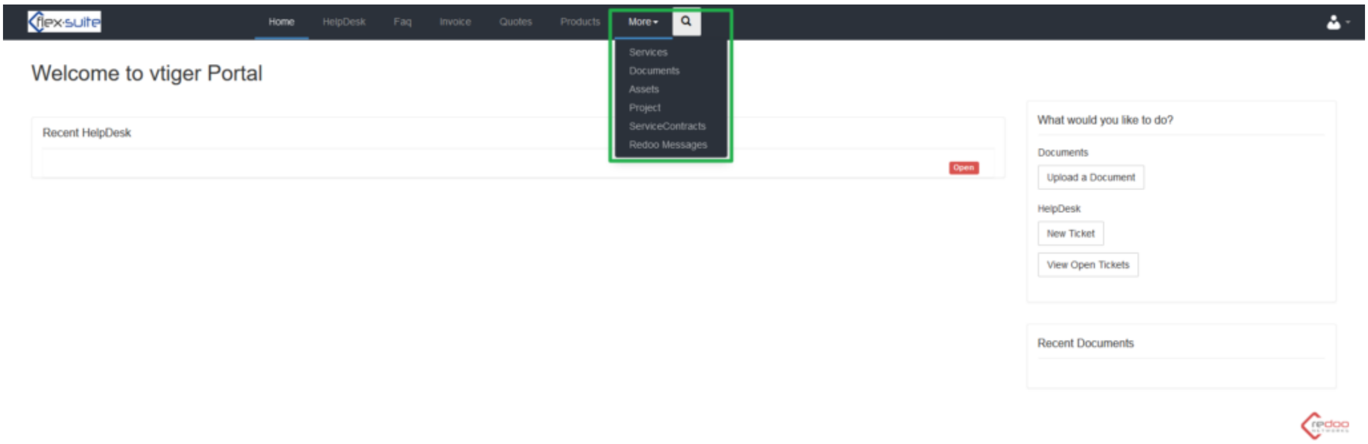
On the Products page you can see the list of all products that you are connected with as a Contact



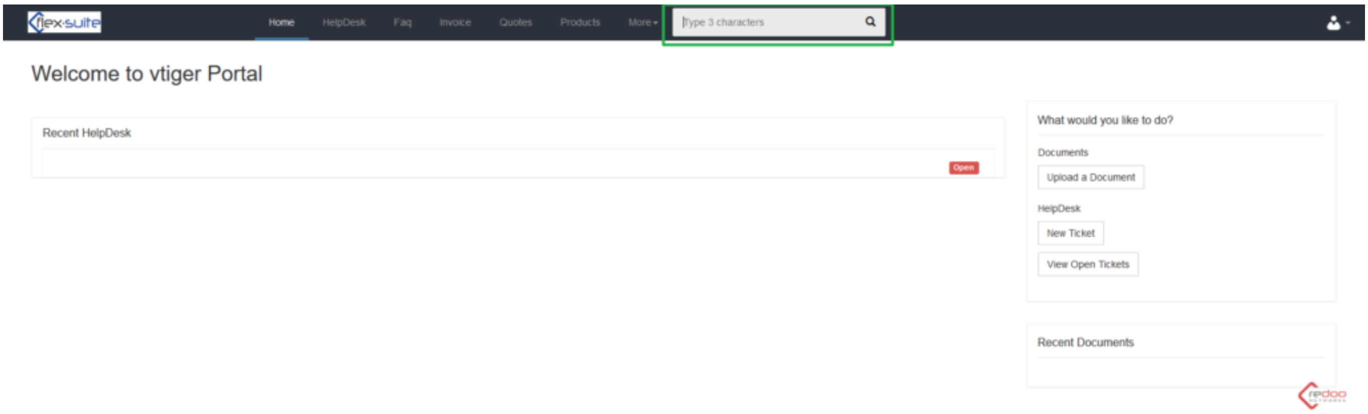


In More there is a pop-up window where you can get to the:

- Services
- Documents
- Assets
- Project
- ServiceContracts
- Redoo Messages

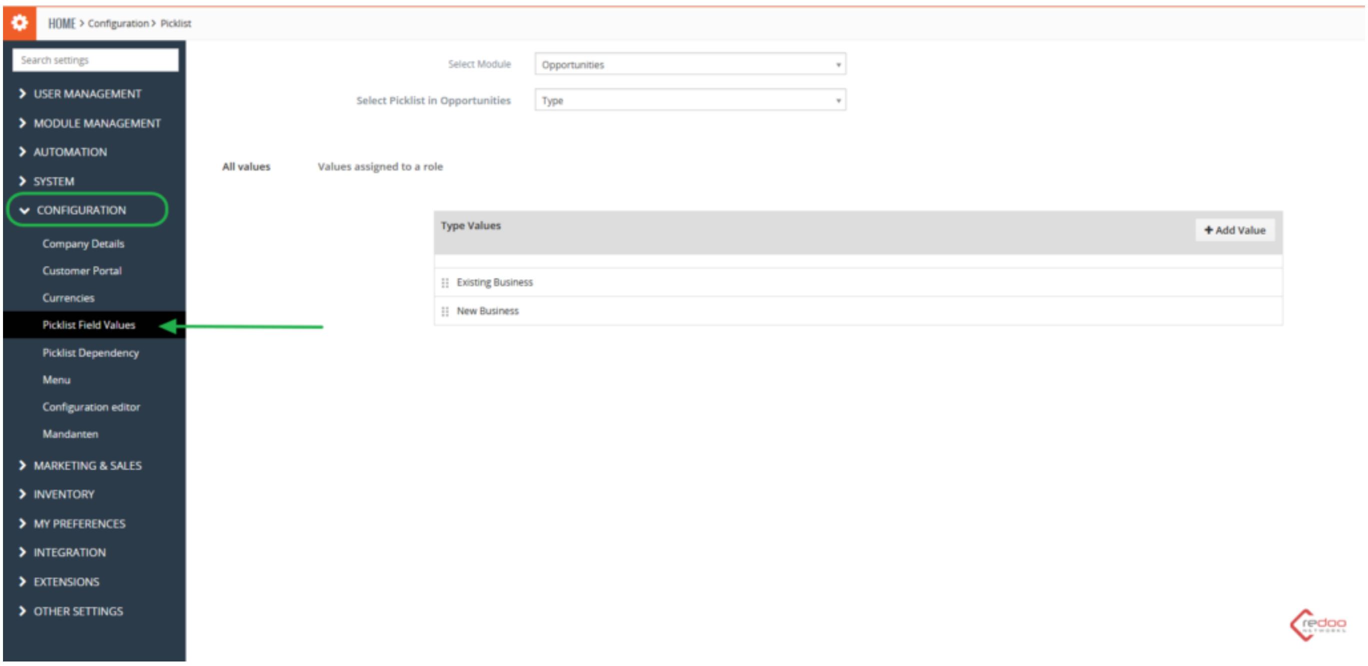


On the right you can see

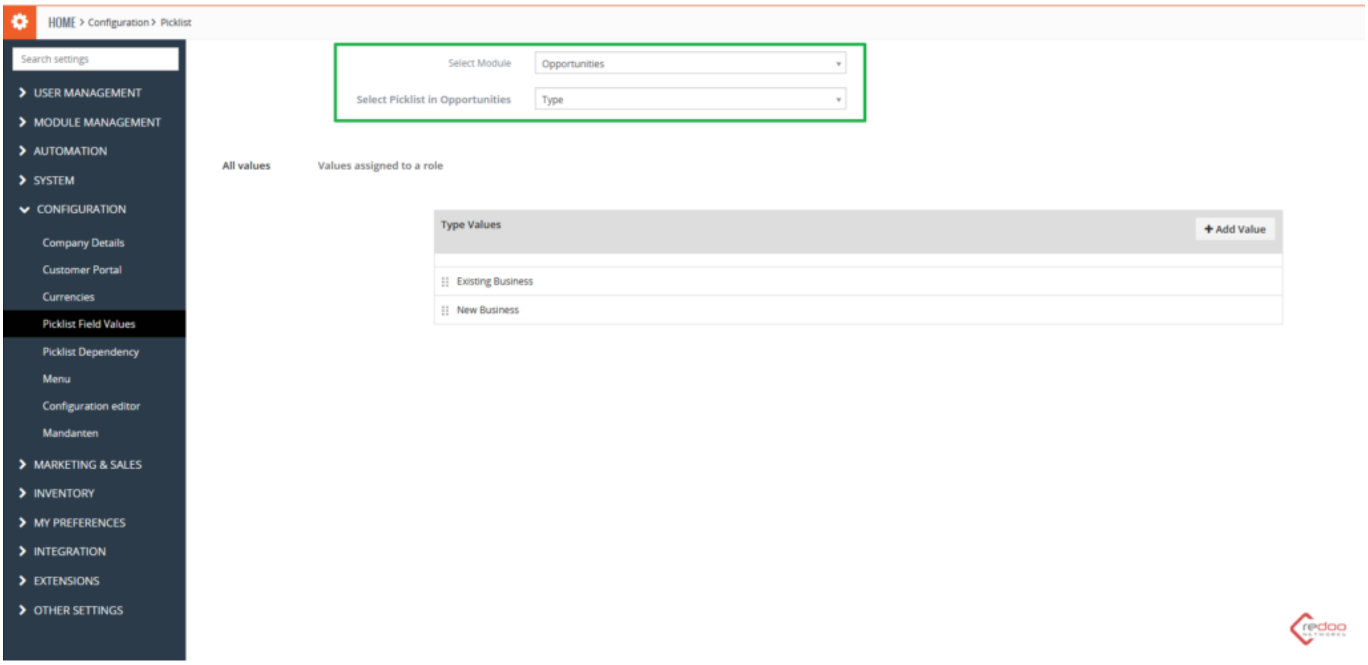


Picklist Field Values

The next page in Configuration block is Picklist Field Values

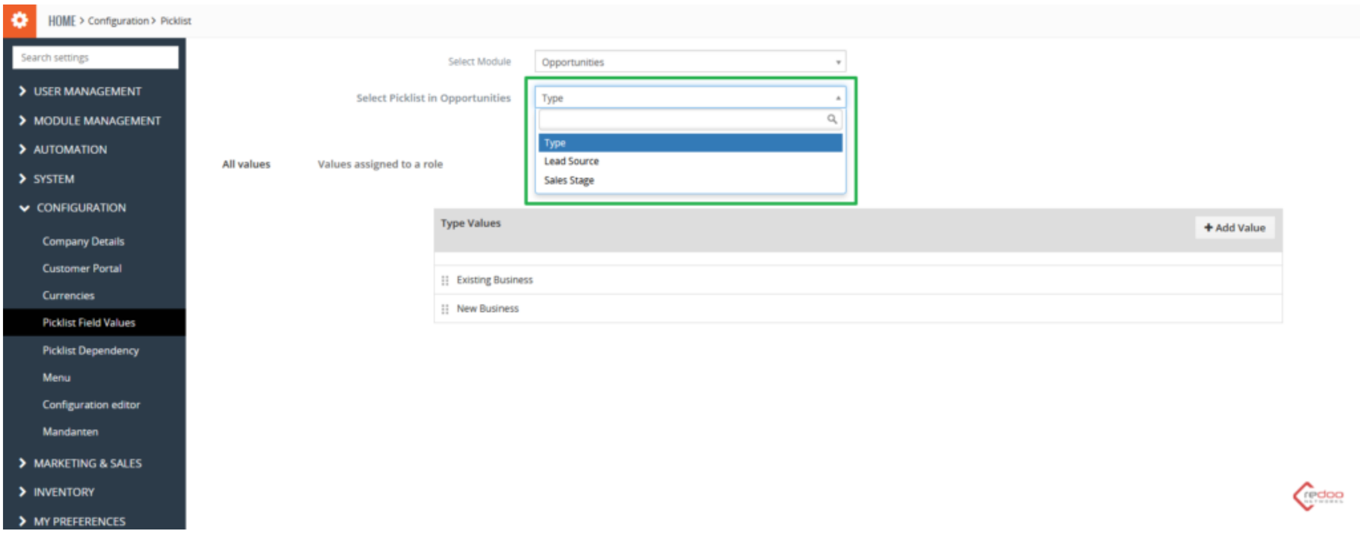


On the first steps you have to select a module which you would like to select picklist for

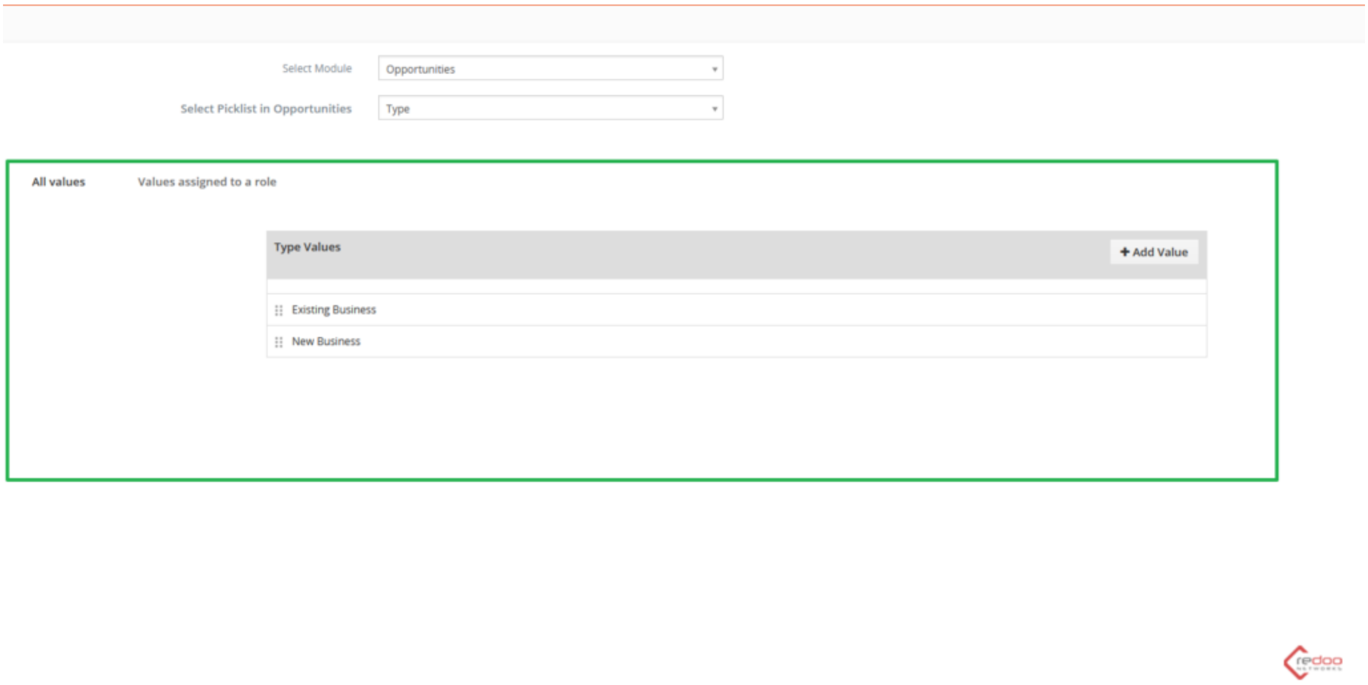


und wählen Sie unter “Möglichkeiten” die Option “Pickerl”, wo Sie zwischen drei Optionen wählen können:

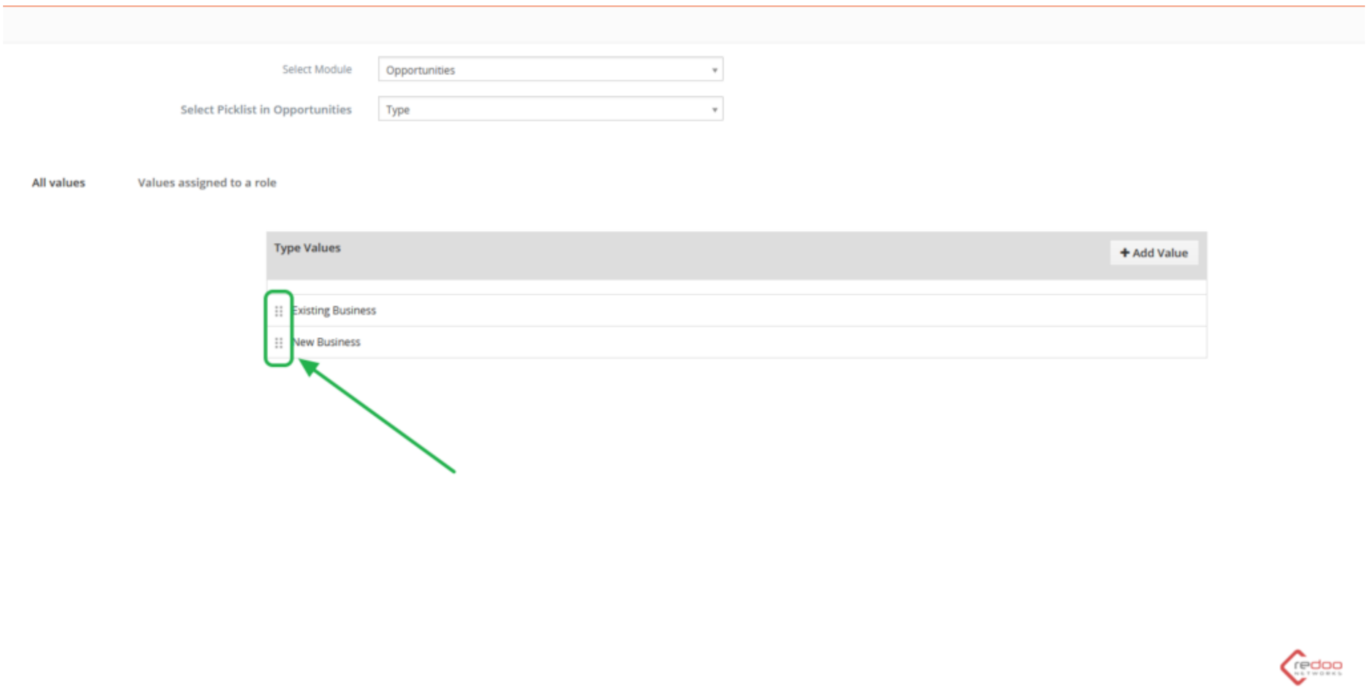
- Typ
- Lead-Quelle
- Verkaufsstufe



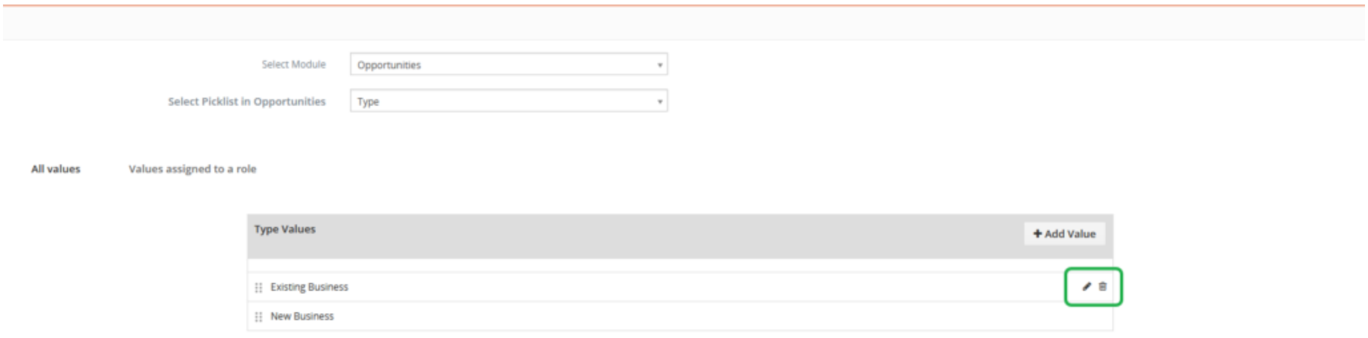
In the main part of the page you can see a list of all Picklist Values that are used within the CRM



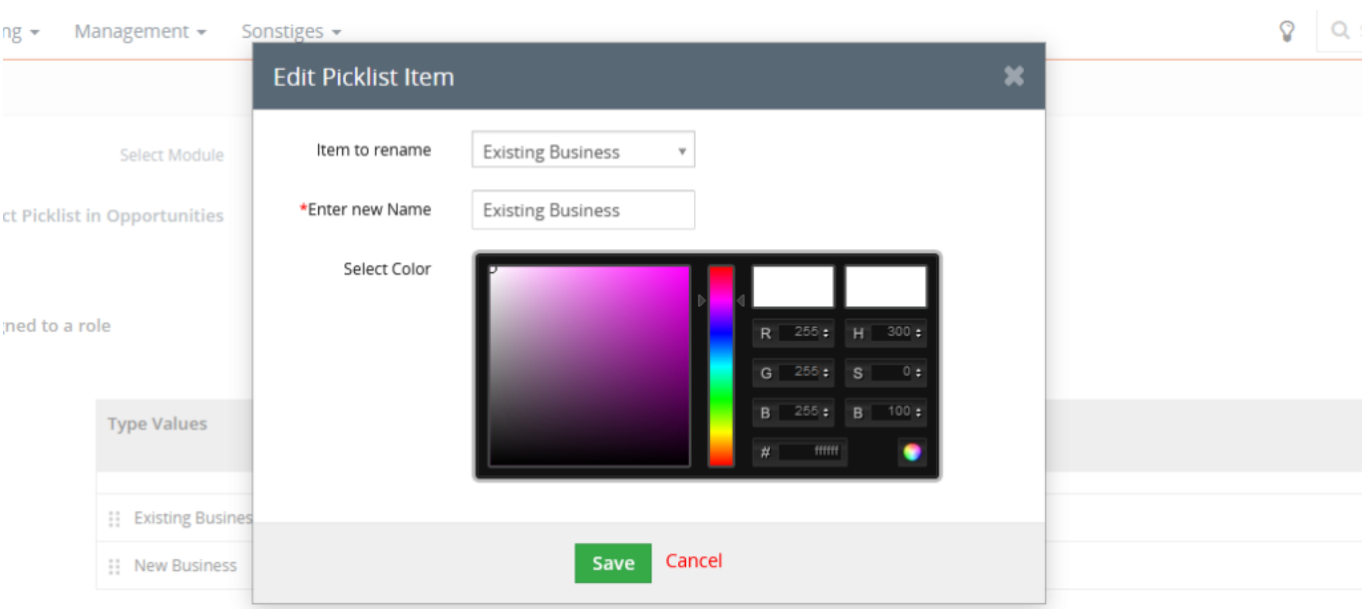
You can move them via drag and drop using these dot signs



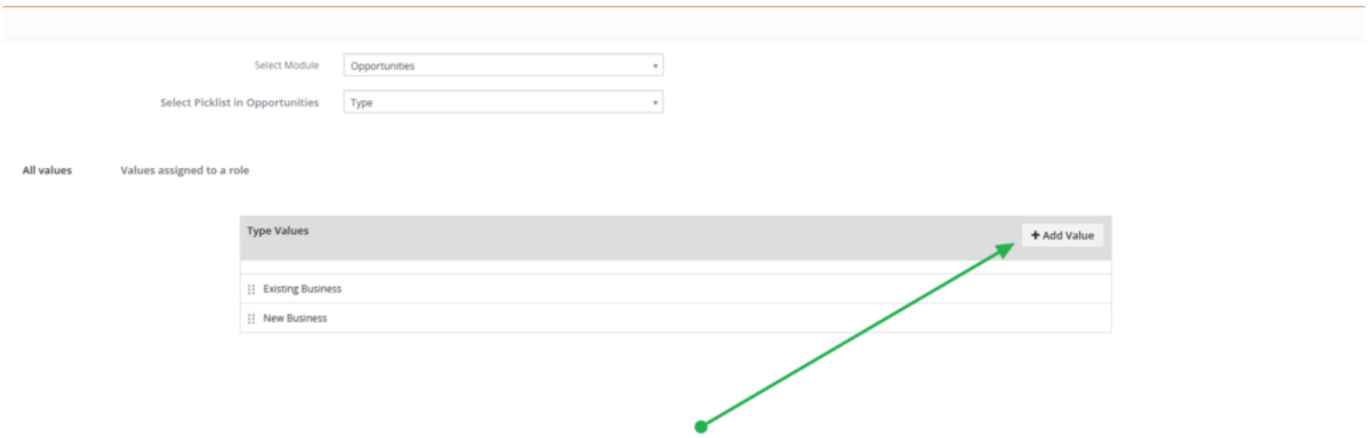
To edit or delete a picklist values you can use these “pencil” and “trash can” icons by clicking at them like shown in the image



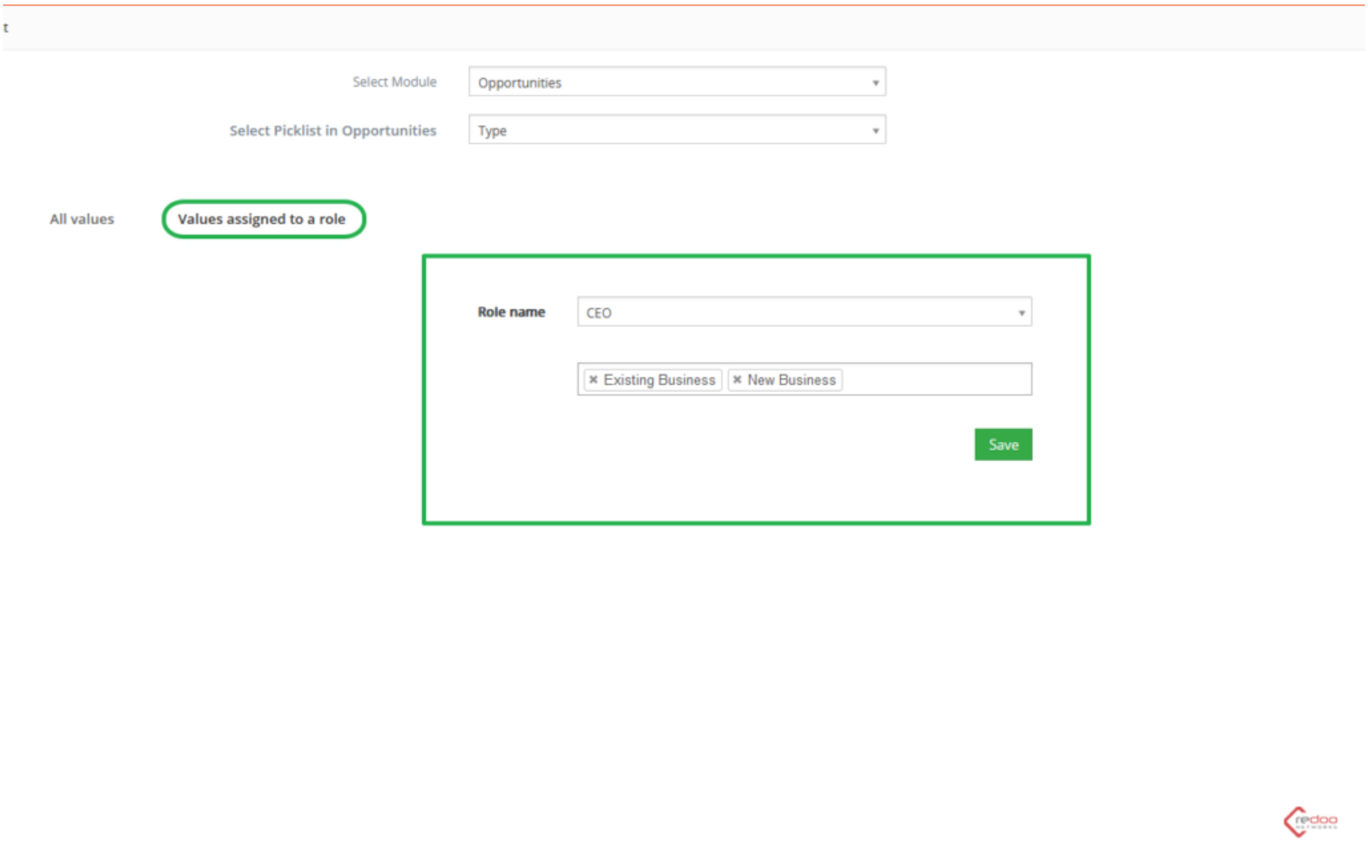
When you edit a Picklist Value you should choose an Item to rename, Enter the new Name and select a color.



To add a Picklist Value use the “Add Value” button shown in the image



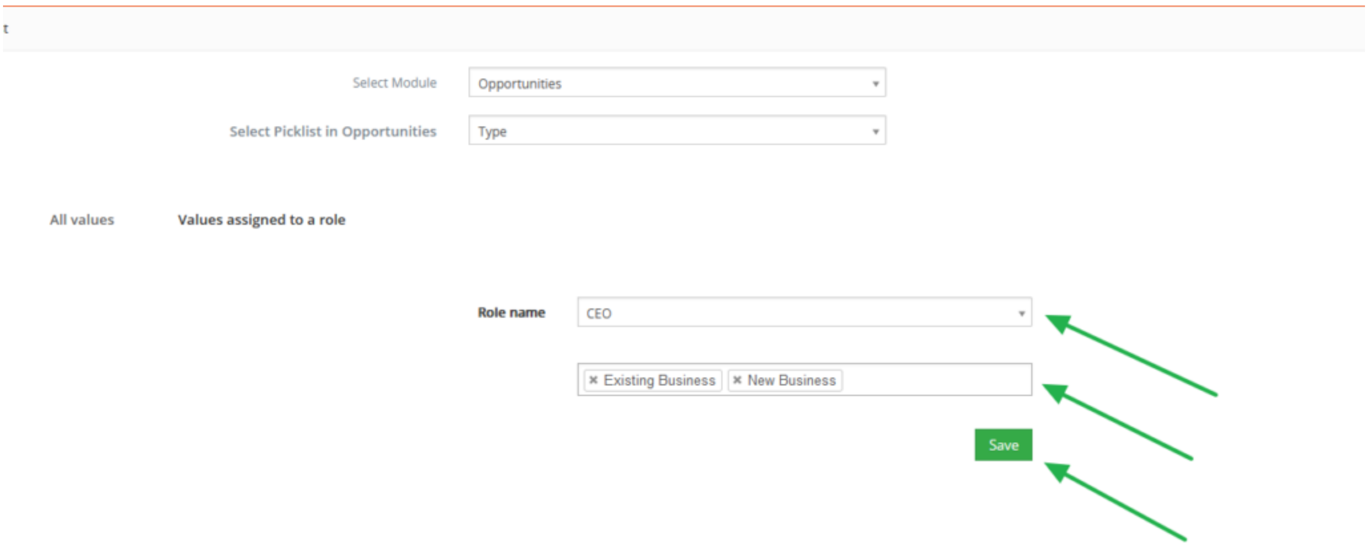
There is also an option to set up Picklist Values individually to each role by switching to the Values assigned to a role page



Firstly – Select a role name

Then choose which Picklist Values to add or remove the extra ones

And finally – save

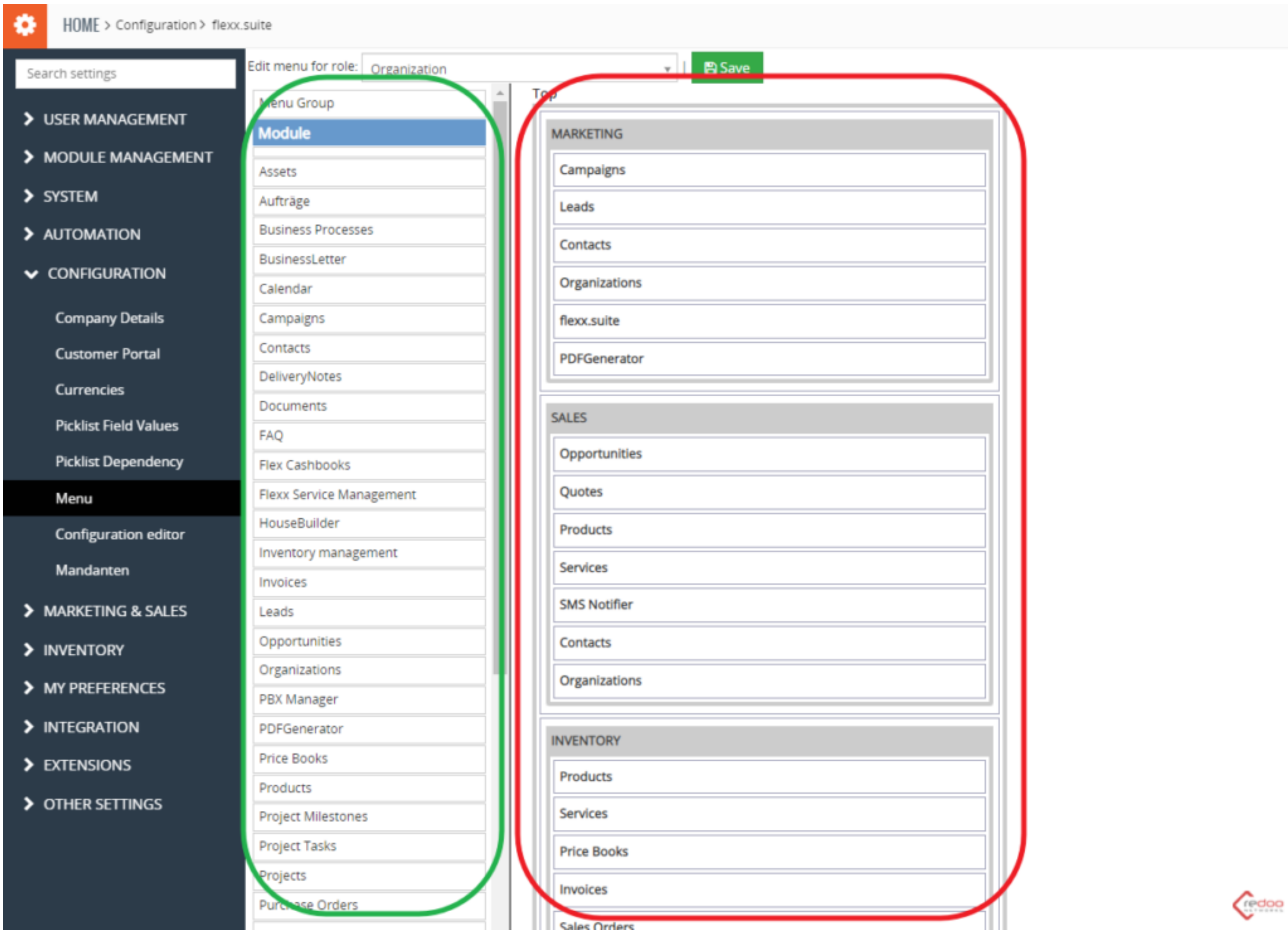


Menu

Here you can see a page divided in two columns

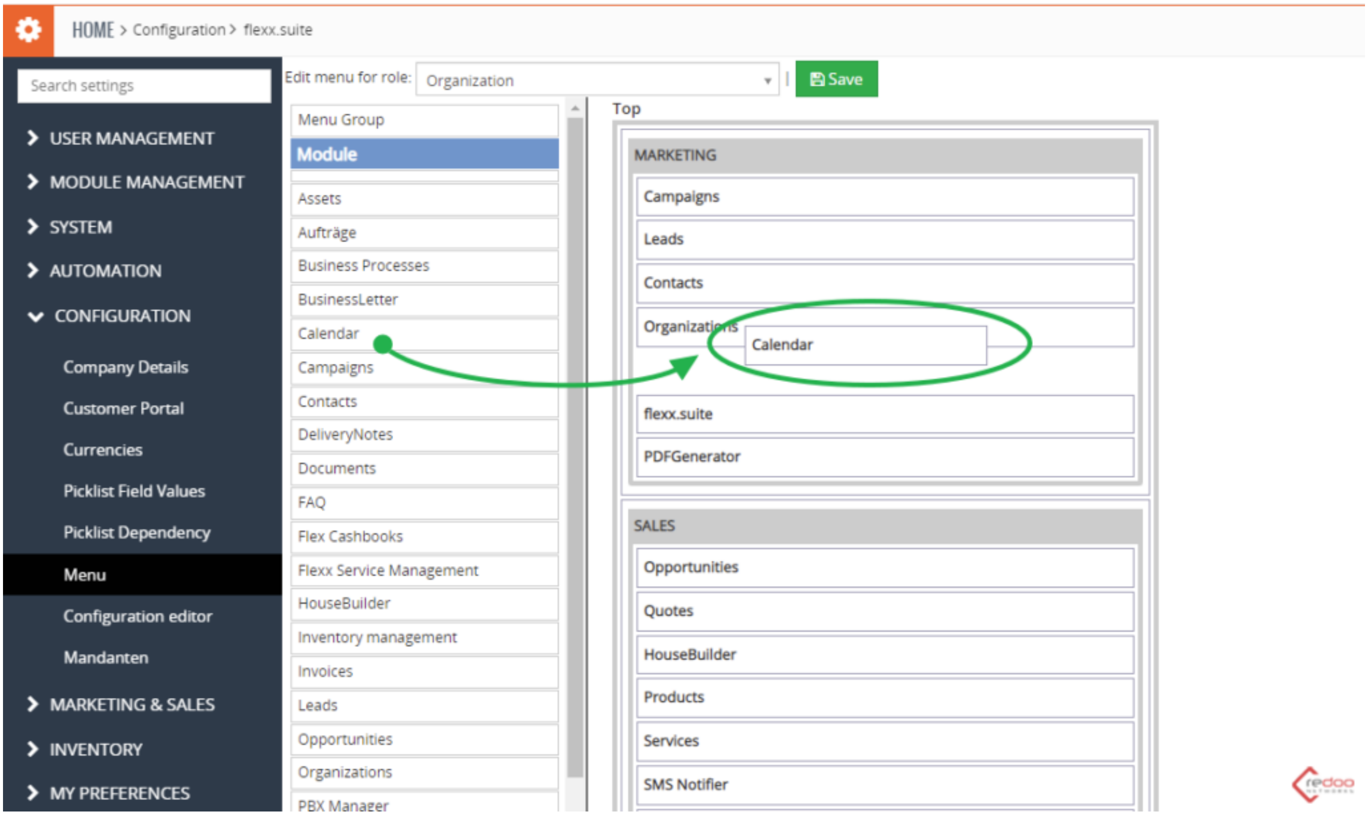
The column shown in green displays the list of all modules available in CRM

The red column responds for all top bar sections and modules that you can view from a pop-up window that opens when you select the proper section.

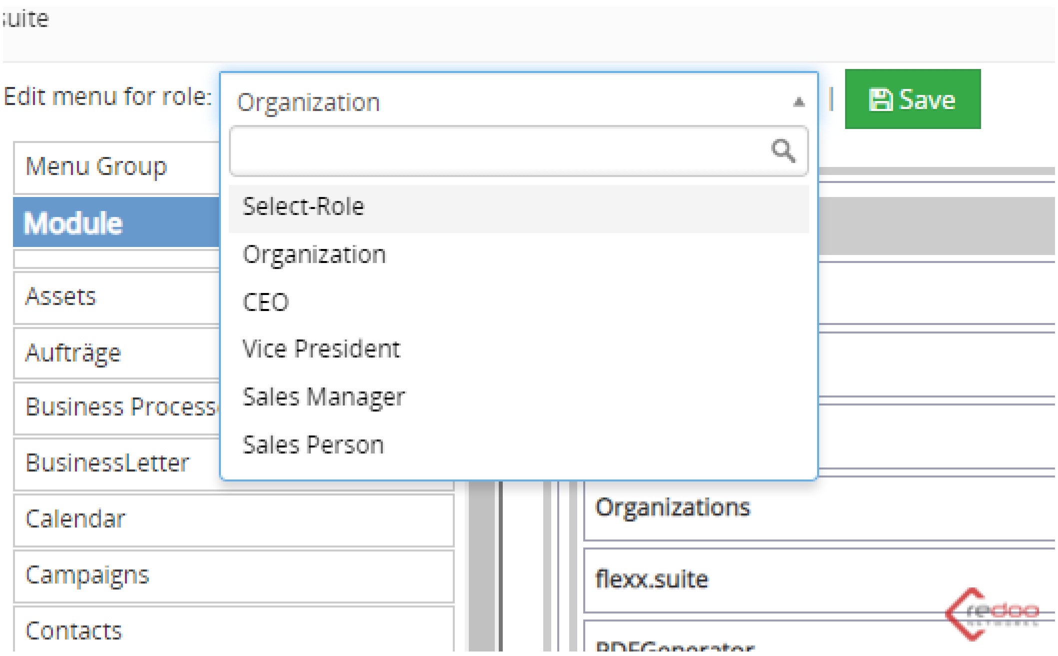


Via drag and drop you can move modules from left column and place them in the desired section

In the example below you can see how a Calendar module is mode to the Marketing section and placed between “Organizations” and “flexx.suite” modules



On the top of the page there is a section when you are able to choose a specific role that will work with the menu you created below

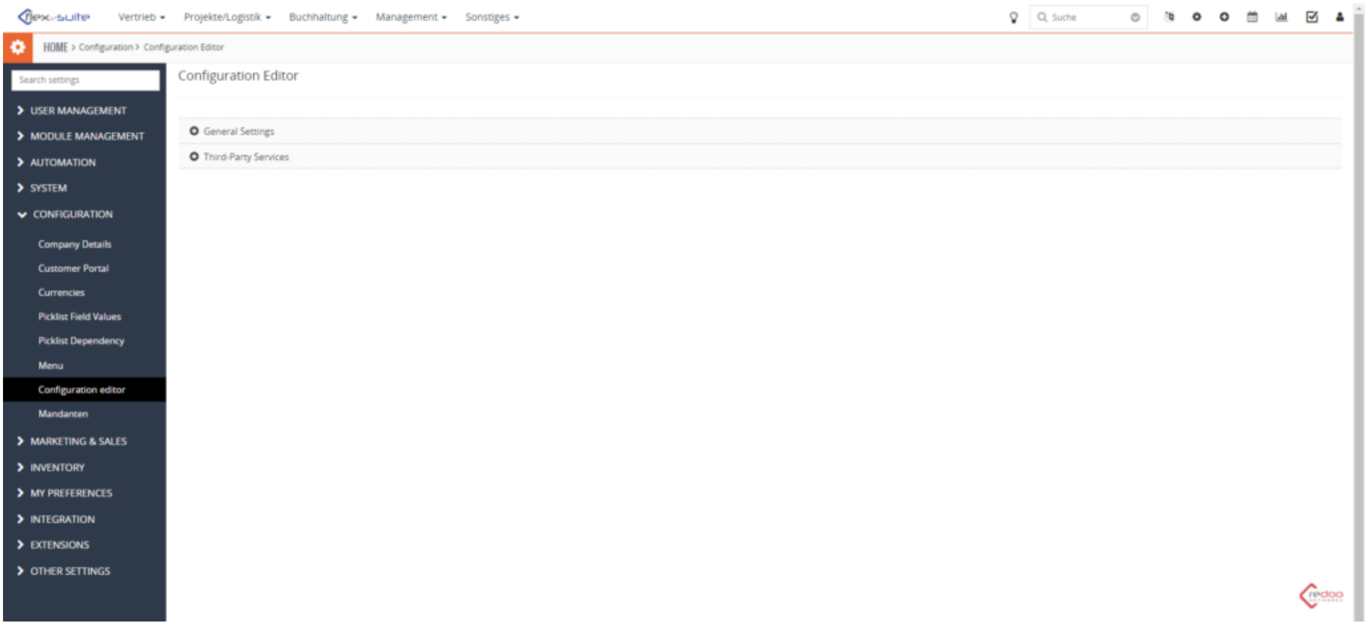


To save your progress press the green “Save” button.

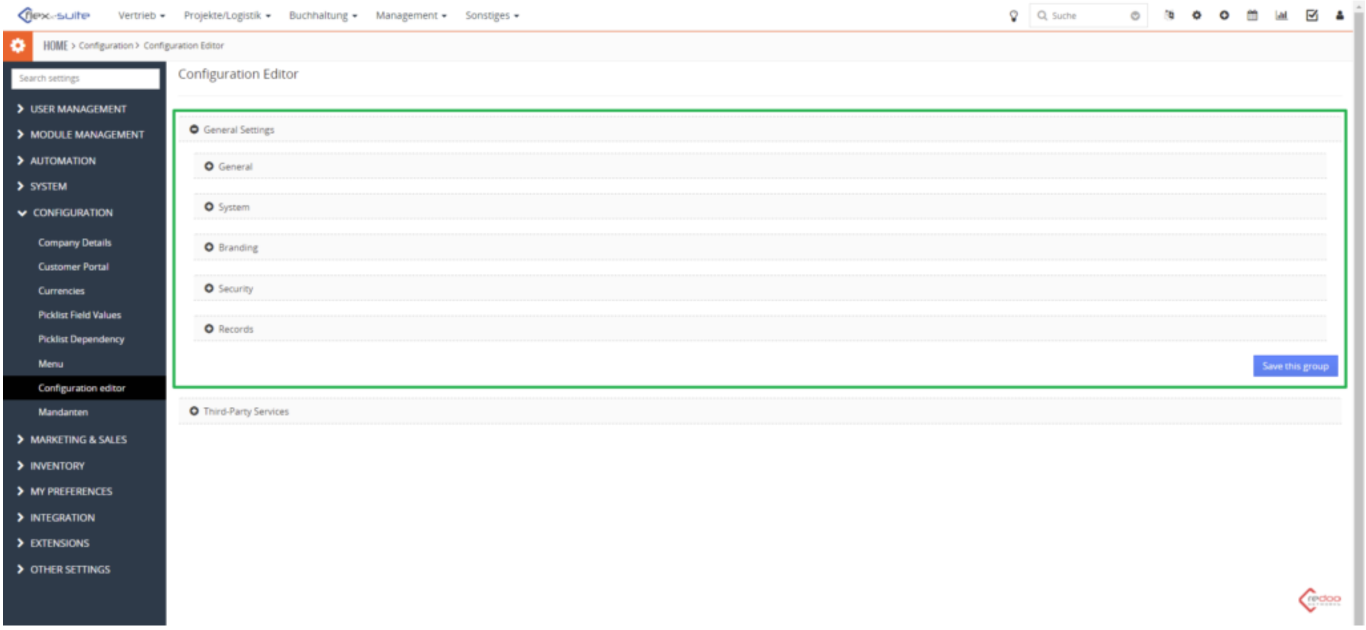
Configuration Editor

This page responds for Configuration Editor

It is divided in two sections:



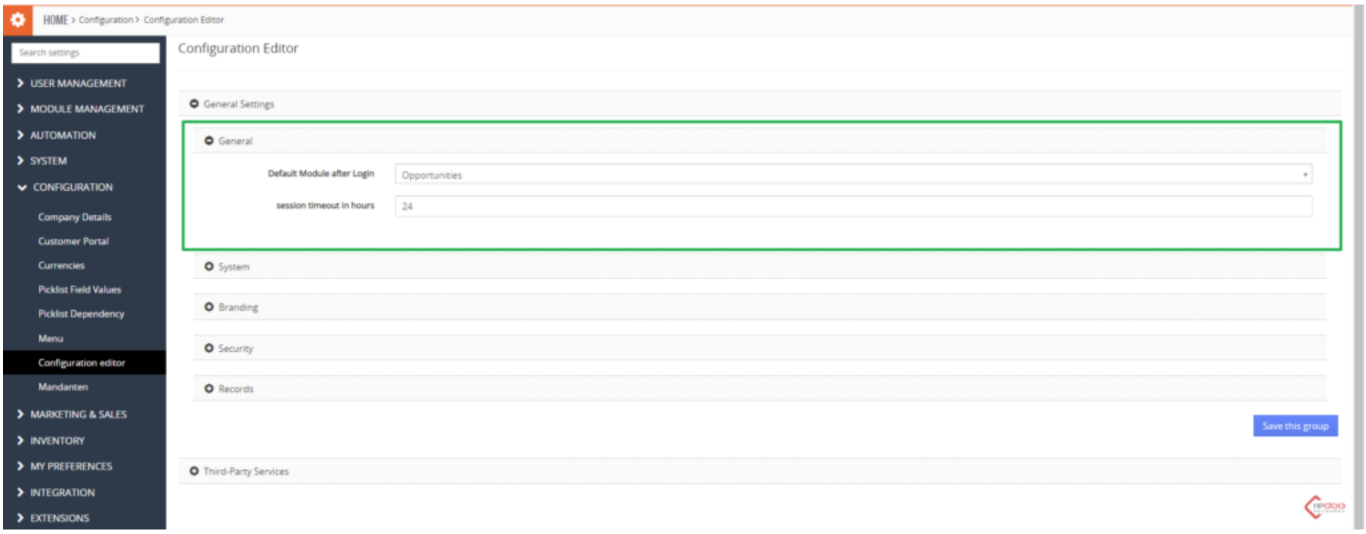
First is **General Settings**



Here are 5 sections corresponding to different aspects of the CRM system:

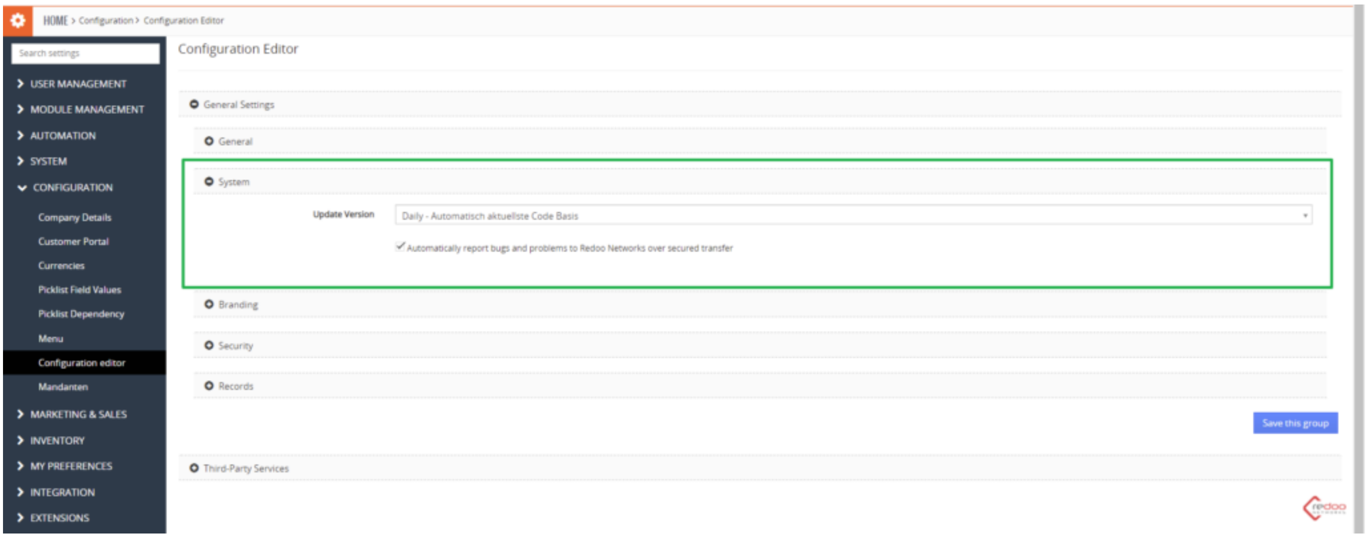
- General

In this part you can set the default module after login and set session timeout in hours

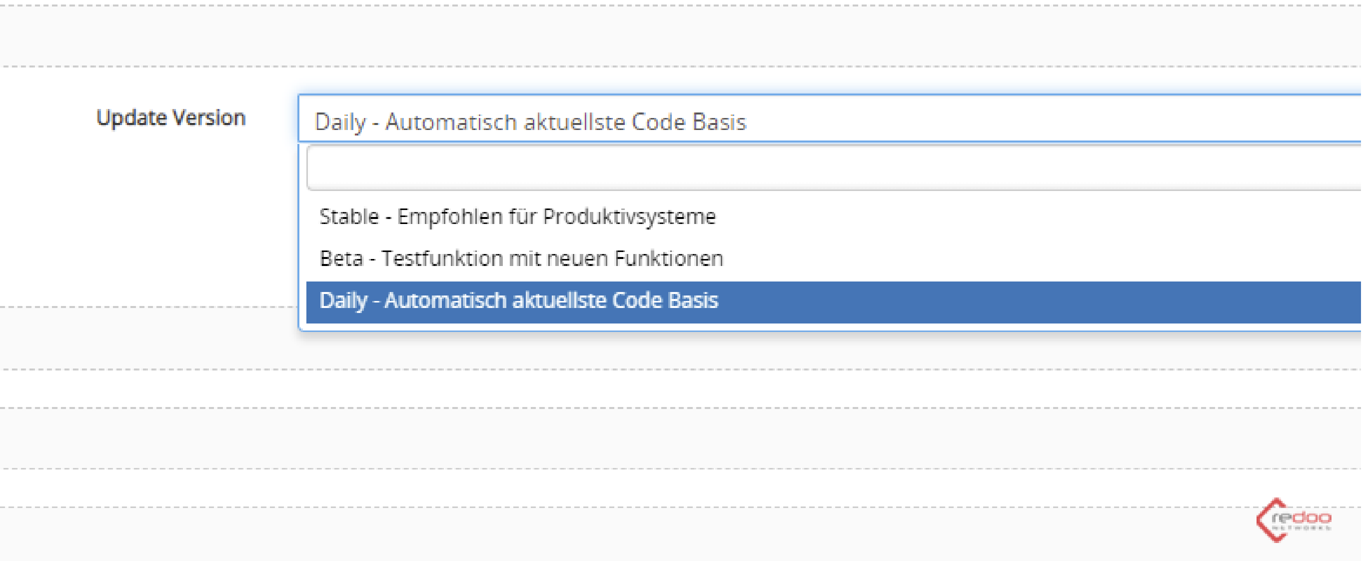


- System

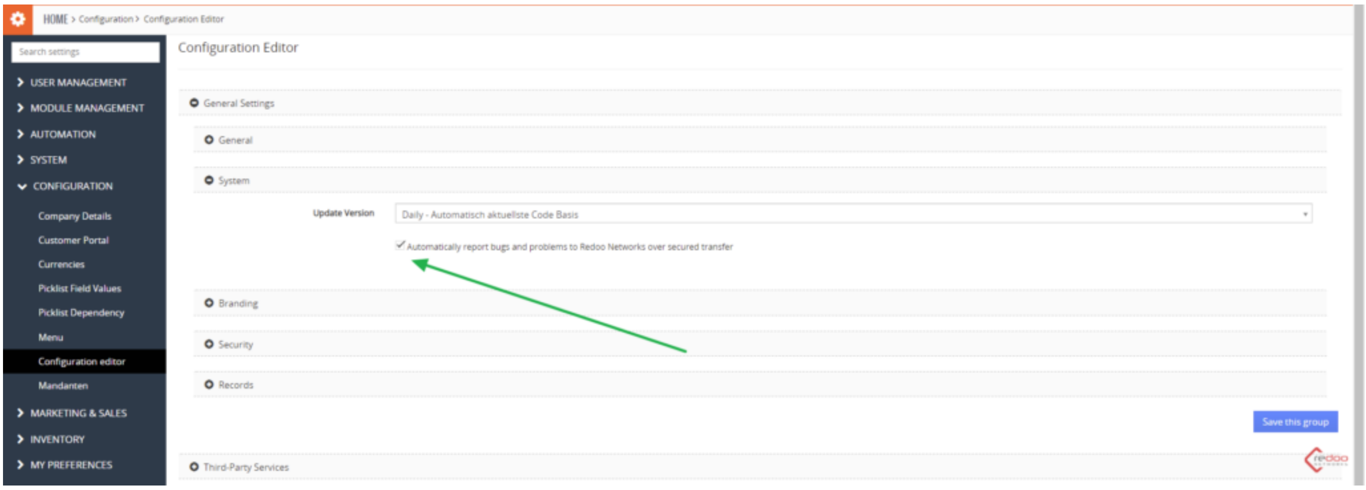
Here you may configure the update process



Pick up one of three different options: Stable, Beta and Daily

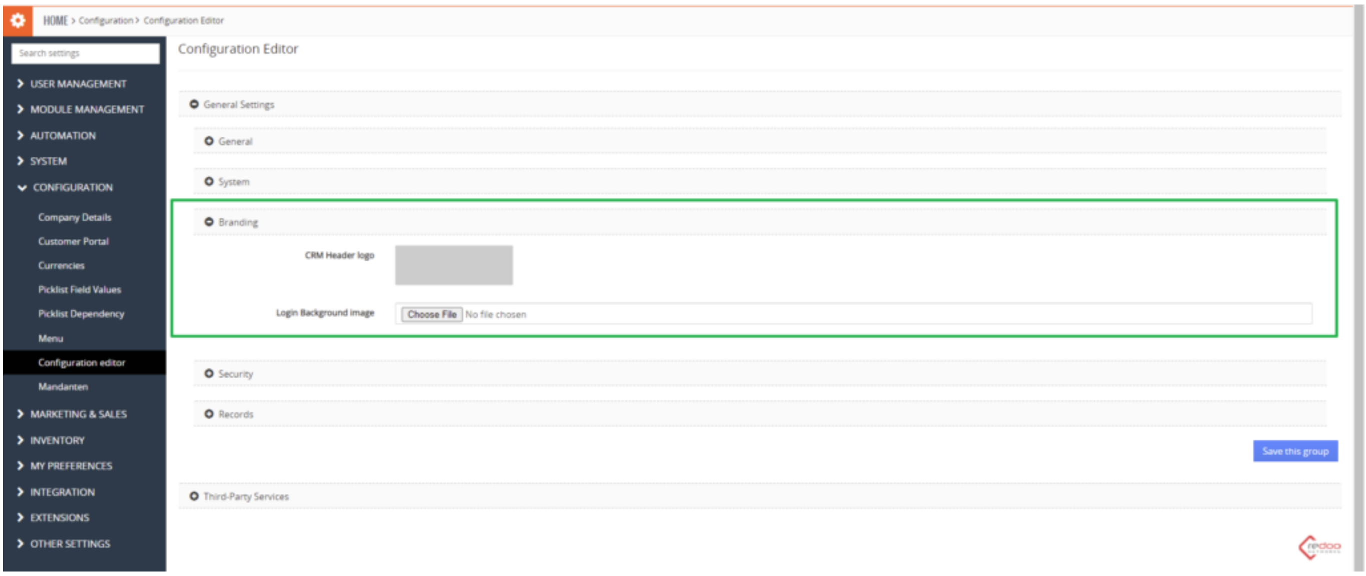


Below there is an option to turn on the automatic bug report function which will send bugs and problems to Redoo Networks over secured transfer



- Branding

This section is made to set up a header logo and login background image

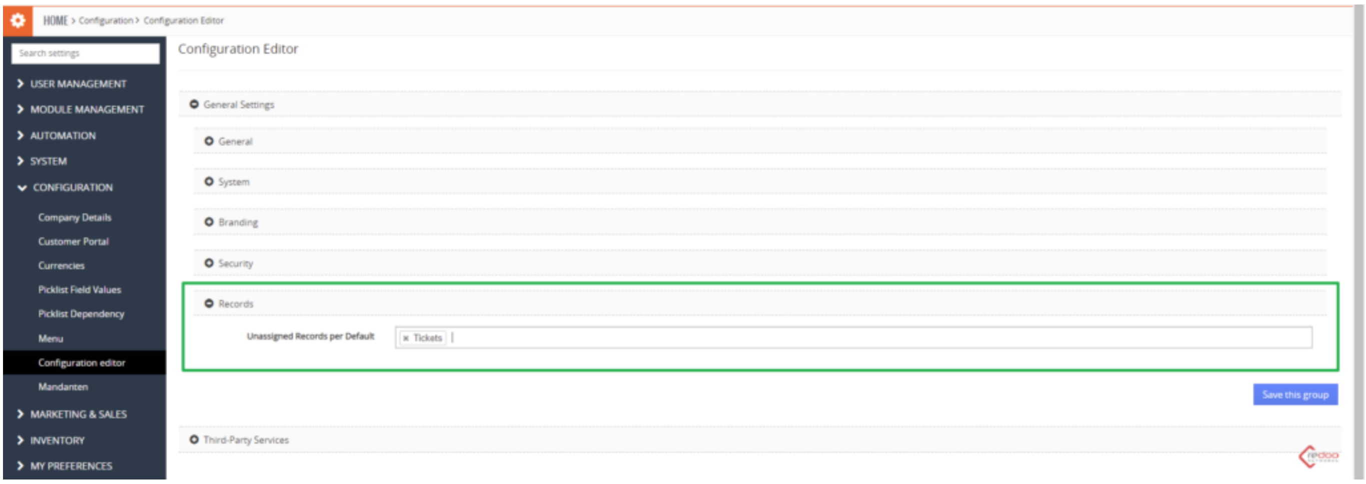


- Security

Security allows you to manually enter the allowed referral domains

- Records

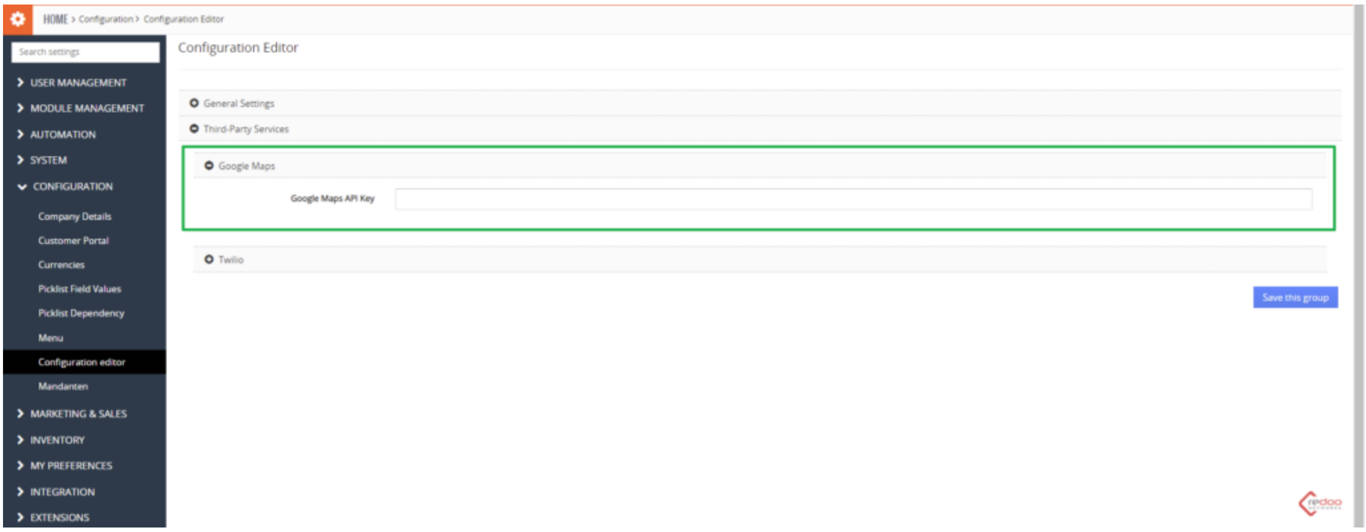
in Records you can select modules which new-made records will be unsigned by default



To save changes press the blue button like shown in the image

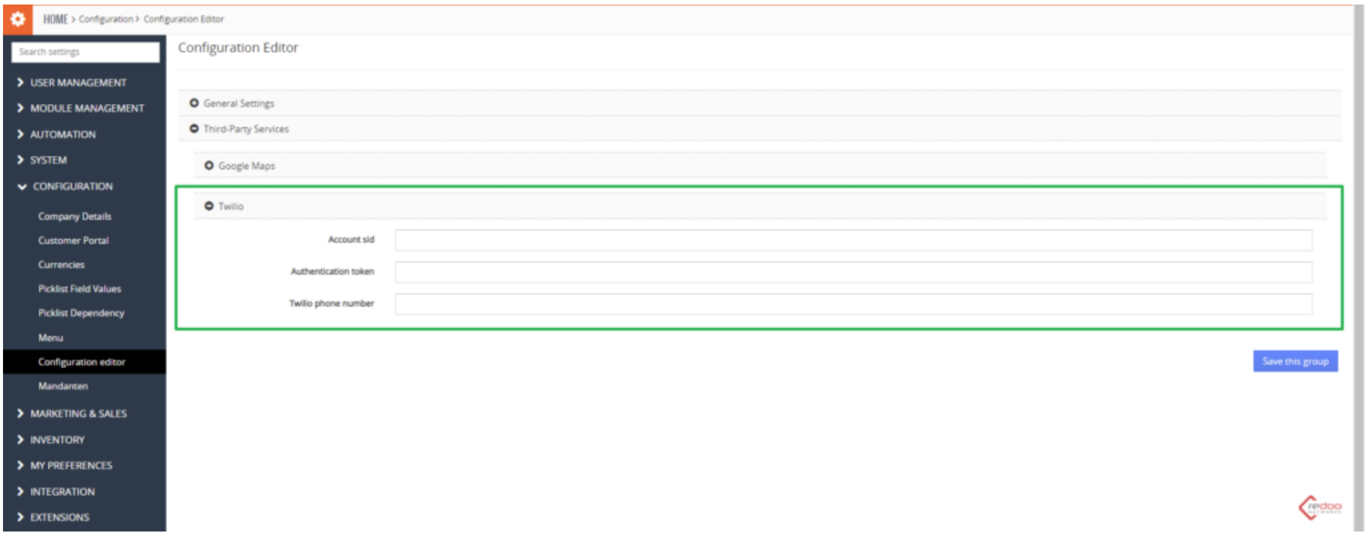
Below there is a second block called **Third-Party Services:**

First block responds for Google Maps API Key



And the second one for Twiilo

Here you can fill in the Account sid, Authentication token and Twilio phone number



Do not forget to save!

