



# 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

The screenshot displays the 'My Preferences' page for the 'Admin Administrator' user. The left sidebar contains a navigation menu with the following categories: USER MANAGEMENT, MODULE MANAGEMENT, AUTOMATION, SYSTEM, CONFIGURATION (highlighted with a green box and arrow), MARKETING & SALES, INVENTORY, MY PREFERENCES, INTEGRATION, EXTENSIONS, and OTHER SETTINGS. The CONFIGURATION section is further divided into: Company Details, Customer Portal, Currencies, Picklist Field Values, Picklist Dependency, Menu, Configuration editor, and Mandanten. The main content area is titled 'My Preferences' and shows user details for 'Admin Administrator'. It is divided into three sections: 'User Login & Role', 'Currency and Number Field Configuration', and 'More Information'.

User Login & Role	
User Name	admin
First Name	Admin
Admin	Yes
Default Lead View	Today
SoW-Arbeitszeit	0
Mandant	cm
Email	sysadmin@redoo-networks.com
Last Name	Administrator
Role	CEO
Status	Active
Name relevanter Feiertagsplan	

Currency and Number Field Configuration	
Currency	Euro
Decimal Separator	.
Symbol Placement	\$1.0
Truncate Trailing Zeros	Yes
Digit Grouping Pattern	123.456.789
Digit Grouping Separator	.
Number Of Currency Decimals	2

More Information	
Title	Fax
Department	Other Email
Office Phone	Secondary Email
Mobile Phone	Reports To

## Company Details

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

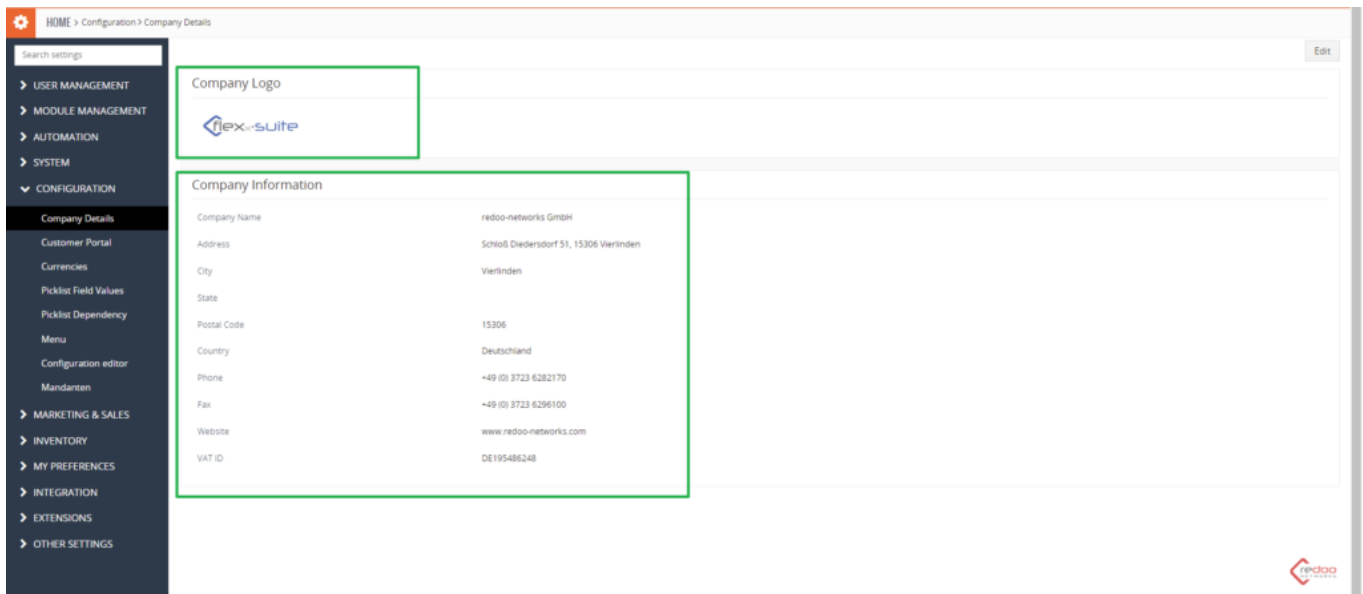
The screenshot displays the Flexx.Suite configuration interface. The top navigation bar includes 'flexx-suite', 'Vertrieb', 'Projekte/Logistik', 'Buchhaltung', 'Management', and 'Sonstiges'. The main content area is titled 'HOME > Configuration > Company Details'. A left sidebar menu is visible, with 'CONFIGURATION' highlighted in green and 'Company Details' selected. The main content area shows the 'Company Logo' (flexx-suite) and 'Company Information' table.

Company Information	
Company Name	redoo-networks GmbH
Address	Schloß Driedersdorf 51, 15306 Vierlinden
City	Vierlinden
State	
Postal Code	15306
Country	Deutschland
Phone	+49 (0) 3723 6282170
Fax	+49 (0) 3723 6296100
Website	www.redoo-networks.com
VAT ID	DE195486248

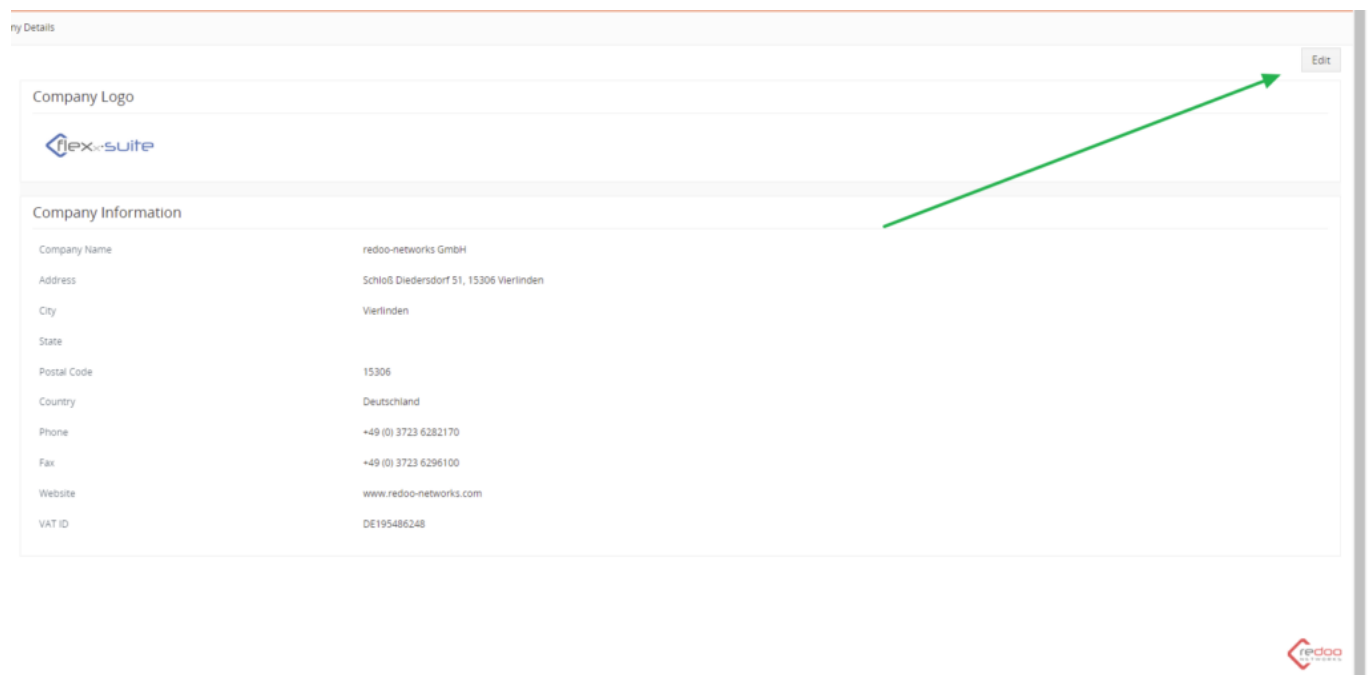
At the bottom of the page, there is a footer with the text: 'Powered by flexx.suite 2021-12-29-daily - Changelog | Generation: 1747 ms | Transfer: 67 ms | DOM: 1 ms | Complete Time: 2593 ms'. The Redoo Networks logo is also present in the bottom right corner.

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

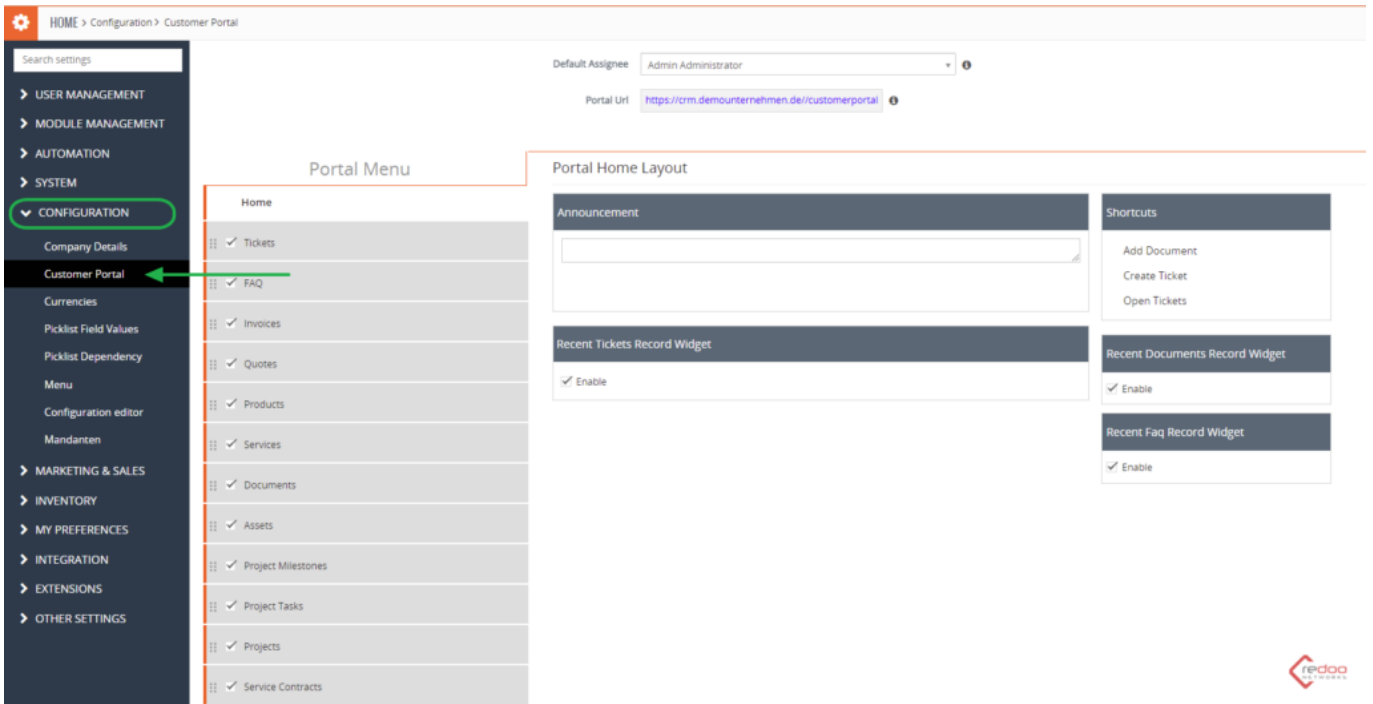
## Customer Portal

Another part of Configuration block is Customer Portal

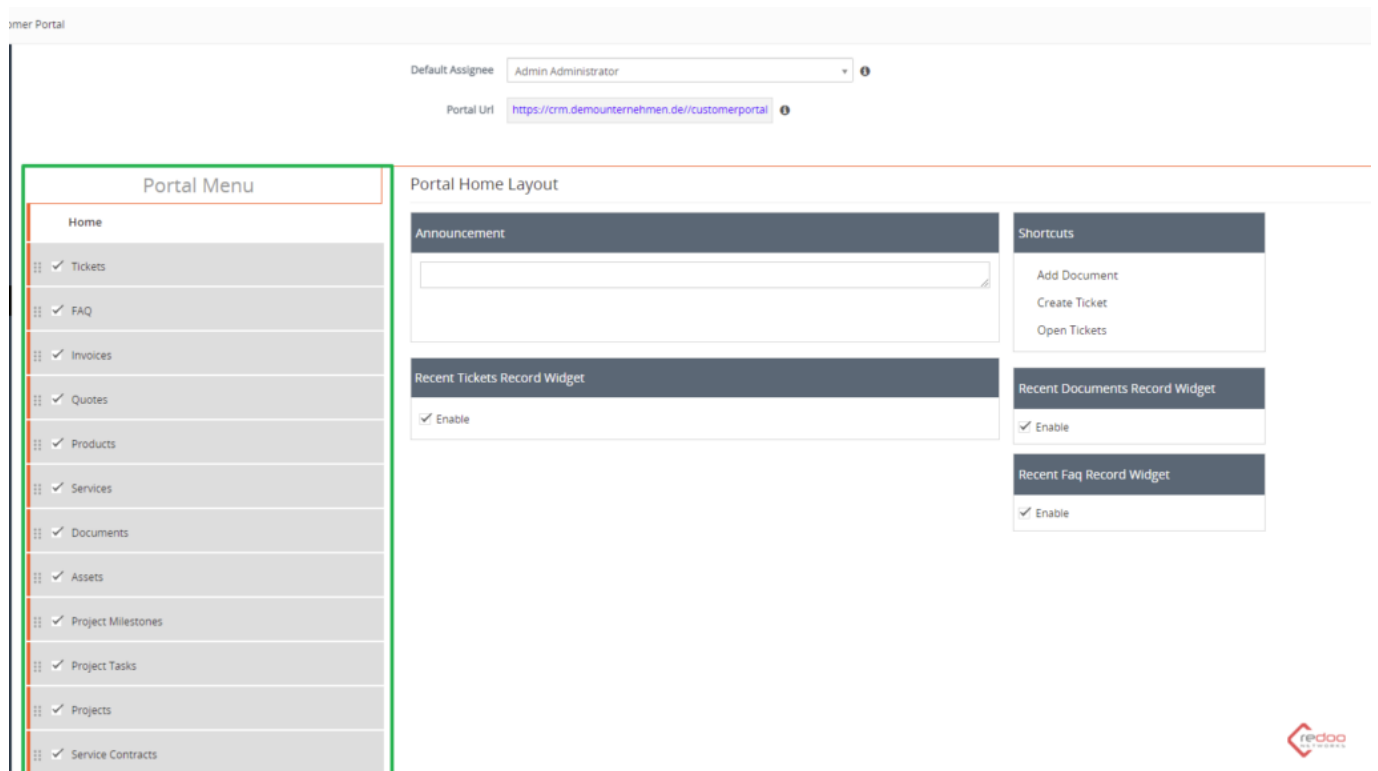
Here you are able to configure a customer portal where your customers will be able to view module records you share with them, keep an eye on important announcements and use important widgets

The screenshot shows the 'Company Details' configuration page in Flexx.Suite. On the left is a dark sidebar menu with a search bar and categories: USER MANAGEMENT, MODULE MANAGEMENT, AUTOMATION, SYSTEM, and CONFIGURATION. Under CONFIGURATION, 'Company Details' is selected, with sub-items: Customer Portal, Currencies, Picklist Field Values, Picklist Dependency, Menu, Configuration editor, Mandanten, MARKETING & SALES, INVENTORY, MY PREFERENCES, INTEGRATION, EXTENSIONS, and OTHER SETTINGS. The main content area is titled 'Company Details' and contains a 'Company Logo' section with a 'flexx.suite' logo and a 'Choose File' button. Below the logo is a note: 'Allowed size 150x40 pixels( .jpeg , .jpg , .png , .gif , .jpeg , .x-png format )'. The 'Company Name' field is filled with 'redoo-networks GmbH'. Other fields include 'Address' (Schloß Diedersdorf 51, 15306 Vierlinden), 'City' (Vierlinden), 'State' (empty), 'Postal Code' (15306), 'Country' (Deutschland), 'Phone' (+49 (0) 3723 6282170), 'Fax' (+49 (0) 3723 6296100), 'Website' (www.redoo-networks.com), and 'VAT ID' (DE195486248). At the bottom right are 'Save' and 'Cancel' buttons, and the Redoo Networks logo.

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 Uri

Customer Portal

Default Assignee: Admin Administrator

Portal Url: https://crm.demounternehmen.de/customerportal

### Portal Menu

- Home
- Tickets
- FAQ
- Invoices
- Quotes
- Products
- Services
- Documents
- Assets
- Project Milestones
- Project Tasks
- Projects
- Service Contracts

### Portal Home Layout

Announcement

Recent Tickets Record Widget

Enable

Shortcuts


- Add Document
- Create Ticket
- Open Tickets

Recent Documents Record Widget

Enable

Recent Faq Record Widget

Enable



Next block is used for Portal Home Layout customization

Customer Portal

Default Assignee: Admin Administrator

Portal Url: https://crm.demounternehmen.de/customerportal

### Portal Menu

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### Portal Home Layout

Announcement

Recent Tickets Record Widget

Enable

Shortcuts

- Add Document
- Create Ticket
- Open Tickets


Recent Documents Record Widget

Enable

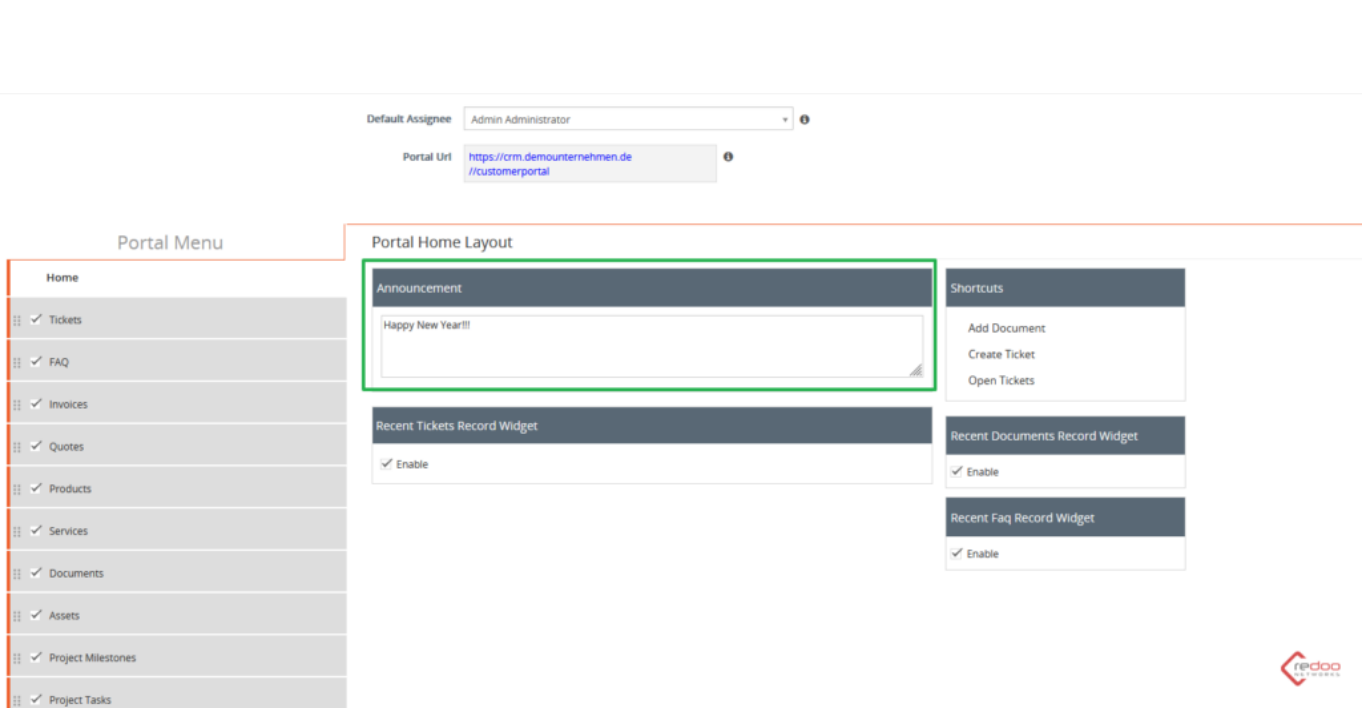
Recent Faq Record Widget

Enable

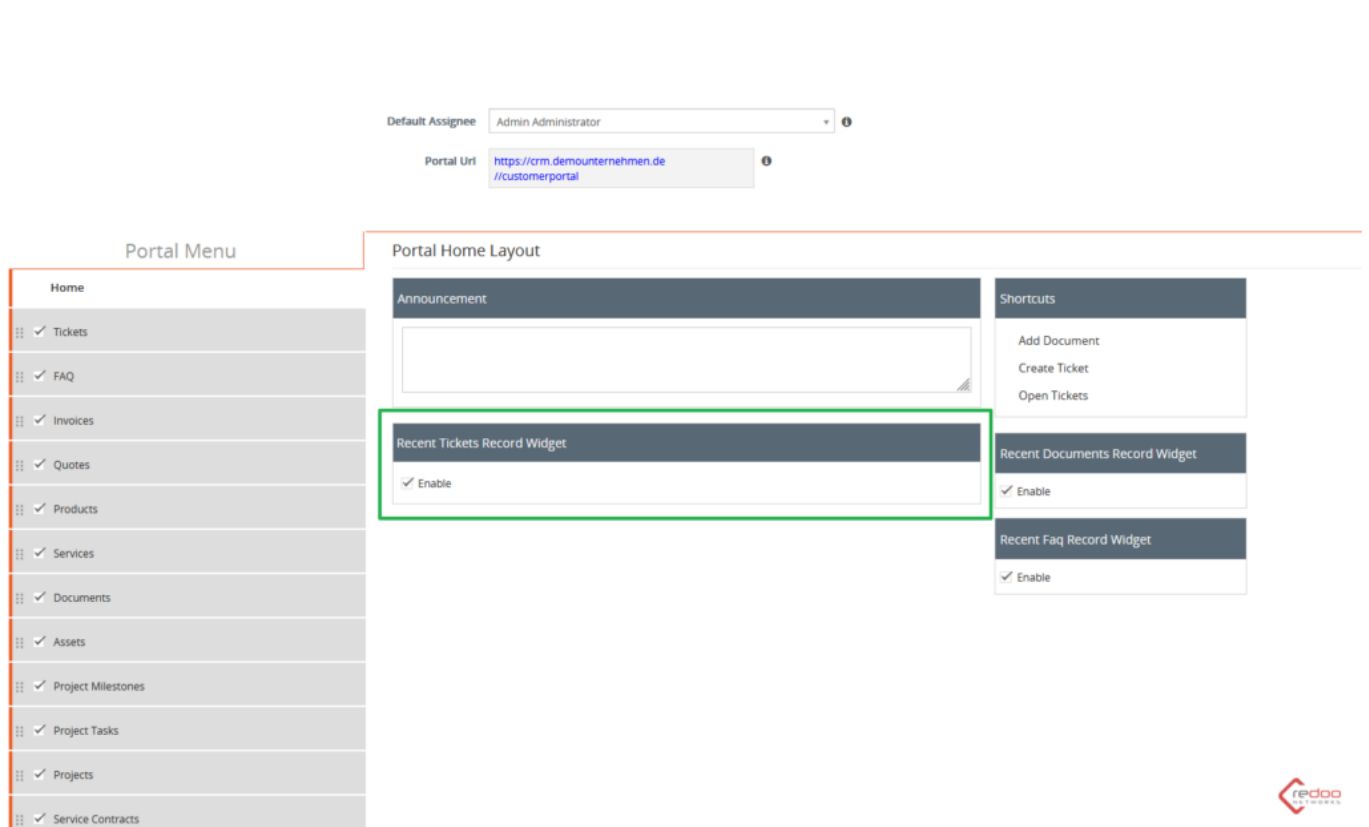
Development Start



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





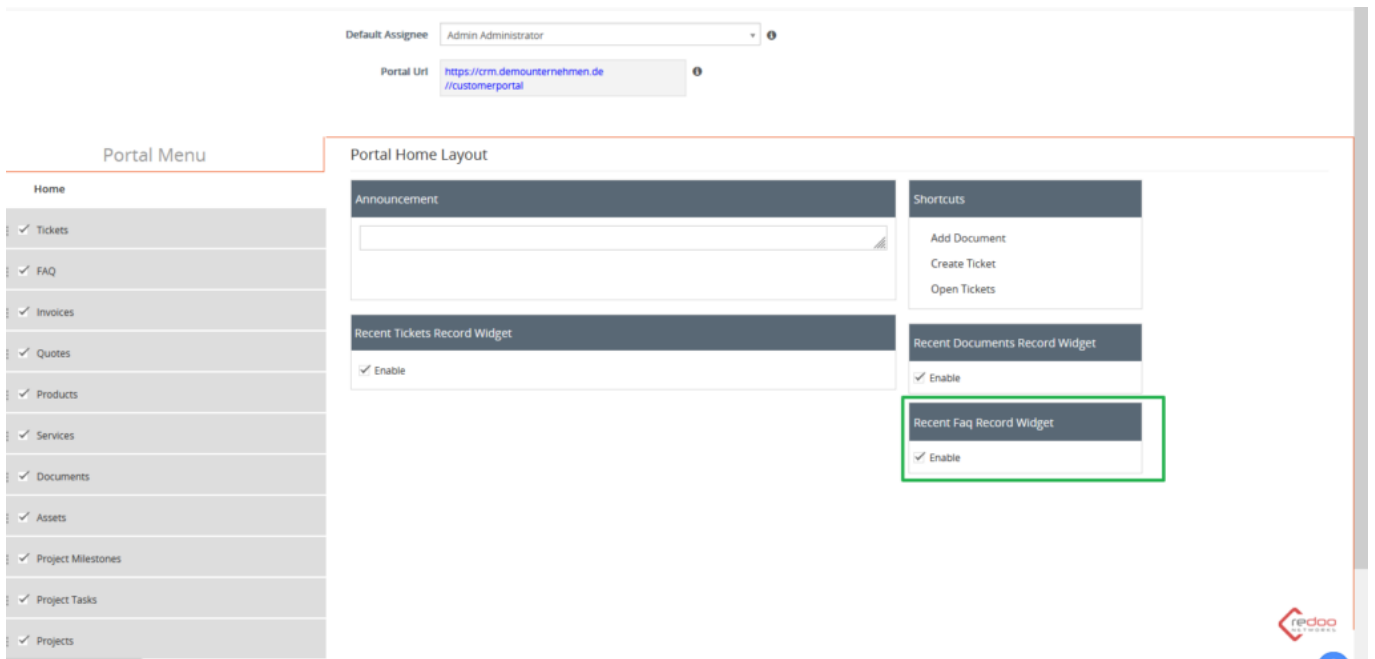
Next one is Recent Documents Widget which you can enable or disable via check mark which shows the recent documents added to the CRM

The screenshot displays the configuration interface for the Flexx.Suite CRM. At the top, there are two dropdown menus: 'Default Assignee' set to 'Admin Administrator' and 'Portal Uri' set to 'https://crm.demounternehmen.de/customerportal'. Below these is the 'Portal Menu' section, which lists various menu items with checkmarks: Tickets, FAQ, Invoices, Quotes, Products, Services, Documents, Assets, Project Milestones, Project Tasks, and Projects. The main area is titled 'Portal Home Layout' and contains several widget configurations:

- Announcement:** A text input field.
- Recent Tickets Record Widget:** A widget with a checked 'Enable' checkbox.
- Recent Documents Record Widget:** A widget with a checked 'Enable' checkbox, highlighted with a green border.
- Recent Faq Record Widget:** A widget with a checked 'Enable' checkbox.
- Shortcuts:** A list of actions: 'Add Document', 'Create Ticket', and 'Open Tickets'.

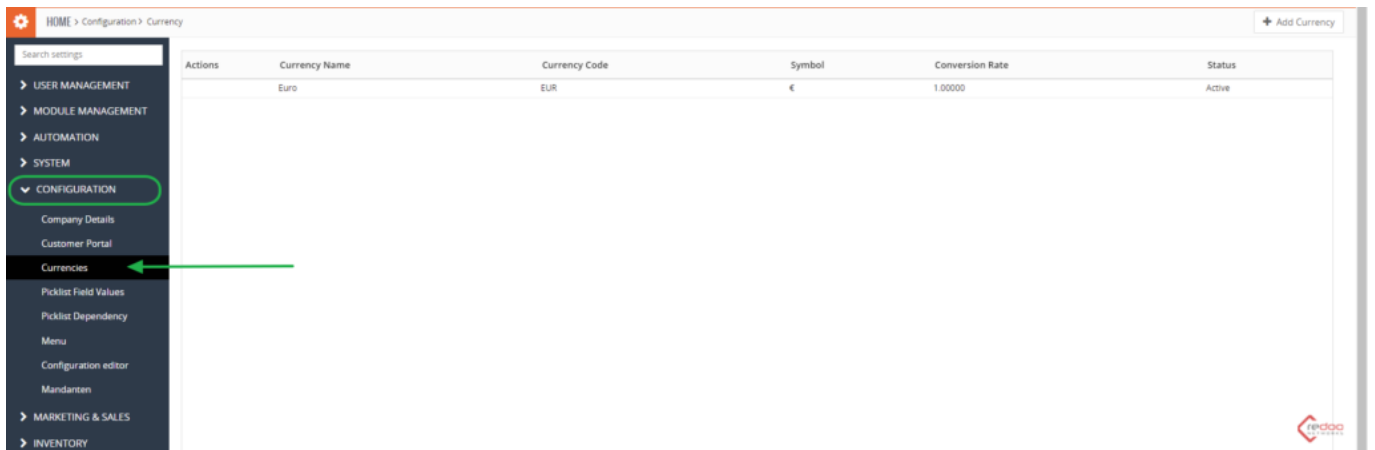
The Redoo Networks logo is visible in the bottom right corner of the interface.

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

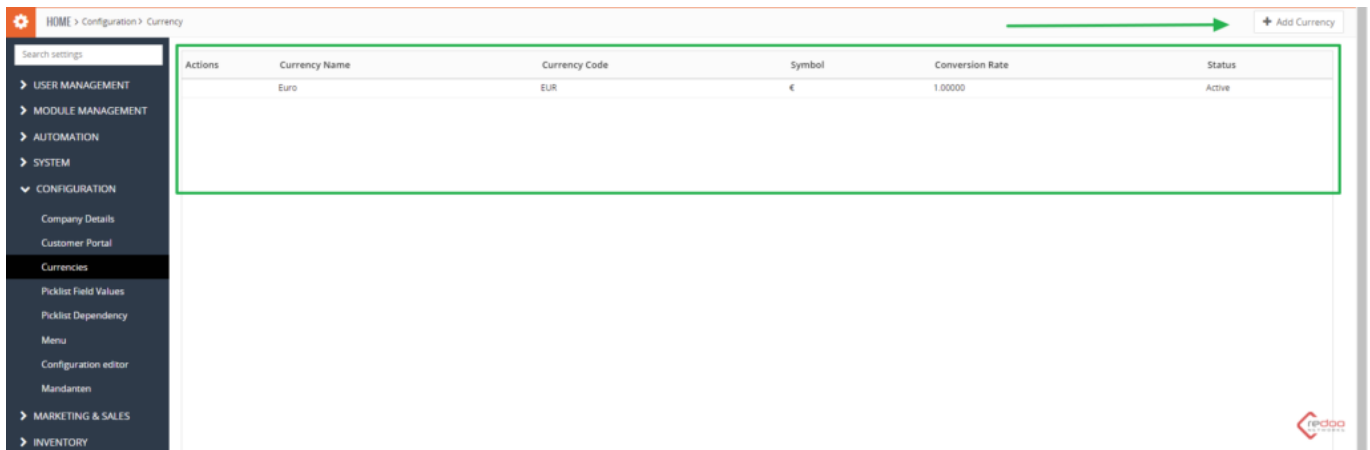


## Currencies

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



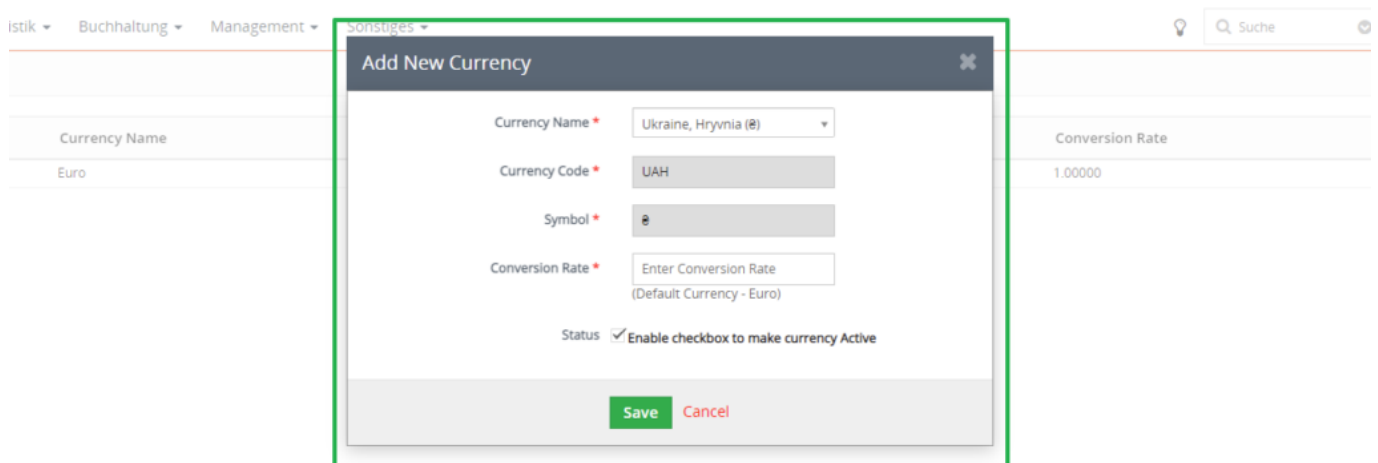
To add a new currency press the “Add Currency” button like shown in the image



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

CONTACTS > Adding new

### Creating New Contact

**Basic Information**

First Name: None [input]  
Office Phone: [input]  
Mobile Phone: [input]  
Home Phone: [input]  
Secondary Phone: [input]  
Fax: [input]  
Date of Birth: [input] [calendar icon]  
Reports To: Type to search [input] [search icon] [plus icon]  
Secondary Email: [input]  
Do Not Call:   
Assigned To: Admin Administrator [dropdown]

Last Name: [input]  
Organization Name: Sporer Group [input] [x] [search icon] [plus icon]  
Lead Source: Select an Option [dropdown]  
Title: [input]  
Department: [input]  
Primary Email: [input] (highlighted with green box)  
Assistant: [input]  
Assistant Phone: [input]  
Email Opt Out:   
Reference:   
Notify Owner:

**Customer Portal Details**

Portal User:  (indicated by a green arrow from the Primary Email field)  
Support Start Date: 01-08-2022 [calendar icon]  
Support End Date: 01-08-2023 [calendar icon]

Save Cancel

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

Please provide your portal credentials

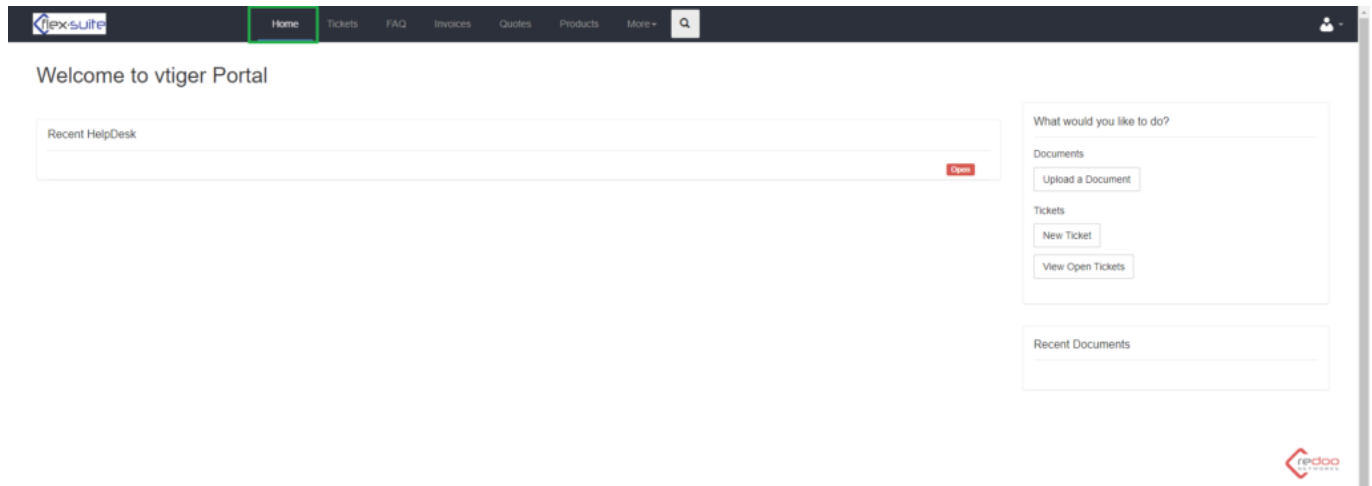
E-mail: [input]  
Password: \*\*\*\*\* [input]  
Language: US English [dropdown]

Sign in [button] [Forgot password?](#)

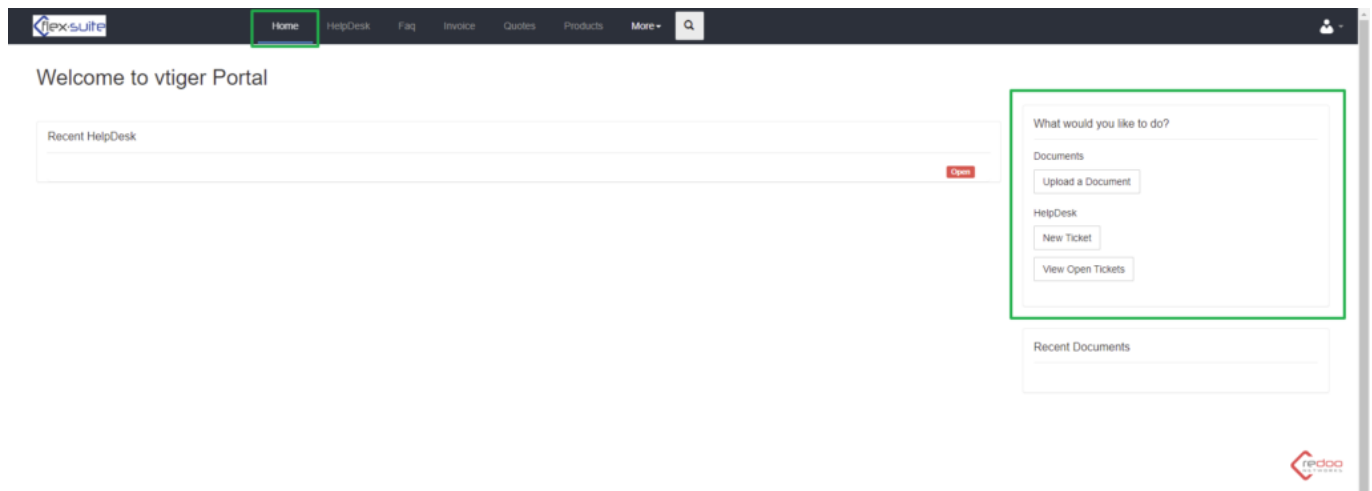
This is Customer Portal from user perspective

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

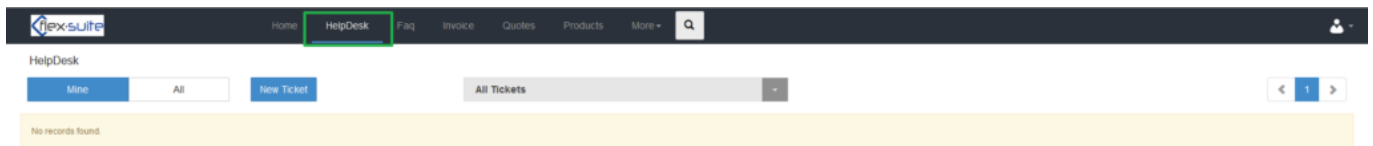
From this page you can enter other parts of Customer Portal



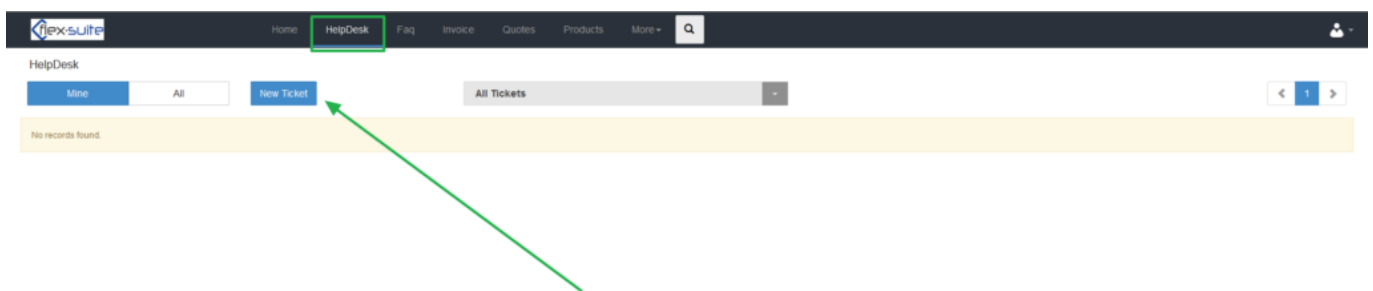
There is a quick-create block “What would you like to do?” where you can in a fast way upload a document, add a new ticket or view already opened ones.



At HelpDesk page you can view the list of Tickets

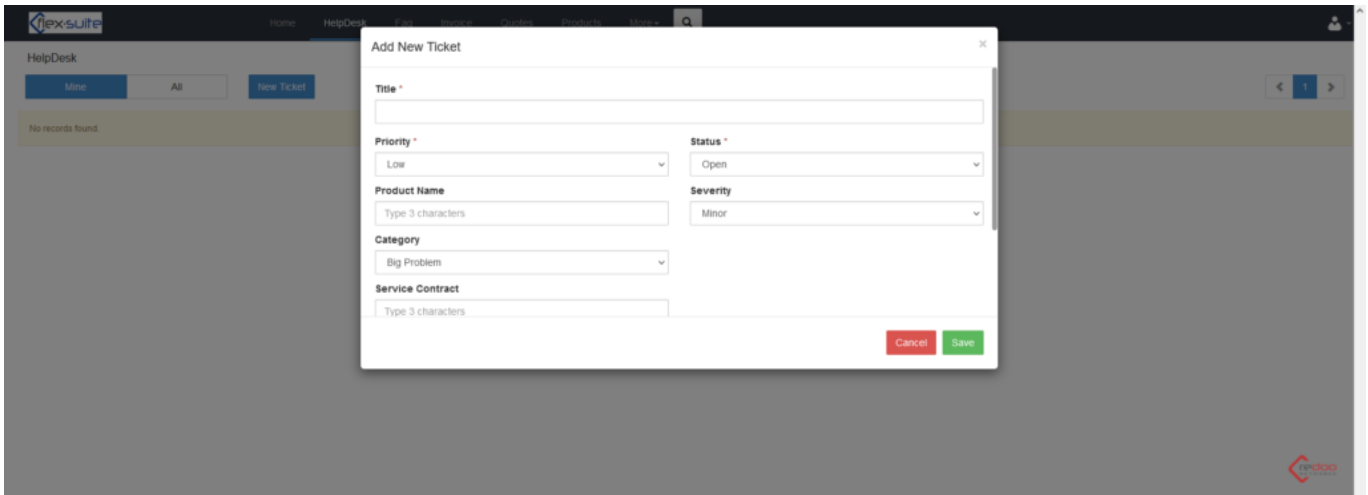


From here you can add new tickets by pressing the “New Ticket” button

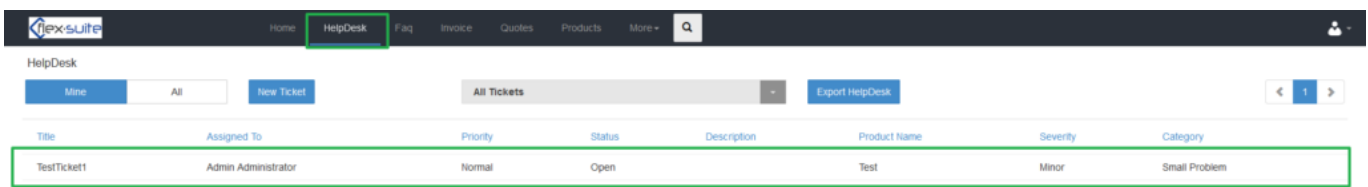


In the opened window you can add all the needed information about the ticket:

- 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

The screenshot shows the Flexx.Suite HelpDesk interface. The top navigation bar includes 'Home', 'HelpDesk', 'Faq', 'Invoice', 'Quotes', 'Products', and 'More'. The 'HelpDesk' menu item is highlighted with a green box. Below the navigation bar, the breadcrumb 'HelpDesk > TestTicket1' is visible. On the right side, there are three buttons: 'Edit Ticket', 'Attach document to this ticket', and 'Mark as closed'. The main content area is divided into two columns. The left column displays ticket details: 'Assigned To: Admin Administrator', 'Category: Small Problem', 'Description', 'Priority: Normal', 'Product Name: Test', 'Severity: Minor', and 'Status: Open'. The right column has three tabs: 'Updates', 'Comments', and 'Documents'. The 'Updates' tab is active, showing a log entry: 'Admin Administrator created 2022-06-23 14:41:39'.



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

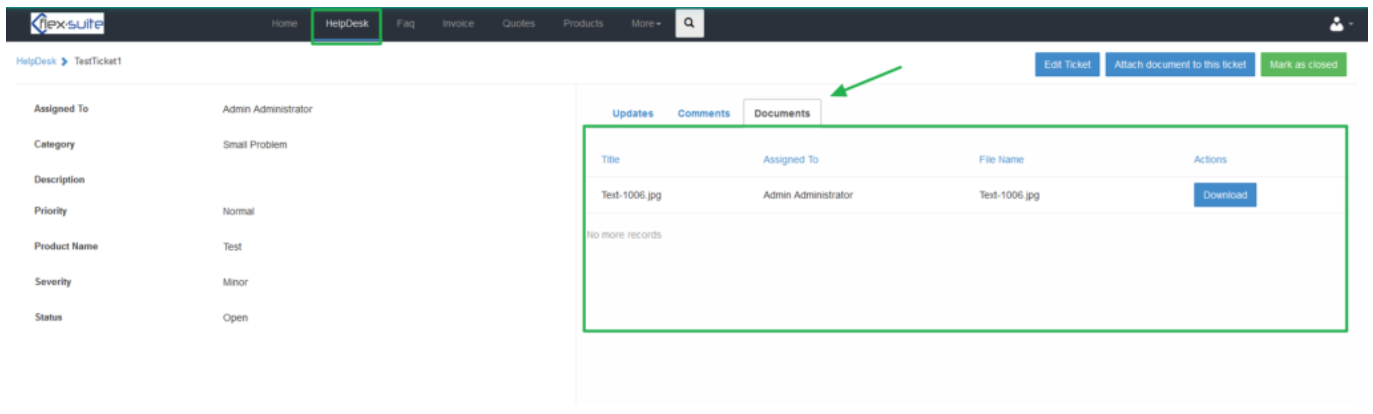
This screenshot is identical to the one above, but a green rectangular box highlights the 'Updates', 'Comments', and 'Documents' tabs and the log entry in the right-hand column.



This screenshot is identical to the one above, but a green rectangular box highlights the 'Comments' tab and the text input field with a 'Submit' button in the right-hand column.



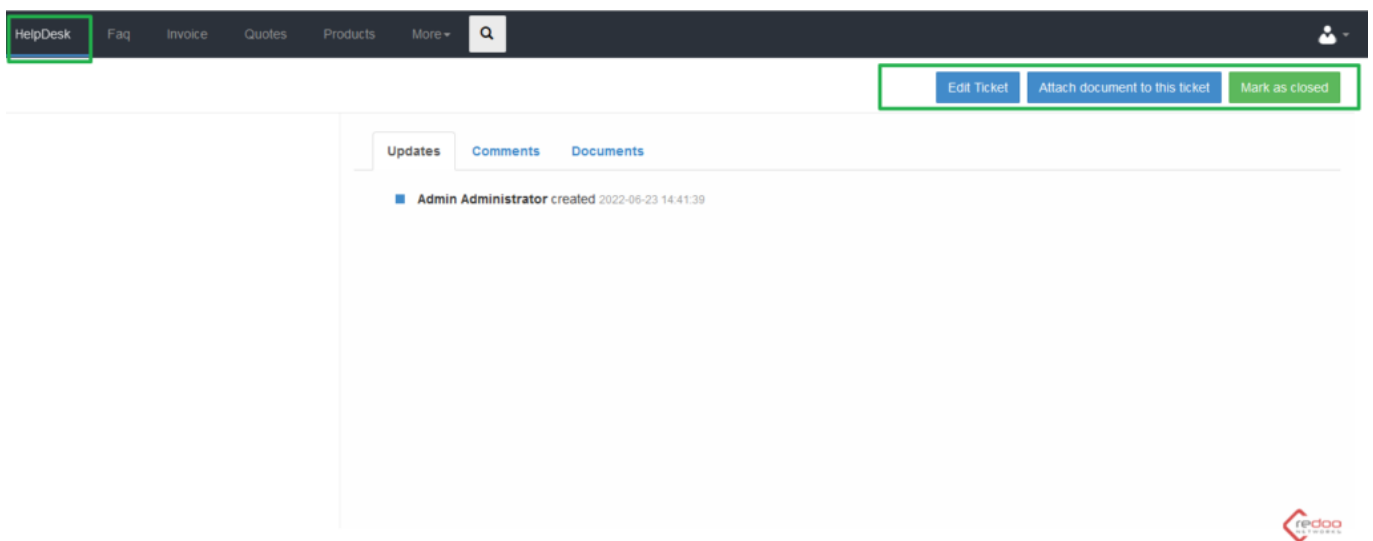




The screenshot shows the Flexx.Suite HelpDesk interface. The top navigation bar includes 'Home', 'HelpDesk', 'Faq', 'Invoice', 'Quotes', 'Products', and 'More'. The 'HelpDesk' menu item is highlighted with a green box. Below the navigation bar, the breadcrumb 'HelpDesk > TestTicket1' is visible. On the right side of the page, there are three buttons: 'Edit Ticket', 'Attach document to this ticket', and 'Mark as closed'. The main content area is divided into two sections. The left section displays ticket details: 'Assigned To: Admin Administrator', 'Category: Small Problem', 'Description', 'Priority: Normal', 'Product Name: Test', 'Severity: Minor', and 'Status: Open'. The right section has three tabs: 'Updates', 'Comments', and 'Documents'. The 'Documents' tab is selected and highlighted with a green box. Below the tabs, there is a table with columns 'Title', 'Assigned To', 'File Name', and 'Actions'. The table contains one row with the following data: 'Text-1006.jpg', 'Admin Administrator', 'Text-1006.jpg', and a 'Download' button. Below the table, it says 'No more records'. A green arrow points to the 'Documents' tab.

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

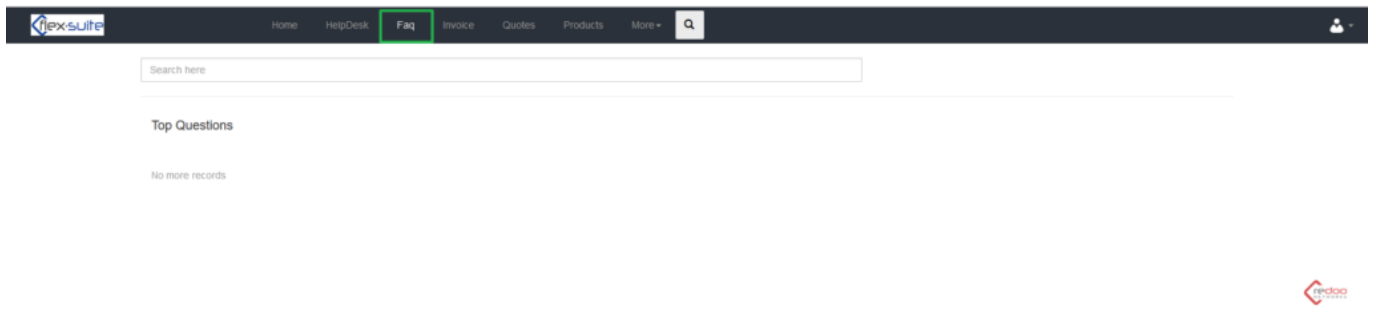
There is also a green “Mark as closed” button which you can use if the ticket was finished



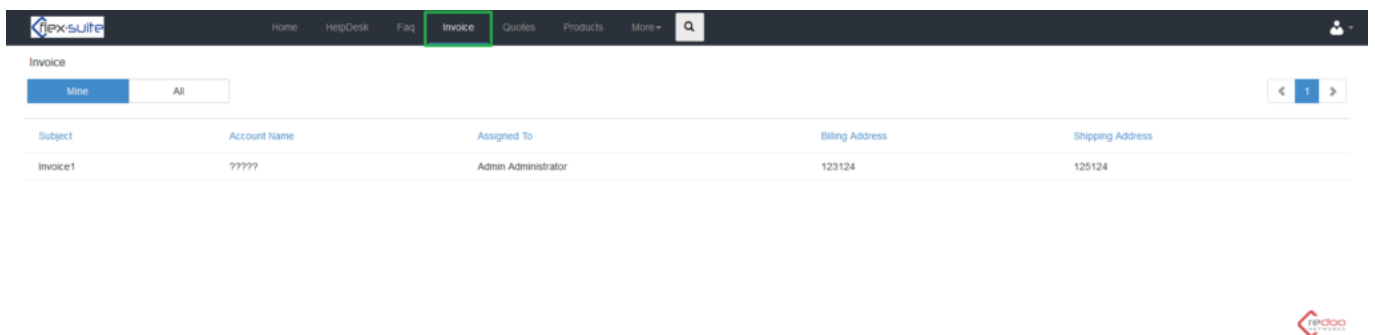
The screenshot shows the Flexx.Suite HelpDesk interface. The top navigation bar includes 'HelpDesk', 'Faq', 'Invoice', 'Quotes', 'Products', and 'More'. The 'HelpDesk' menu item is highlighted with a green box. Below the navigation bar, the breadcrumb 'HelpDesk > TestTicket1' is visible. On the right side of the page, there are three buttons: 'Edit Ticket', 'Attach document to this ticket', and 'Mark as closed'. The main content area has three tabs: 'Updates', 'Comments', and 'Documents'. The 'Updates' tab is selected and highlighted with a green box. Below the tabs, there is a list of updates. The first update is: 'Admin Administrator created 2022-06-23 14:41:39'. A green box highlights the 'Edit Ticket', 'Attach document to this ticket', and 'Mark as closed' buttons.

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

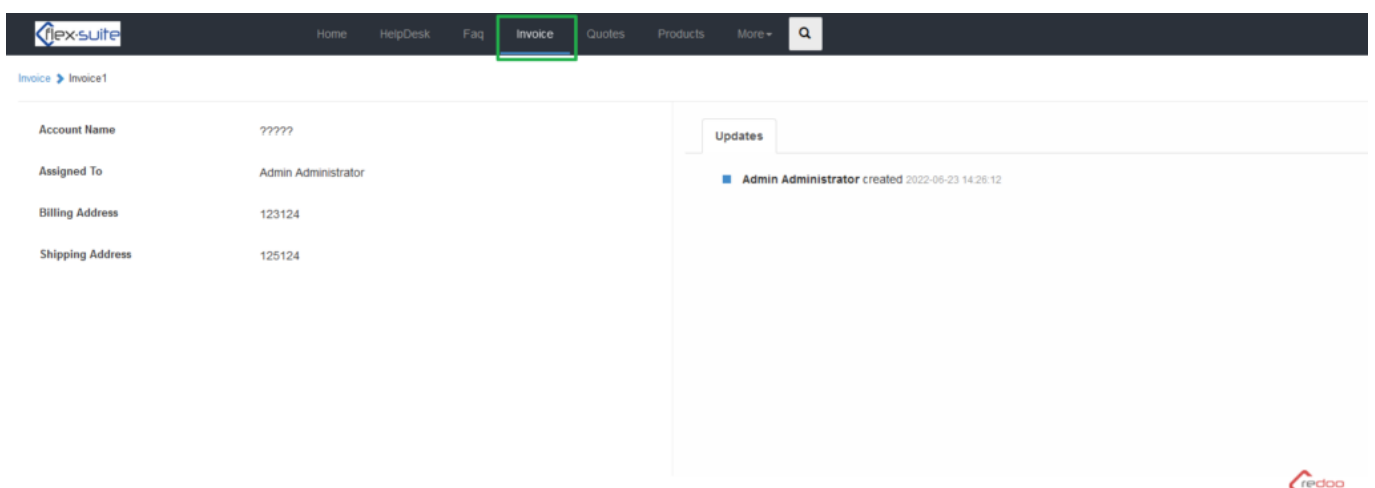
Here you can search for any top questions recorded in the CRM



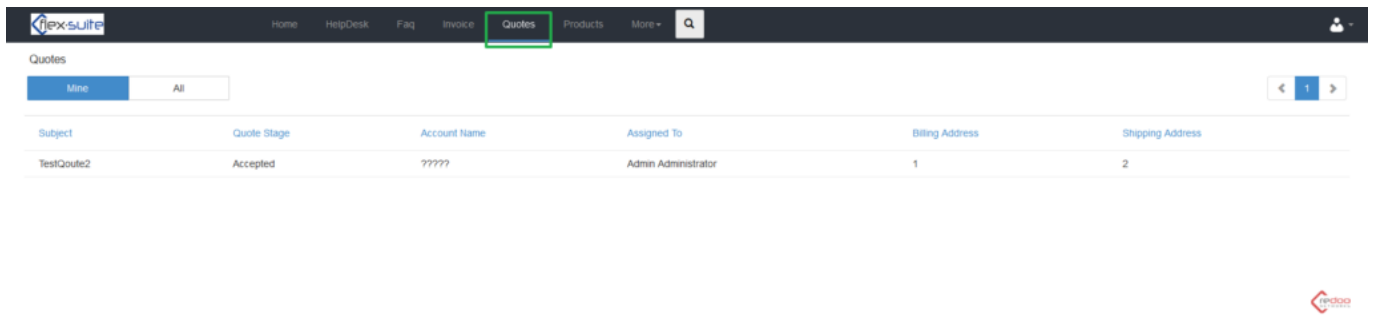
On the **Invoice** page you can see the list of all available Invoices connected to your user profile



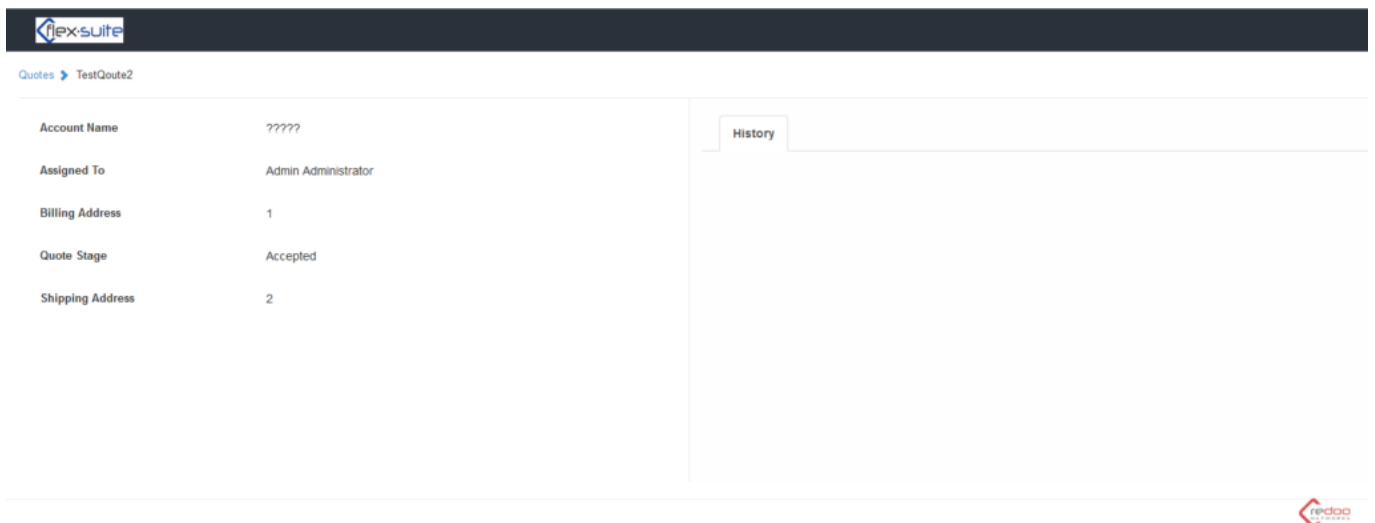
By clicking on the Invoice name you will see the page corresponding to it



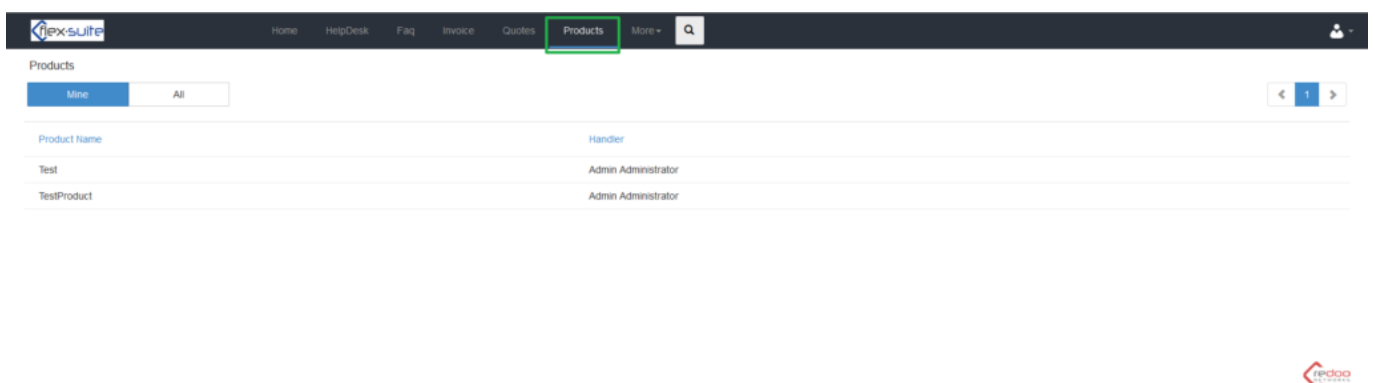
Next one is a Quotes page where all quotes connected to your account are available

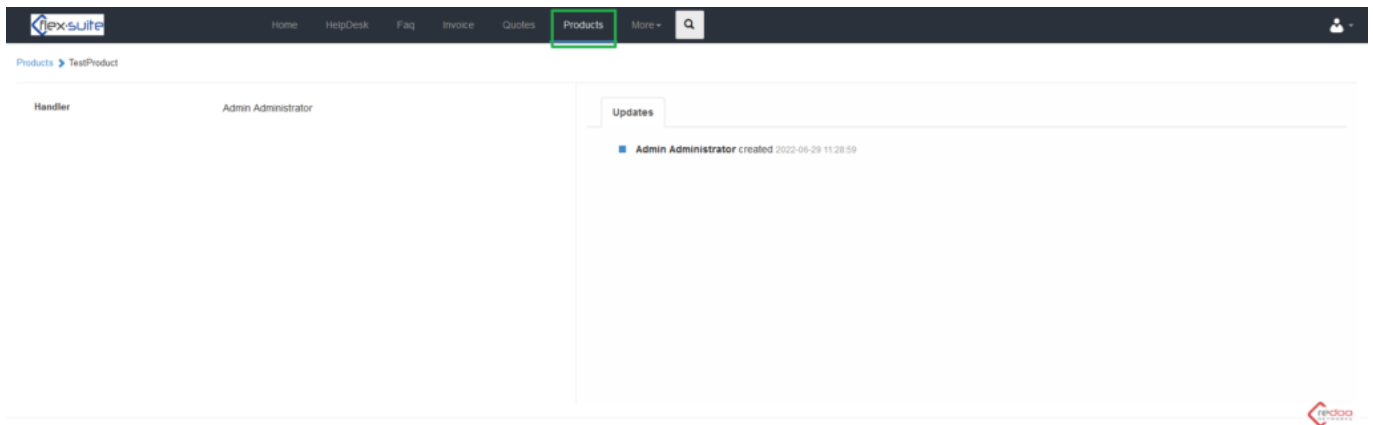


On the quote page itself you can see some basic information and History block



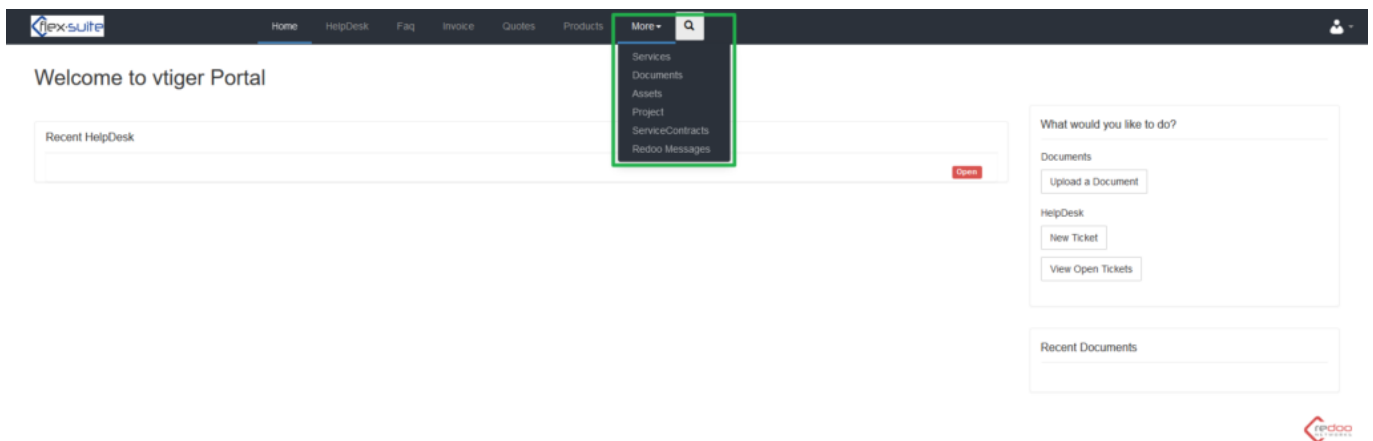
On the Products page you can see the list of all products that you are connected with as a Contact



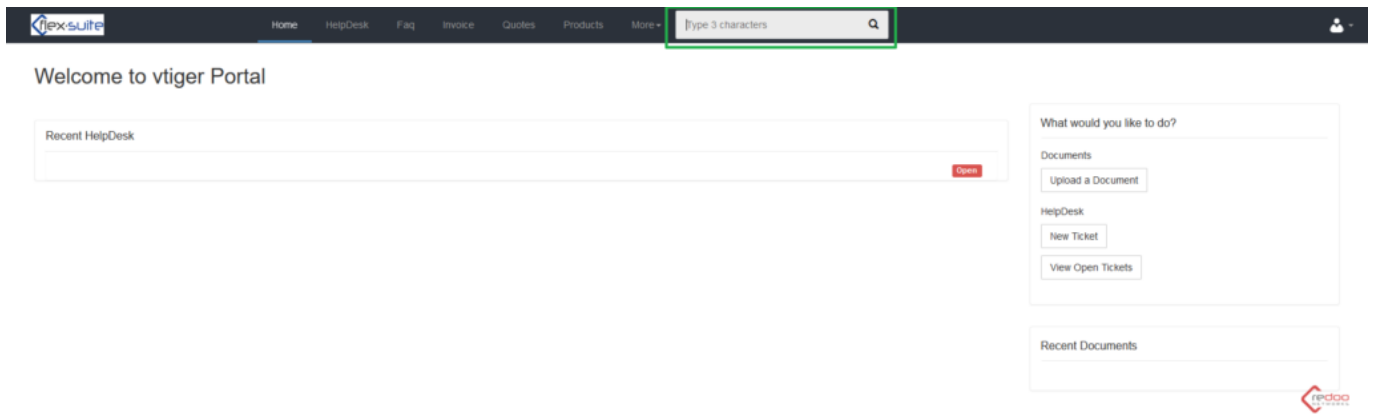


In More there is a pop-up window where you can get to the:

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

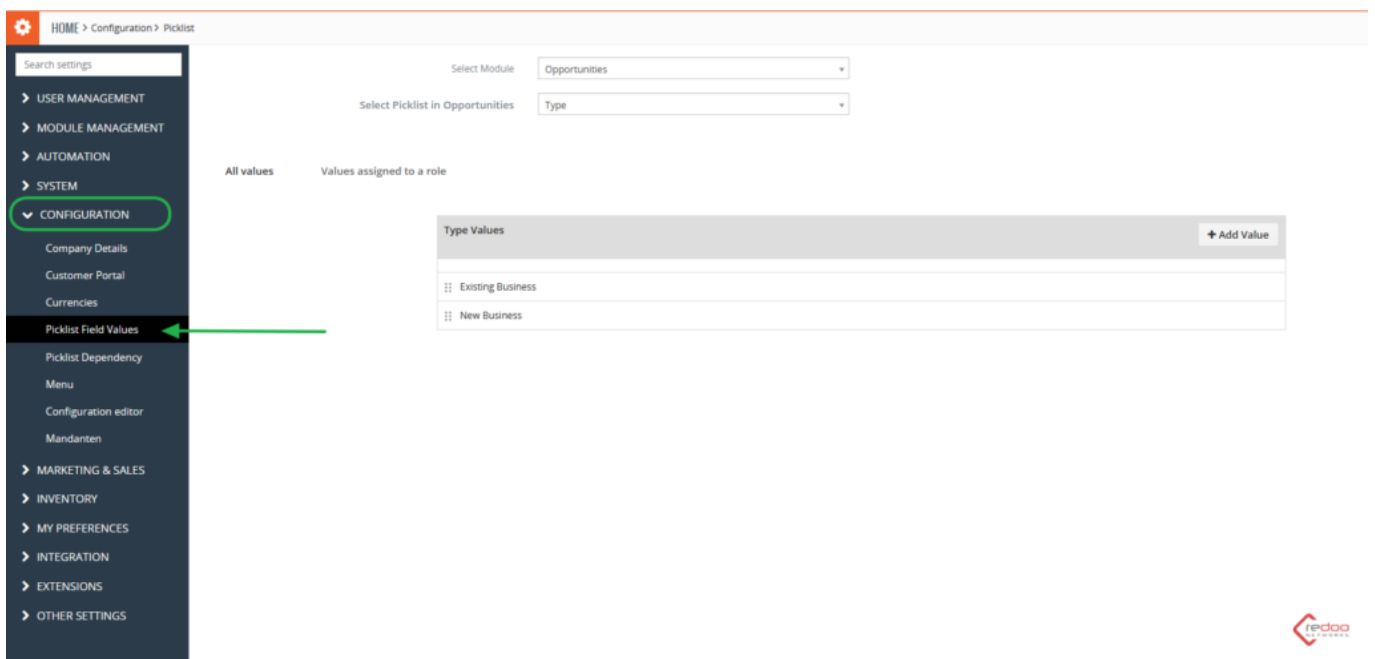


On the right you can see

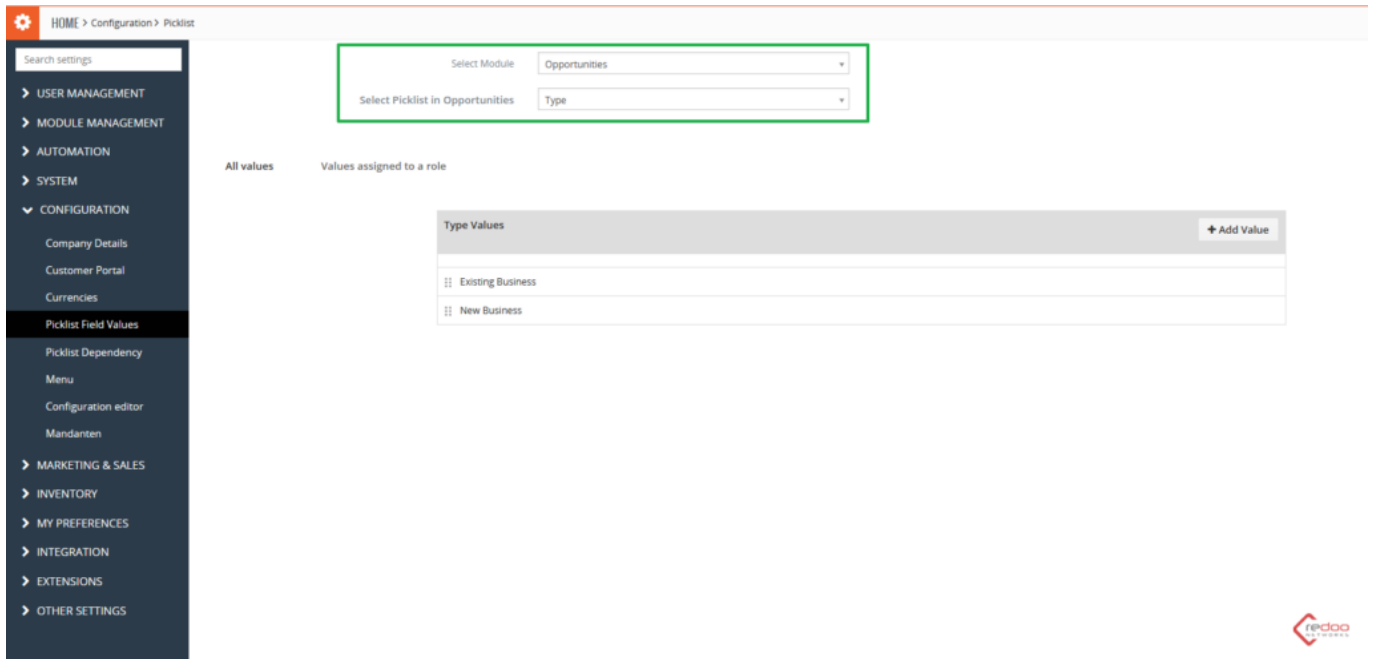


## Picklist Field Values

The next page in Configuration block is Picklist Field Values

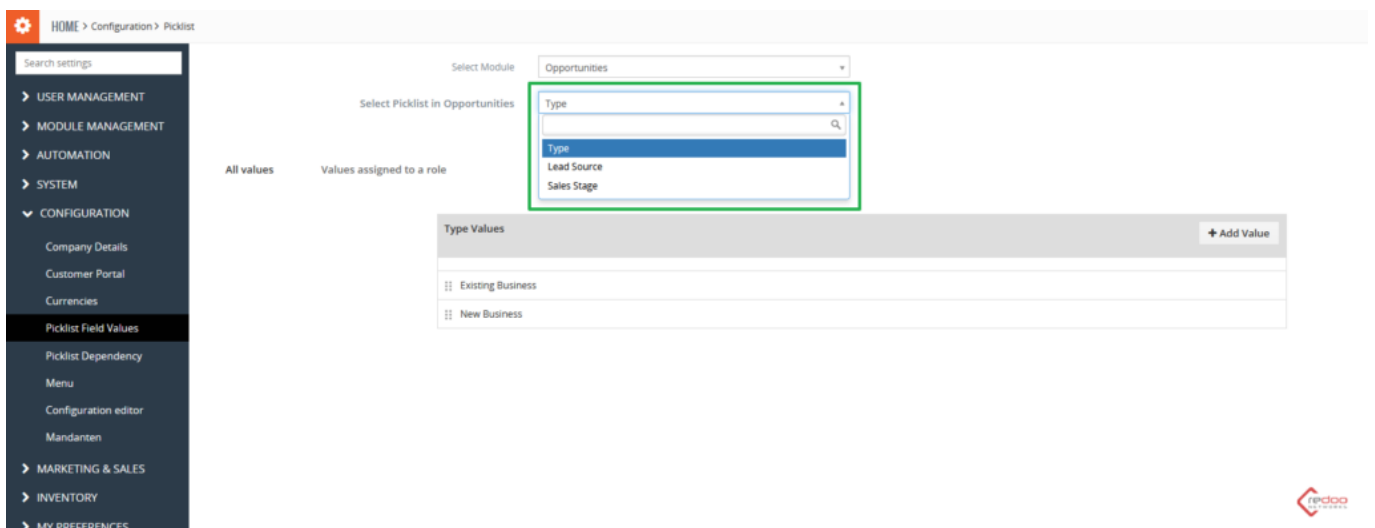


On the first steps you have to select a module which you would like to select picklist for

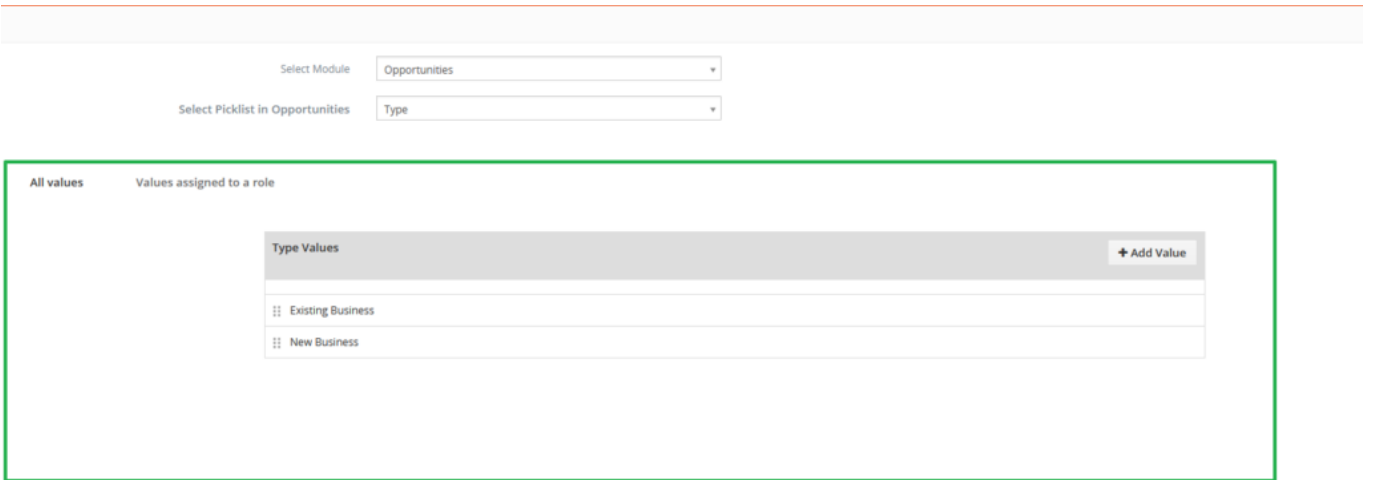


und wählen Sie unter “Möglichkeiten” die Option “Pickerl”, wo Sie zwischen drei Optionen wählen können:

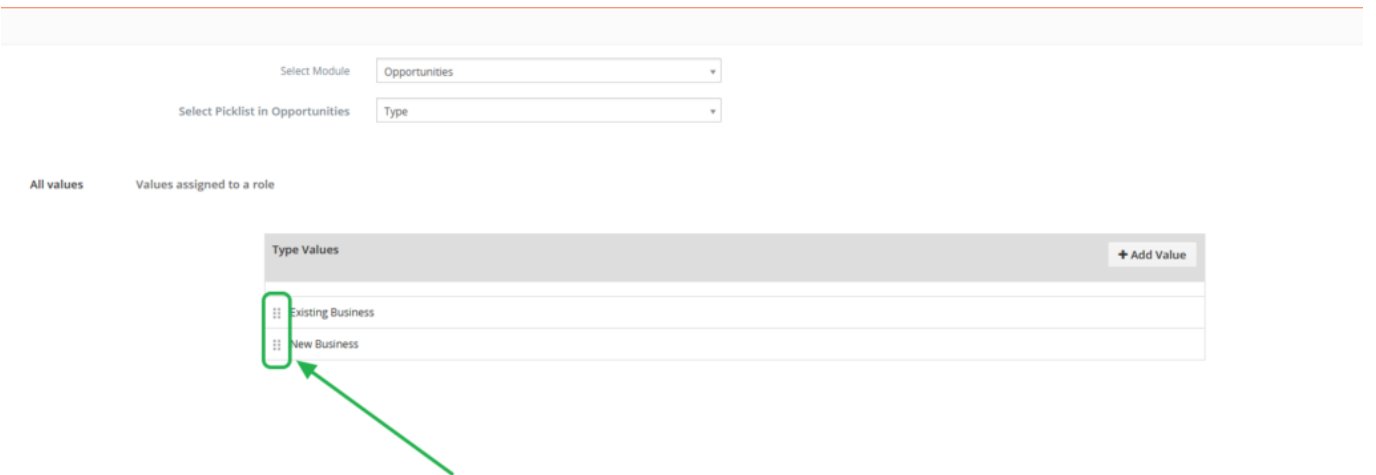
- Typ
- Lead-Quelle
- Verkaufsstufe



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

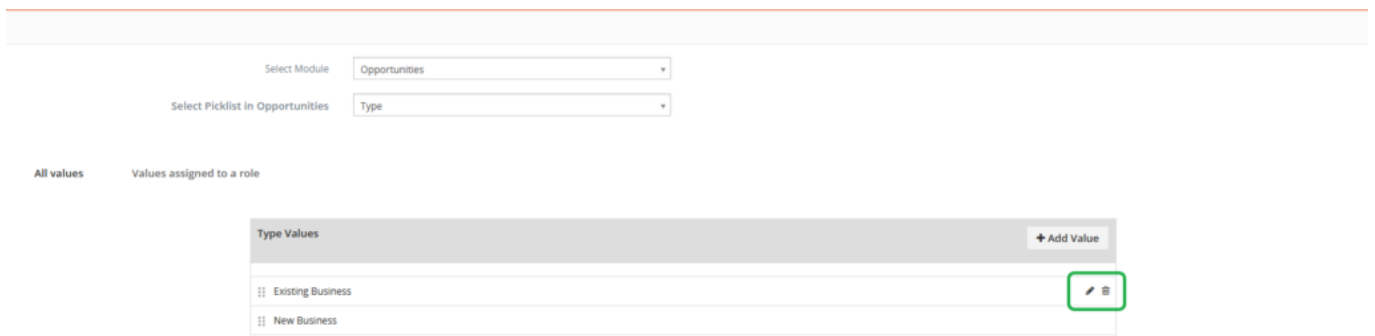


You can move them via drag and drop using these dot signs



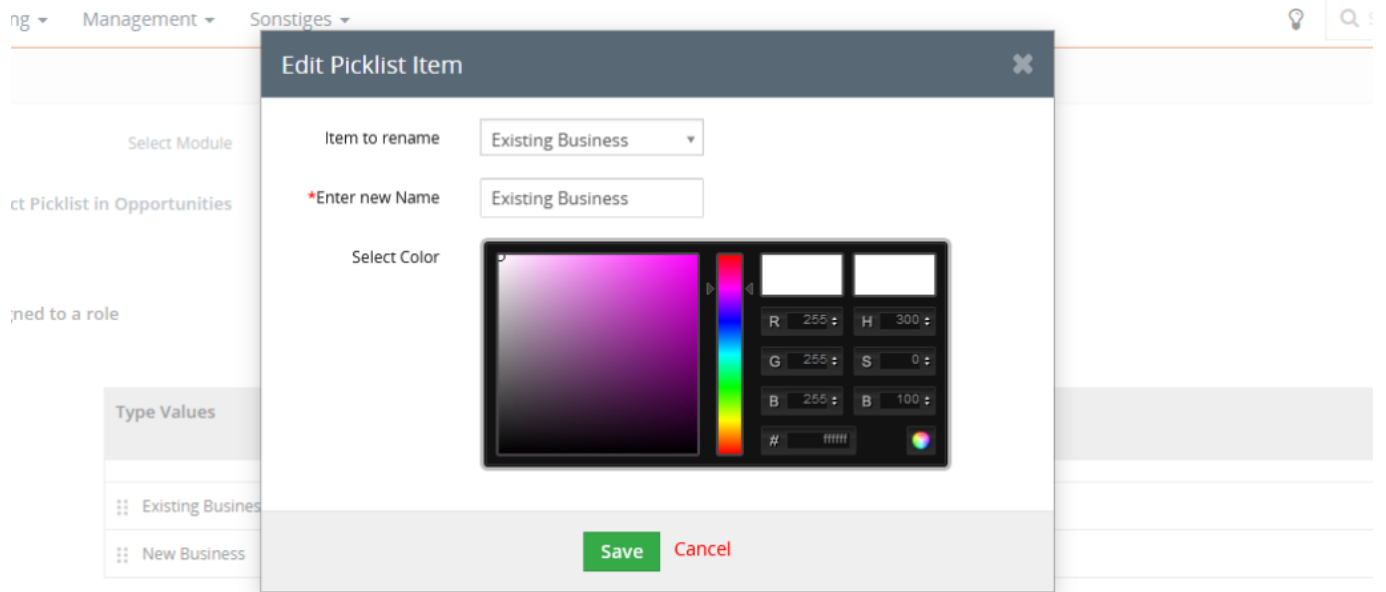
To edit or delete a picklist values you can use these “pencil” and “trash can” icons by clicking at

them like shown in the image

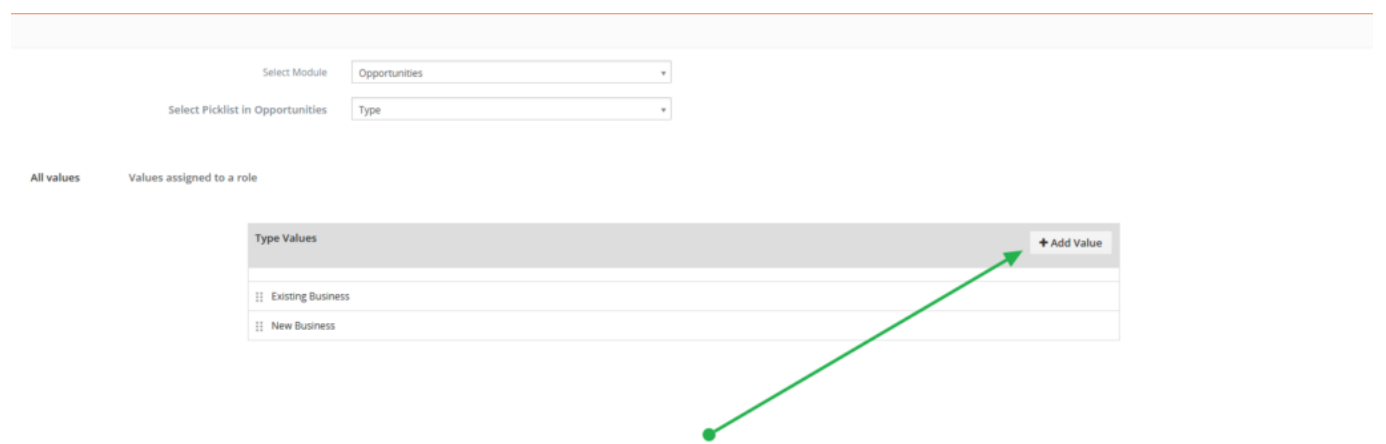


When you edit a Picklist Value you should choose an Item to rename, Enter the new Name and select a color.





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

The screenshot shows a configuration page for assigning picklist values to a role. At the top, there are two dropdown menus: "Select Module" set to "Opportunities" and "Select Picklist in Opportunities" set to "Type". Below these, there are two tabs: "All values" and "Values assigned to a role", with the latter being selected and highlighted with a green border. The main content area is also enclosed in a green border and contains a "Role name" dropdown menu set to "CEO". Below this is a list of picklist values: "Existing Business" and "New Business", each with a small 'x' icon to its left. A green "Save" button is located at the bottom right of the form.



Firstly - Select a role name

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

And finally - save

t

Select Module

Select Picklist in Opportunities

All values **Values assigned to a role**

Role name



## Menu

Here you can see a page divided in two columns

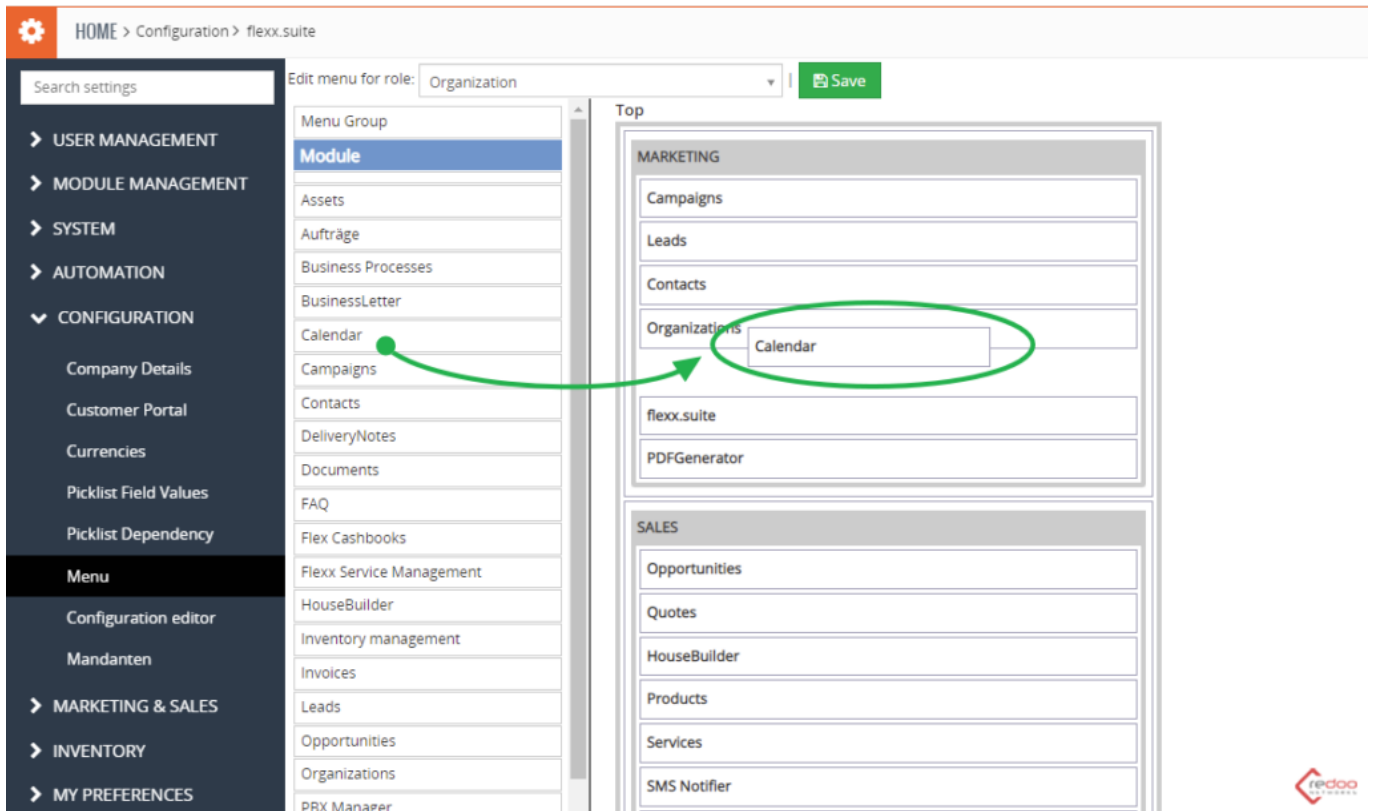
The column shown in green displays the list of all modules available in CRM

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.

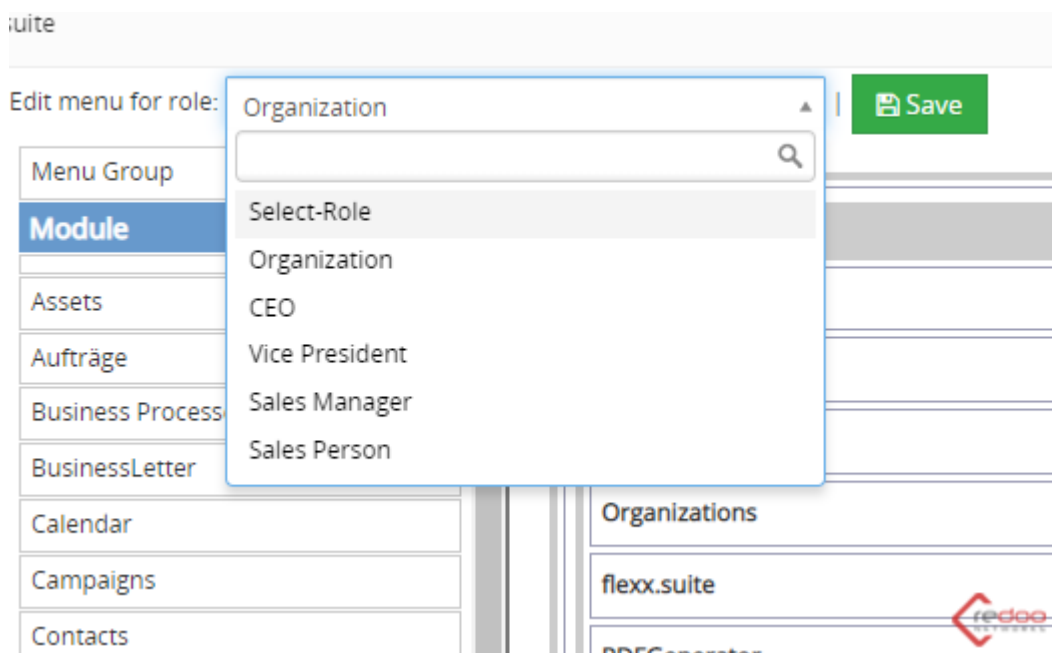
The screenshot displays the 'Configuration editor' for the 'Menu' in Flexx.Suite. The interface is divided into a left sidebar and a main content area. The sidebar lists various modules, with 'Calendar' highlighted by a green circle. The main content area shows a grid of modules organized into sections: MARKETING, SALES, and INVENTORY. A red circle highlights the 'Organizations' and 'flexx.suite' modules in the MARKETING section. A 'Save' button is visible at the top right of the main content area.

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 moved 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

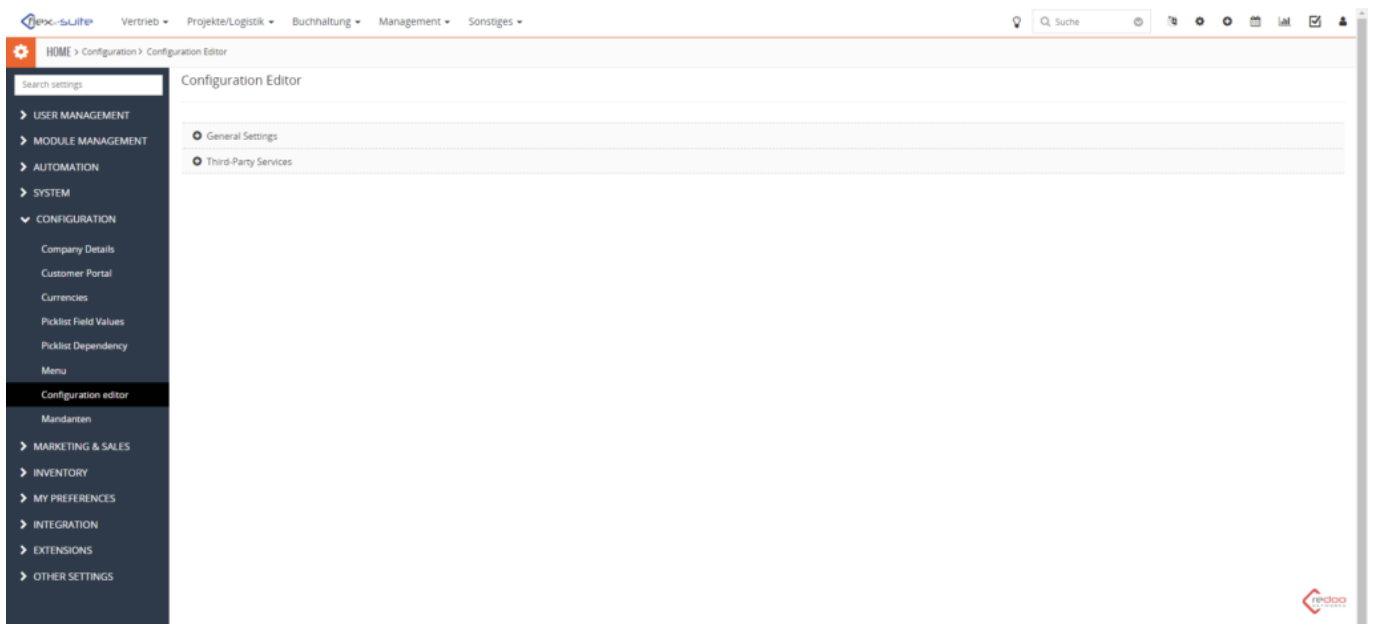


To save your progress press the green "Save" button.

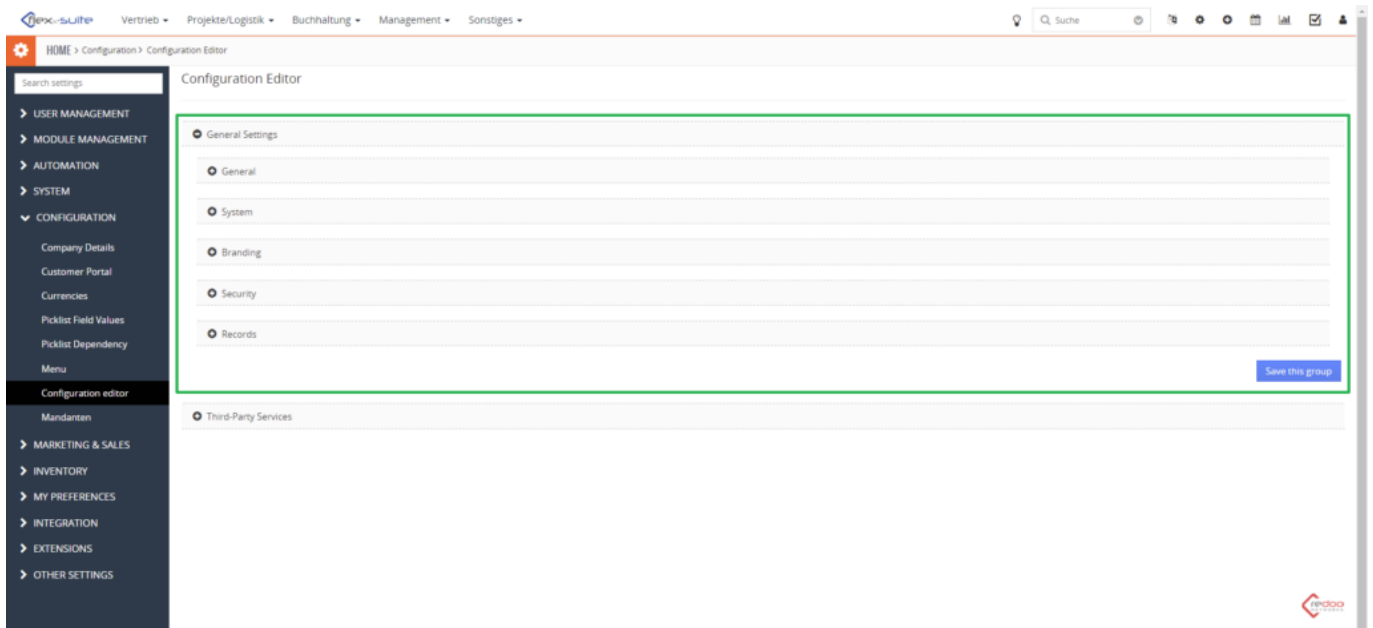
## Configuration Editor

This page responds for Configuration Editor

It is divided in two sections:



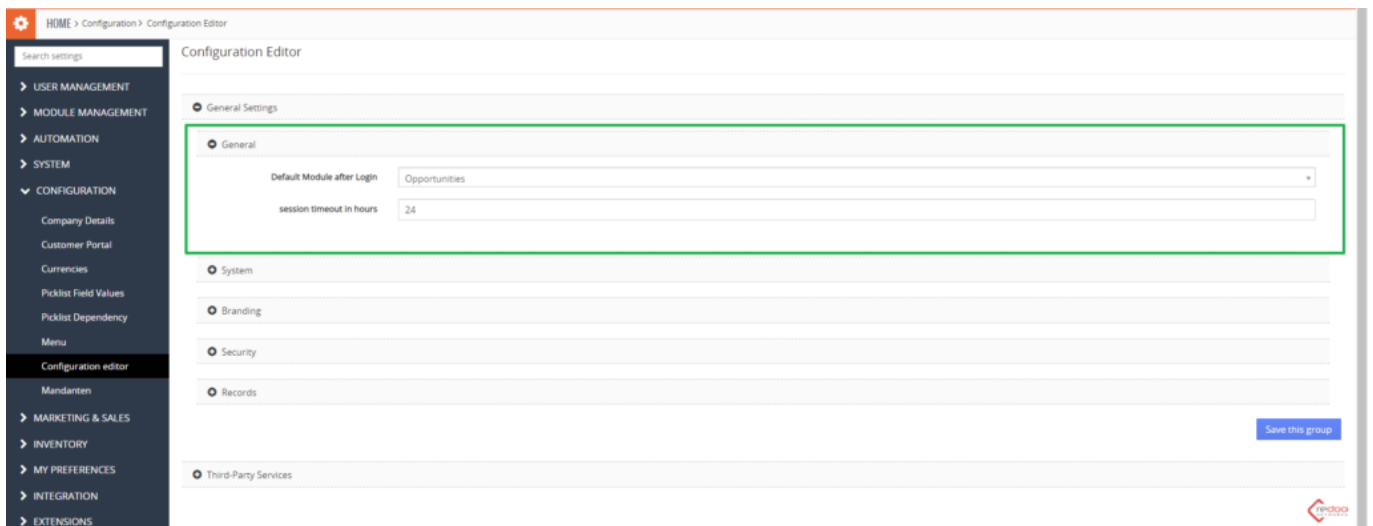
First is **General Settings**



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

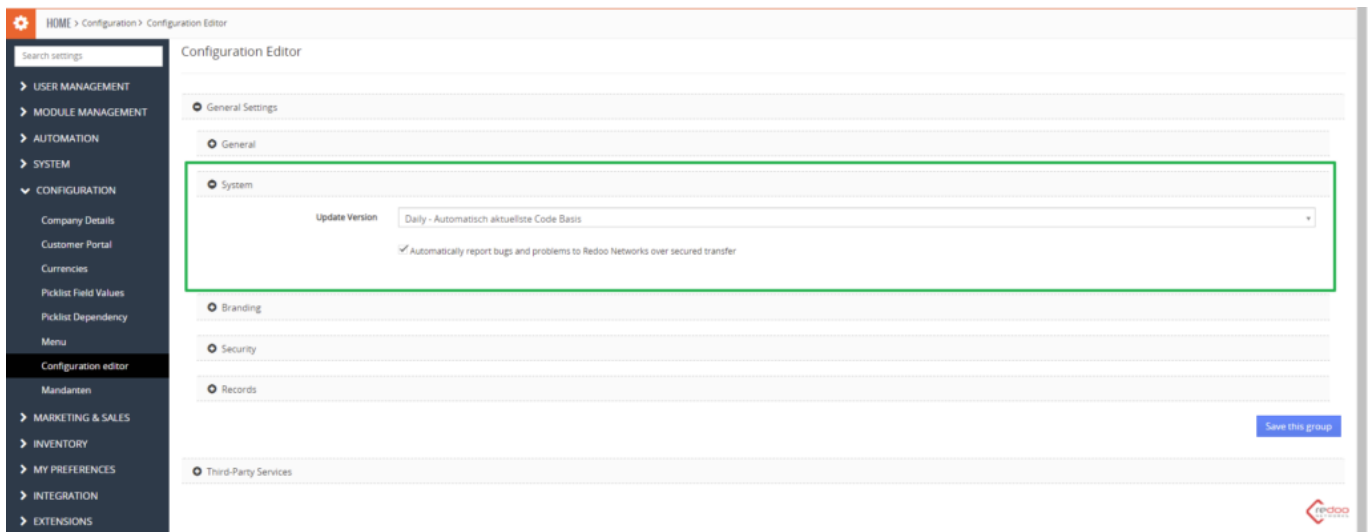
- General

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



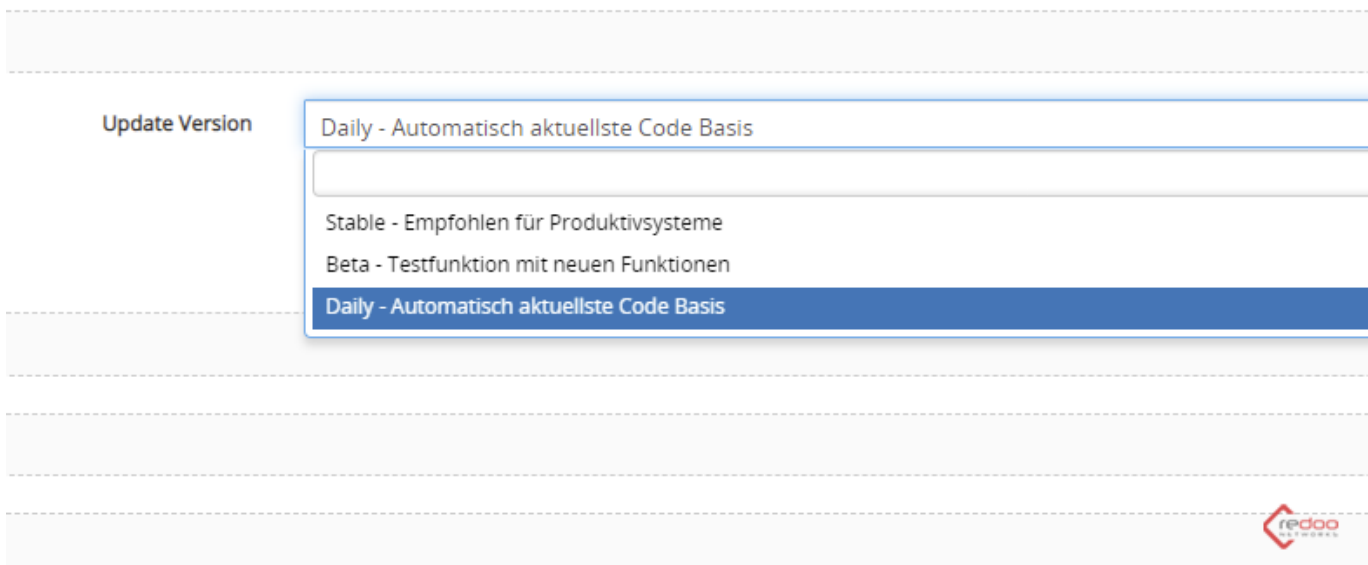
- System

Here you may configure the update process



The screenshot shows the 'Configuration Editor' interface. On the left is a dark sidebar with a search bar and a menu listing various categories: USER MANAGEMENT, MODULE MANAGEMENT, AUTOMATION, SYSTEM, CONFIGURATION (expanded), and MARKETING & SALES. The 'CONFIGURATION' section is expanded to show 'Configuration editor' and 'Mandanten'. The main content area is titled 'Configuration Editor' and contains several sections: General Settings, General, System (highlighted with a green box), Branding, Security, Records, and Third-Party Services. The 'System' section includes an 'Update Version' dropdown menu currently set to 'Daily - Automatisch aktuellste Code Basis' and a checked checkbox for 'Automatically report bugs and problems to Redoo Networks over secured transfer'. A 'Save this group' button is located at the bottom right of the configuration area. The Redoo Networks logo is visible in the bottom right corner.

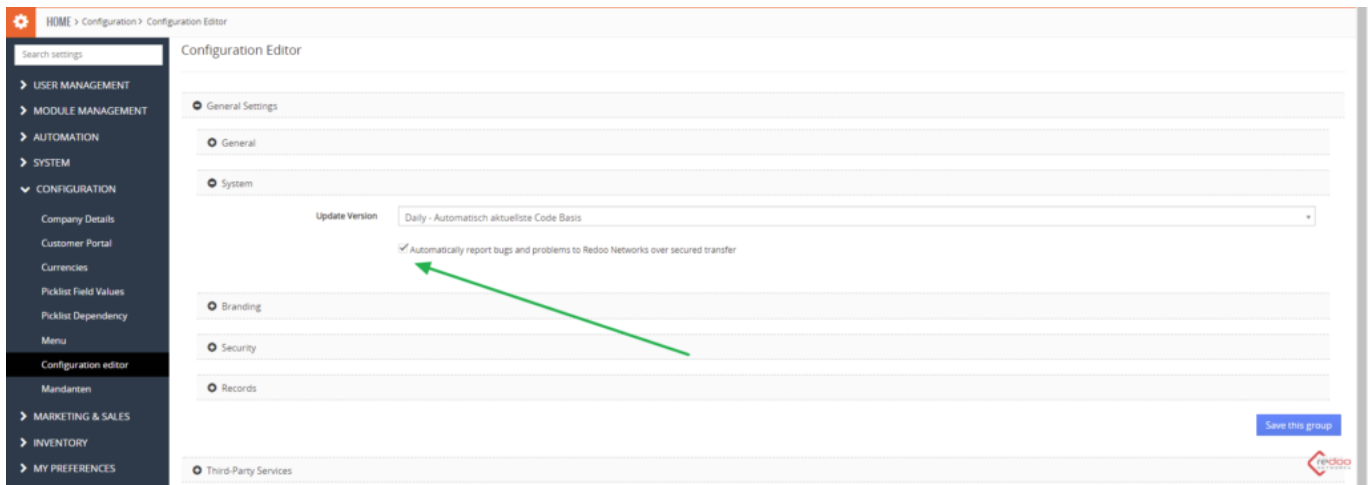
Pick up one of three different options: Stable, Beta and Daily



This image is a close-up of the 'Update Version' dropdown menu. The label 'Update Version' is on the left. The dropdown list contains four items: 'Daily - Automatisch aktuellste Code Basis' (highlighted in blue), an empty text input field, 'Stable - Empfohlen für Produktivsysteme', 'Beta - Testfunktion mit neuen Funktionen', and 'Daily - Automatisch aktuellste Code Basis' (highlighted in blue). The Redoo Networks logo is visible in the bottom right corner.

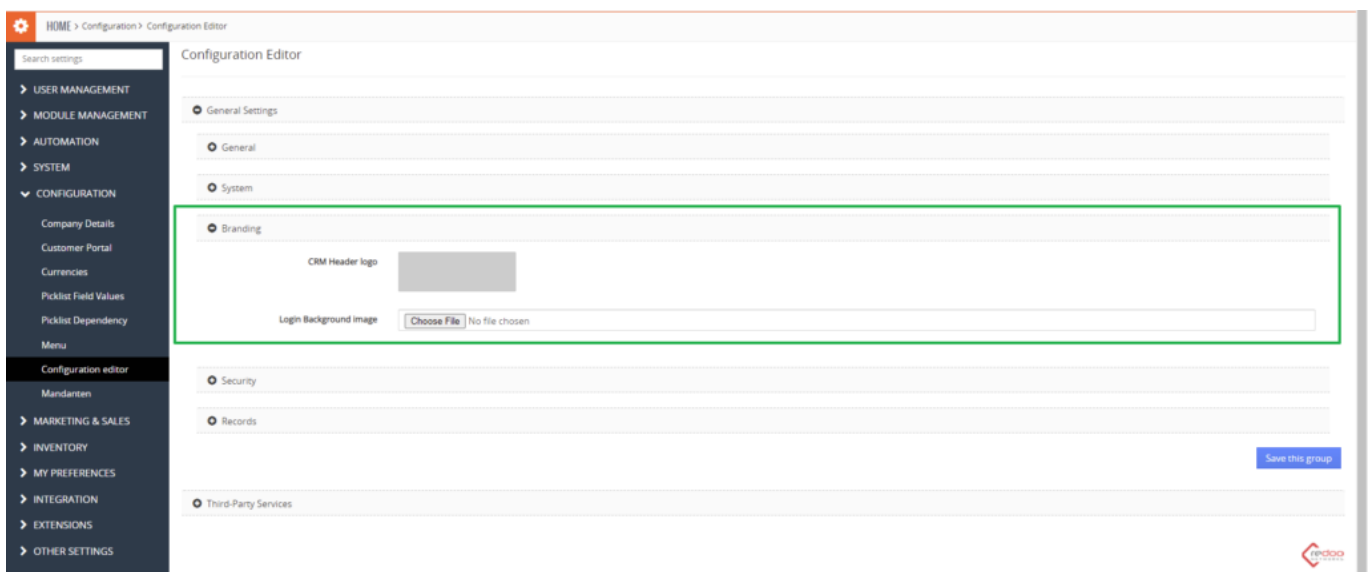
Below there is an option to turn on the automatic bug report function which will send bugs and problems to Redoo Networks over secured transfer





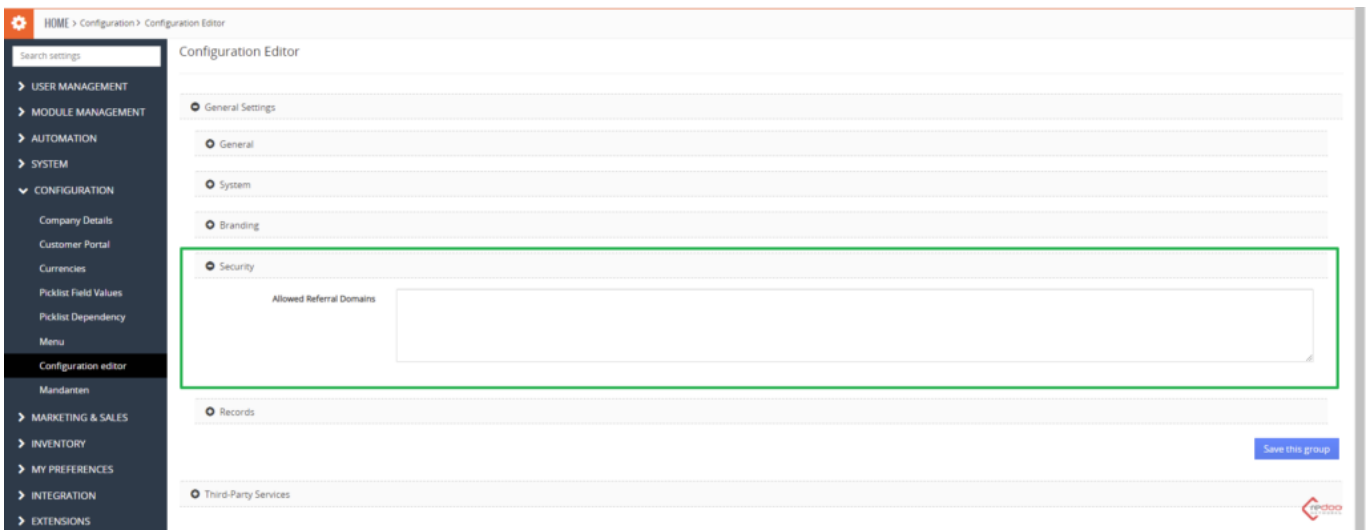
- Branding

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



- Security

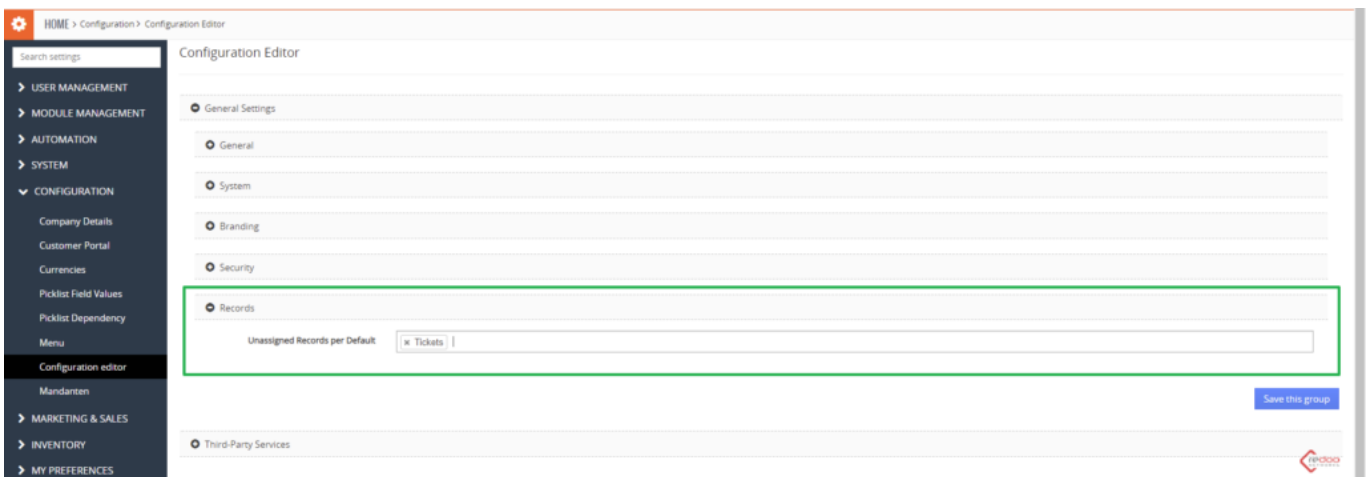
Security allows you to manually enter the allowed referral domains



The screenshot shows the Configuration Editor interface. On the left is a dark sidebar with a search bar and a list of categories: USER MANAGEMENT, MODULE MANAGEMENT, AUTOMATION, SYSTEM, CONFIGURATION (expanded), and others. Under CONFIGURATION, 'Security' is highlighted. The main content area is titled 'Configuration Editor' and contains several sections: General Settings (General, System, Branding), Security (highlighted with a green box), Records, and Third-Party Services. The Security section contains a text input field labeled 'Allowed Referral Domains'. A blue 'Save this group' button is visible at the bottom right of the Security section.

- Records

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



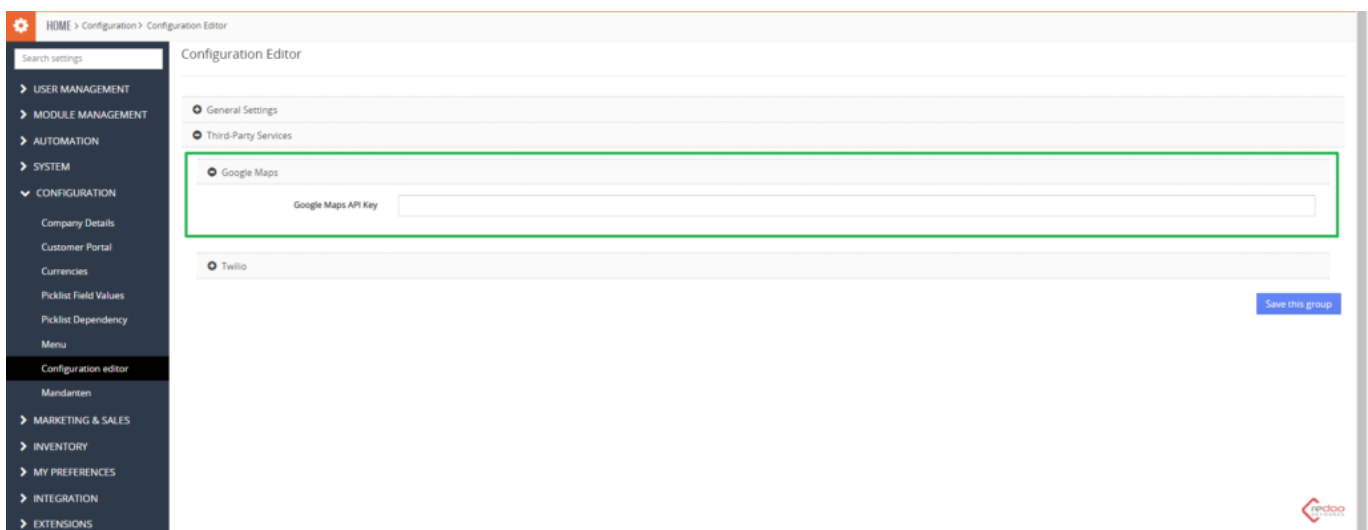
This screenshot shows the Configuration Editor interface with the 'Records' section highlighted by a green box. The 'Records' section contains a text input field labeled 'Unsigned Records per Default' with the value 'Tickets' entered. A blue 'Save this group' button is located at the bottom right of the Records section.

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 Twilio

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

The screenshot shows the 'Configuration Editor' interface. On the left is a dark sidebar with a search bar and a list of categories: USER MANAGEMENT, MODULE MANAGEMENT, AUTOMATION, SYSTEM, CONFIGURATION (expanded), and then Mandanten, MARKETING & SALES, INVENTORY, MY PREFERENCES, INTEGRATION, and EXTENSIONS. Under 'CONFIGURATION', several sub-items are listed, including 'Configuration editor' which is highlighted. The main content area is titled 'Configuration Editor' and contains a list of settings groups: General Settings, Third-Party Services, Google Maps, and Twilio. The Twilio group is selected and highlighted with a green border. It contains three input fields: 'Account sid', 'Authentication token', and 'Twilio phone number'. A blue 'Save this group' button is located at the bottom right of the Twilio section. The Redoo logo is visible in the bottom right corner of the page.

Do not forget to save!

