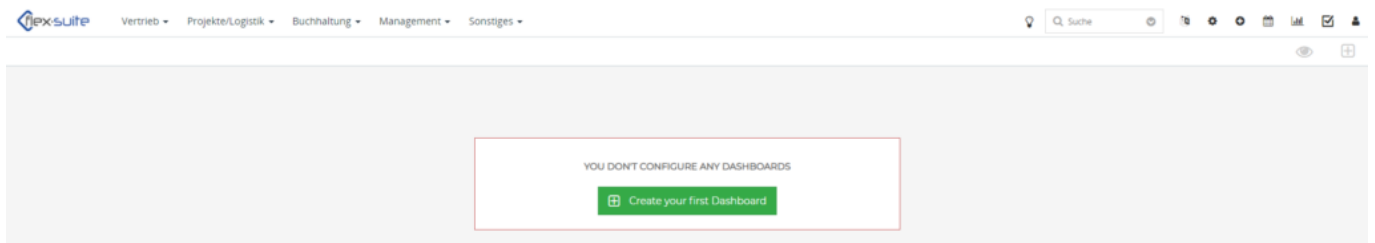




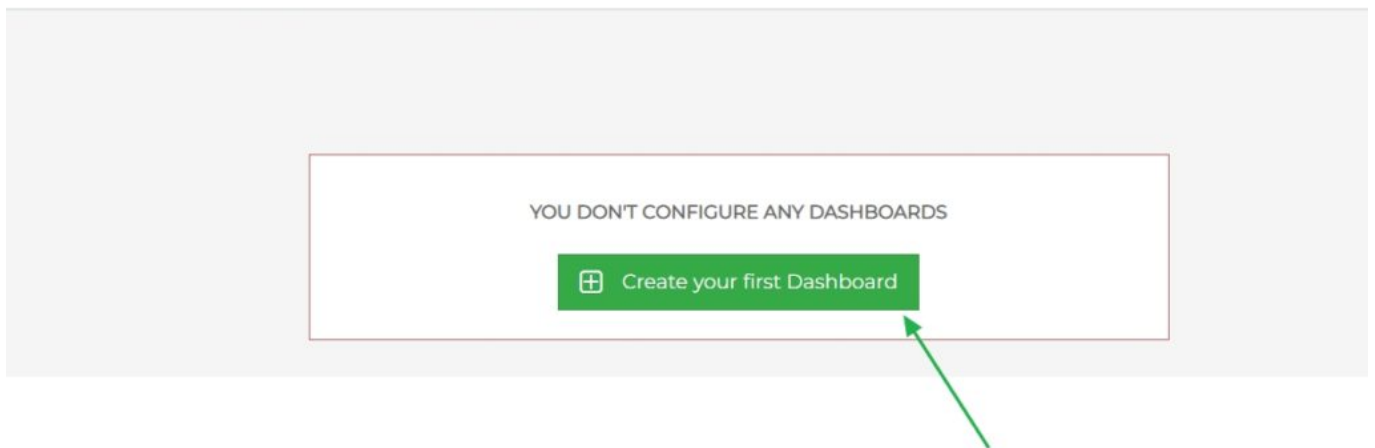
Flexx.Suite

2. Overview and settings

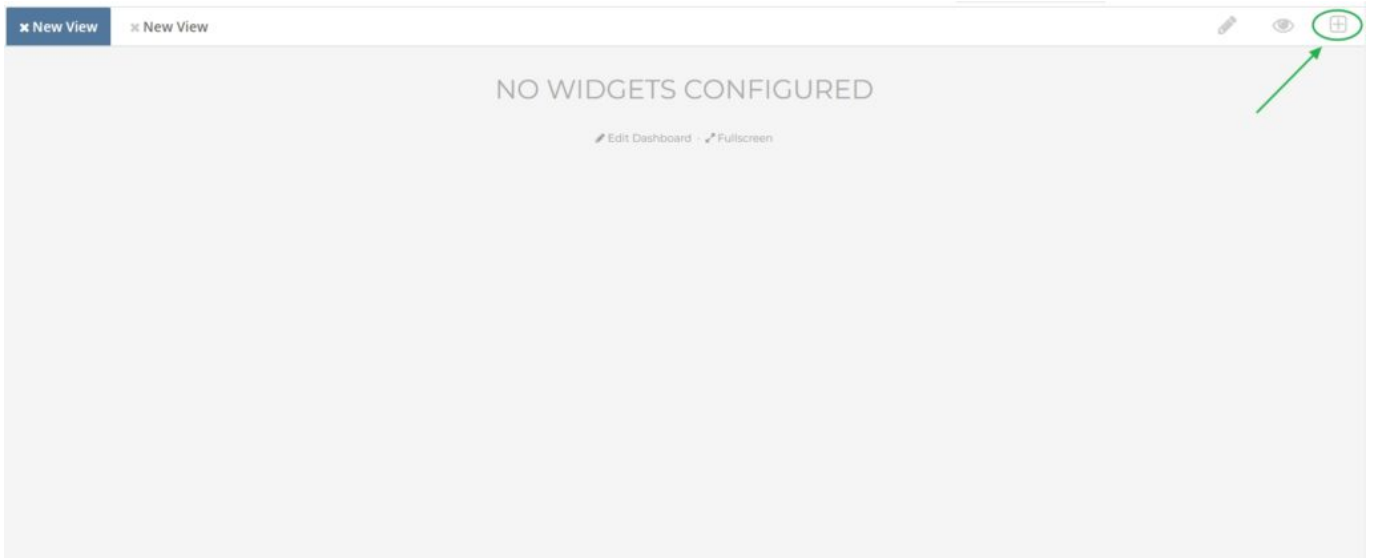
The first page you see is the Dashboard



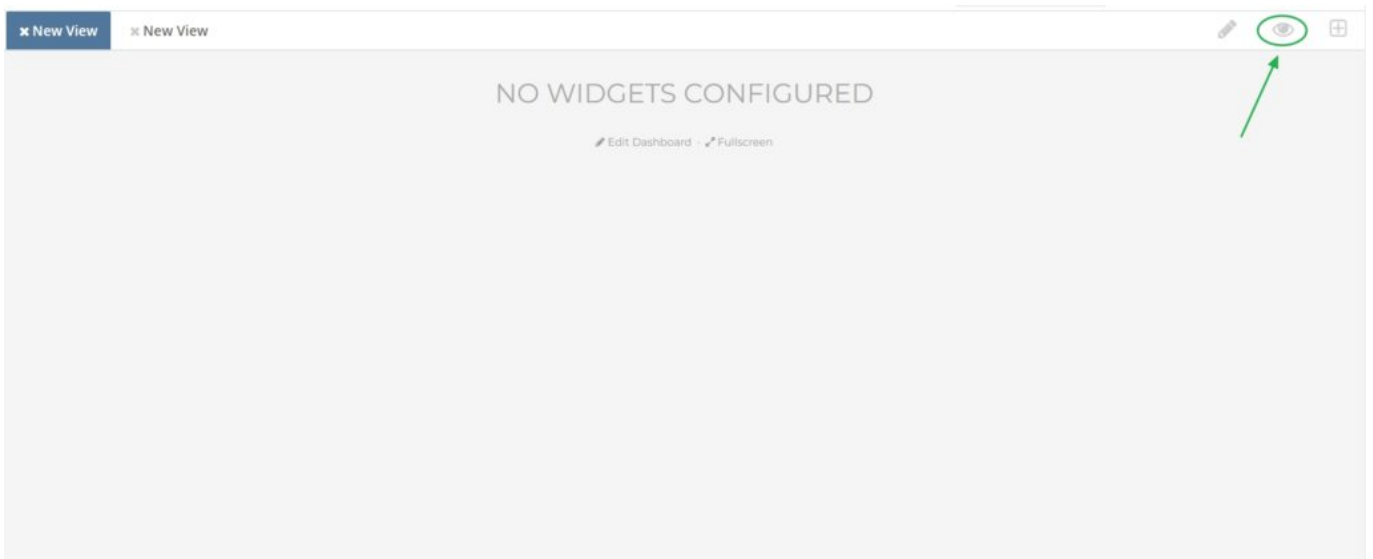
To create a Dashboard click here



To add new tab click here



Click here to add a hidden dashboard

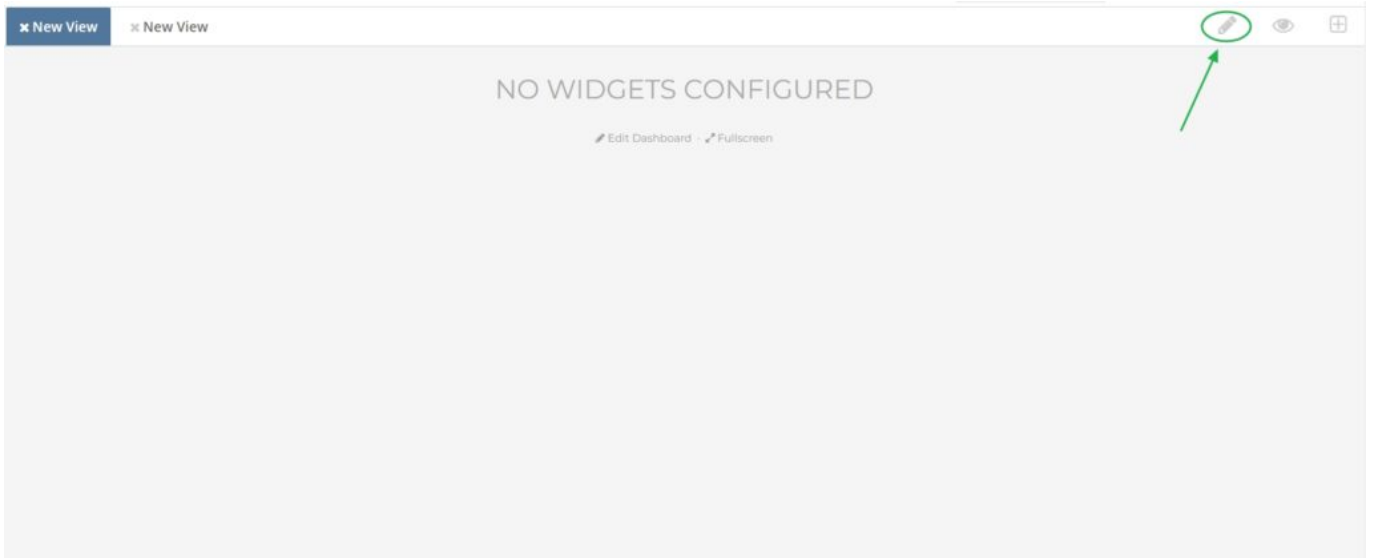


And click on "+" to add

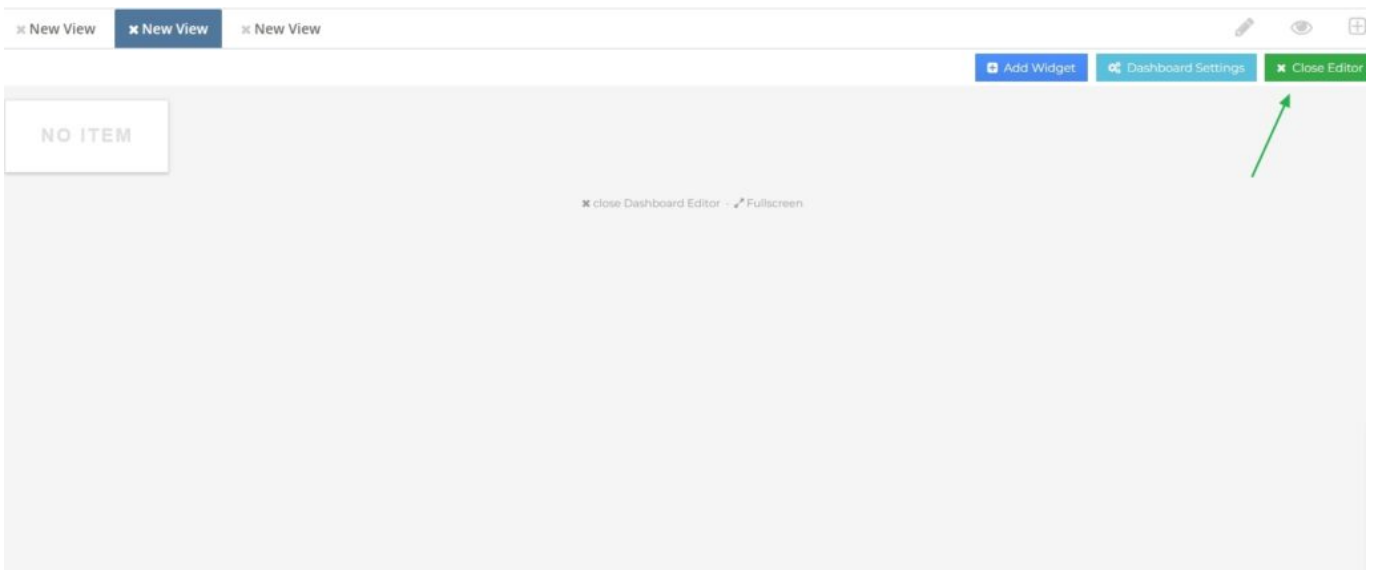
enable hidden Dashboards ✕

- + New View
- + New View
- + New View
- + New View
- + New View
- + New View
- + New View
- + New View
- + New View

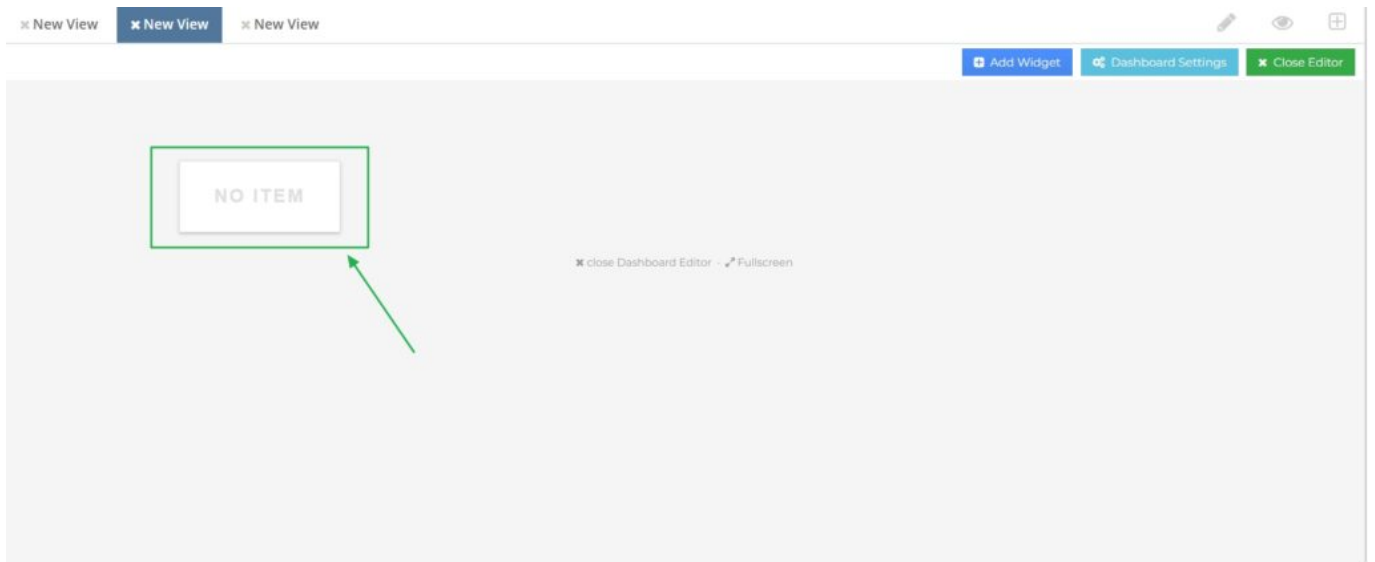
To edit the Dashboard tab click [here](#)



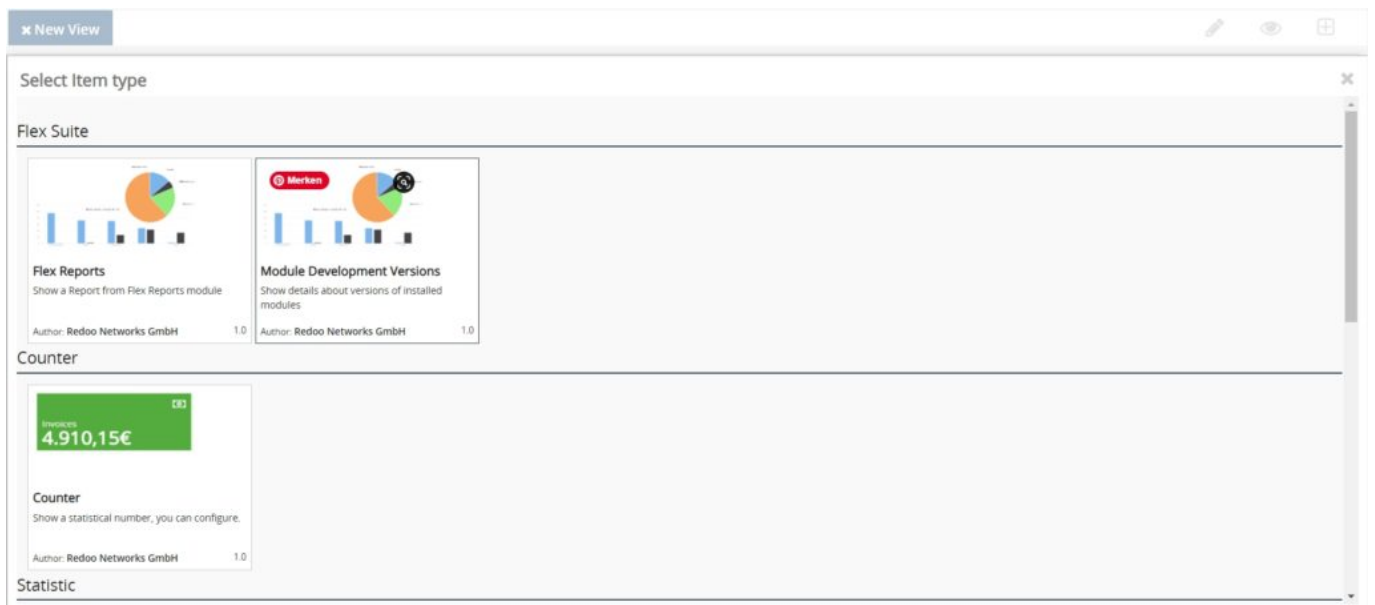
To close the editor click here



This is a widget. Here you can add the necessary module data by clicking on it



Here you can see a list of what you can add to the widget



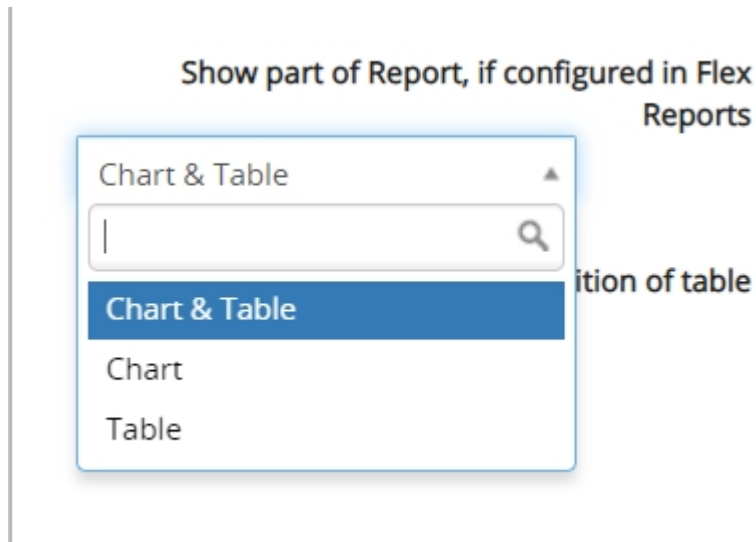
Dashboard Editor interface showing a grid of widgets. The top bar includes 'Add Widget', 'Dashboard Settings', and 'Close Editor' buttons. The main area is titled 'Select Item type' and contains a 'Statistic' section with two widgets: 'DB24 Wagen Status' (a bar chart) and 'VtigerCRM Reports' (a pie chart). Below this is a 'Lists' section with 'History' and 'ListView' widgets. The bottom of the grid is labeled 'LBL_SIMPLE_ELEMENTS'.

Dashboard Editor interface showing a grid of widgets. The top bar includes 'Add Widget', 'Dashboard Settings', and 'Close Editor' buttons. The main area is titled 'Select Item type' and contains a 'Statistic' section with two widgets: 'show metrics from vaagen' and 'show report from vtiger'. Below this is a 'Lists' section with 'History' and 'ListView' widgets. The bottom of the grid is labeled 'LBL_SIMPLE_ELEMENTS' and contains five widgets: 'IFrame embedding', 'Single Image', 'Kanban Board', 'Editable Notepad', and 'Text'.

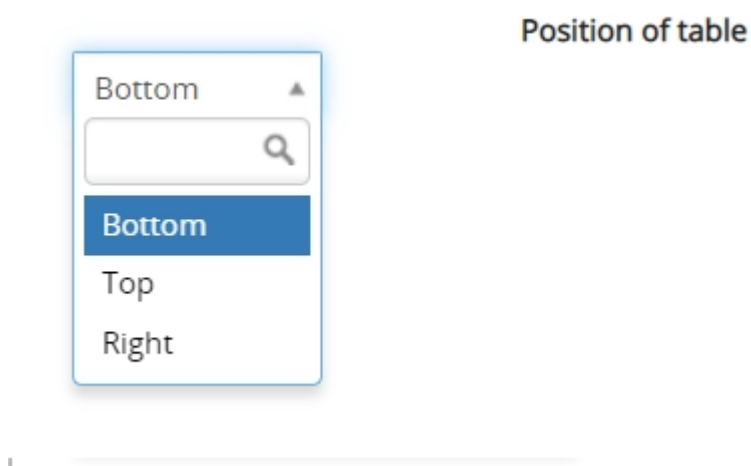
Customize the widget by selecting the necessary items and entering the necessary information

Item Configuration dialog box. It includes fields for 'Item title' (set to 'Test'), 'Item active' (checked), 'Item show title' (unchecked), and 'Load directly with board' (unchecked). Below these are 'SELECT REPORT' options: 'Which Report to show' (dropdown), 'Show part of Report, if configured in Flex Reports' (dropdown set to 'Chart & Table'), and 'Position of table' (dropdown set to 'Bottom'). Buttons for 'Reset Item', 'Save Item', and 'Close Editor' are at the top right.

In the "Show part of Report, if configured in Flex Reports" field, select the required item



In the "Position of table" field, select the required item



If you want to reset the item click [here](#)

Item Configuration

Item title: Reset Item Save Item Close Editor

Item active: Item show title: Load directly with board:

SELECT REPORT

Which Report to show:

Show part of Report, if configured in Flex Reports:

Position of table:

If you want to close editor click here

Item Configuration

Item title: Reset Item Save Item Close Editor

Item active: Item show title: Load directly with board:

SELECT REPORT

Which Report to show:

Show part of Report, if configured in Flex Reports:

Position of table:

To save click here

Item Configuration

Item title: Reset Item Save Item Close Editor

Item active: Item show title: Load directly with board:

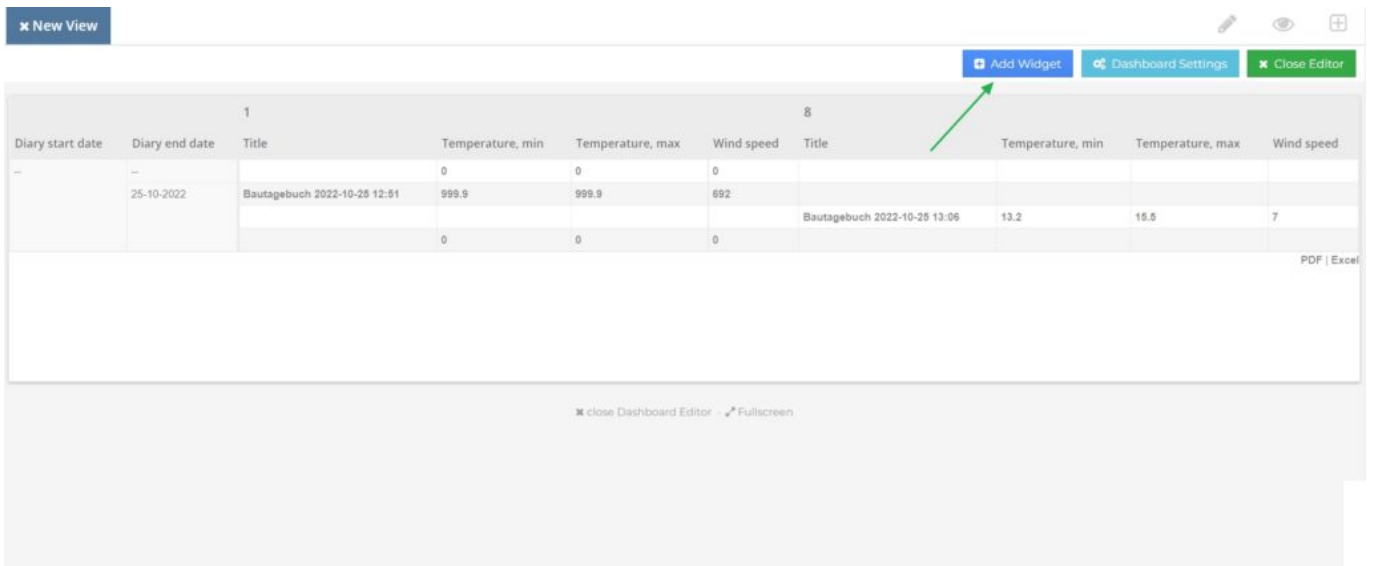
SELECT REPORT

Which Report to show:

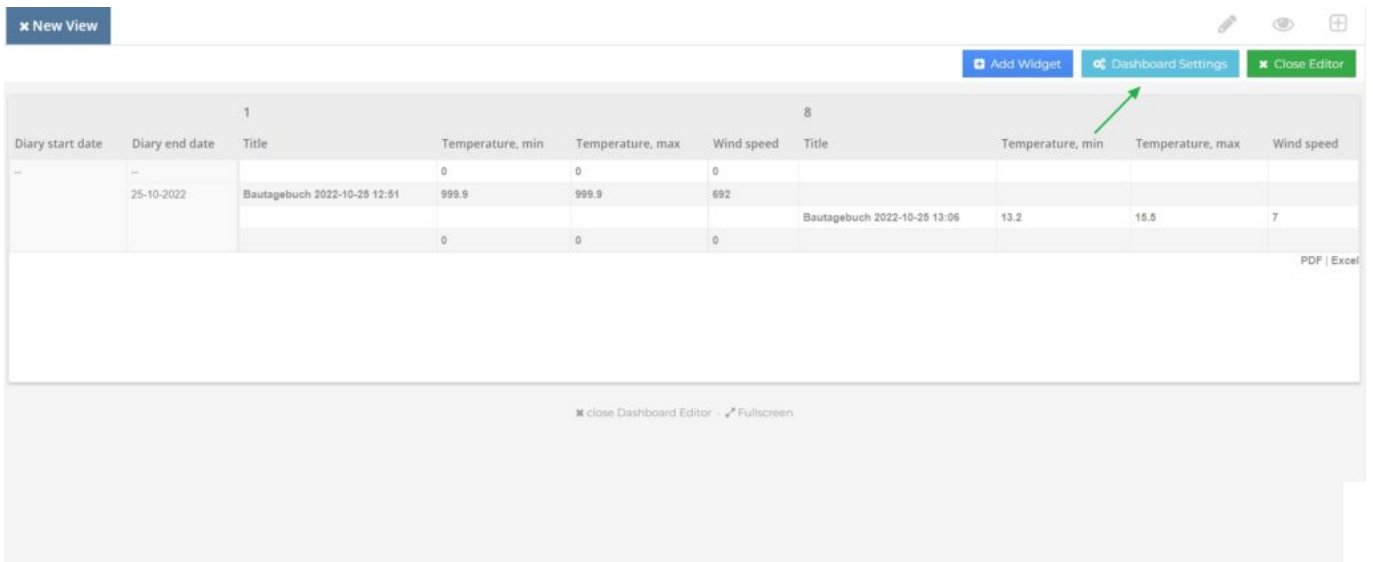
Show part of Report, if configured in Flex Reports:

Position of table:

To add a new widget click here



To open the Dashboard settings click here



Here you can see the dashboard settings, if necessary, you can change the data in the fields

Dashboard Configuration Save Dashboard Settings Close Settings

Dashboard title

Dashboard Icon

Sharing permission

Minimum stability level of widgets
When you switch the minimum stability to "Beta" you probably can use more functions. But there is no guarantee, this functions are working as expected.

Skin of Dashboard

Dashboard Type

Export Dashboard Delete Dashboard

In the "Dashboard Icon" field you can select the icon that will be used to mark your dashboard

Dashboard Icon

Sharing permission

stability level of widgets

Skin of Dashboard

Dashboard Type

⚖ fa-balance-scale

- ✕ fa-arrows-alt**
- ↔ fa-arrows-h
- ↕ fa-arrows-v
- 👂 fa-assistive-listening-systems
- ✳ fa-asterisk
- @ fa-at
- 🗣 fa-audio-description
- ⏪ fa-backward

In the "Share permission" field you can choose who will see your Dashboard

Dashboard Icon

Sharing permission

Minimum stability level of widgets

When you switch the minimum stability level of widgets, the dashboard will be reset to the default settings.

In the "Minimum stability level of widgets" field you can select the stability level of your dashboard

Minimum stability level of widgets

Skin of Dashboard

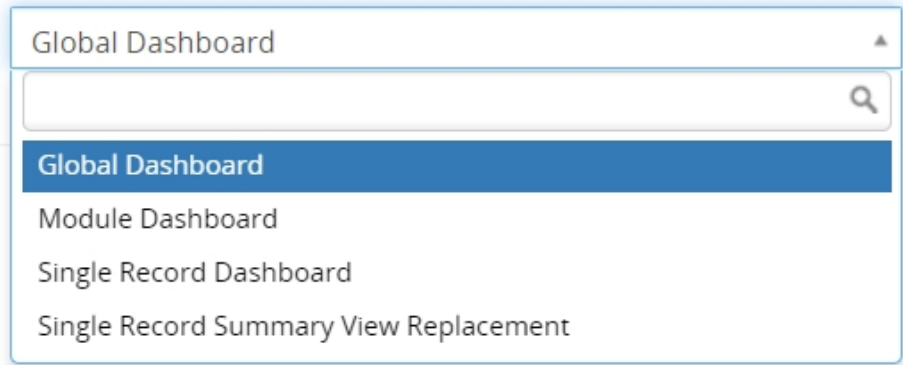
In the "Skin of Dashboard" field you can choose the look of your Dashboard

Skin of Dashboard

Dashboard Type

In the "Dashboard Type" field you can select the type of your dashboard

Dashboard Type



A dropdown menu with a search icon in the top right corner. The menu is currently open, showing a list of options: "Global Dashboard" (highlighted in blue), "Module Dashboard", "Single Record Dashboard", and "Single Record Summary View Replacement".

If you choose any other type of dashboard except "Global Dashboard", then also select in the "Related Module" field the module with which your dashboard will be associated

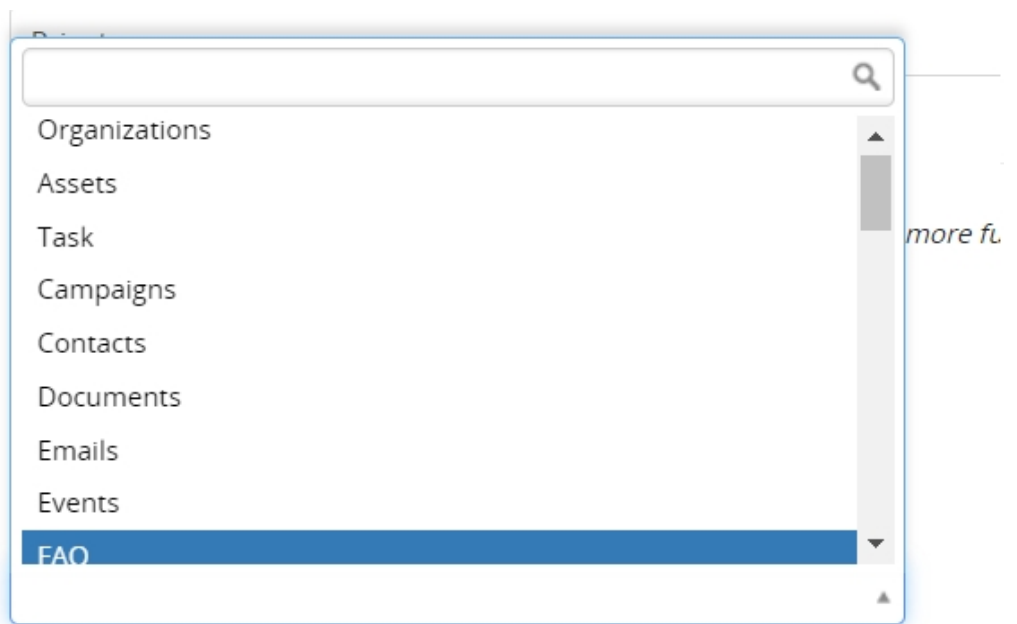
Sharing permission

stability level of widgets

Skin of Dashboard

Dashboard Type

Related Module



A dropdown menu with a search icon in the top right corner. The menu is open, showing a list of modules: "Organizations", "Assets", "Task", "Campaigns", "Contacts", "Documents", "Emails", "Events", and "FAQ" (highlighted in blue). A scrollbar is visible on the right side of the list, and the text "more fu" is partially visible next to it.

To export Dashboard click here

Dashboard Configuration [Save Dashboard Settings](#) [Close Settings](#)

Dashboard title

Dashboard Icon

Sharing permission

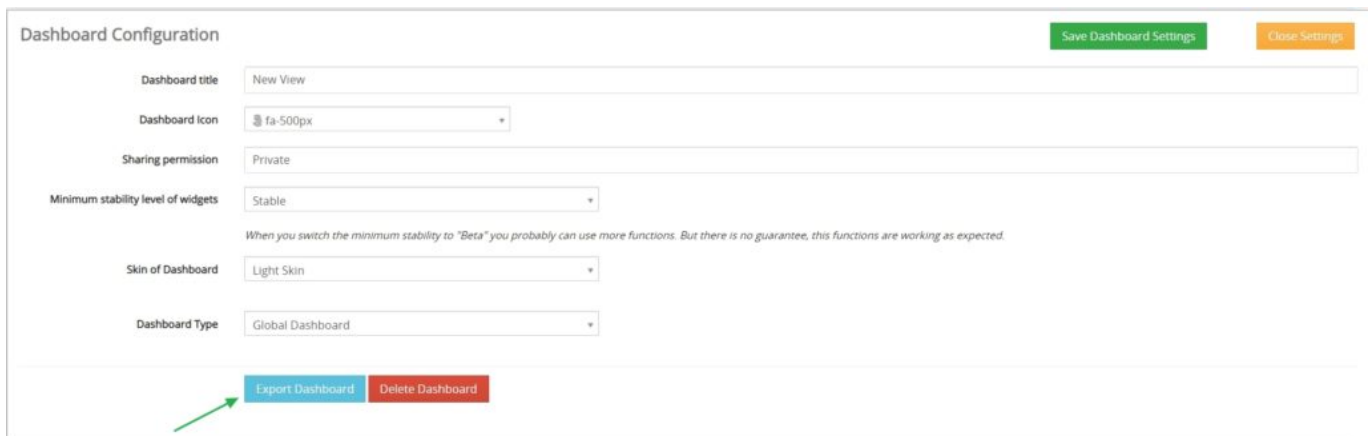
Minimum stability level of widgets

When you switch the minimum stability to "Beta" you probably can use more functions. But there is no guarantee, this functions are working as expected.

Skin of Dashboard

Dashboard Type

[Export Dashboard](#) [Delete Dashboard](#)



To delete Dashboard click here

Dashboard Configuration [Save Dashboard Settings](#) [Close Settings](#)

Dashboard title

Dashboard Icon

Sharing permission

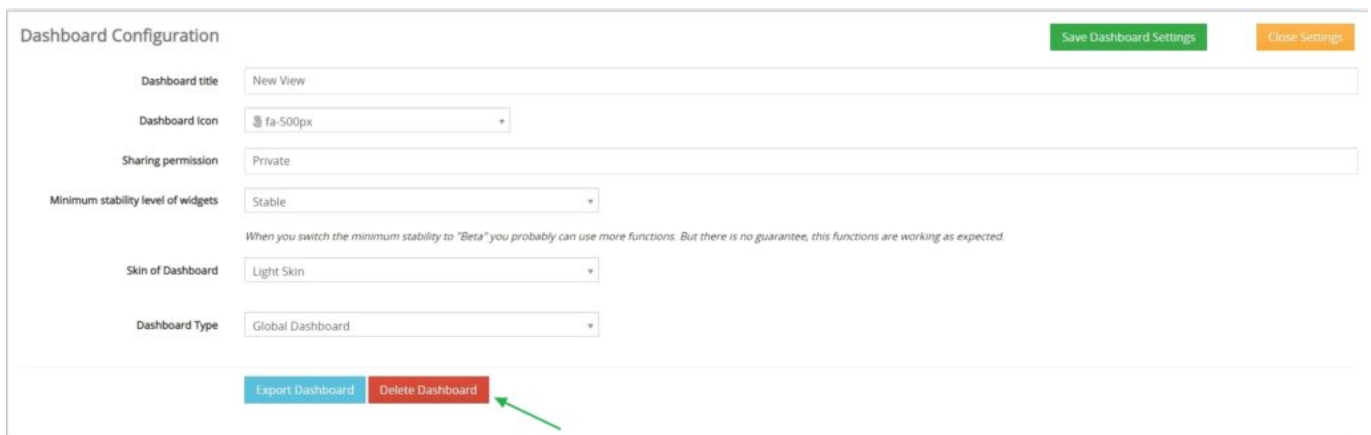
Minimum stability level of widgets

When you switch the minimum stability to "Beta" you probably can use more functions. But there is no guarantee, this functions are working as expected.

Skin of Dashboard

Dashboard Type

[Export Dashboard](#) [Delete Dashboard](#)



To save click here

Dashboard Configuration [Save Dashboard Settings](#) [Close Settings](#)

Dashboard title

Dashboard Icon

Sharing permission

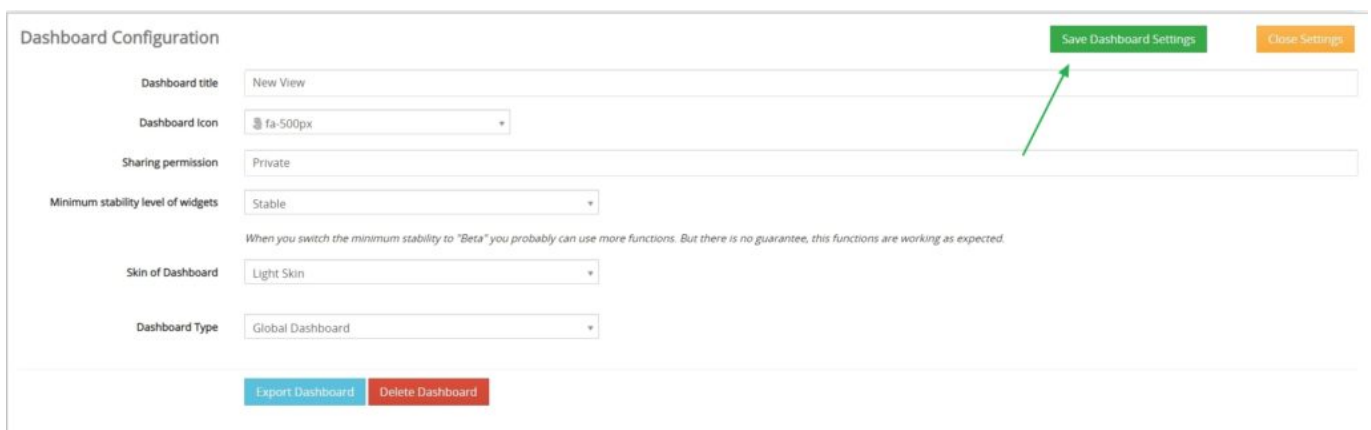
Minimum stability level of widgets

When you switch the minimum stability to "Beta" you probably can use more functions. But there is no guarantee, this functions are working as expected.

Skin of Dashboard

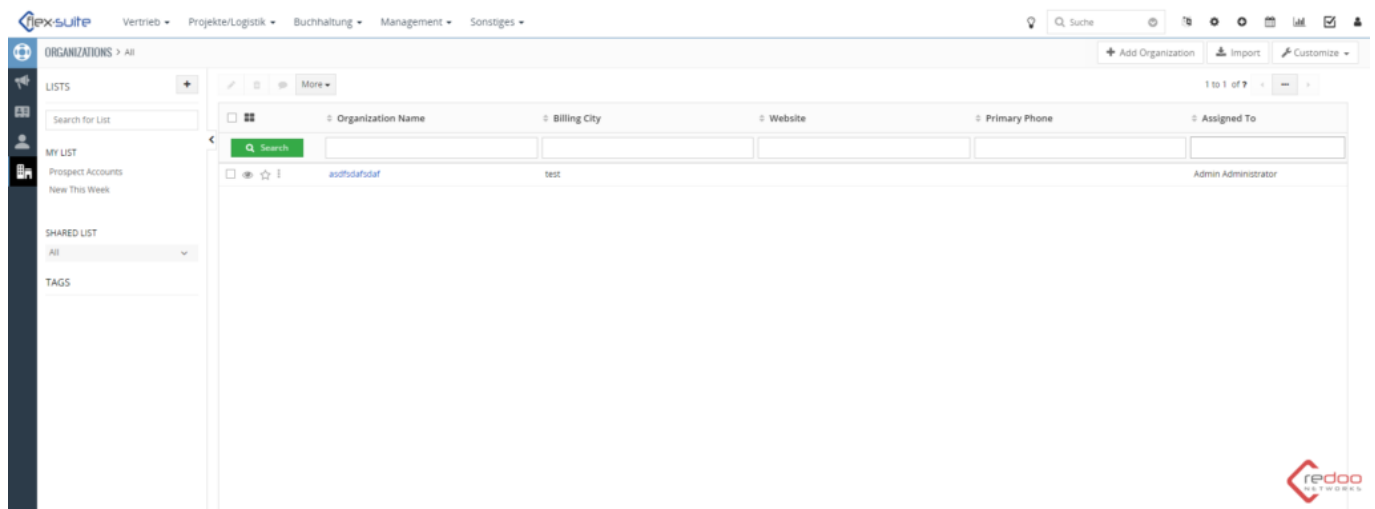
Dashboard Type

[Export Dashboard](#) [Delete Dashboard](#)

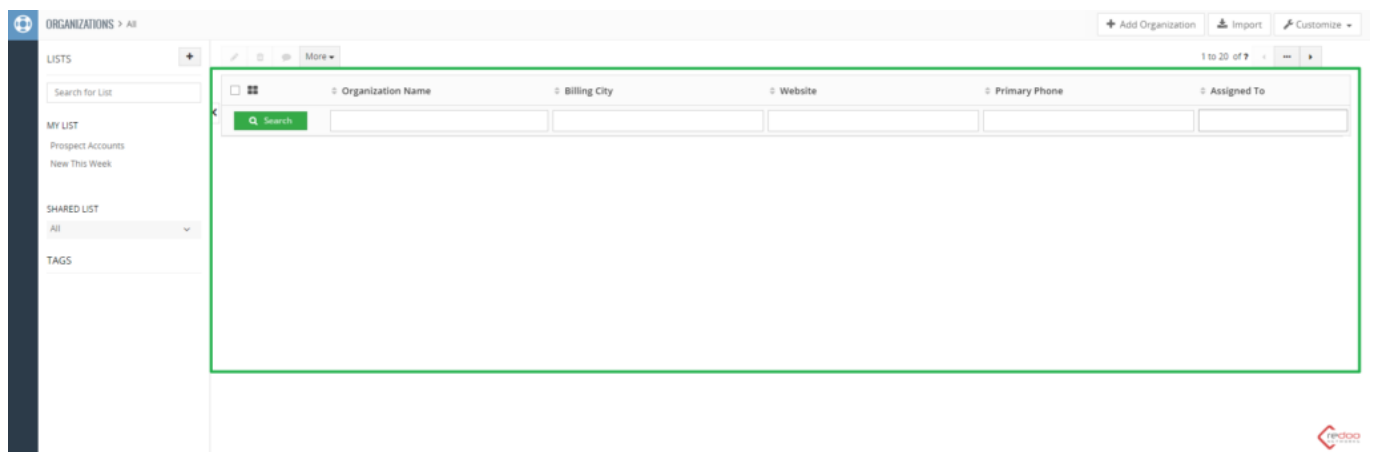


Here in the left top corner you can see the list

Lets move to the Organization page and see how records of the CRM are listed



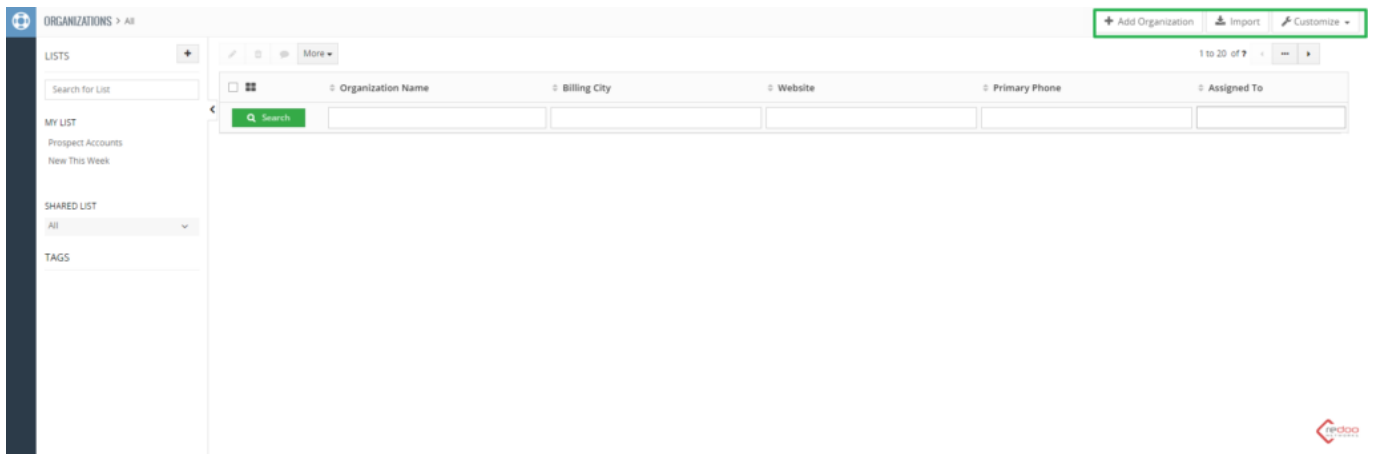
Main part of the page is a place where all records are listed



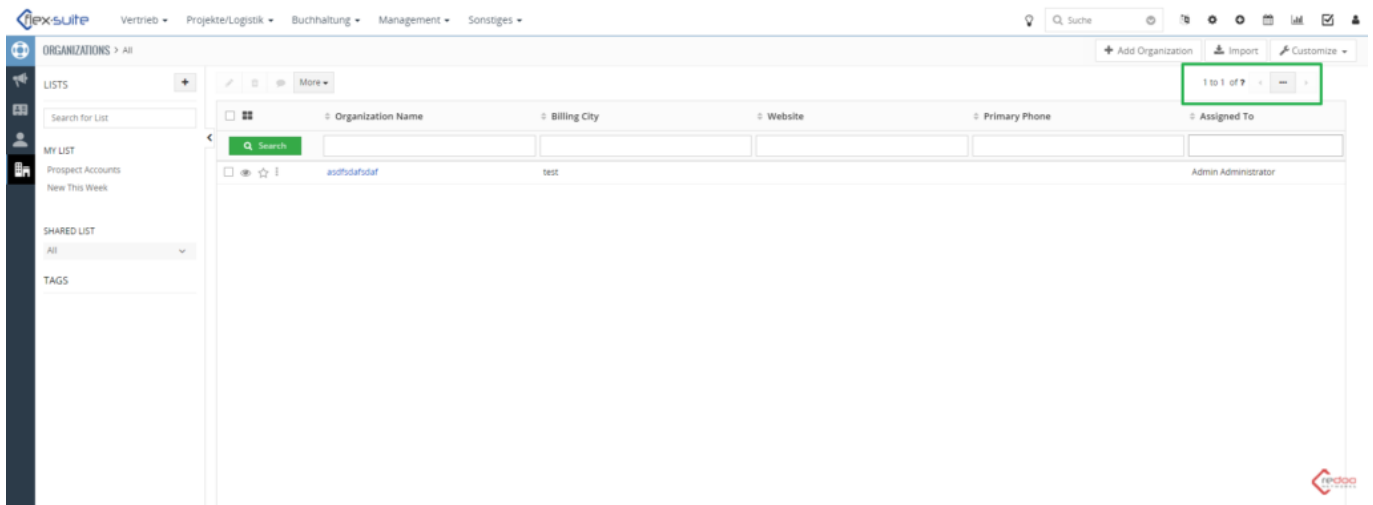
Here you can see recors's basic information, in this case: Organization Name, Billing City, Website and Primary Phone

There is also a column where a person assigned to that particular record can be seen

The right upper section responds for adding, importing and customizing records



Below there is a page counter and buttons to operate the navigation between them

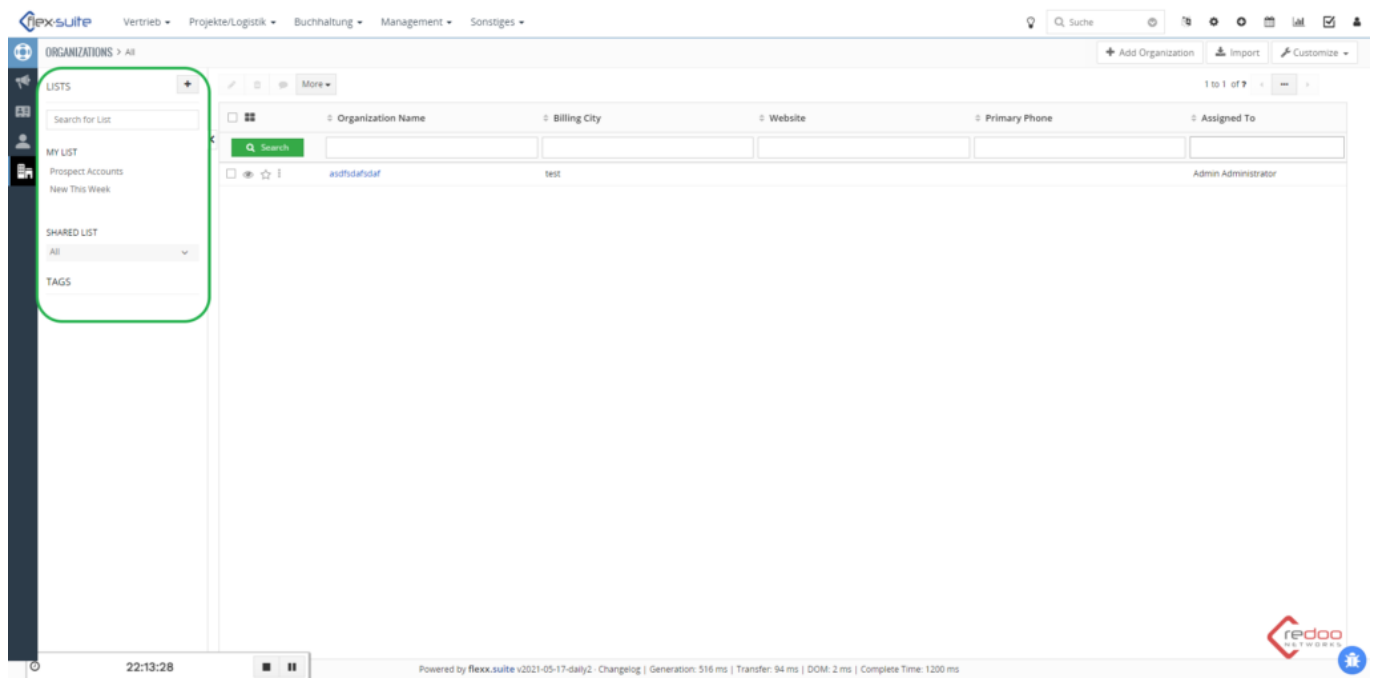


In the left corner you can view the list menu where you are able to configure a list view of the page

You have the option of defining lists in the area marked green. These can help you with the clarity of your orders.

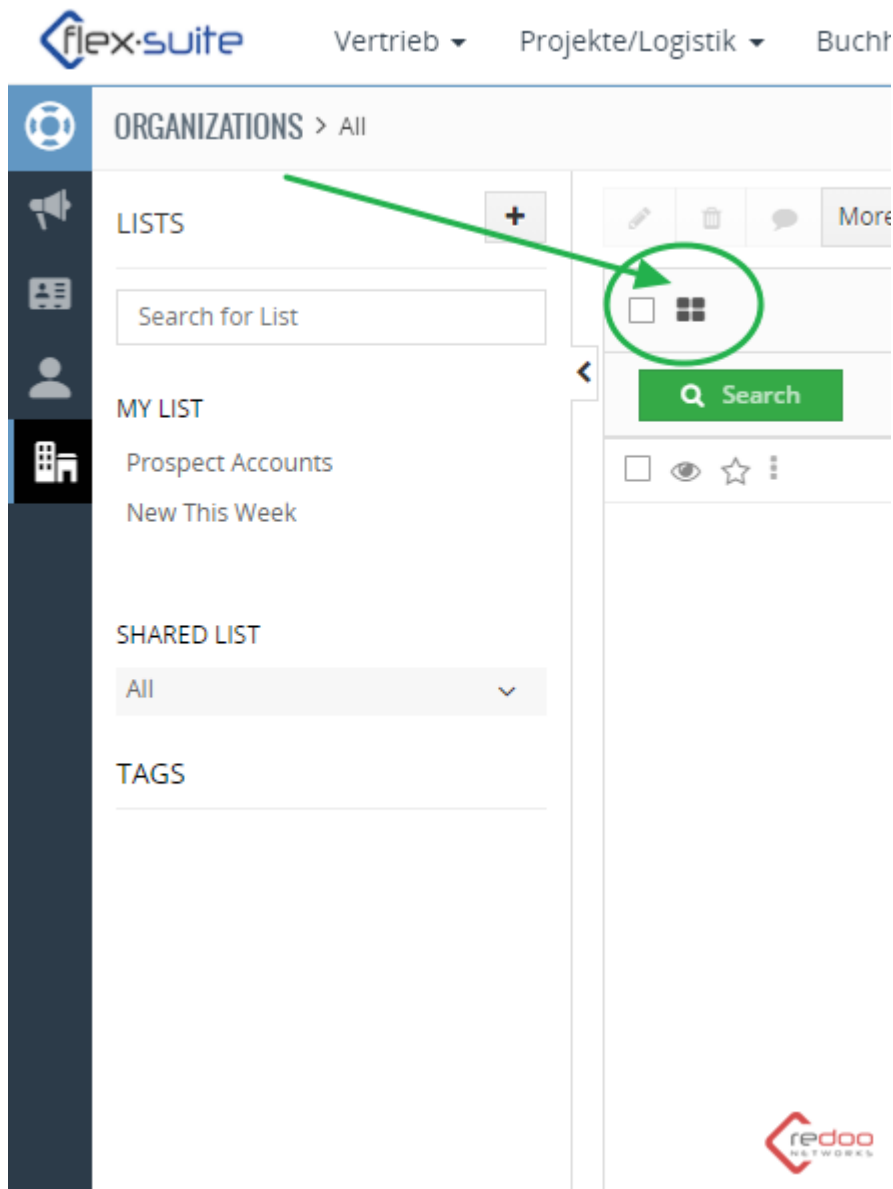
You can define your lists according to various attributes, for example, the current status, the customer and many more.

To do this, click on the “+” sign in the highlighted area and create your own lists



The screenshot displays the Flexx.Suite web application interface. On the left, a sidebar titled 'LISTS' is highlighted with a green box. It contains a search bar, a '+ Add List' button, and sections for 'MY LIST' (with 'Prospect Accounts' and 'New This Week'), 'SHARED LIST' (with 'All'), and 'TAGS'. The main content area shows a table of organizations with columns for Organization Name, Billing City, Website, Primary Phone, and Assigned To. A single row is visible with the organization name 'asdhdsd' and 'Admin Administrator' assigned to it. The footer includes the time '22:13:28', a status bar with performance metrics, and the Redoo Networks logo.

In the green marked area you can now define your central list view.



Define your list view in the window that now opens.

You can fill in the Listname, choose the columns with suitable for you information

Create a New List ✕

List Name * Set as Default List in Metrics

Choose columns and order (Max 15)
 Organization Name * Website Primary Phone Primary Email Assigned To * Billing City Billing Country

Choose List conditions:

All Conditions (All conditions must be met)

Any Conditions (At least one of the conditions must be met)

Share the list

You can also add your custom conditions by pressing “Add Condition” button

Create a New List ✕

List Name * Set as Default List in Metrics

Choose columns and order (Max 15)
 Organization Name * Website Primary Phone Primary Email Assigned To * Billing City Billing Country

Choose List conditions:

All Conditions (All conditions must be met)

Website

Select Field

Organization Details

Organization Name

Organization Number

Website

Primary Phone

Ticker Symbol

Fax

Member Of

Website equals

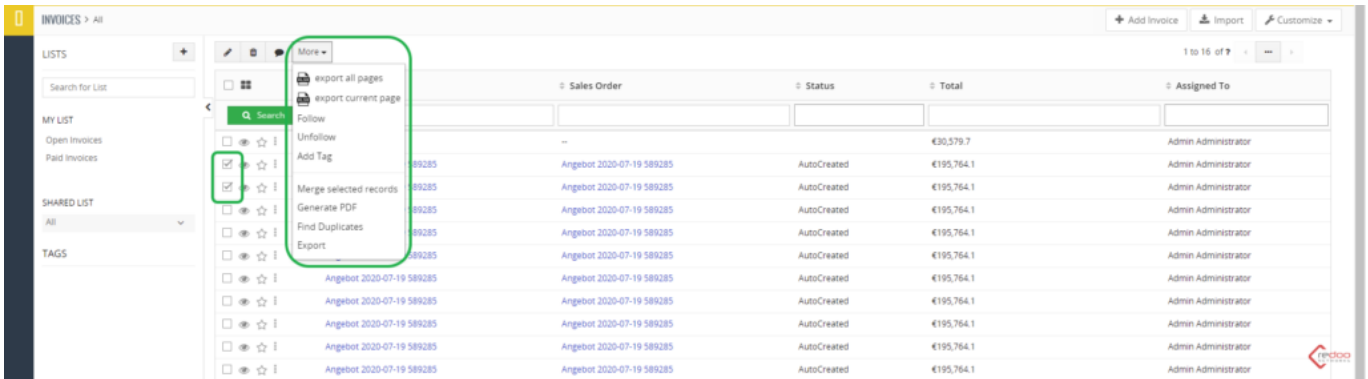
None None

Share the list

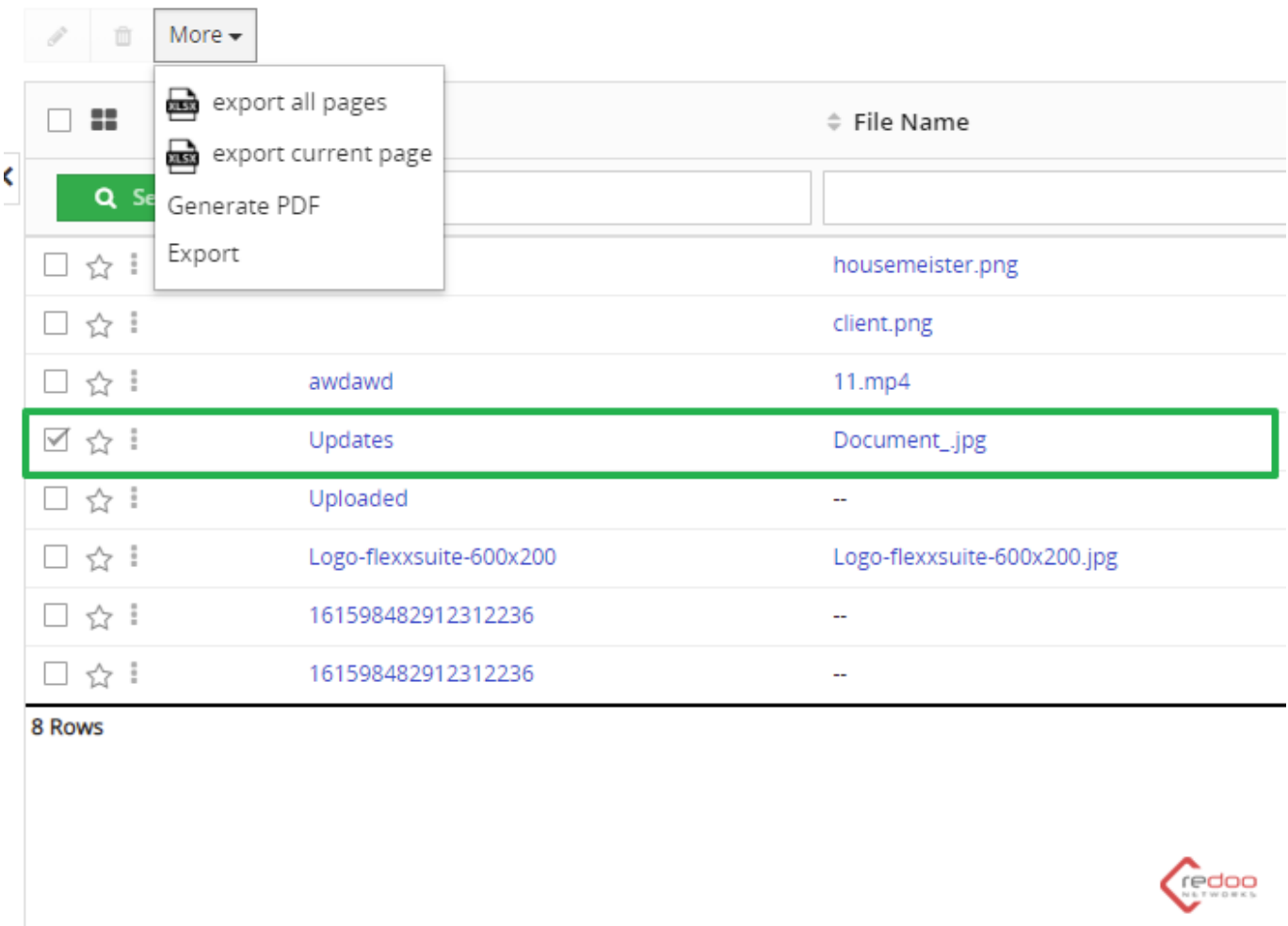
You can select a record via check mark and by pressing “More” button on the top you will see a pop up window were you can select a various available actions that you can apply to the checked records

From top to bottom:

- Export all pages
- Export current pages
- Follow - allows you to track changes in a specific record
- Unfollow
- Add Tag
- Merge selected records
- Generate PDF
- Find duplicate
- Export

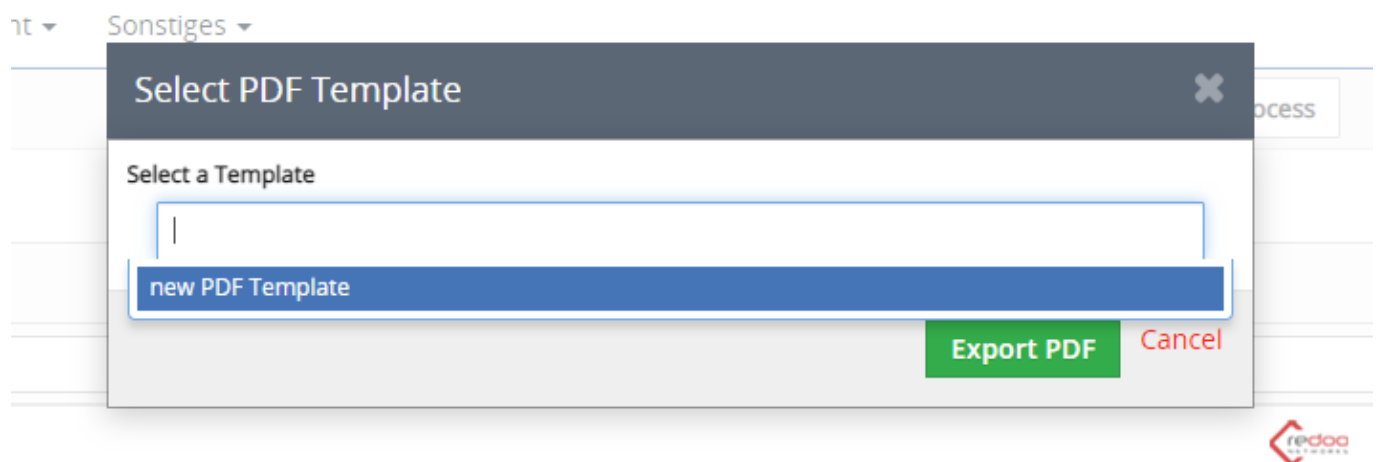


For example lets select a Generate PDF option for the Updates record in Documents module

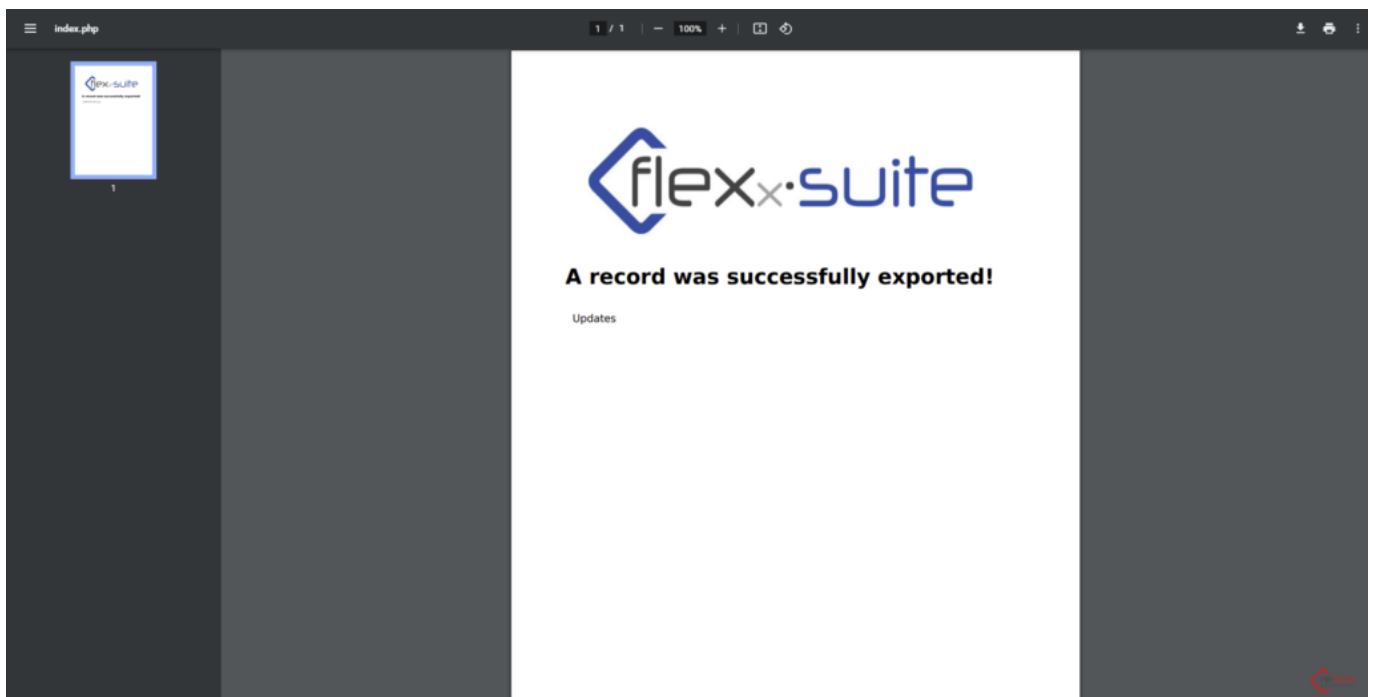


The “Select PDF Template” window will open and here you are able to select a PDF template

As you have selected a template press the button “Export PDF” to export



Then a PDF will be created and you can download it on your device

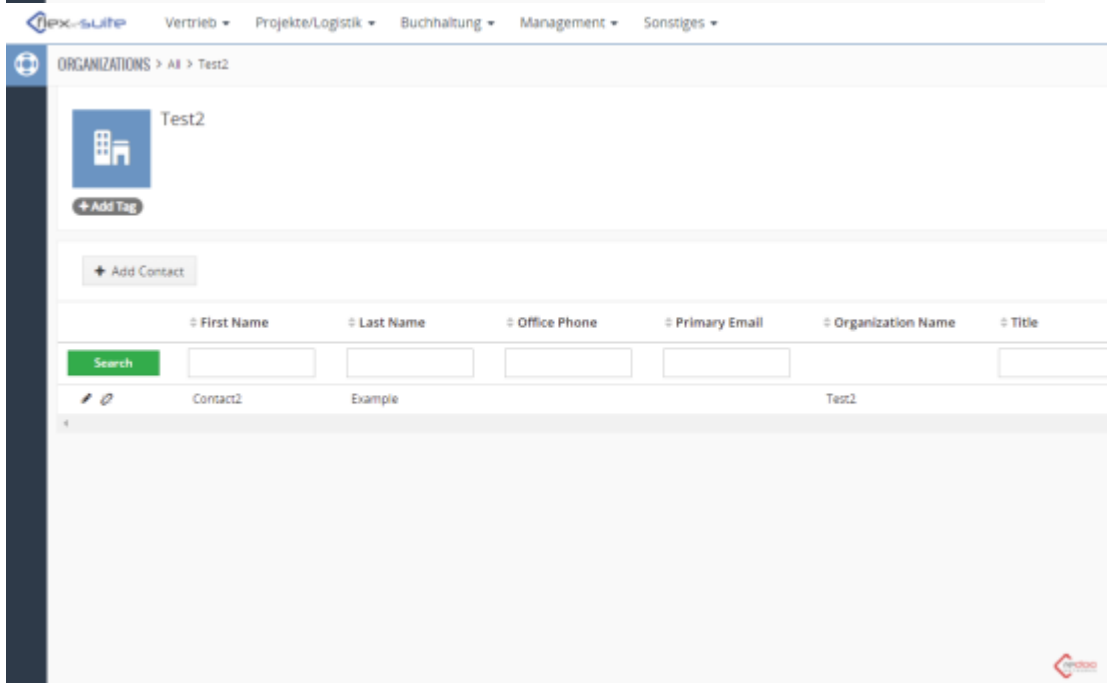
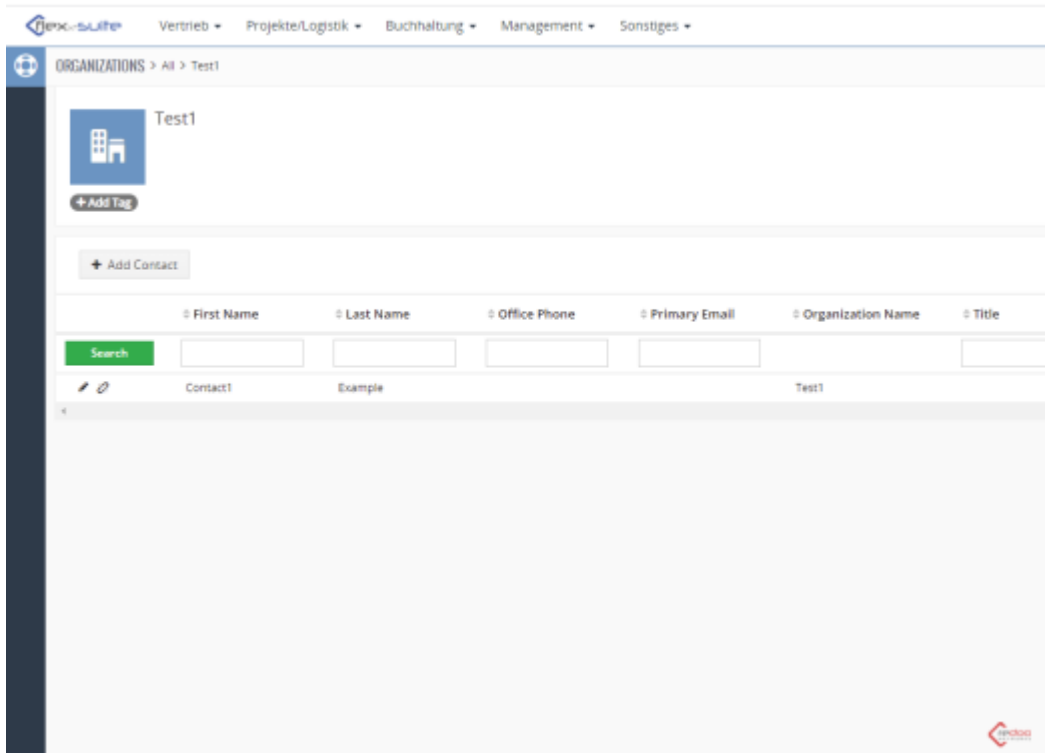


Merging Records

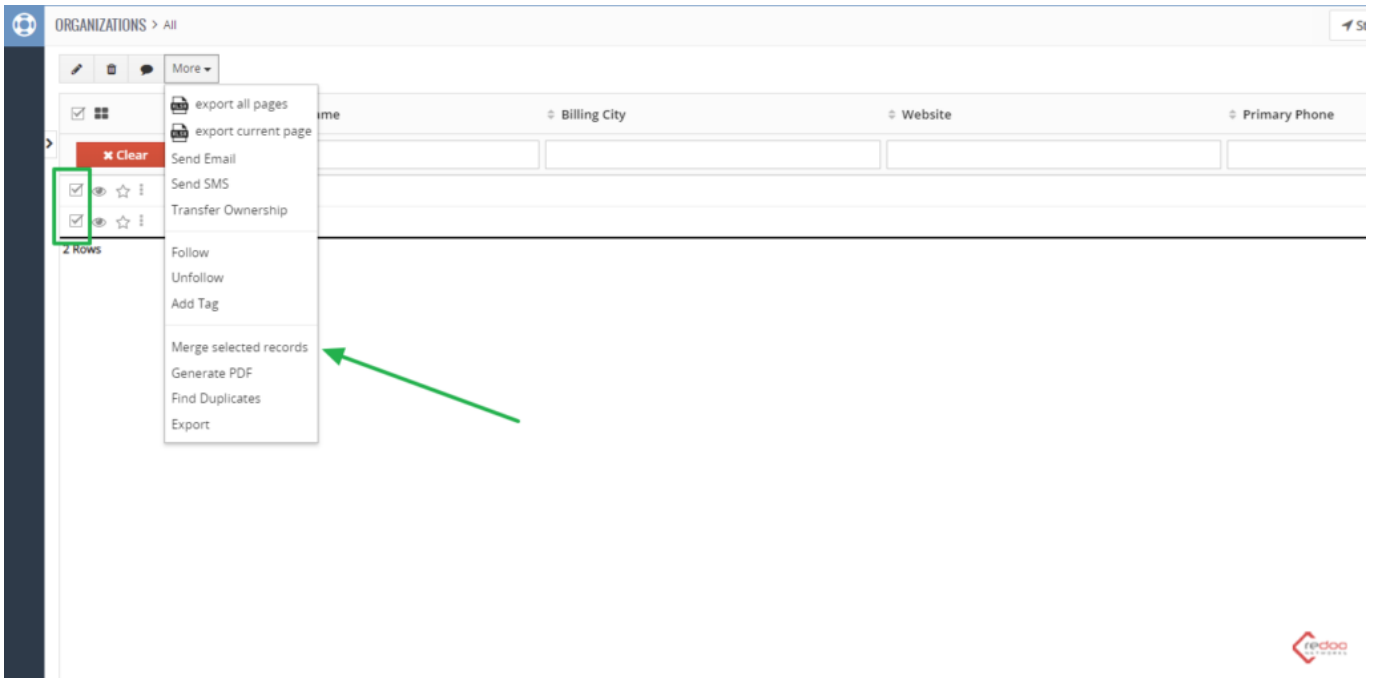
When you select two records a special feature opens and you can merge these records

In this case we will merge records Test1 and Test2

The Test1 record has one Contact named Contact1, when the Test2 has a Contact2

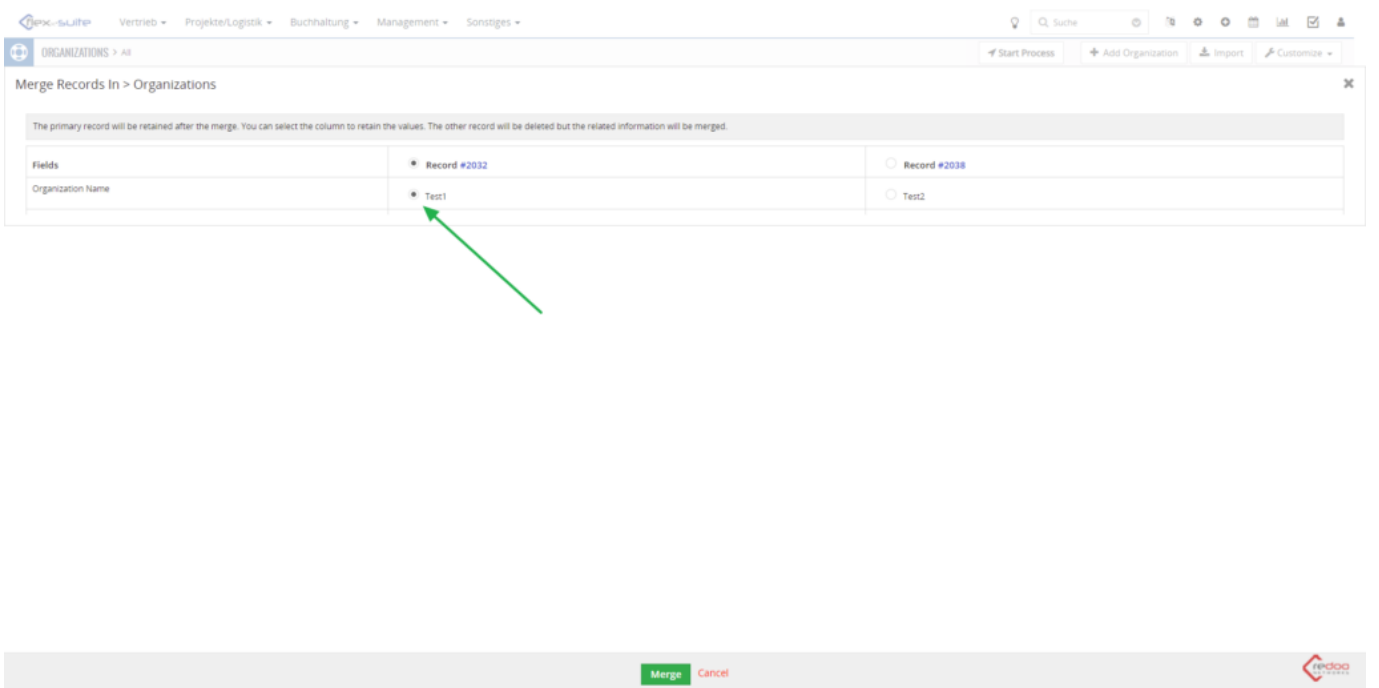


After the merge both of these contacts should belong to one record



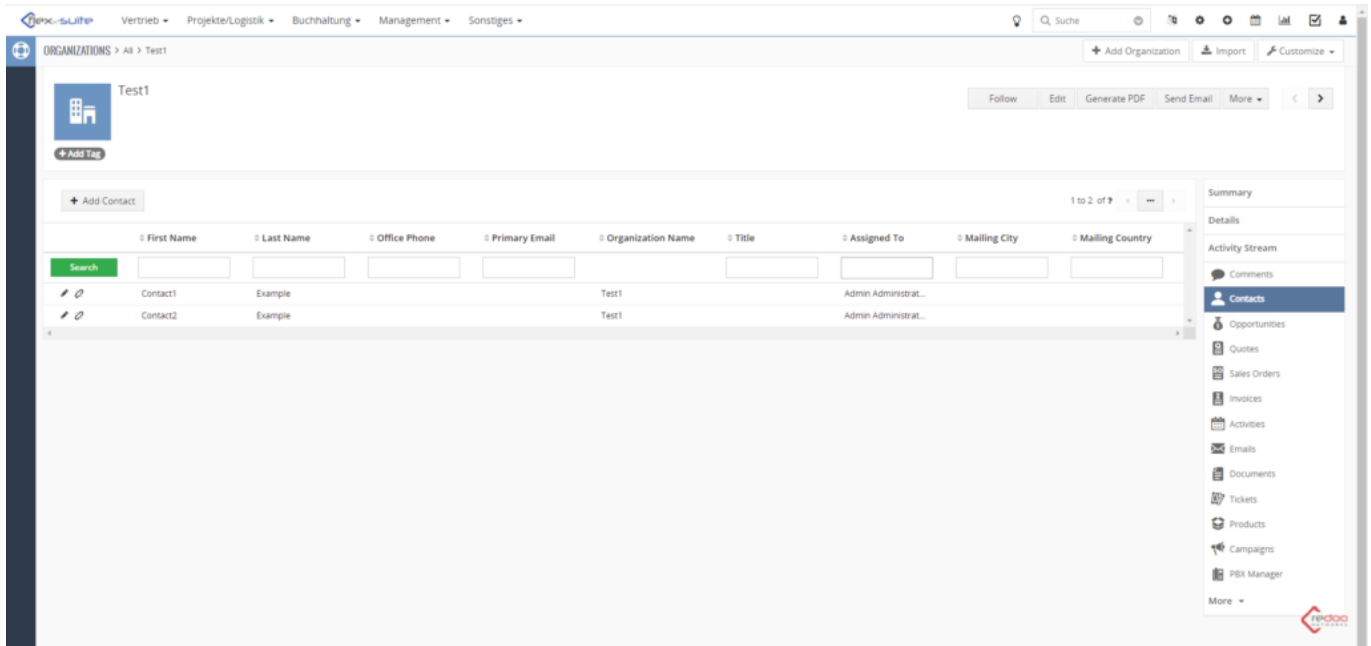
After you select **Merge selected records** a window opens where you select the primary record that will be retained after the merge. You can select the column to retain the values. The other record will be deleted but the related information will be merged.

In this case I select the Test1 record which will inherit contacts from the Test2 record



After that press the green **Merge** button below

Now we can see that both contacts belong to the Test1 record while the Test2 record is deleted, but its contact is inherited by another record



Duplicates Merging

Flexx Suite has a feature to find duplicates of different records

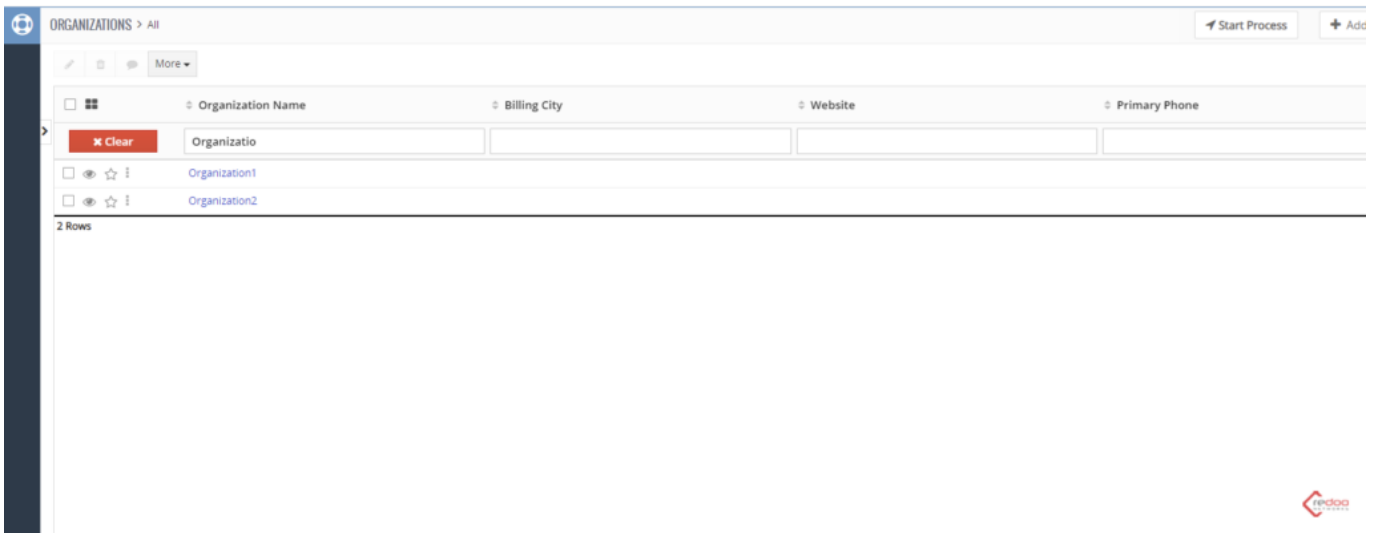
This feature is useful to find the same fields within two or more number of records

As an example lets look at these two Organization records which have the same Primary Phone number

The screenshot displays two instances of the 'Organization Details' page in Flexx.Suite. The top instance is for 'Organization1' and the bottom for 'Organization2'. Both pages show identical data for 'Organization Number' (ACC435) and 'Primary Phone' (12345), which are highlighted with a green box. The interface includes a left sidebar, a main content area with 'Organization Details' and 'Address Details' sections, and a right sidebar with 'Summary' and 'Activity Stream' sections.

Field	Organization1	Organization2
Organization Name	Organization1	Organization2
Organization Number	ACC435	ACC435
Website		
Primary Phone	12345	12345
Ticker Symbol		
Member Of		
Fax		
Employees	0	0
Secondary Phone		
Secondary Email		
Primary Email		
Industry		
Ownership		
Type		
Rating		
SIC Code		
Email Opt Out	No	No
Annual Revenue	€ 0	€ 0
Assigned To	Admin Administrator	Admin Administrator
Notify Owner	No	No
Modified Time	08-04-2022 12:00:07	08-04-2022 12:00:45
Created Time	08-04-2022 11:50:06	08-04-2022 11:53:40
Is Converted From Lead	No	No
Source	CRM	CRM

To find a duplicate firstly you have to select records which you want to compare (in this case Organization1 and Organization2)

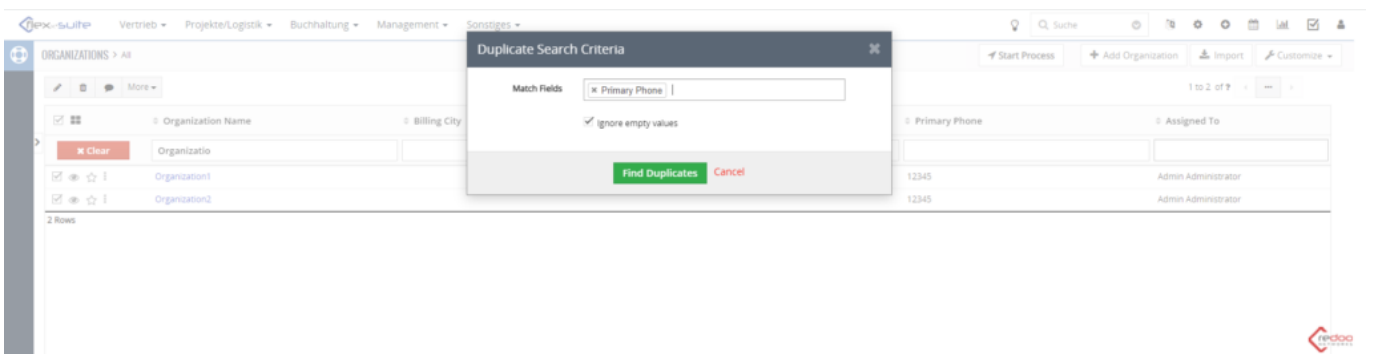


After you selected records you want to compare use “More” button and choose “Find Duplicates” from the list



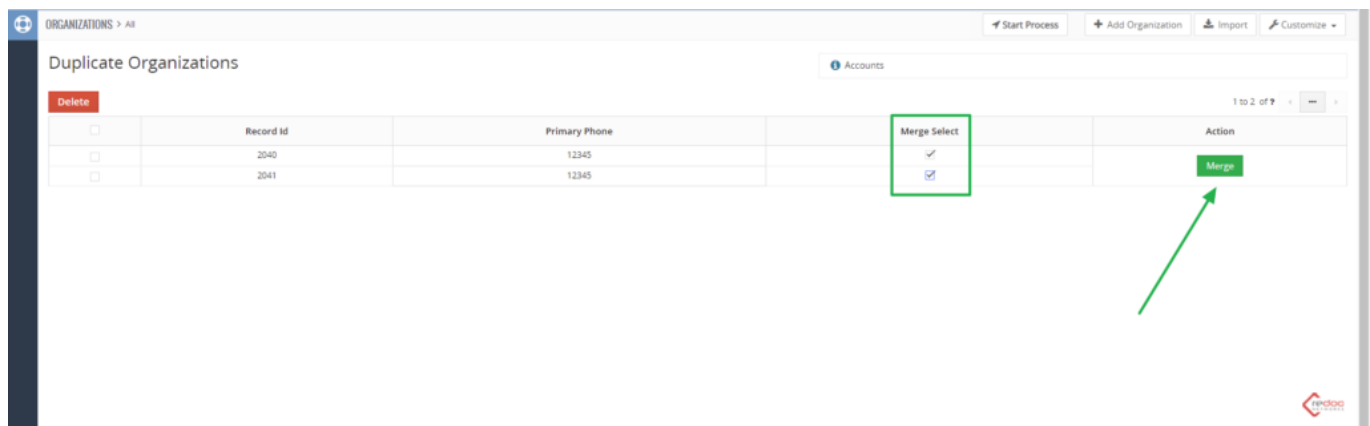
In the opened up window select fields you would like to compare (you can select one or multiple number of fields)

To continue press “Find Duplicates” ones you choose fields to compare



After that you will see a list of all Duplicates within records you chose

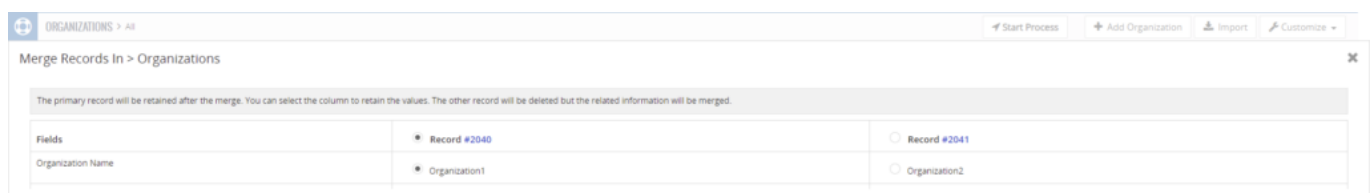
Select which duplicates you would like to merge and press the green “Merge” button on the right



The screenshot shows the 'Duplicate Organizations' page. At the top, there are navigation buttons: 'Start Process', 'Add Organization', 'Import', and 'Customize'. Below the title, there is a 'Delete' button and a search bar for 'Accounts'. The main table has the following data:

	Record Id	Primary Phone	Merge Select	Action
<input type="checkbox"/>	2040	12345	<input checked="" type="checkbox"/>	<input type="button" value="Merge"/>
<input type="checkbox"/>	2041	12345	<input type="checkbox"/>	

Right after you will be taken to the Merge page when you have to select a record which will inherit all data from the other, from those who have duplicates



The screenshot shows the 'Merge Records In > Organizations' dialog. It contains the following text: 'The primary record will be retained after the merge. You can select the column to retain the values. The other record will be deleted but the related information will be merged.'

Fields:

Organization Name	<input checked="" type="radio"/> Record #2040	<input type="radio"/> Record #2041
	<input checked="" type="radio"/> Organization1	<input type="radio"/> Organization2

After the merge a duplicate will be deleted and the other record will stay, with all information and related records inherited from the duplicate.

	Organization Name	Billing City	Website	Primary Phone	Assigned To
<input type="checkbox"/>	<input type="text" value="Organization1"/>			12345	Admin Administrator

1 Rows

