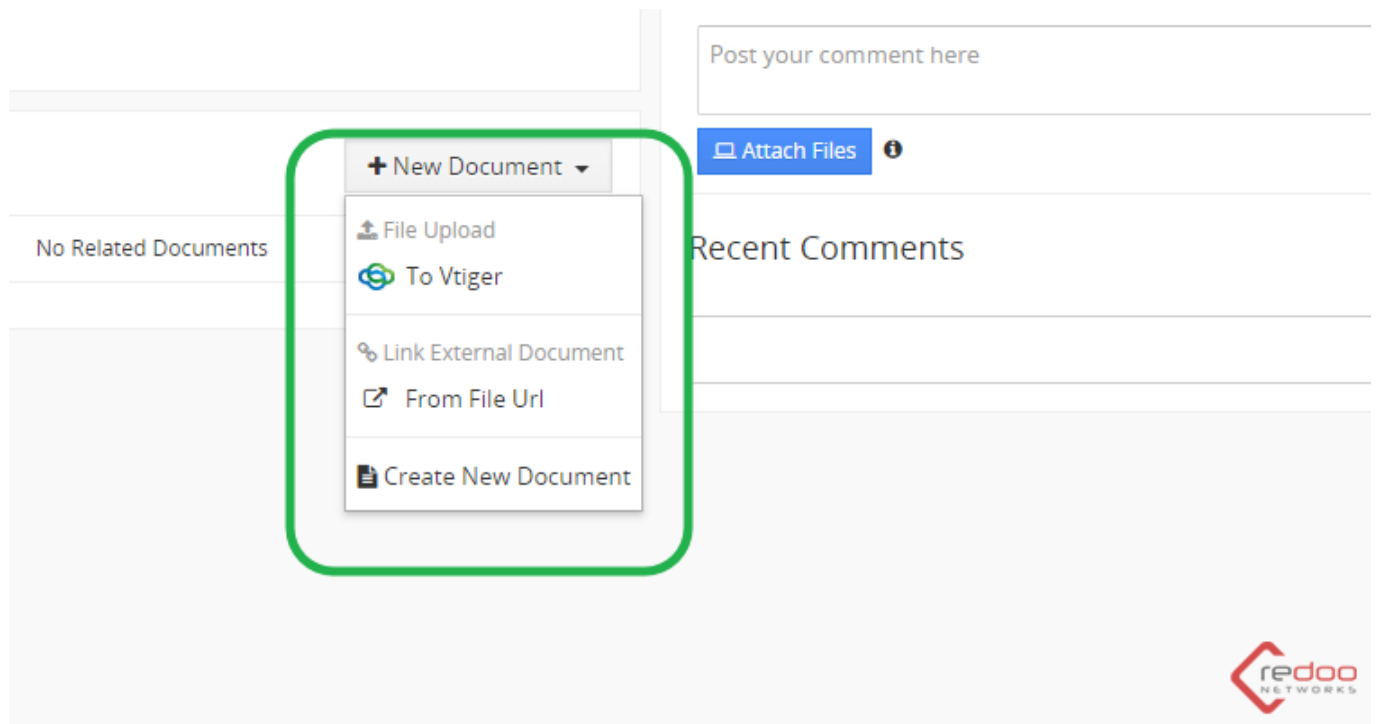




Flexx.Suite

5.Attach a document

Documents can be added by pressing the “Plus” button



Here you can see the list of all available upload options

To Vtiger

Upload Document to Vtiger

Drag & Drop File Here
OR
Select File from my Computer


Title *

Assigned To * Admin Administrat... Folder Name Default

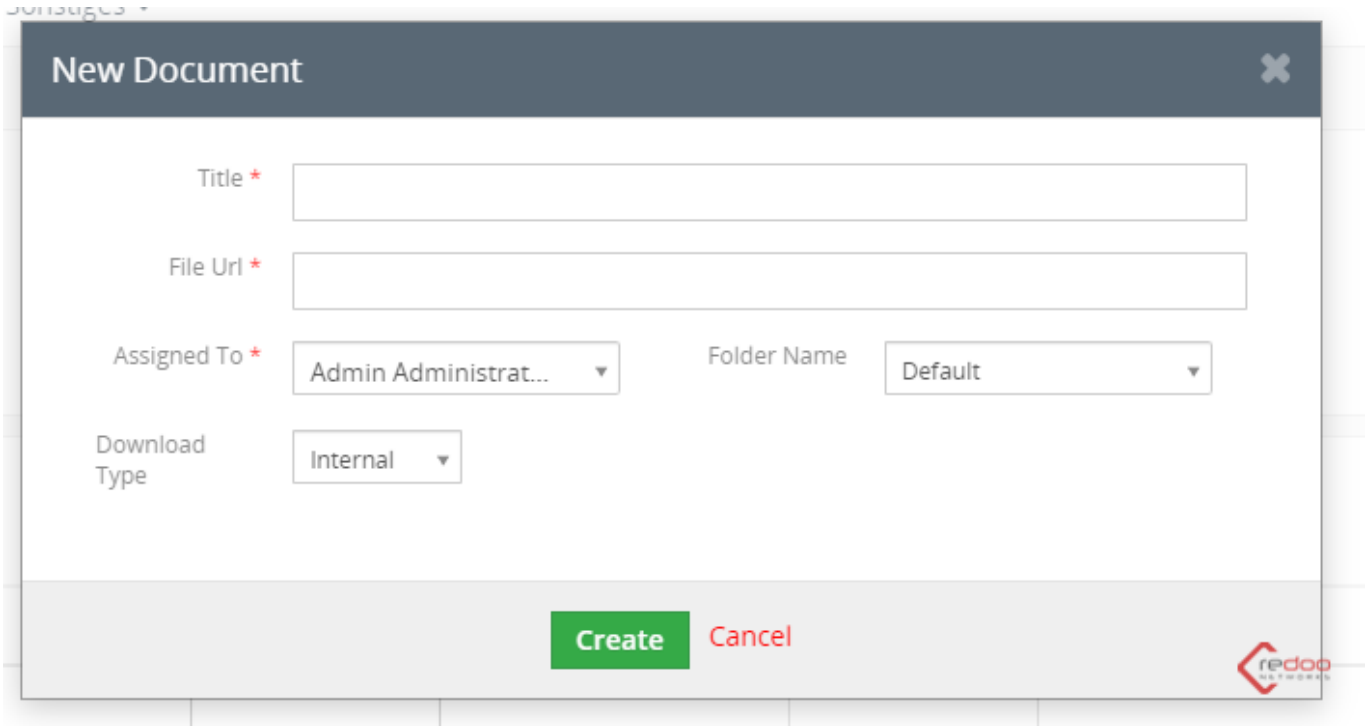
Note

Download Type Internal

Upload Cancel



From the URL



New Document

Title *

File Url *

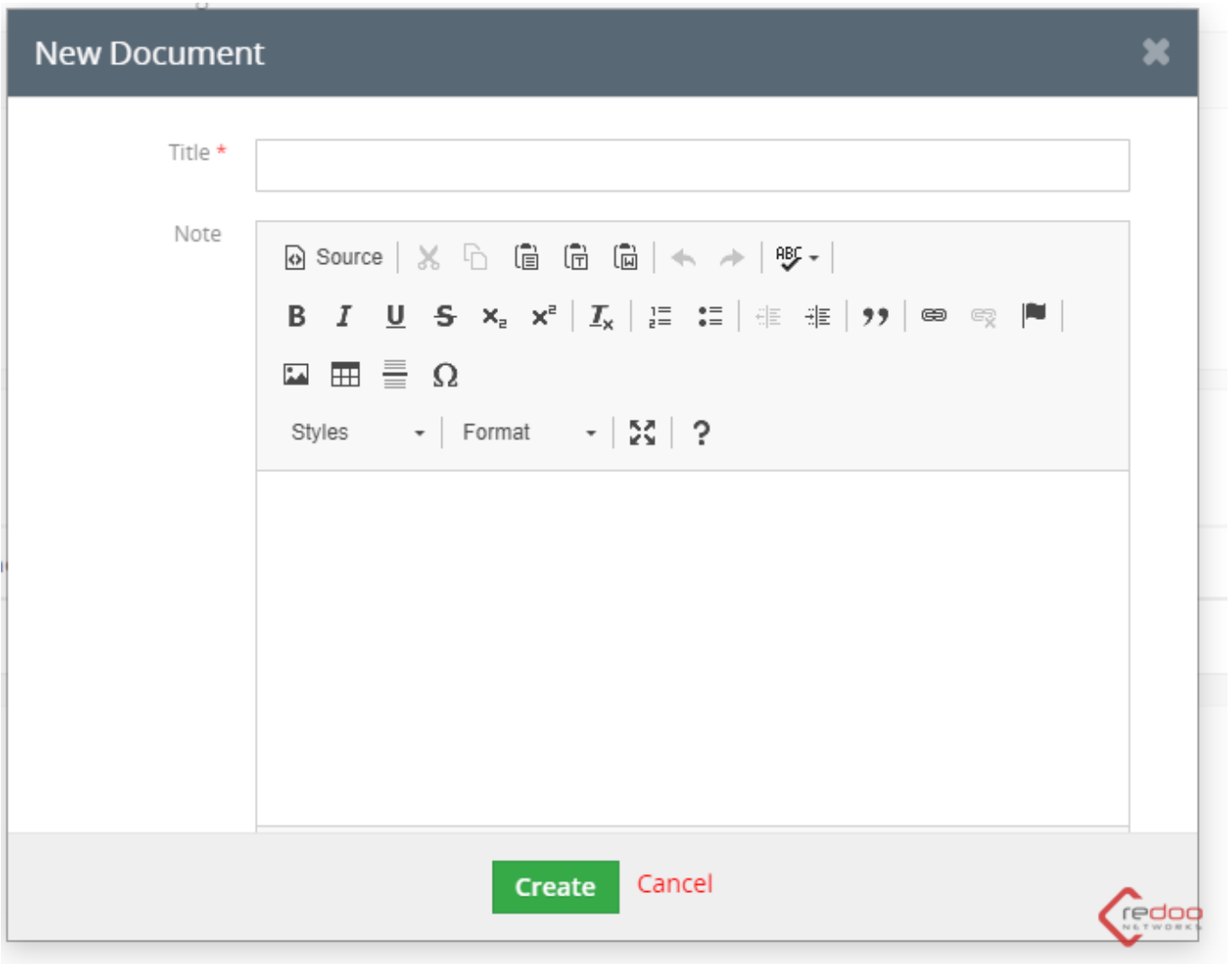
Assigned To * Folder Name

Download Type

Create **Cancel**

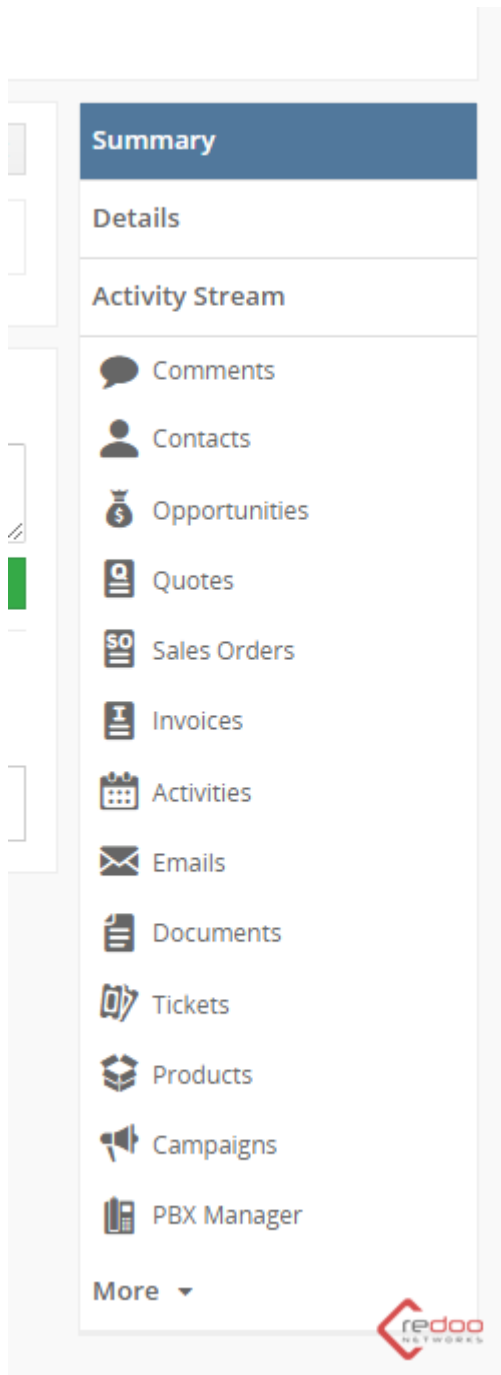
redoo
NETWORKS

You are also able to **create a new document** using the build-in editor



Now select the desired way and upload your document.

In the right corner you can see three available view types and all related modules to your main module



Lets move to the “Details” view page

The screenshot displays the Flexx.Suite CRM interface for an organization named 'ExampleOrg'. The interface is divided into several sections:

- Organization Details:** A table listing various attributes such as Organization Name, Website, Ticker Symbol, Member Of, Employees, Secondary Email, Industry, Type, Email Opt Out, Assigned To, Modified Time, and Is Converted From Lead. It also includes fields for Organization Number, Primary Phone, Fax, Secondary Phone, Primary Email, Ownership, Rating, SIC Code, Annual Revenue, Notify Owner, Created Time, and Source.
- Address Details:** A section for entering Billing and Shipping addresses, including fields for Address, PO Box, City, State, Postal Code, and Country.
- Description Details:** A section for entering a description of the organization.
- Summary and Activity Stream:** A sidebar on the right containing a 'Summary' section and an 'Activity Stream' section with links to Comments, Contacts, Opportunities, Quotes, Sales Orders, Invoices, Activities, Emails, Documents, Tickets, Products, Campaigns, and PBX Manager.
- Buttons:** At the top right, there are buttons for 'Follow', 'Edit', 'Generate PDF', 'Send Email', and 'More'.

The interface also shows a search bar at the top, a navigation menu on the left, and a footer with the time '03:15:55:04' and system information.

On this page you can see all information about the record

To fill empty fields or change existing ones press the "Edit" button like shown in the image

This image is a close-up of the 'Edit' button in the Flexx.Suite CRM interface. The button is highlighted with a green circle, and a green arrow points to it from the left. The button is part of a row of action buttons: 'Follow', 'Edit', 'Generate PDF', 'Send Email', and 'More'. The 'Edit' button is the second button in the row.

On the page just opened you can edit any field of an already existing record in your CRM

After you finish editing do not forget to save

Lets move to the **Activity Stream** page, here you can see all changes that were made with the record, the exact date, the information that was added and who exactly did that particular activity.

As you see, previously I showed you how to make an edit to the record and now there is a entry in Activity Stream that displays that exact change, when it was made and who did that change.

Each of these blocks has the information about:

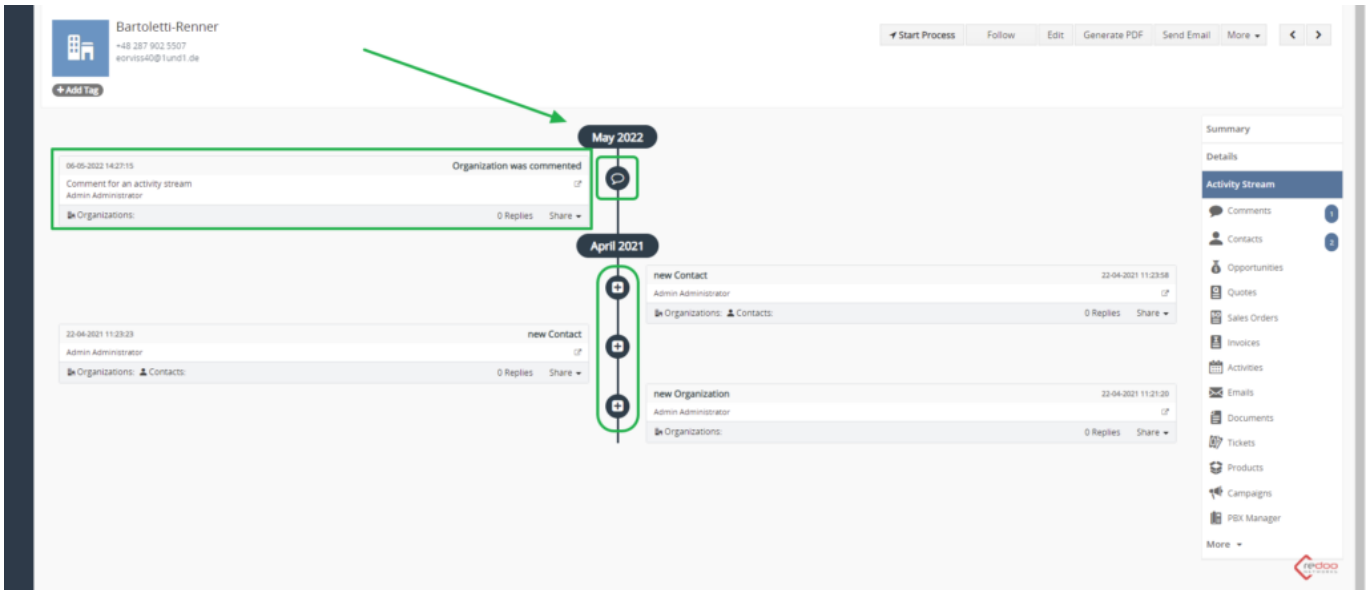
- Time when the activity was made

- Type of the activity
- Body of the activity which can hold an additional information
- Person assigned
- Links to the related records
- Reply and Share options

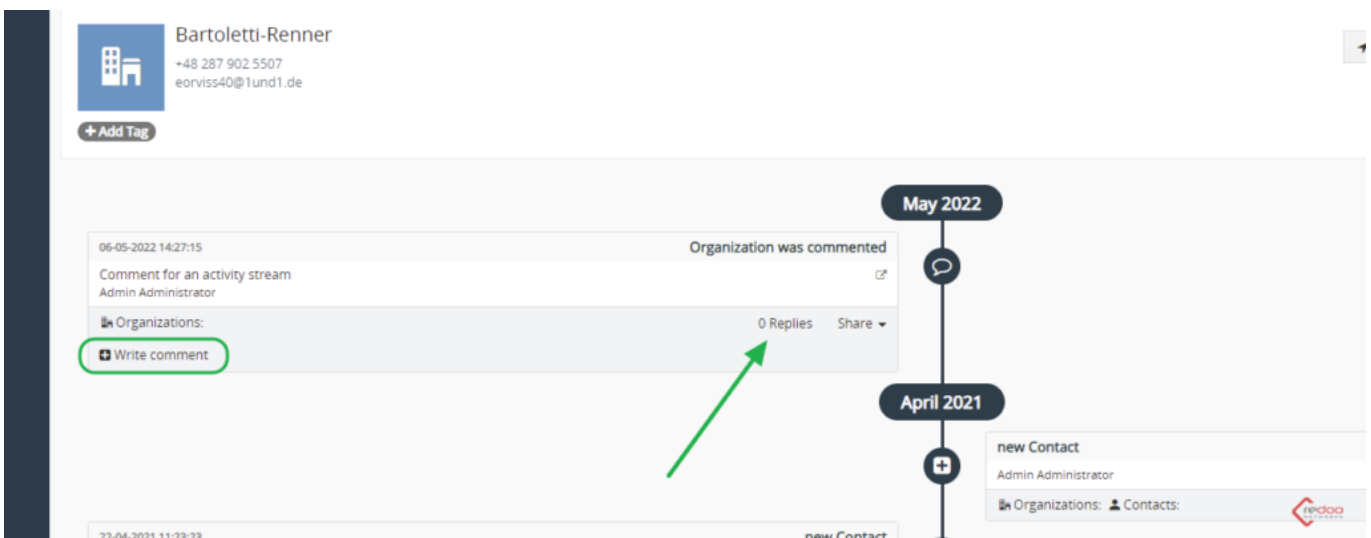
The screenshot displays the user profile for Bartoletti-Renner, including contact information and a '+ Add Tag' button. Below the profile is a timeline of activities. The timeline is divided into two sections: 'May 2022' and 'April 2021'. A green box highlights a comment activity from May 2022, which includes a timestamp, the text 'Organization was commented', and a 'Comment for an activity stream' by 'Admin Administrator'. Below this comment are 'Organizations:' and '0 Replies Share' options. Other activities include 'new Contact' and 'new Organization' from April 2021, each with a timestamp, the text 'new Contact' or 'new Organization', and 'Admin Administrator' as the user. Below these activities are 'Organizations:' and 'Contacts:' options. The Redoo logo is visible in the bottom right corner.

In the middle of the page you can see the type of activities that were made. In the picture below you can see whether it was a comment or a new entry.

There is also a date that shows the time when activities were made.

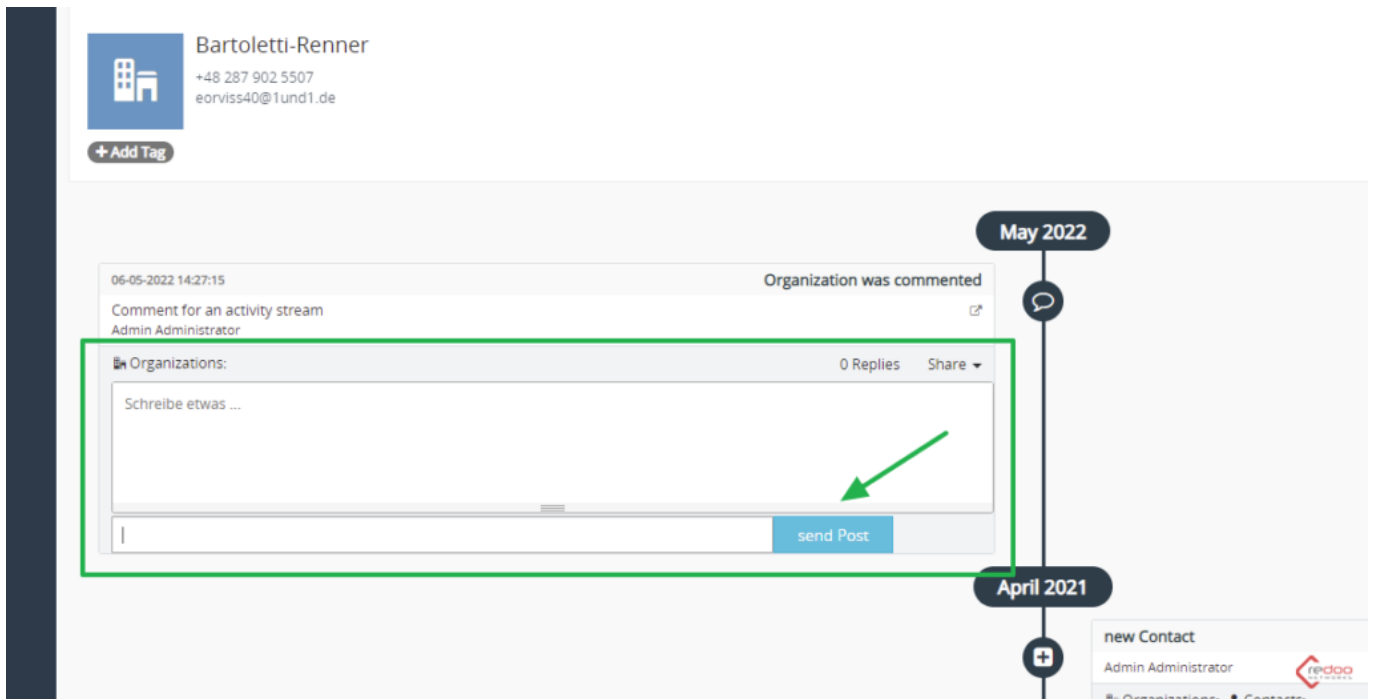


There is also an option to leave a reply. To do that press on the Replies count and then press “Write comment” button



After that a window will open where you can leave your comment.

To save - press “send Post” button like shown in the image



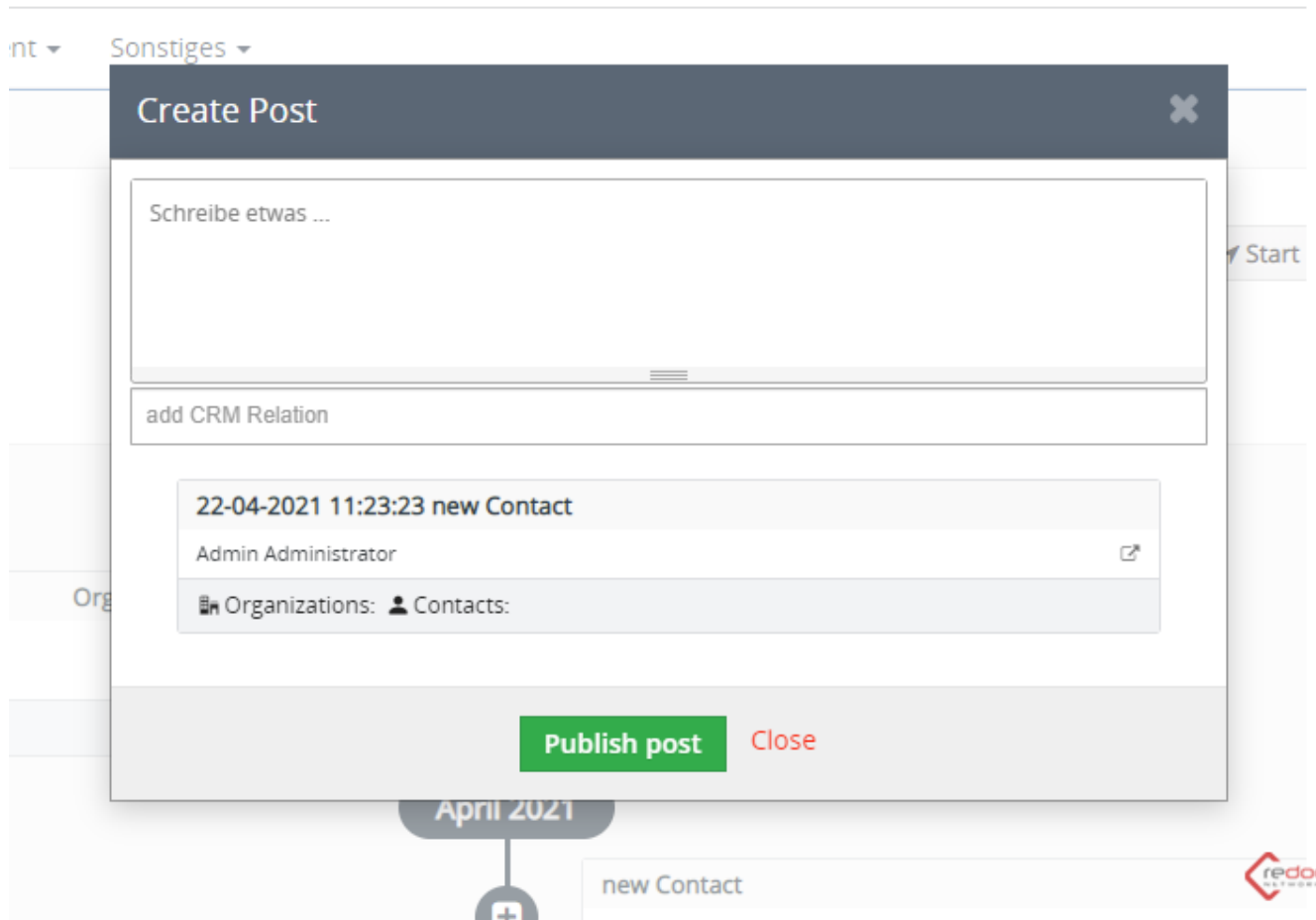
You are also able to share the activity by using the corresponding sign like shown below



Here you have two options to share with a comment or without it

As you choose to Share without a comment your activity will be immediately to Timeline.

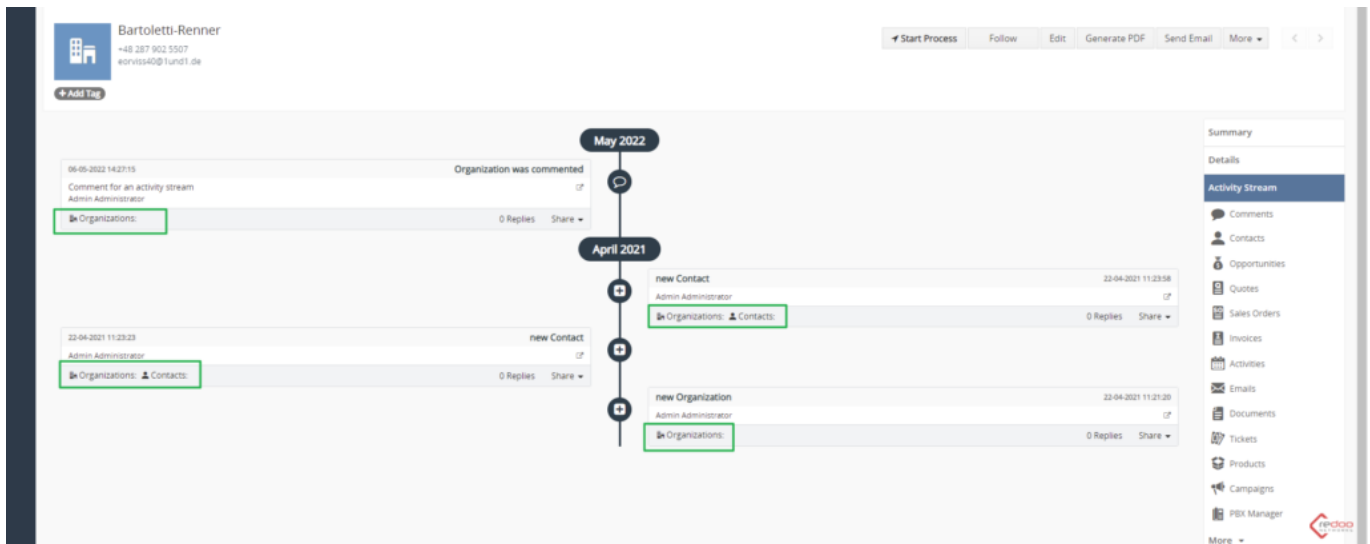
If you selected "Share" a window will open where you can leave a comment and/or add a CRM Relation



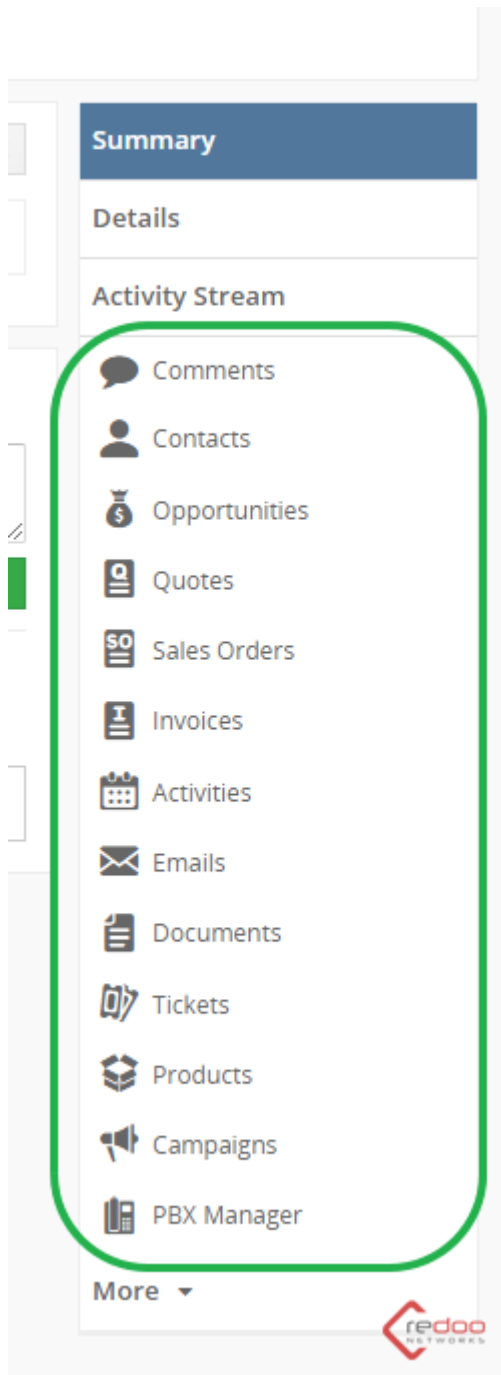
To share press the green button below.

Each Activity has links connected to it

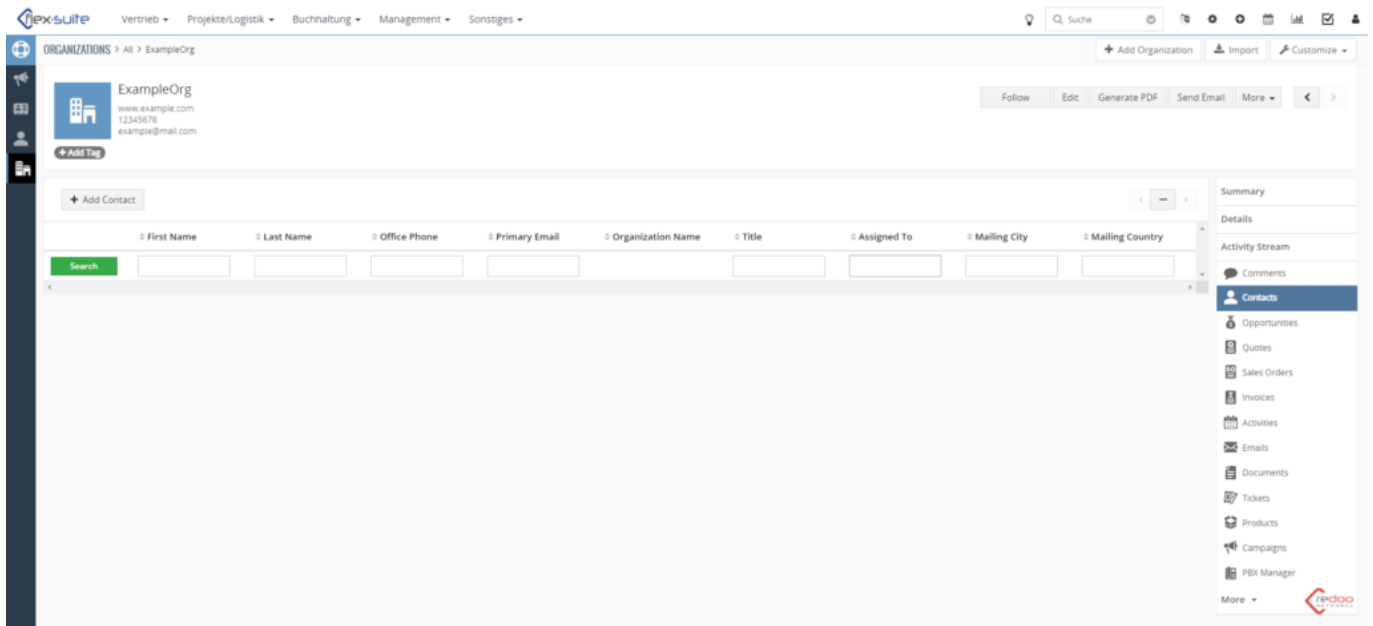
Each link leads to a corresponding record that has a relation to the Activities that were made



This section allows you to see all module records related to the one you are viewing



As an example lets go to the **Contacts** page



There are no records here for now as we did not add any entries to our test organization

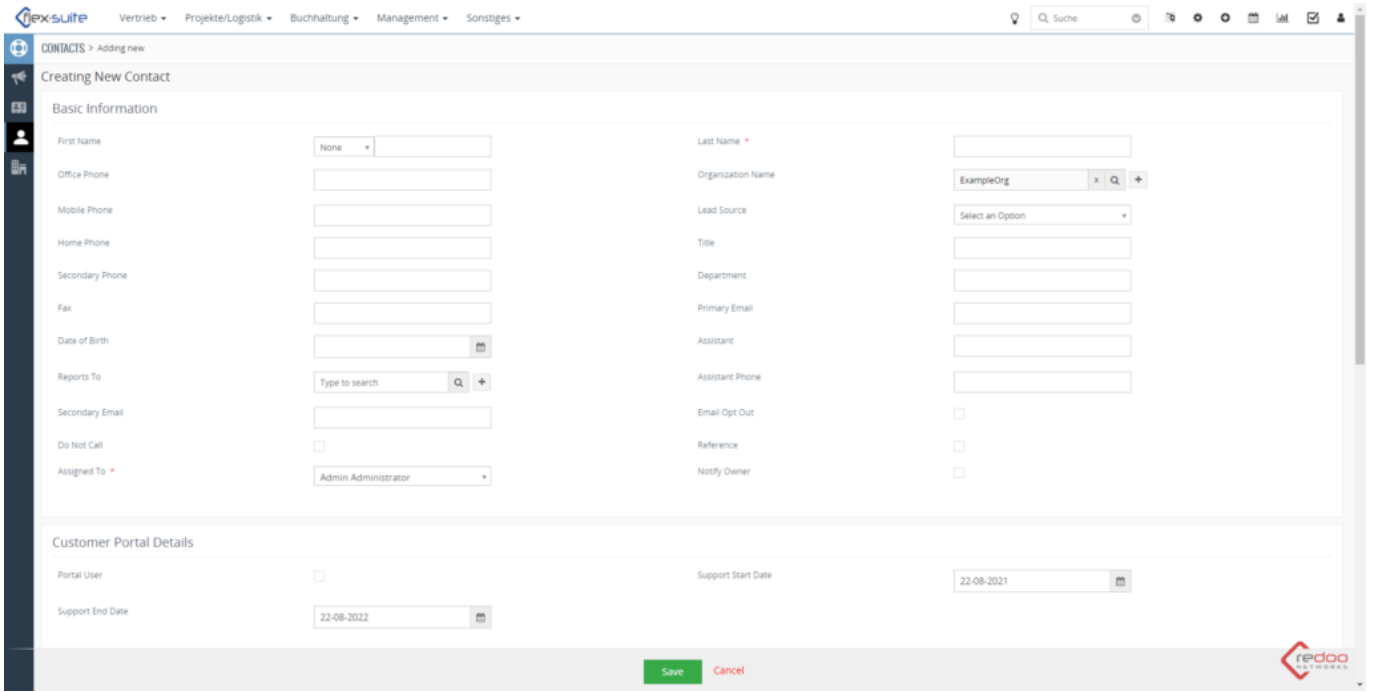
To add a contact press the plus button “Add Contact”

A Quick Create Contact form has appeared

Here you can create a Contact record that will be related to your Organization in a quick way, adding only necessary information

You can also move to the full form by pressing the “Go to full form” button below

This will lead you to the form that would open as if you decided to create a new Contact entry from the Contacts view page, but with Organization Name field set to the Organization that you were creating a contact from



Lets save a new contact

Now you can see the Contact we have just saved listed here.

In the right corner you can see the number of entries related to your Organization, after we created a Contact, the number increases from zero to one.

