

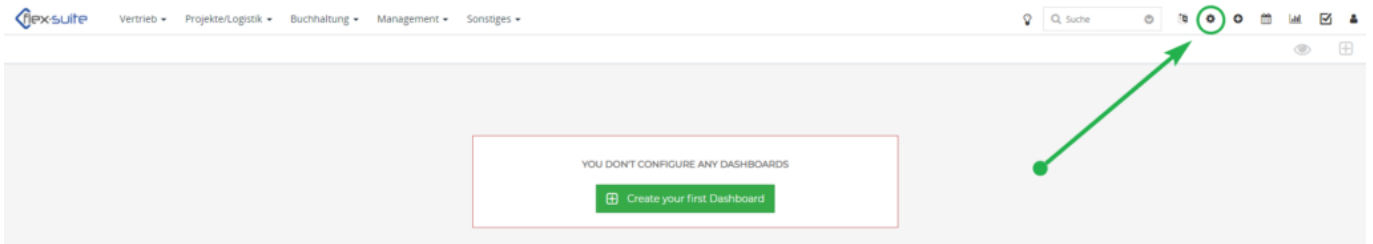


# Flexx.Suite

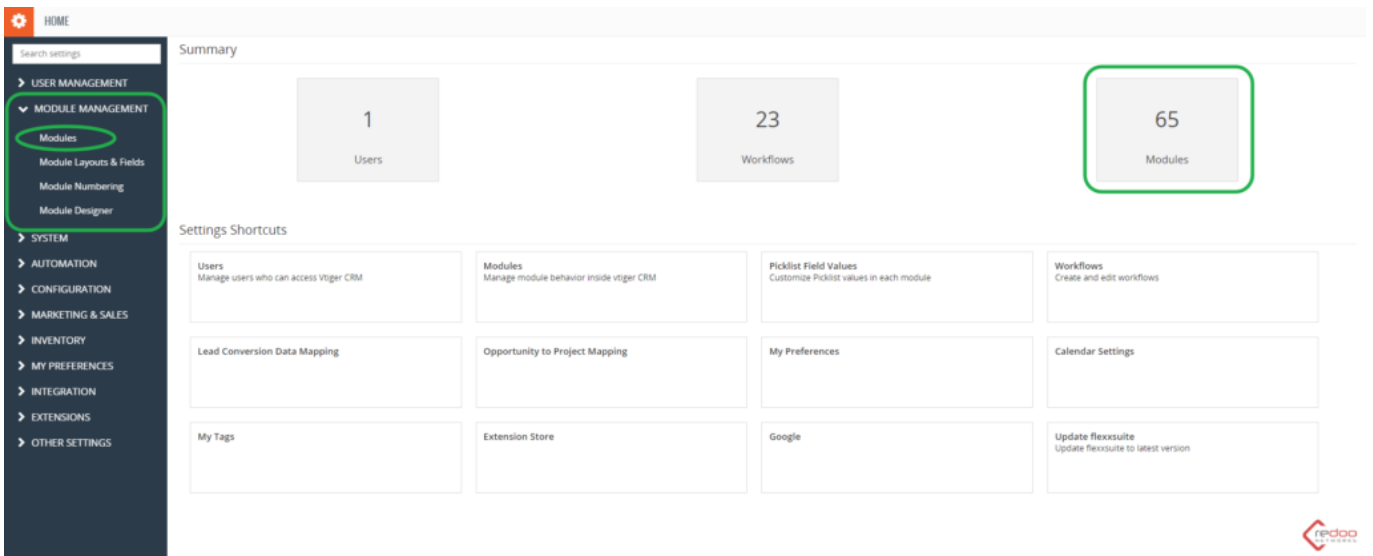
## 8.Module management

To get to the Module management page firstly you have to enter the Settings page

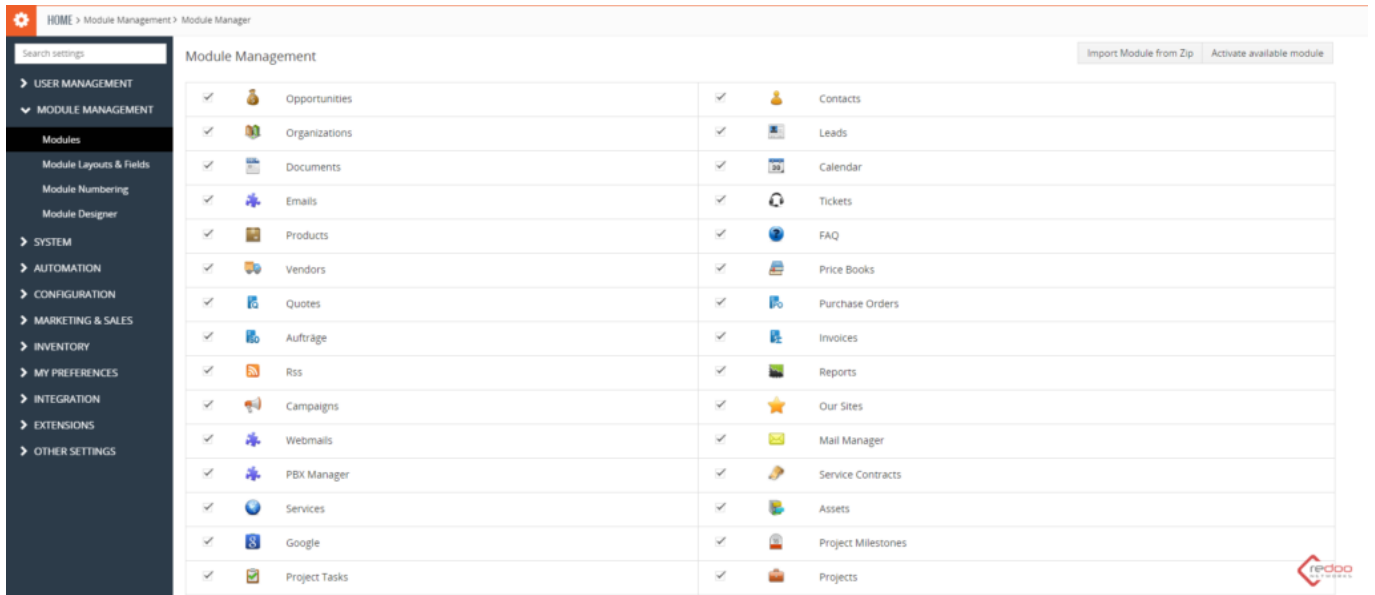
Click on the gear symbol like shown in the image



Now you have two options: First - is to open a Module Management layout and click on "Modules". Second - click on the "Modules" square in the right corner of the page

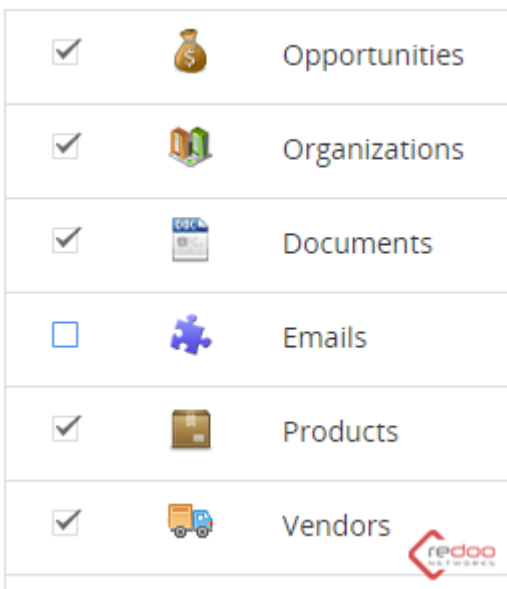


Here you can see the list with all basic or customly added modules



Here, by using the hooks placed beside the Module names, you can determine if the Module is visible in CRM or is it deactivated.


(Modules that has the hook set are available)



To import a new Module click on the “Import Module from Zip” button

Module Management Import Module from Zip Activate available module

<input checked="" type="checkbox"/>		Opportunities	<input checked="" type="checkbox"/>		Contacts
<input checked="" type="checkbox"/>		Organizations	<input checked="" type="checkbox"/>		Leads
<input checked="" type="checkbox"/>		Documents	<input checked="" type="checkbox"/>		Calendar
<input checked="" type="checkbox"/>		Emails	<input checked="" type="checkbox"/>		Tickets
<input checked="" type="checkbox"/>		Products	<input checked="" type="checkbox"/>		FAQ
<input checked="" type="checkbox"/>		Vendors	<input checked="" type="checkbox"/>		Price Books



To start the import process set a hook for accepting the disclaimer and press just appeared blue button “Select from My Computer”

HOME > Module Management > Module Manager

Search settings


Import Module from Zip

Disclaimer - Custom Files could put your CRM at risk  
This functionality has been made available for Developers to test new modules. If you are installing from a file provided 3rd party, please proceed only if you trust the publisher. Custom Modules could include security vulnerabilities and overwrite system files putting your CRM at risk. The module you are about to install has not been reviewed by Vitiger.

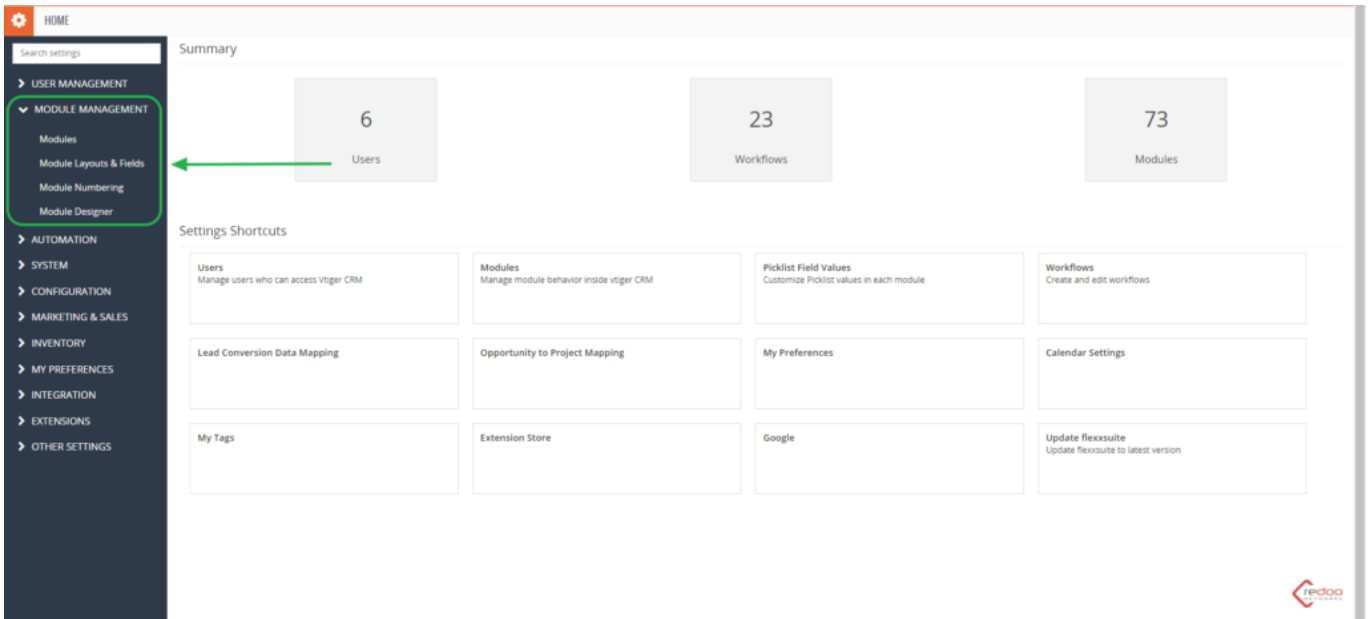
I accept with disclaimer and would like to proceed

Select from My Computer

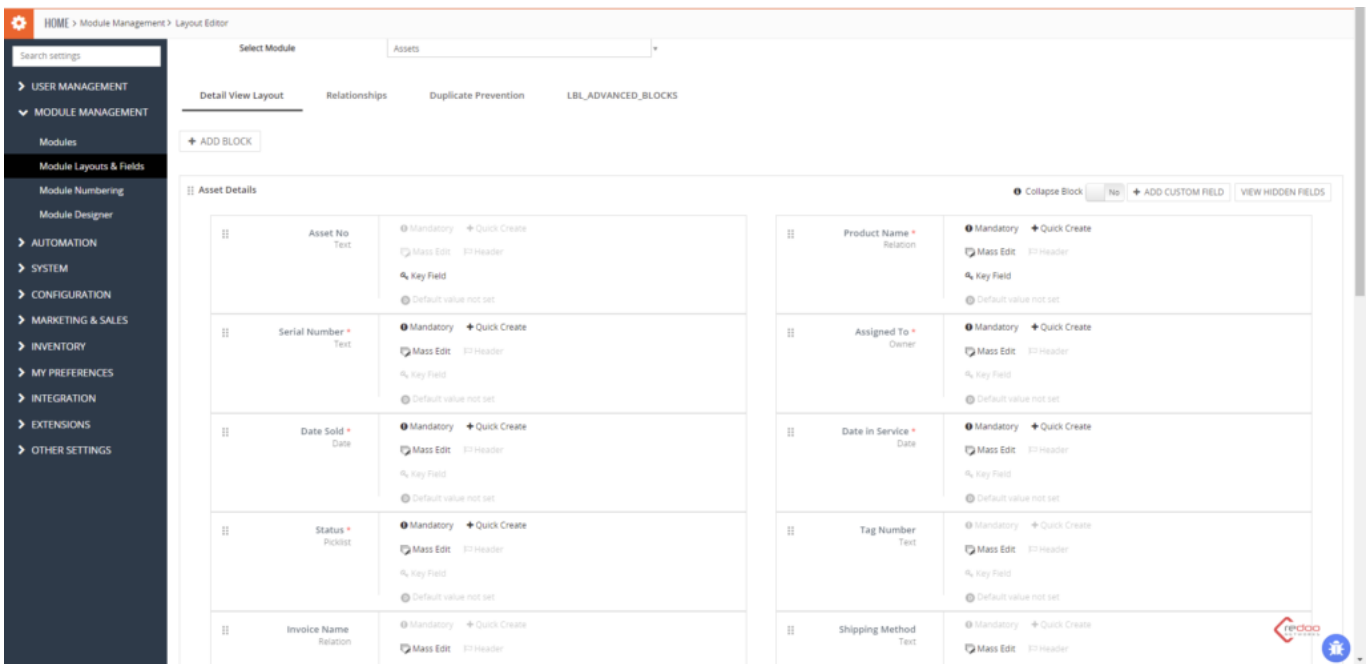
- > USER MANAGEMENT
- ▼ MODULE MANAGEMENT
  - Modules
  - Module Layouts & Fields
  - Module Numbering
  - Module Designer
- > SYSTEM
- > AUTOMATION
- > CONFIGURATION
- > MARKETING & SALES



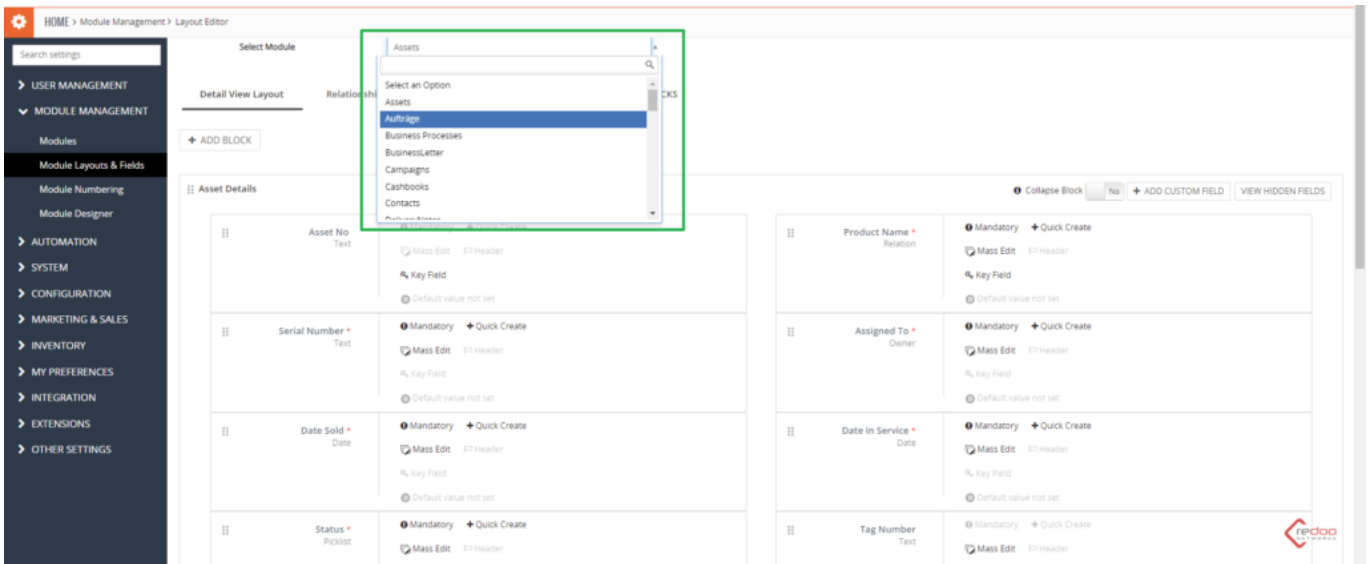
## Module Layouts & Fields



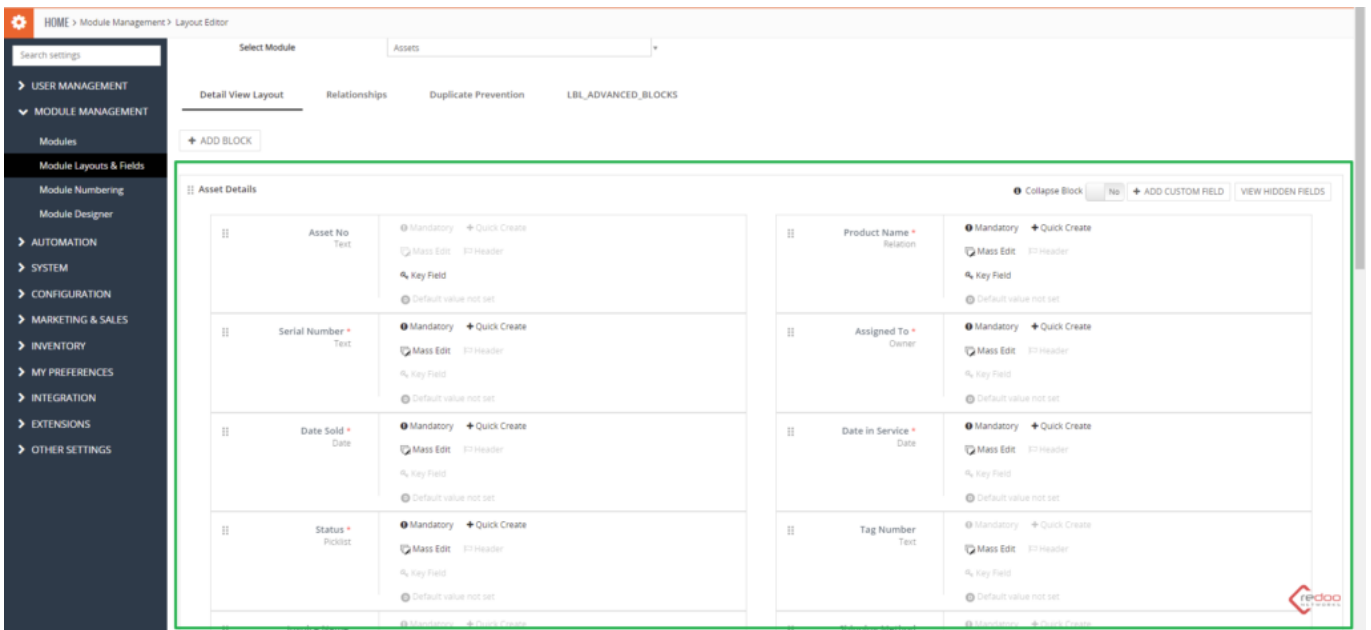
This section is used particularly for customizing Fields for any module within the CRM



First step is to select a Module

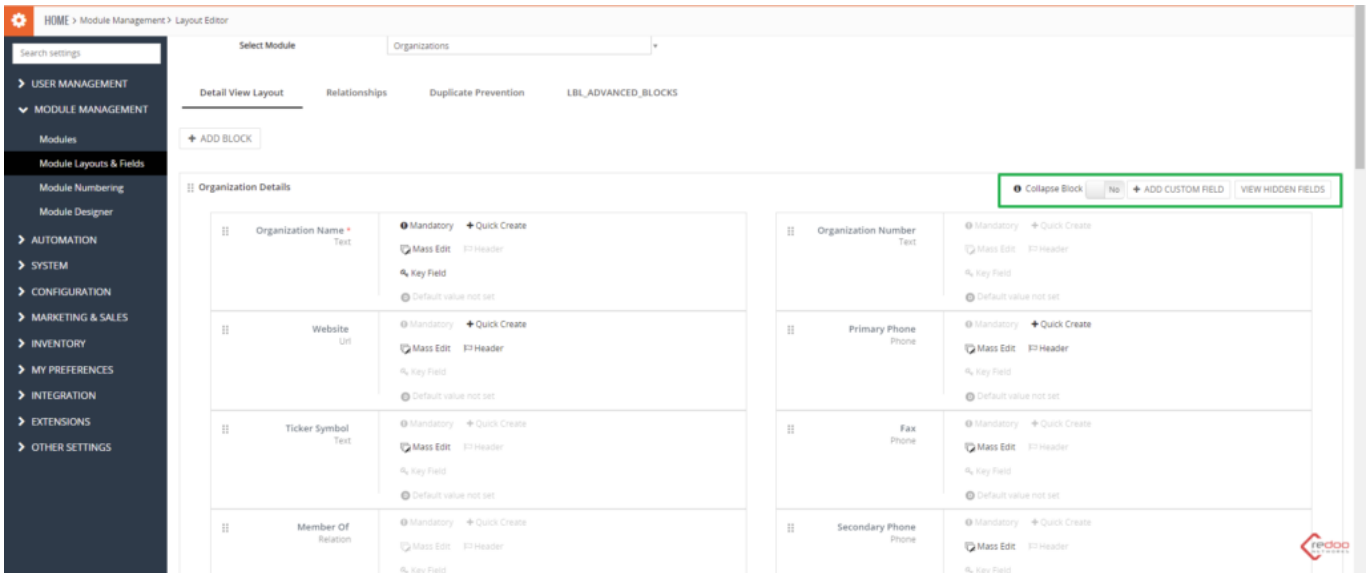


Next is Asset Details

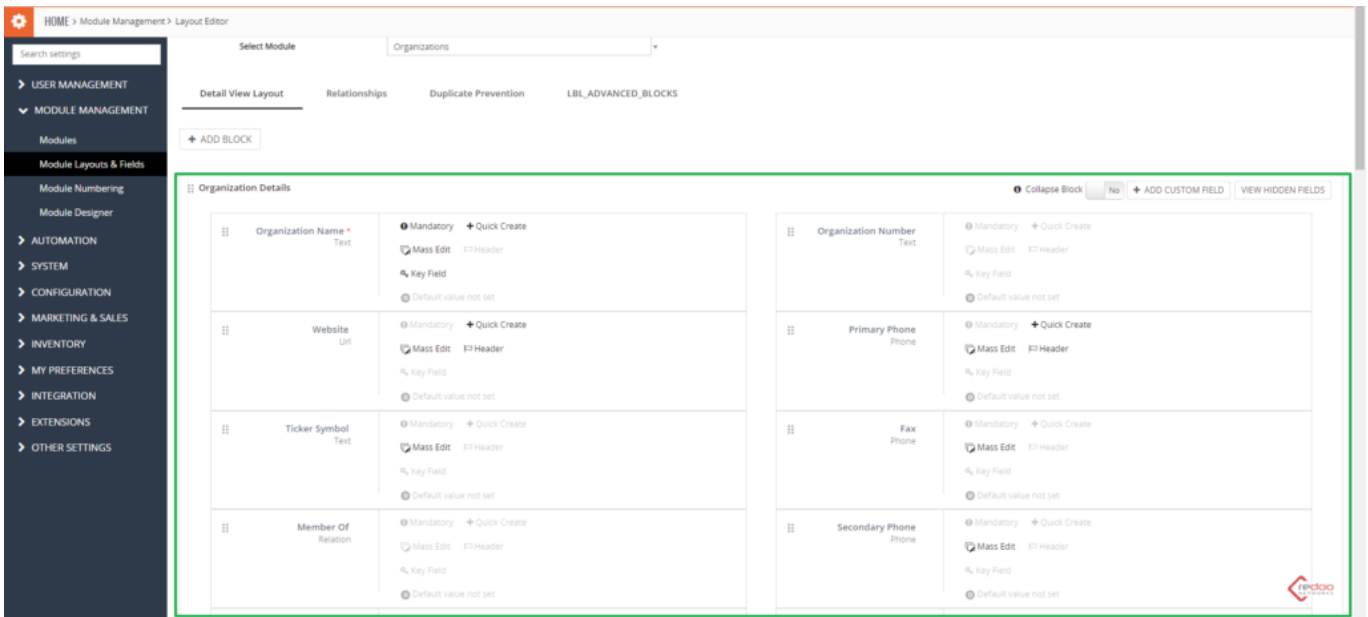


In that part there are three activity buttons corresponding for:

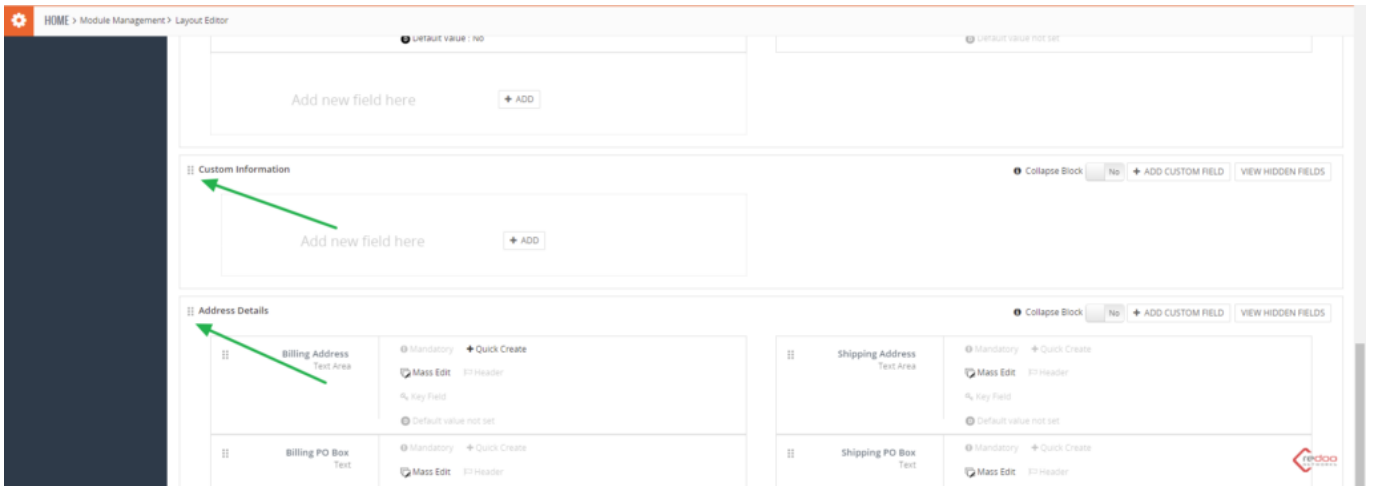
- Collapse block
- Add Custom Field
- View Hidden Fields



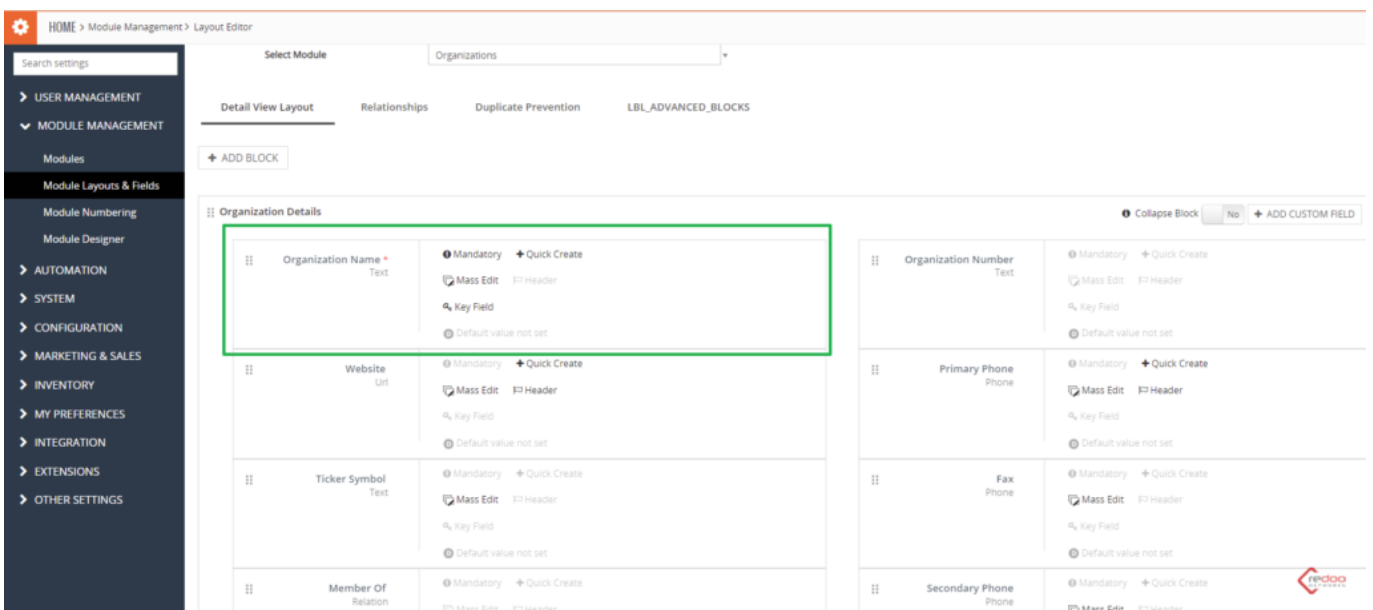
All of the fields are grouped in blocks like shown in the image



You can move blocks via drag and drop using these signs



Every field has its own properties that you can see in here



Firs one goes the name and then the field type



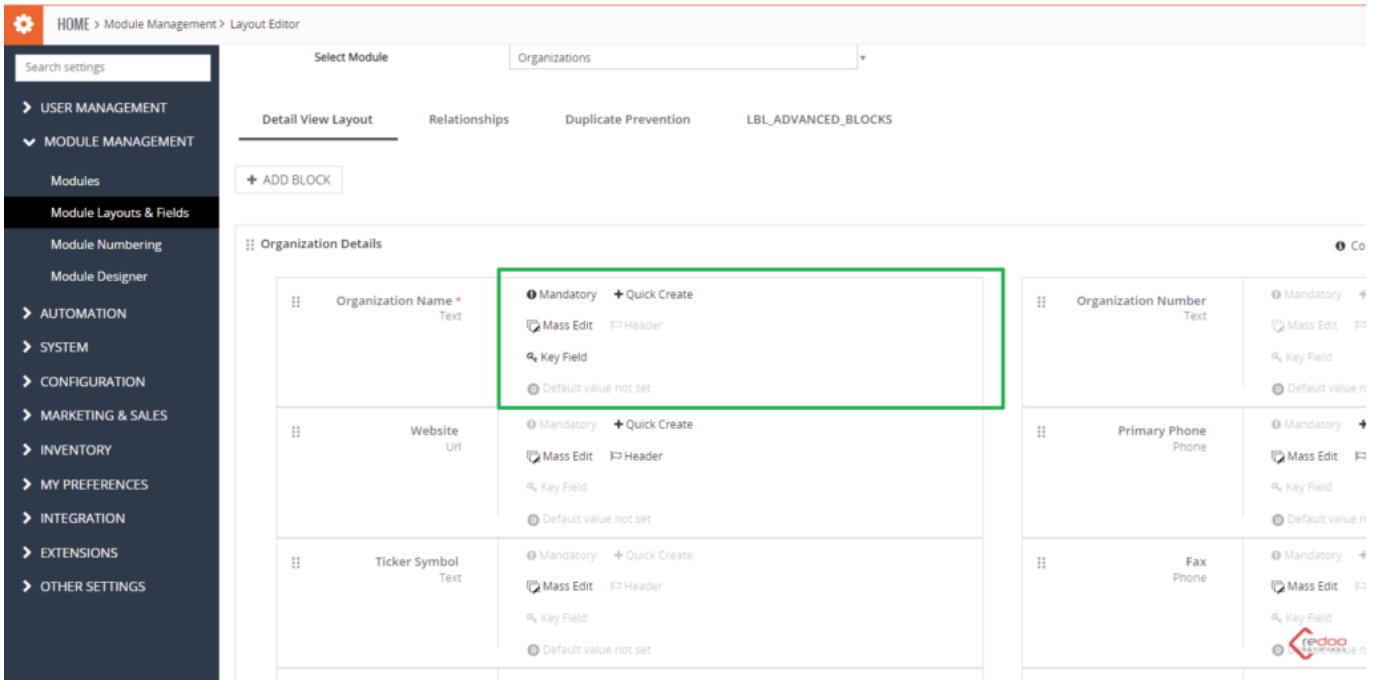
The screenshot displays the 'Module Management' interface in Flexx.Suite, specifically the 'Layout Editor' for the 'Organizations' module. The left sidebar contains a navigation menu with categories like 'USER MANAGEMENT', 'MODULE MANAGEMENT', 'AUTOMATION', 'SYSTEM', 'CONFIGURATION', 'MARKETING & SALES', 'INVENTORY', 'MY PREFERENCES', 'INTEGRATION', 'EXTENSIONS', and 'OTHER SETTINGS'. The main area shows the 'Organization Details' layout with a grid of fields. A green arrow points to the 'Organization Name' field, which is highlighted with a green underline. The fields and their properties are as follows:

Field Name	Type	Mandatory	Quick Create	Mass Edit	Header	Key Field	Default Value
Organization Name	Text	Yes	Yes	Yes	Yes	Yes	Not set
Website	Uri	Yes	Yes	Yes	Yes	Yes	Not set
Ticker Symbol	Text	Yes	Yes	Yes	Yes	Yes	Not set
Member Of	Relation	Yes	Yes	Yes	Yes	Yes	Not set

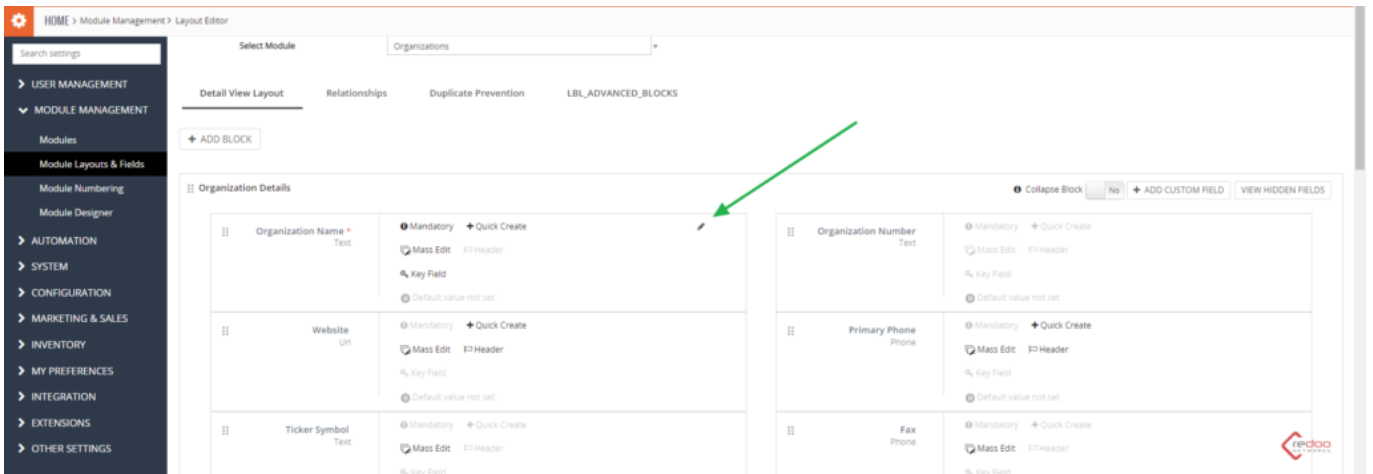
Other visible fields include 'Organization Number' (Text), 'Primary Phone' (Phone), and 'Secondary Phone' (Phone). The 'Secondary Phone' field has a red 'redoo' logo next to it.

Then goes the main properties of the fields like:

- Mandatory (yes/no)
- Quick create option
- Mass edit
- Header
- Key field (yes/no)
- Default value set/not set



To edit a Field press this pencil button



When adding a new custom field you should firstly select a field Type,

then enter Label Name and Length,

there is also an option to set a default value, but this field can be left untouched if the default value is not needed.

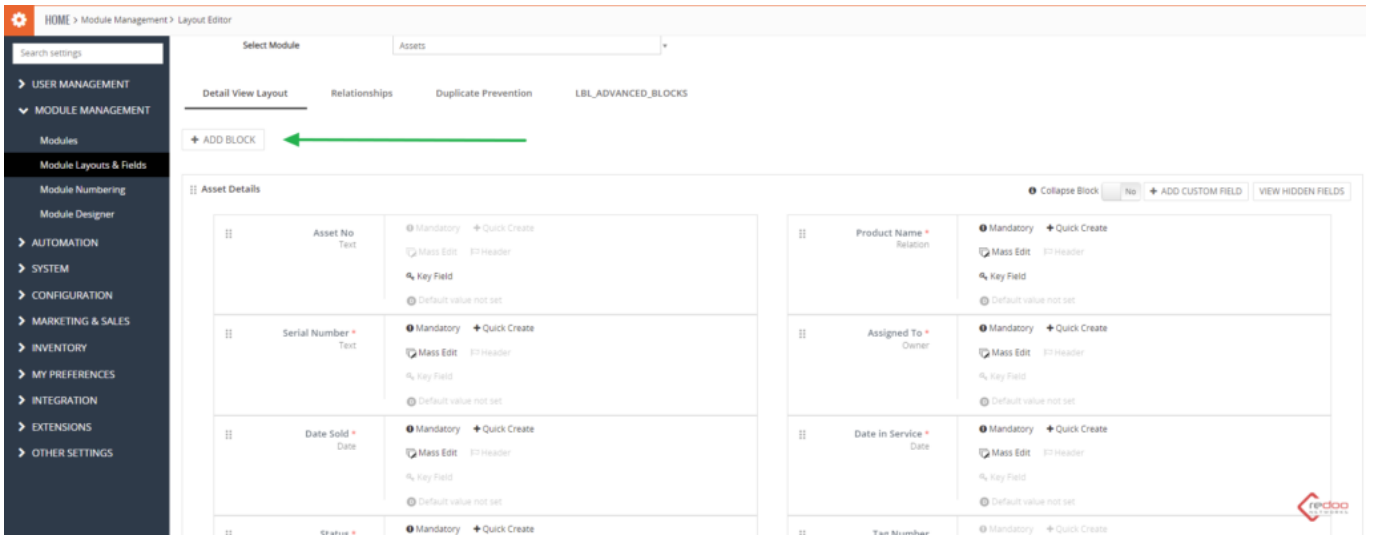
Then enable all desired properties and save.

The screenshot shows the 'Create Custom Field' dialog box in the Flexx.Suite interface. The dialog is positioned over a table of field configurations. The dialog's title bar reads 'Create Custom Field' and includes a close button. The main content area contains the following elements:

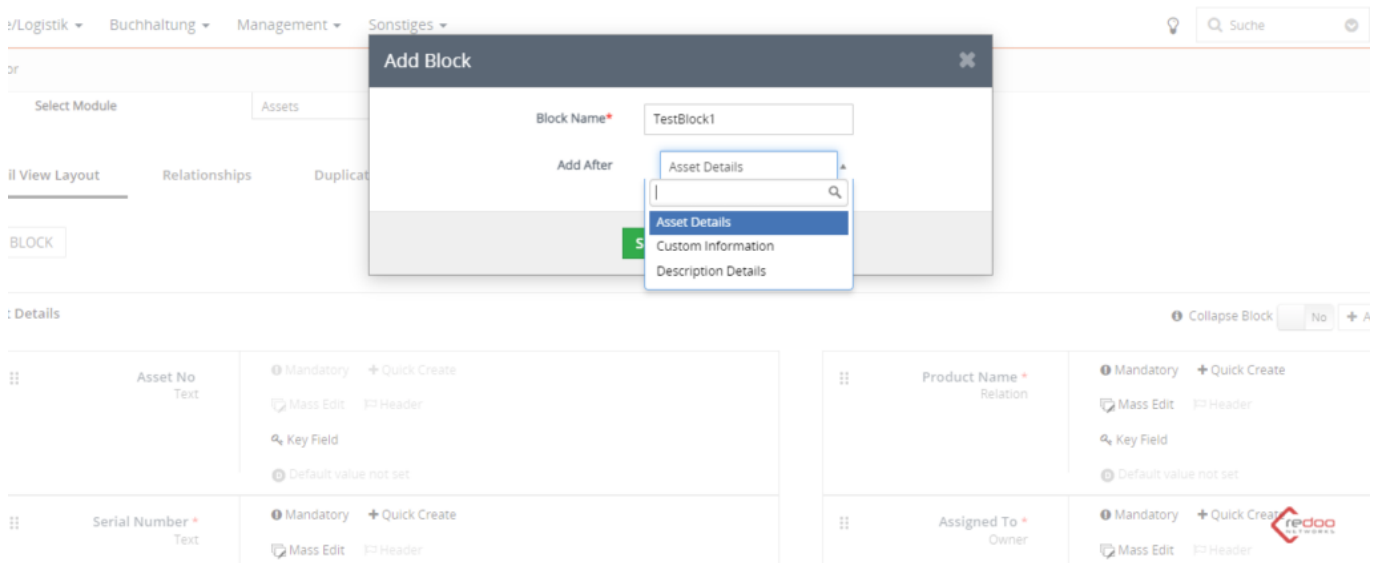
- Select Field Type:** A dropdown menu currently set to 'Text'.
- Label Name \*:** An empty text input field.
- Length \*:** An empty text input field.
- Default Value:** An empty text input field.
- Enable / Disable field properties:** A section with several checkboxes:
  - Mandatory Field:**
  - Key Field View:**
  - Mass Edit:**
  - + Quick Create:**
  - Header View:**
- Buttons:** A green 'Save' button and a red 'Cancel' button at the bottom.

The background table shows various field configurations for different entities, including 'Organizations', 'Relationships', 'Member Text', 'Website Url', 'Member Symbol Text', 'Member Of', 'Phone', 'Fax Phone', and 'Secondary Phone'. Each row lists field properties like 'Mandatory', 'Quick Create', 'Mass Edit', 'Key Field', and 'Header View'.

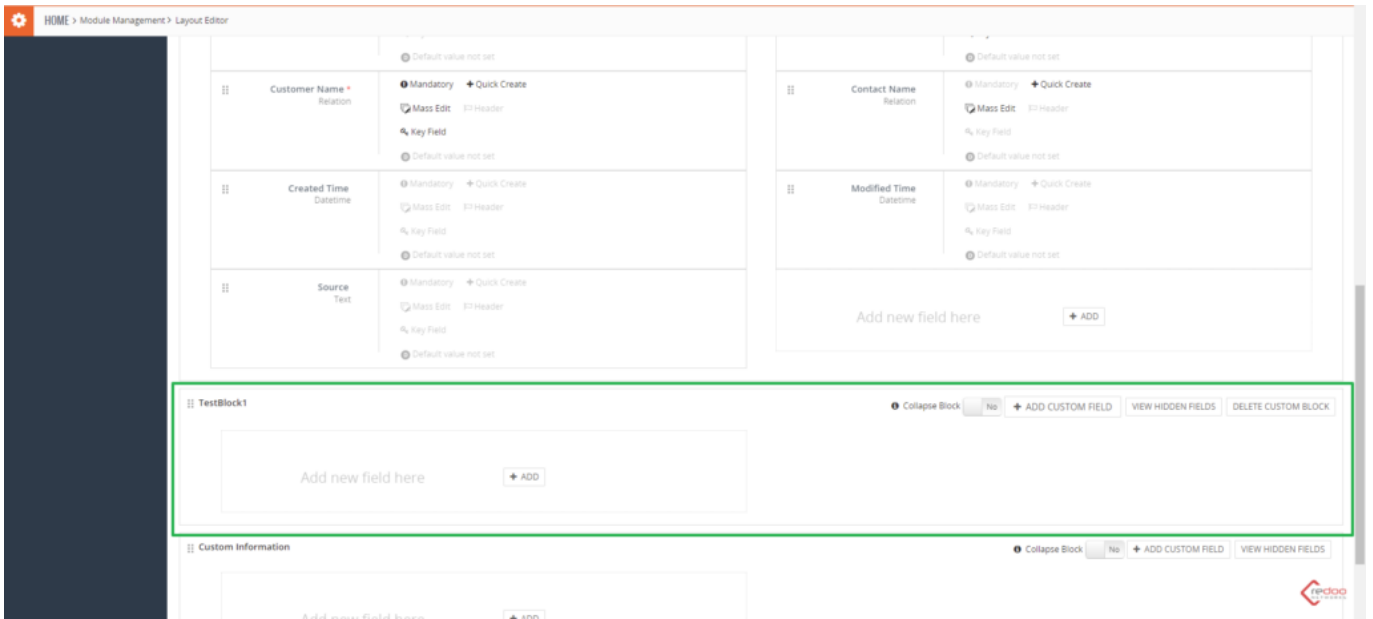
Using this button you can create a new block



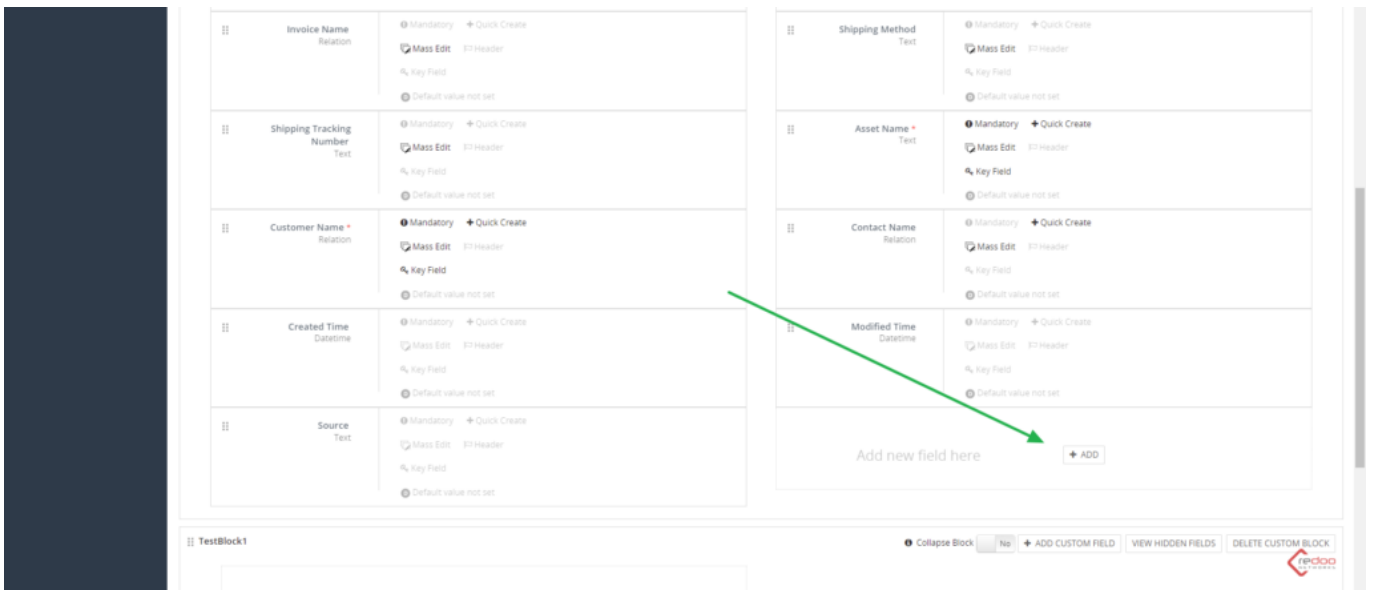
In the opened window enter Block`s Name and what it is add after



Newly created block will be then displayed on the page

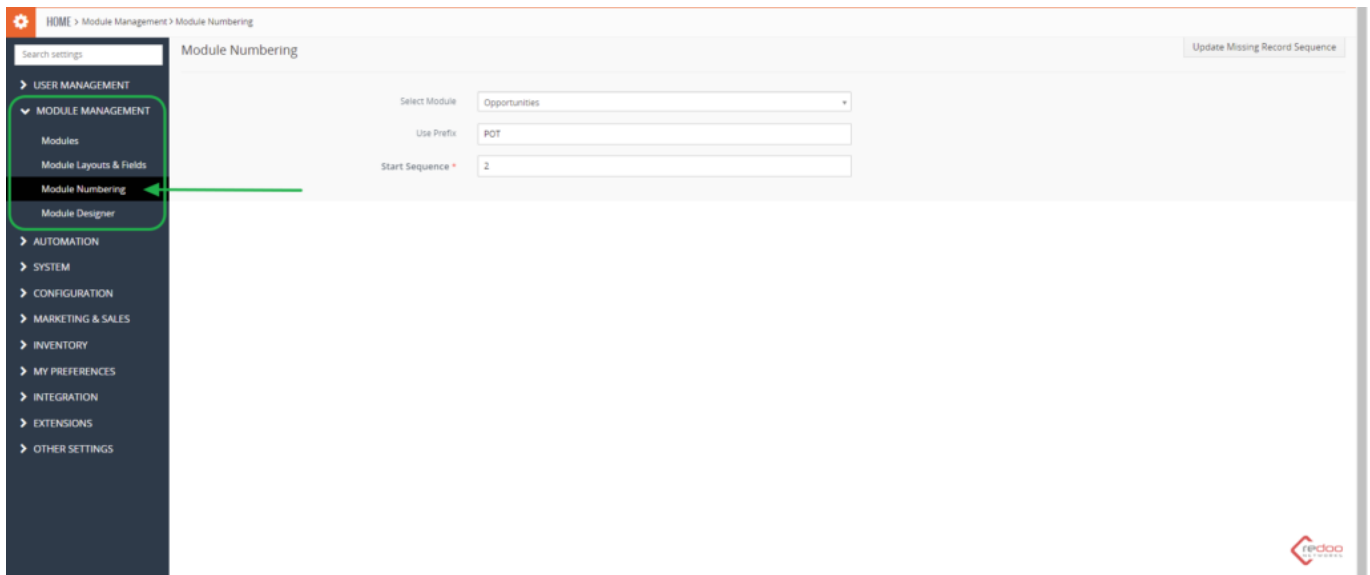


To add a new field press the "Add" button in the end of the block



## Module Numbering

Next section of Module Management is **Module Numbering**



HOME > Module Management > Module Numbering

Search settings

Module Numbering Update Missing Record Sequence

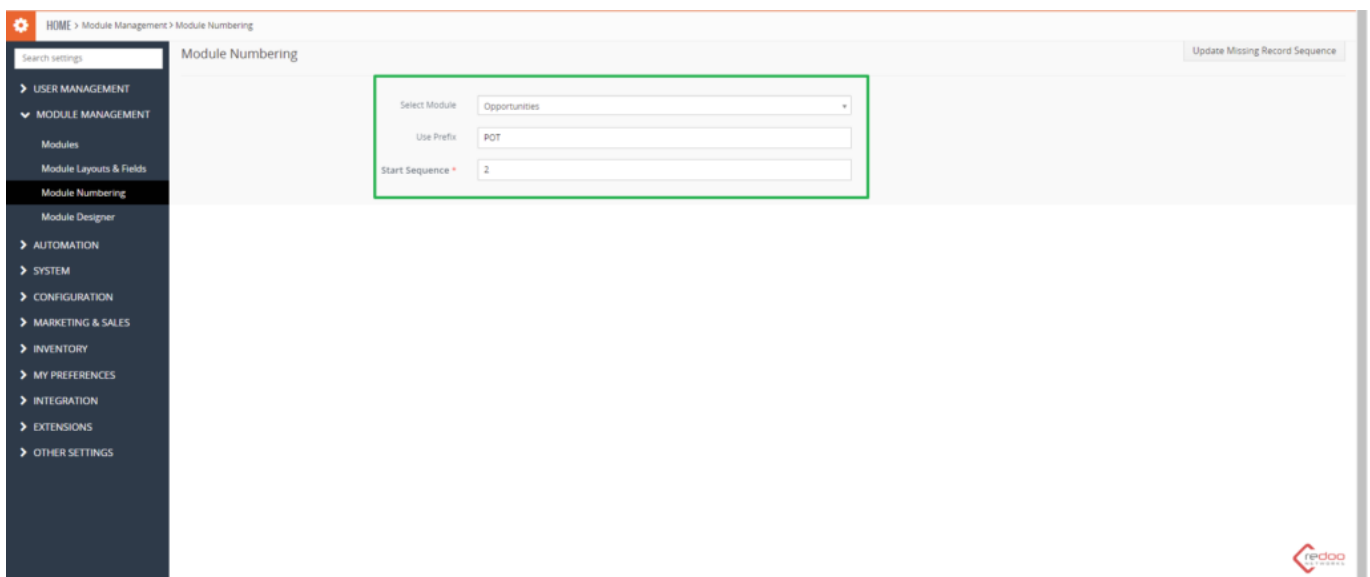
Select Module: Opportunities

Use Prefix: POT

Start Sequence: 2

redoo

Here you can set a Prefix and Start Sequence for each module of the CRM



HOME > Module Management > Module Numbering

Search settings

Module Numbering Update Missing Record Sequence

Select Module: Opportunities

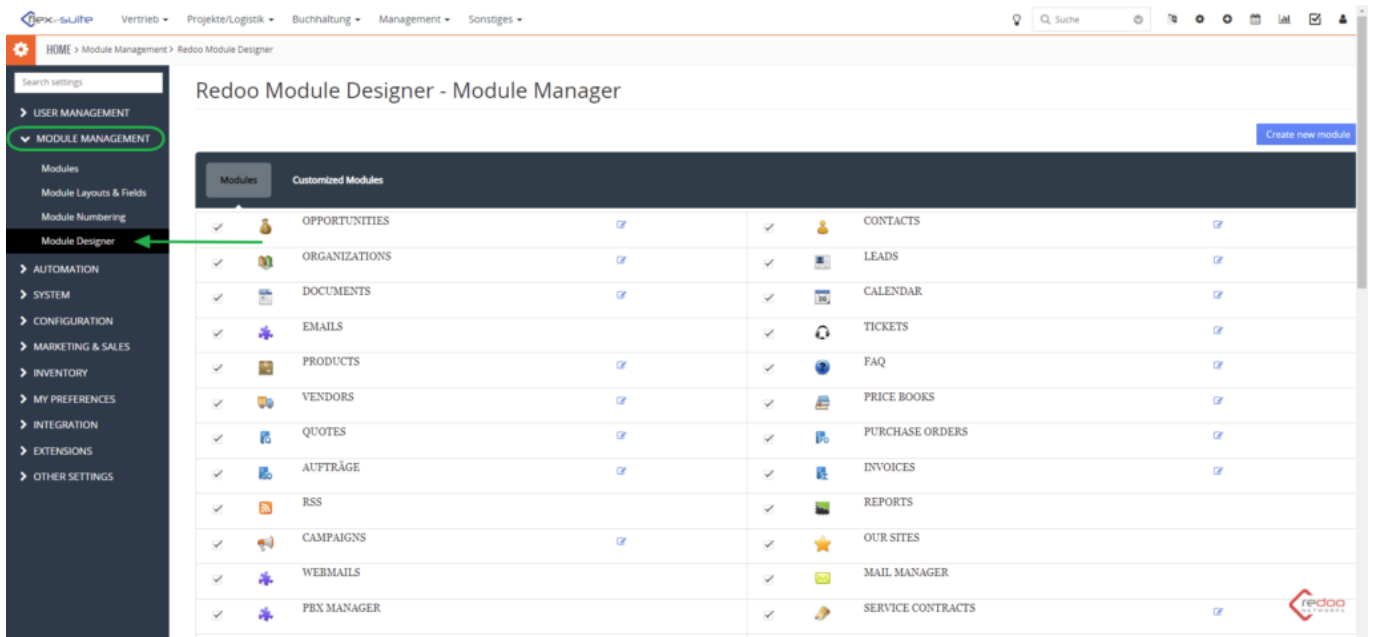
Use Prefix: POT

Start Sequence: 2

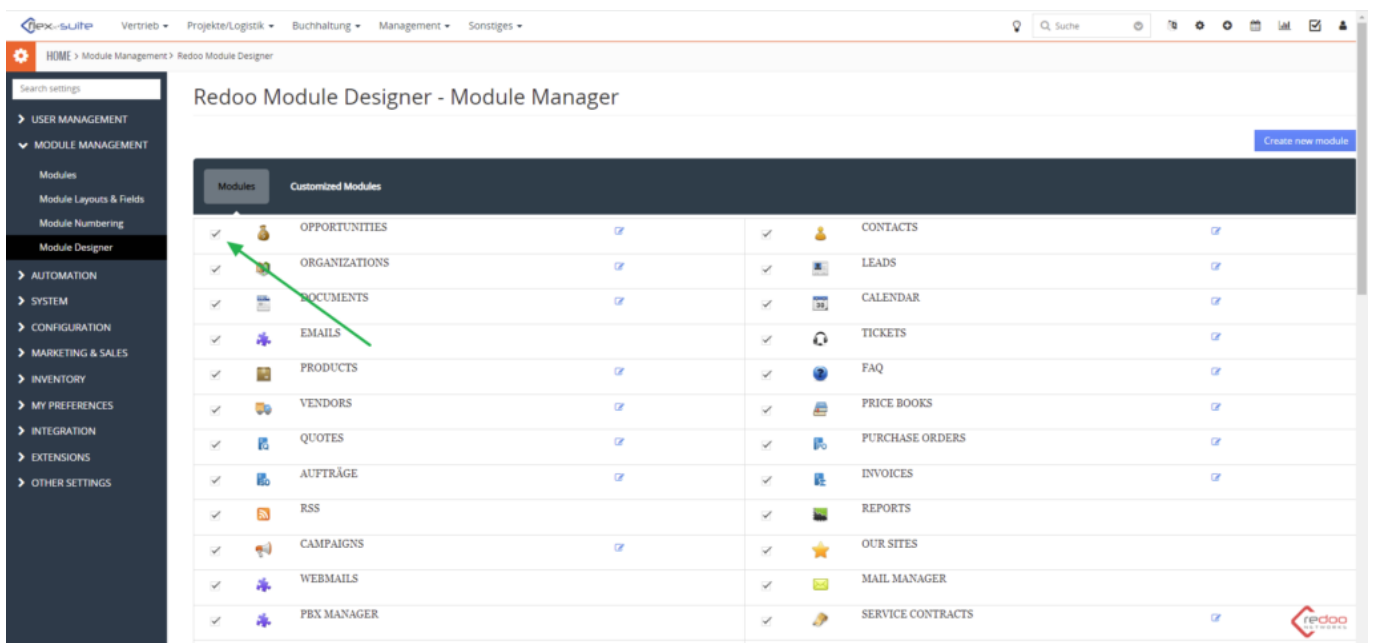
redoo

## Module Designer

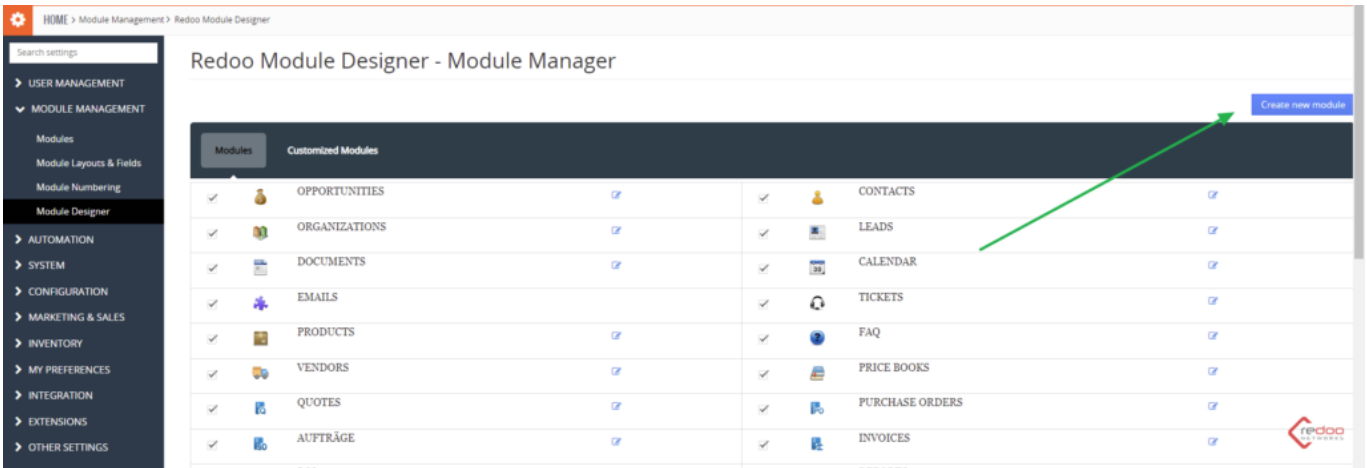
Here you can see the list of all modules within your CRM and create your personal one



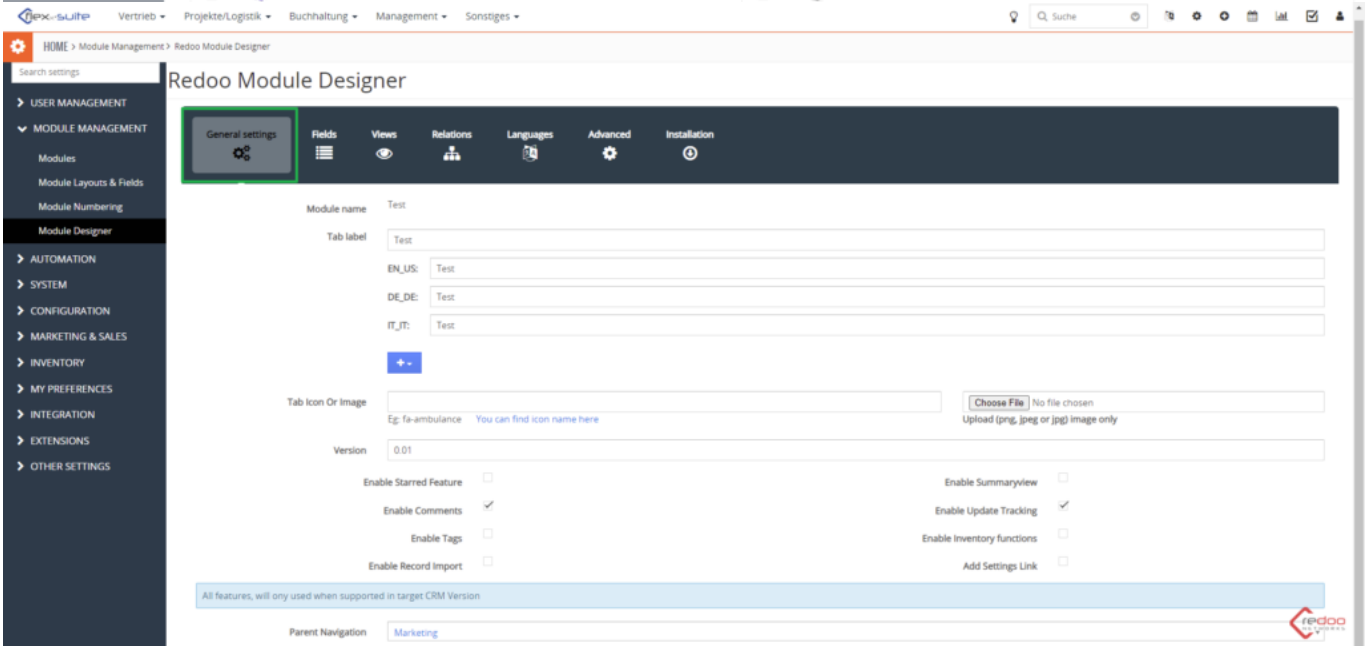
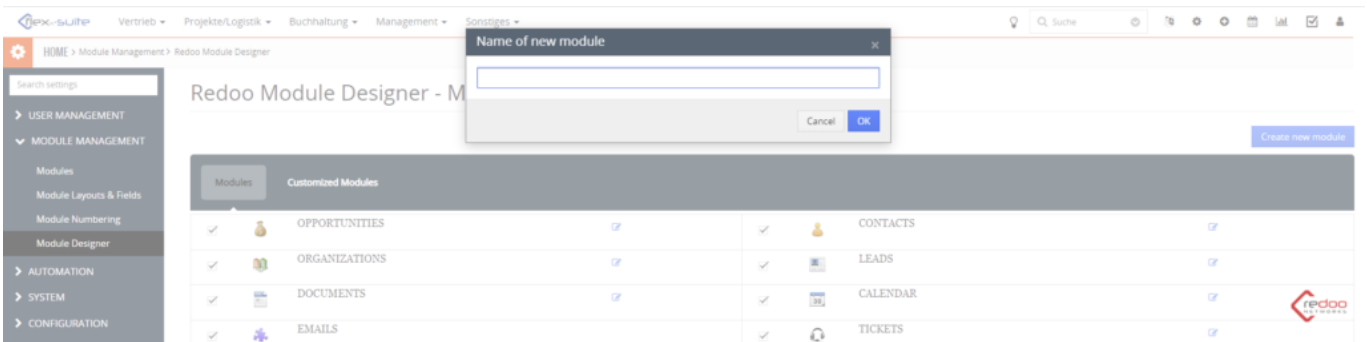
By setting a check mark near the Module you can make it available or disable it



To create a new Module press the corresponding button like shown in the image



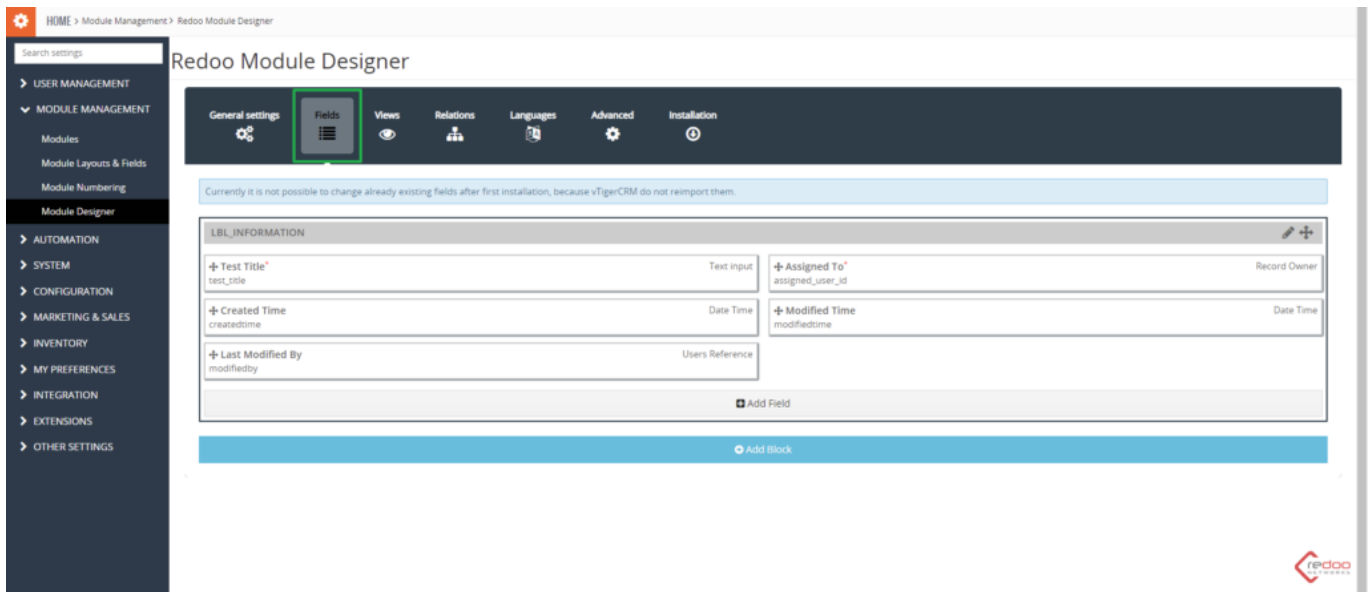
On the first step you will have to set the name



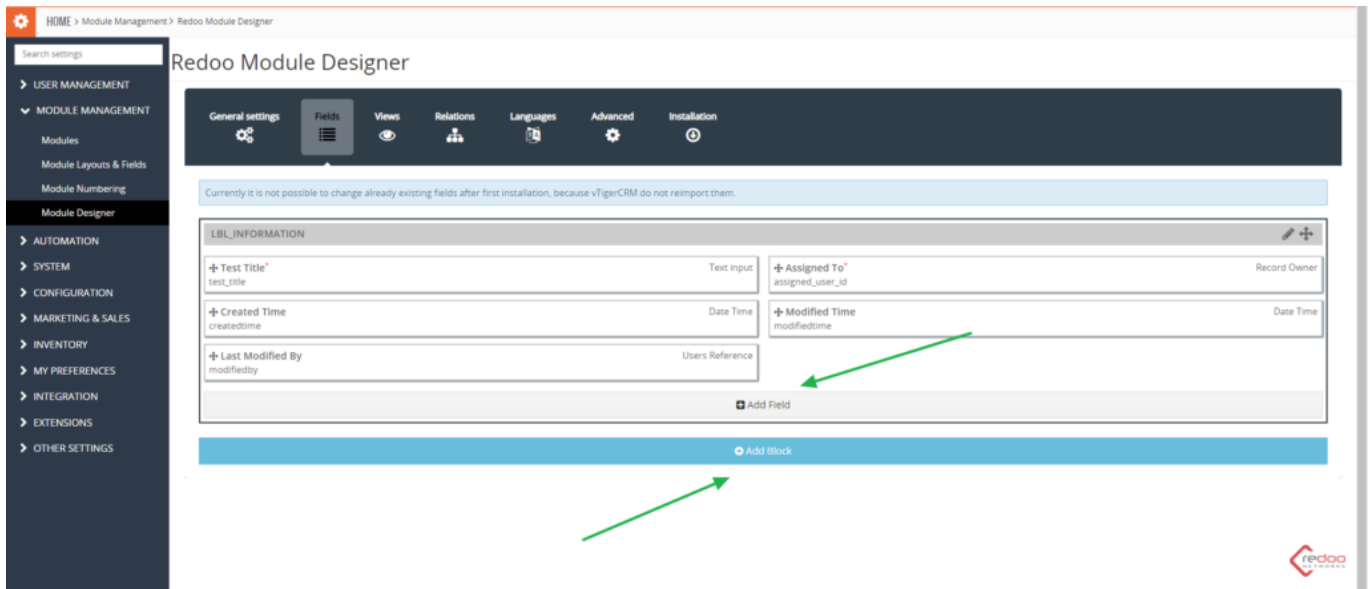
In Fields you can see some basic fields used in most records of different modules within the CRM



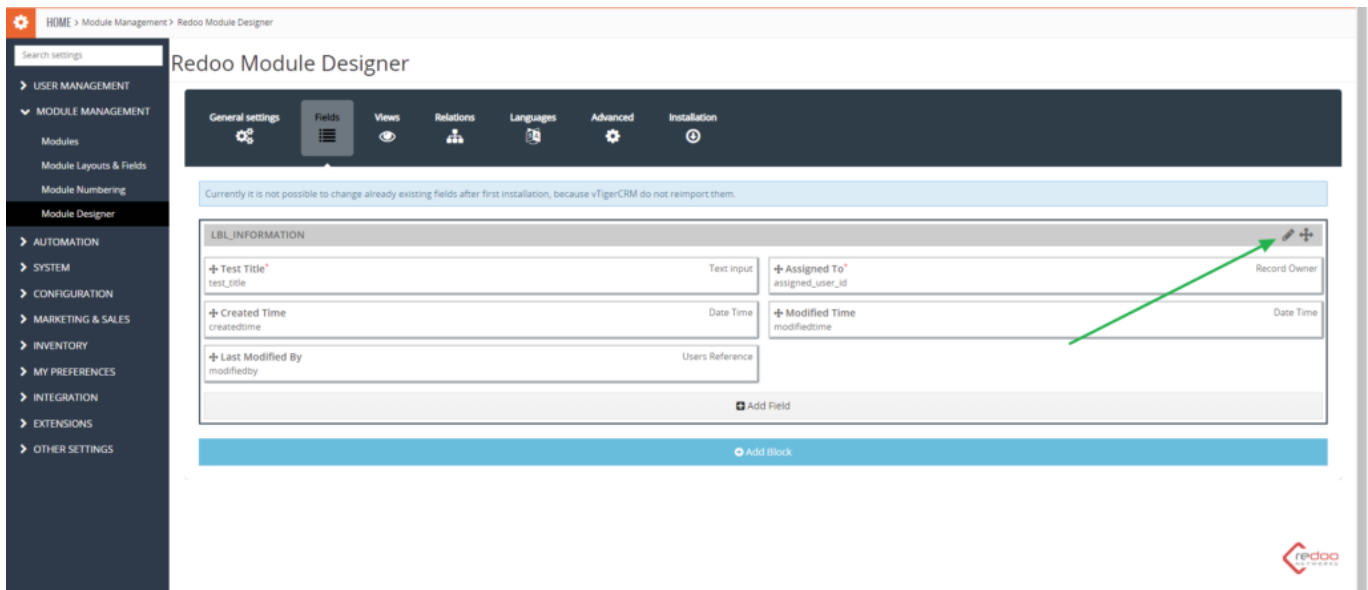
You can move them around via the block they are in via drag and drop



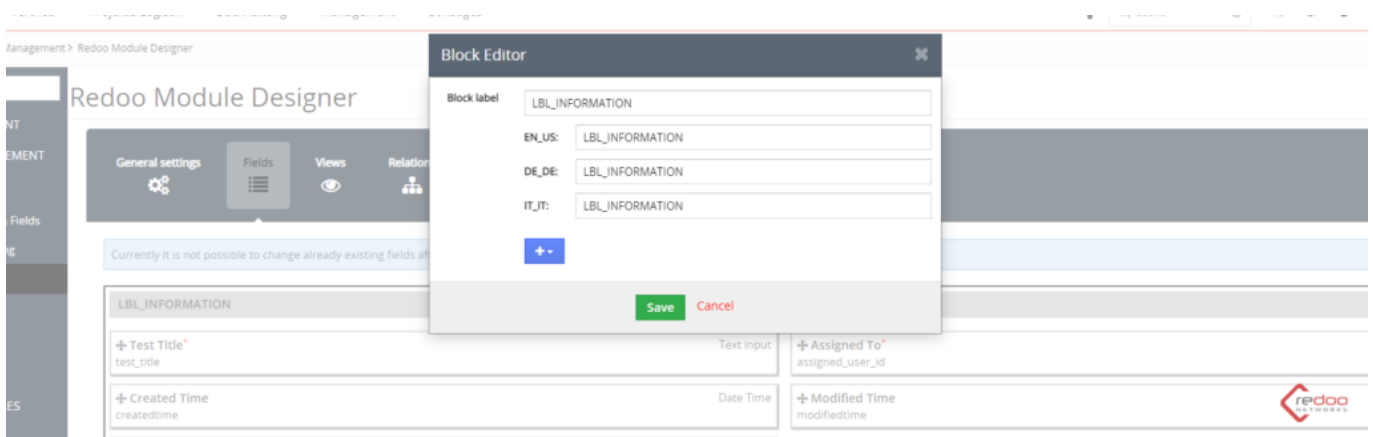
To add a new field within the block or to add a new block with fields use “Add Filed” and “Add Block” buttons



To edit a block press this edit sign like shown in the image



In the opened window you are able to configure Block label and it's variations in different languages



When creating a field first step is to set it`s type

Next is to create a Field label and a Fieldname

Below that you have an opportunity to set a Default value, Maximum length and a DataBase Table and Column which will then be used in the DataBase of the CRM itself

Last settings are for the Listview Style and for field visibility in different parts of the module

The screenshot shows the Redoo Module Designer interface with a 'Field Editor' dialog box open. The dialog box contains the following fields and options:

- Fieldtype: 1 - Text Input
- Field label\*: [Empty text box]
- EN\_US: [Empty text box]
- DE\_DE: [Empty text box]
- IT\_IT: [Empty text box]
- [Add field button: +]
- Fieldname\*: [Empty text box]
- Do not update field settings after creation:
- Default value: [Empty text box]
- Maximum Length: 100
- DB Table\*: vtiger\_test
- DB Column\*: [Empty text box]
- Listview Style: Default Listview Style
- Show in Summary:
- Show in EditView:
- Show in Quick create:
- Used as Record Label:
- Show in Header:
- Show in DetailView:
- Show in Mass edit:
- Default Sort in Listview:
- Mandatory Field:

Buttons at the bottom: Save (green), Cancel (red).

