New options on what to show on the organisation main view

Multiple aspects have been changed for the main view for organisations (the customer card). This has been done to improve the overview of the organisation information and have more control of which information is shown and where.

PLEASE NOTE! The new mainview options will be activated the next time you enter the customer record configuration and hit save. Your current configuration will be replaced, and the new customer record will be activated.

The following changes have been implemented for the main view of organisations:

- All entity boxes can show up to 5 fields about each entity

- The entity box for products can show up to 10 fields about each product

- The boxes with information about entities, general information etc. can be drag'n'dropped to the correct place during configuration of the set-up

- There is no limit on how many boxes can be shown on the main view

- It is possible to define the main view depending on the Type of the organisation. E.g. the main view can look different for leads, customers and partners.

- It is possible to remove the "data type box" completely

- In the header, up to 10 fields can be shown with name and value

- Connected relations are now displayed as a relation tree on the main view for organizations (If there are relations connected)

Examples:

Main view – header

Main view – boxes

Pictures above presents selected activity boxes and 2 information boxes with individual selected content and placement for all boxes. Thus, means you can choose were the box should be placed on the page (under data type and header) and choose data from all the customer fields.

Main view – boxes continued

Information		
Område: Sjælland	**Ansvarlig:** Axel Kihlgren	
Type: Kunde	**Branche:** Andet	
Status: Detail	**Postnummer:** 2100	
By: København Ø	**Land:** Danmark	

Økonomi		
Omsætning: 0	**DB:** 18.192	
EBIT: 6.673	**Overskud:** 5.201	
Egenkapital: 3.129	**Selskabsform:**	
Hovedkontor (j/n):	**Etableret dato:** 10-02-2000	

3 to do's ➕

✏️	05-02-2019	TP	**Beskrivelse:** **Ansvarlig:** Thomas webCRM **Dato og tid:** 05-02-2019 **Status:** Igangværende
✏️	08-05-2018	TP	**Beskrivelse:** Konsulentopgave **Ansvarlig:** Thomas webCRM **Dato og tid:** 08-05-2018 **Status:** Igangværende
			Beskrivelse:

21 møder ➕

✏️	📧	✉️	07-02-2019 08:00 1:00 T. TP	**Beskrivelse:** Møde **Status:** Bekræftet **Dato og tid:** 07-02-2019 08:00 **Varighed timer:** 1:00
✏️	📧	✉️	30-01-2019 08:00 1:00 T. TP	**Beskrivelse:** Møde **Status:** Bekræftet **Dato og tid:** 30-01-2019 08:00 **Varighed timer:** 1:00

12 pipelines ➕

✏️	12-02-2019 0004	**Pipeline niveau:** 13 **Ansvarlig:** Thomas webCRM **Omsætning:** 550,00 **Beskrivelse:** Tilbud på Produkt X **Hoved produkt/service:** -- vælg --
✏️	31-12-2018 0099	**Pipeline niveau:** 1 **Ansvarlig:** Thomas webCRM **Omsætning:** 0,00 **Beskrivelse:** Realiseret omsætning 2018

14 personer ➕

✏️	✉️	Axel Kihlgren	**Status:** Aktiv **Jobtitel:** **Mobiltelefon:** **Jobfunktion:** --vælg-- **Fødselsdag:**
✏️	✉️	Bengt Kihlgren	**Status:** Aktiv **Jobtitel:** **Mobiltelefon:** **Jobfunktion:** --vælg-- **Fødselsdag:**
			Status:

Continued view for selected example boxes on the Main view.

Headers and information in activity boxes

As it shows on the Picture above it can be displayed up to 5 customer fields with information in the right side of the task box and these are now shown with header and information.

Related relationships – relation tree

Related relations is now display as a Relation tree on the main view for organizations. The setup is still maid in the menu for relations. Click on the eye and the relation tree is displayed in a pop-up window.

Main view – setup

The setup menu for main view- from here, all boxes with their content and location are set up. The main menu setup menu - from here, all boxes with their content and location are set up. There is no limitation on how many boxes that can be displayed, but it is recommended to not over do it since the main view for Organizations risks becoming unmanageable.

Main view – setup drag and drop

Select, click and hold the marker button on a box and then drag'n'drop it to chosen place. This can either be where there already is a box, below it or next to it.

Main view – setup "Type field"

Set up a different view per chosen value in the "Type field". In the same way as it is possible to setup the boxes for individual users, it is now also possible to set up the layout based on the "Type field".