

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

**INTERLOGIC**
IT A/S

Division name: IT A/S
Telephone: 0982510305
www: www.interlogic.com.ua
Responsible: Jesper
Industry: Retail
Post code/ZIP: 79000



 Emails (28+7+35)	 Relations (0)	 Financial Information	 All data	 Support cases (3+4) 
 Support cases (3+4)	 Activities (6)	 Campaigns	 Meetings	 Contacts (6)
 Opportunities (12)	 Orders (5)	 Products (1+19)	 SMS (0+0)	 Documents (132)
 Punch cards (2)	 Test More fields			

Main view – boxes

✉ E-mails (3+0+1)

📄 Dokumenter (13)

👥 Relationer (4)

🔍 Alle data

🗨 Support cases (3)

🗨 Support cases (3)

📅 To do's (14+1)

🎯 Kampagner

📅 Møder 0+21

👤 Personer (19)

📄 Pipelines (7)

📦 Leverancer (5)

📍 Lokationer (7+4)

💬 SMS (0+0)

📄 Klippekort (0)

📍 NN Markedsdata

➕ +Felter

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: Ansvarlig: Thomas webCRM Dato og tid: 08-05-2018 Status: Igangværende

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

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	Seleksionsform:
Hovedkontor (j/n):	Etableret dato: 10-02-2000

3 to do's		
	05-02-2019	TP Beskrivelse: Thomas webCRM 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

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:

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 screenshot displays the 'Main view – setup' interface, which consists of four panels arranged in a 2x2 grid. Each panel has a title, a 'Status' dropdown menu, and a 'Vis:' section containing several fields. Each field has a dropdown menu and a red 'X' icon to its right, indicating it can be toggled on or off.

- To do's:** Status: Alle; Vis: Beskrivelse, Ansvarlig, Dato og tid, Status, -- Vælg --.
- Møder:** Status: Alle; Vis: Beskrivelse, Status, Dato og tid, Varighed timer, -- Vælg --.
- Pipelines:** Status: Alle; Vis: Pipeline niveau, Ansvarlig, Omsætning, Beskrivelse, Hoved produkt/service.
- Personer:** Status: Aktiv; Vis: Status, Jobtitel, Mobiltelefon, Jobfunktion, Fødselsdag.

At the bottom of the setup area, there is a dashed blue box containing the text 'Click to add more'.

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

The screenshot displays four widget configuration panels in a 2x2 grid. Each panel has a title, a 'Status' dropdown menu, and a 'Vis:' section with a list of fields and checkboxes. A red 'X' icon is in the top right of each panel. Below the panels are two dashed boxes and a blue button labeled 'Click to add more'.

Widget	Status	Field	Checked
To do's	Alle	Beskrivelse	✗
		Ansvarlig	✗
		Dato og tid	✗
		Status	✗
		-- Vælg --	
Personer	Aktiv	Status	✗
		Jobtitel	✗
		Mobiltelefon	✗
		Jobfunktion	✗
		Fødselsdag	✗
		-- Vælg --	
Pipelines	Alle	Pipeline niveau	✗
		Ansvarlig	✗
		Omsætning	✗
		Beskrivelse	✗
		Hoved produkt/service	✗
Møder	Alle	Beskrivelse	✗
		Status	✗
		Dato og tid	✗
		Varighed timer	✗
		-- Vælg --	
		-- Vælg --	

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"



The screenshot shows the 'FIRMAER' setup page with the title 'Hovedoversigt opsætninger'. The page contains several configuration options:

- Slå individuel opsætning fra, med undtagelse af adgangsniveau 99
- Kopi:
- Rediger opsætning for:
- Type:** (This field is highlighted with a red box in the original image)
- Brug som standard for nye brugere (*)

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".