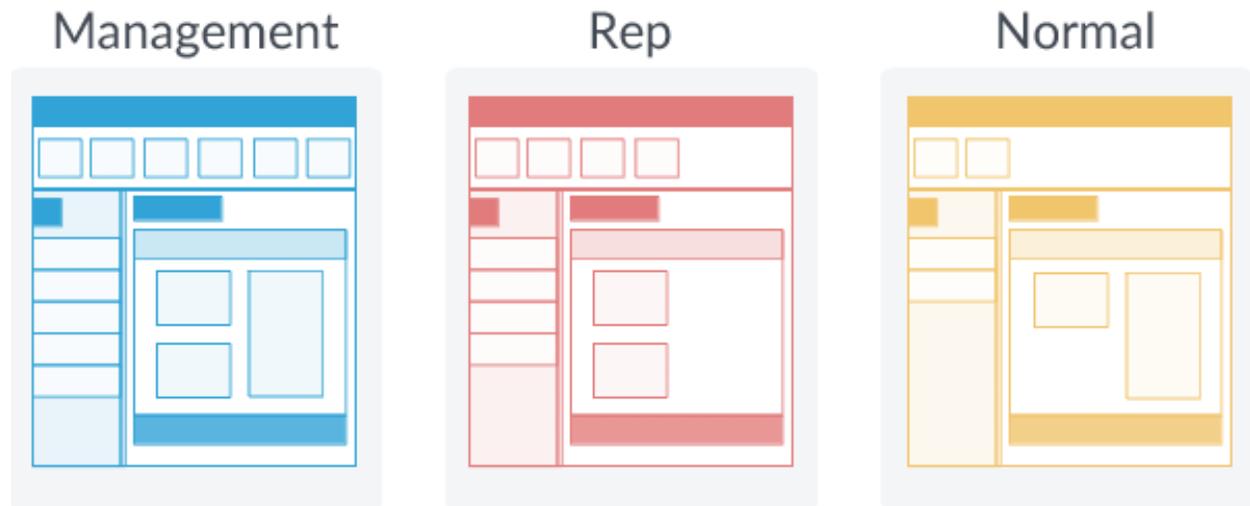


Moffice CRM Page Layouts

Introduction

Page Layouts enable administrators to customize visible menus, modules, fields, and more for specific departments in Moffice CRM. This way, users only view the data that is most necessary to them and keeps the security of other metrics or information intact. Likewise, companies can add or remove additional fields or data that are relevant or irrelevant to their business practices for a more customized CRM experience. Simplify CRM to work best for your company.

An example of how Page Layouts works is below. The same CRM will have different main menus, side menus, and fields depending on the type of user viewing the page.



* Page Layouts adjust the visible main menus, side menus, and fields

Getting started with Page Layouts involves two main steps:

- 1. Setting up CRM Groups**
- 2. Adjusting layout elements**

For Main Menus

For Side Menus

For Individual Fields

Step 1: Setting Up CRM Groups

Start registering CRM Users through your company's *postmaster* admin account.

This is the first step you must take to utilize page layouts is to create work groups for CRM users.

There are three types of basic work groups in Moffice CRM: Management, Rep, and Normal. Management types are for administrators, executives, managers, etc. who would be expected to have greater control and permissions over other employees.

Reps are for representatives. They can be customer service, sales, product, etc. departments.

Normal types are for everyone else. These can be for marketing teams, tech teams, or whoever needs access to customer-related data in some capacity.

Click the relevant tab to add a department to the relevant work group and add users to teams from there. The teams inside the folders for Management, Rep, and Normal categories can be selected through Page Layout for customization.

The screenshot shows a sidebar menu with three main categories: MANAGEMENT, REP, and NORMAL. The REP category is expanded, showing a search bar and a list of sub-groups: Sales Team (with a sub-group Sales Reps), and Customer Service (with a sub-group CS Reps). At the bottom, it indicates 'User Accounts Available 90 Users'.

The screenshot shows the configuration form for a CRM group. It includes fields for Name Type (U.S.A.), English Name (Sales Reps), and Nickname (Sales Reps). The Team Work Summary is also Sales Reps. Team Activity is set to Activity (checked). The Assigned Rep table lists Giovanni Alighieri (checked as manager), Jamie Bronte, Laura Woolf, and Eric Lee. At the bottom are Save, Delete Group, and Cancel buttons.

Assigned Rep	Manager
Giovanni Alighieri	<input checked="" type="checkbox"/>
Jamie Bronte	<input type="checkbox"/>
Laura Woolf	<input type="checkbox"/>
Eric Lee	<input type="checkbox"/>

Step 2: Adjusting Layout Elements

For Main Menus

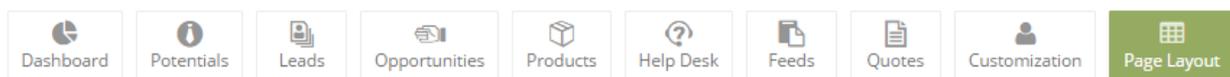
Next, go to the Page Layout menu (only available for management CRM users).

Main menus are the accessible menus from the top of the CRM. Pressing the [+] and [-] buttons on the left-hand column entitled “Available Items” will add or remove the menu from visibility. The menus that will appear are shown in the right-hand column. For added customization, you can change the order of the items in the right-hand column by dragging and dropping the fields as desired. In addition, you can also click the pencil button on any of the menus in the right-hand column to edit its name.

Make sure to pay attention to what team you are loading (template) and the target work group which will be affected by any changes you make. View potential changes by clicking the Preview button and return to default settings with the Reset button. Note that you must save changes to a target work group (or all work groups) to add or remove the desired menus.

The screenshot displays the 'Page Layout' configuration interface. At the top, there is a 'Load' dropdown menu set to 'Executives', a 'Target Work Group' dropdown menu set to 'Sales Team', and buttons for 'Save', 'Reset', and 'Preview'. On the left side, there is a 'Main Menu' sidebar with a 'Copy All' button and a list of menu items: Side Menu, Dashboard, Customers, Potentials, Leads, Opportunities, Activities, Products, Marketing, Help Desk, Quotes, and Sales. The main area is divided into two columns. The left column, titled 'Available items', lists various menu items with plus and minus buttons to toggle their visibility. The right column shows the currently selected page layout, which includes Dashboard, Potentials, Leads, Opportunities, Products, Help Desk, Feeds, Quotes, Customization, and Page Layout. Each item in the right column has a close (x) and edit (pencil) button.

Main menu bar after saving changes:



Step 2: Adjusting Layout Elements

For Side Menus

After setting up the appropriate main menus per group, admins can continue to edit side menus and individual pages a similar fashion. All side menus are accessible through the Side Menu sub-menu.

As with main menus, side menus sub-menus can be added, deleted, rearranged, or have their names edited for various target work groups.

The screenshot shows the 'Side Menu' configuration interface. On the left is a vertical list of menu items: Side Menu, Potentials, Leads (highlighted), Opportunities, Products, Help Desk, Feeds, Quotes, Customization, and Page Layout. The main area is titled 'Available Items' and contains a list of items with plus and minus buttons: Dashboard, Lead Status, Conversion Analysis, Leads, All Leads, Employee Contacts, Deferred Leads, Lost Leads, My Leads, View by Group, and View by Rep. On the right, a preview pane shows the layout for the 'Executives' target work group, displaying a 'Dashboard' section with 'Lead Status' and a 'Leads' section with 'Lost Leads', 'My Leads', and 'View by Rep'.

Side sub-menus after editing:

The screenshot shows the edited side menu for the 'Leads' section. The menu items are: Leads (with a sub-menu icon), Dashboard, Lead Status, Leads (with a sub-menu icon and highlighted), Lost Leads, My Leads, and View by Rep. A back arrow is visible at the bottom of the menu.

Step 2: Adjusting Layout Elements

For Individual Fields

Adding and removing fields in Moffice CRM is the last portion of Page Layouts. To do so, click any of the below sub-menus below (named after the main menus they affect) and choose a page. From there, you can find various viewing pages and creation menus as well as the fields that compose those pages.

The screenshot displays the Moffice CRM interface. On the left is a navigation menu with categories: Marketing, Sales, Customers, Activities, Dashboard, Potentials, Leads, Opportunities, Products, Help Desk, and Quotes. The main area is titled 'Executives' and shows a 'Target Work Group' dropdown set to 'Executives'. Below this is an 'Available Items' panel with a list of fields: Campaign Name, Type, Product, Status, Start Date, End Date, Budgeted Cost, Estimated Respondents, Expected Revenue, Orders, Memo, and three CustomFieldInt items. To the right is a 'Campaign Write Basic Information' form with fields for Campaign Name, Type, Product, Status, Start Date, End Date, Budgeted Cost, Estimated Respondents, Expected Revenue, Orders, and Memo.

While most of the adding, editing, and removing features are similar to the above pages, Moffice CRM also offers a variety of custom fields to choose from. There are two main types of fields—Text fields and Number fields—and they each take different types of data. Choose the right type of field for the data you wish to add for collection, [+] add the field, title it, and enjoy easy-to-make custom fields.

Moffice CRM Field Types

Data Type VARCHAR

This type of field only accepts **text** based content in the following formats:

- T Text
- Text Area
- ✉ Email
- 🔗 URL
- ☰ Selection List
- ⦿ Radio
- Custom

Data Type BIGINT

This type of field only accepts **number** based content in the following formats:

- 1,2,3 Number
- % Percent
- ☰ Selection List
- ⦿ Radio
- Custom