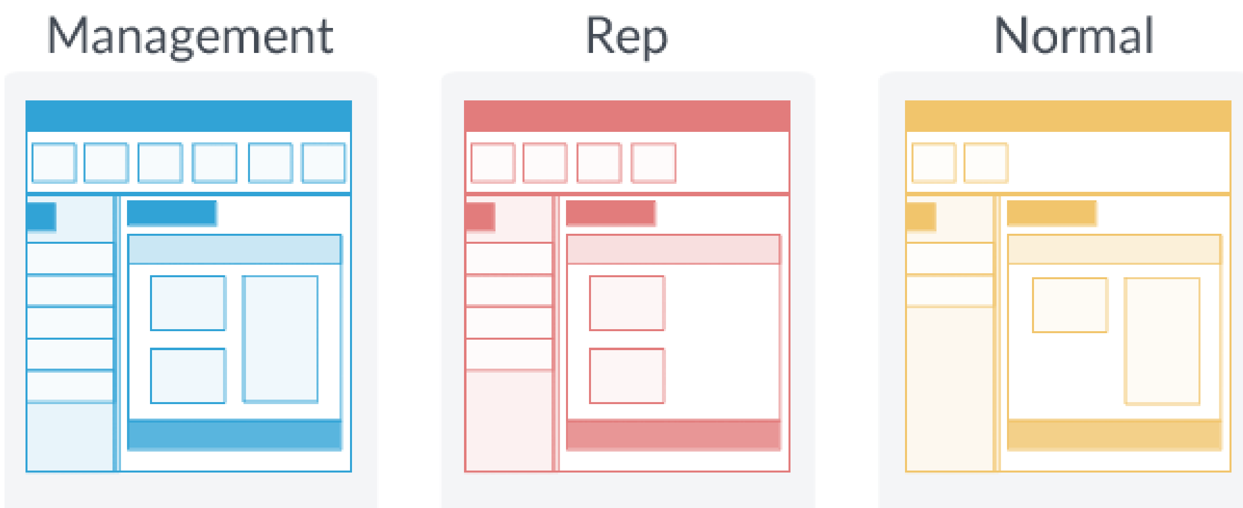
Moffice CRM Page Layouts

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.

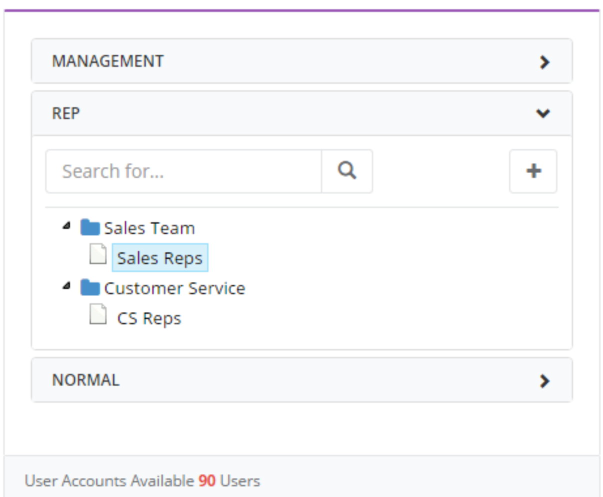
This is the first step you must take to utilize page layouts is to create work groups for CRM users.

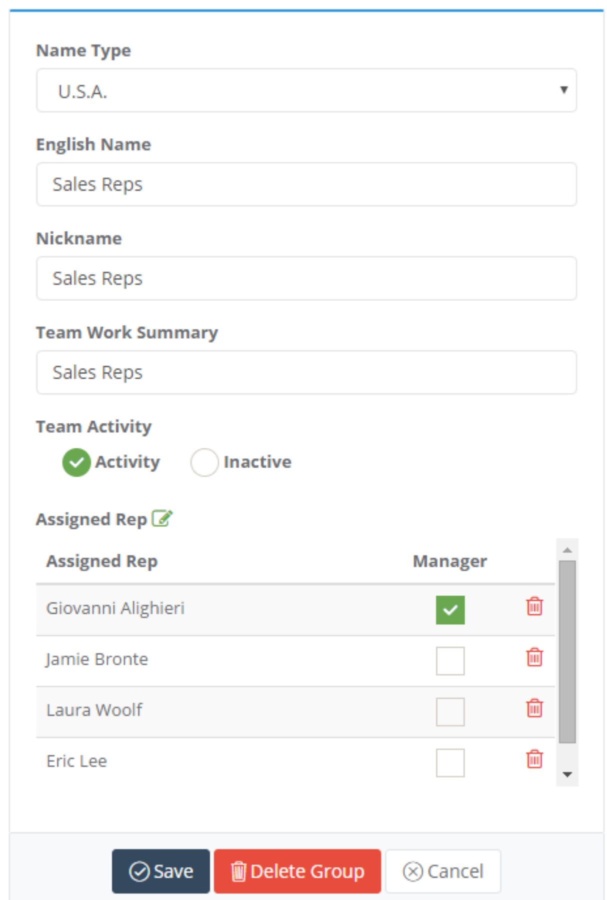
There are three types of basic work groups in Moffice CRM: Management, Rep, and Normal. Management types are for administrators, executives, managers, etc. who would be expected to have greater control and permissions over other employees.

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.



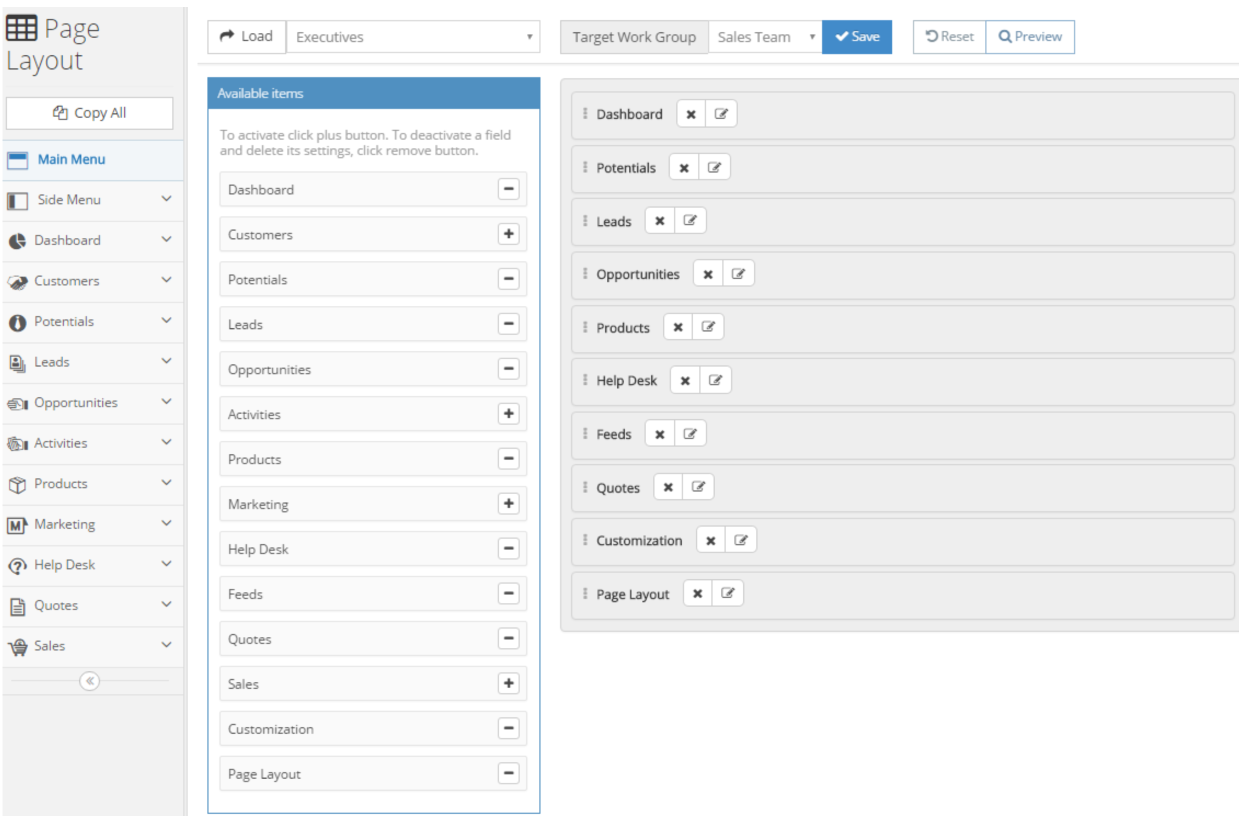


Step 2: Adjusting Layout Elements

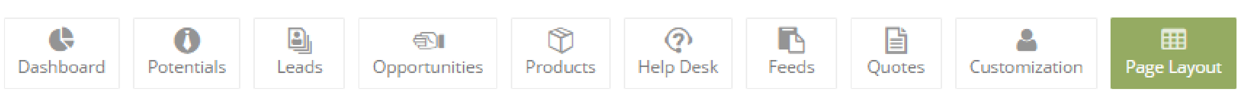
For Main Menus

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 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 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.



Main menu bar after saving changes:

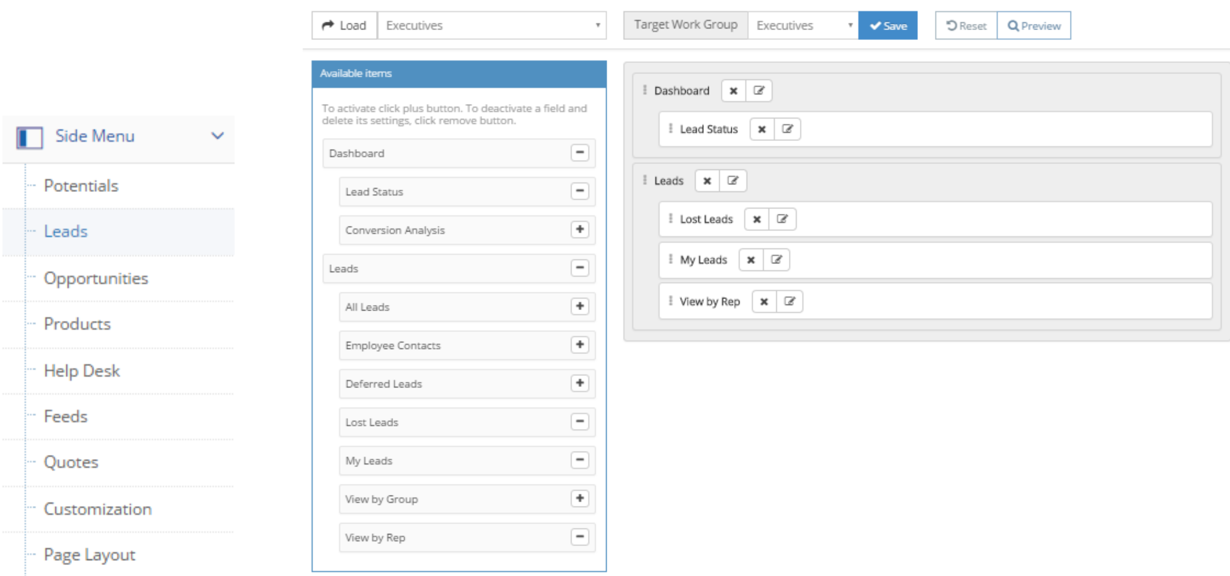


Step 2: Adjusting Layout Elements

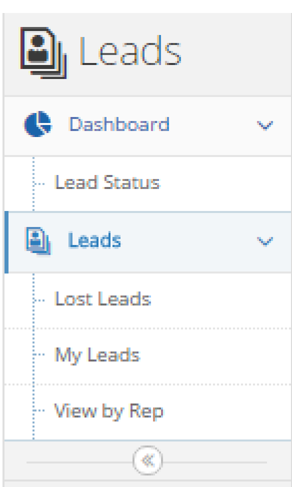
For Side Menus

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.



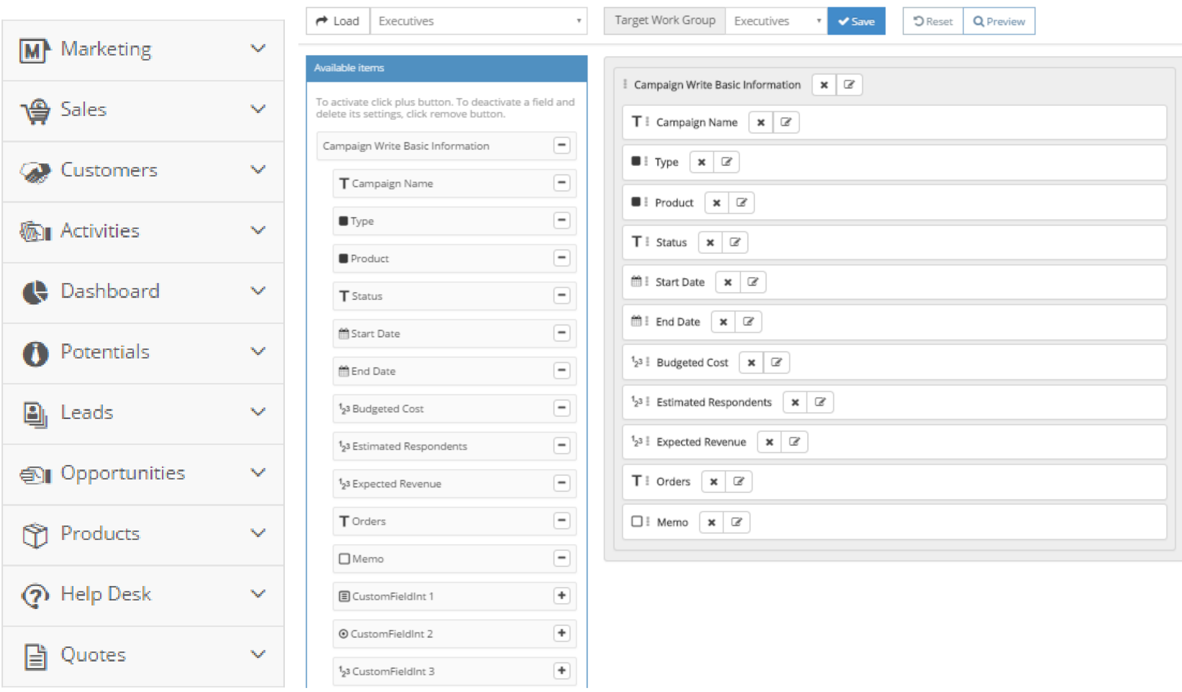
Side sub-menus after editing:



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.



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