

vTigerCE Documentation: Customization

Vtiger Customization

- Account Settings
- Automation
- Configuring Fields
- Creating and Importing Modules
- Configuring Modules
- Miscellaneous
- Organizing Data
- Finding Duplicates

Vtiger Customization Account Settings

- Adding company details
- Changing password
- Configuring outgoing emails
- Configuring incoming emails
- Organizing menu bar
- Changing date, themes, timezone, etc
- Customizing field labels, tab names & other strings

Automation

- Setting up workflows
- Capturing website visitors as leads
- Configuring mailbox to convert emails to suitable entities

Configuring Fields

- Creating custom fields
- Re-arranging fields
- Editing field properties
- Deleting custom fields
- Customizing picklist fields

Creating and Importing Modules

- Creating a New Module
- Importing custom modules

Configuring Modules

- Deactivating unwanted modules
- Activating deactivated modules

Miscellaneous

- Tagging important records

Jumping to a selected page in list view of records
Adding custom lists to dashboard
Languages supported by Vtiger CRM
Disabling and configuring fields in summary view
Performing mass operations on selected records
Exporting Comments

Organizing Data

Importing records from existing files
Creating custom filters

Finding Duplicates

Finding and managing duplicate records
Finding and managing duplicate records while importing records

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