

Layout Customization

Tabs on Contact Folder Detail, Project Detail are customized using **Activity Panel Settings**. Due to high robustness and customization options, there are several steps that need to be done in order to fully customize Project's or Contact Types's Tabs.

Set-up User Profiles

There are some default User Profiles already set-up (such as: External User, Internal User, Manager). If you want to create new, go to web client: Options & Tools > Profiles and create the new User Profile (top left).

New User Profiles may be for example: "Accountant, Finance Manager, Developer, Support Engineer, etc."

Set-up Activity Panel Presets

GUI (Graphical User Interface) sets are configured using Activity Panel Settings. User Profiles may share one Activity Panel Preset or there can be create one Activity Panel Preset for each individual User Profile (that means each User Profile will have it's own configuration of Tabs).

To set-up new Activity Panel Presets, go to Options & Tools > Profiles. On top-rights, you can select preset: Activity Panel and add new records. There are already some existing, but you may add new, such as "GUI for Finance, GUI for Support, GUI for Production, etc."

Now you need to assign Activity Panel Presets to User Profiles. Let say define that User Profile "Developer" will be using "GUI for Production".

Define New Activity Panel

For each **Contact Folder Type** and **User Profile**, you may want to create new Activity Panel. If there is no need to set-up various User Profiles, you can (of course) create just one Activity Panel Setting and assign it to all Contact Types and store it in all Activity Panel Presets.

To create new Activity Panel Setting go to Options & Tools > Activity Panel Settings. Add new here, put in some descriptive name, such as "Prospect view for Finance", save. Once properly saved, you can select what Tabs will be displayed in this Activity Panel and save again.

Match Activity Panel Setting & Preset

You should add newly created Activity Panel to one or more Activity Panel Presets. For example add Activity Panel "Prospect view for Finance" to Contact Type "Prospect" and Activity Panel Preset called "GUI for Finance".

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