



Mobile – 1.0

Extension Module for vtiger CRM 5.1.0

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About

Mobile is a vtiger CRM extension module that aims at providing basic web interface to mobile devices.

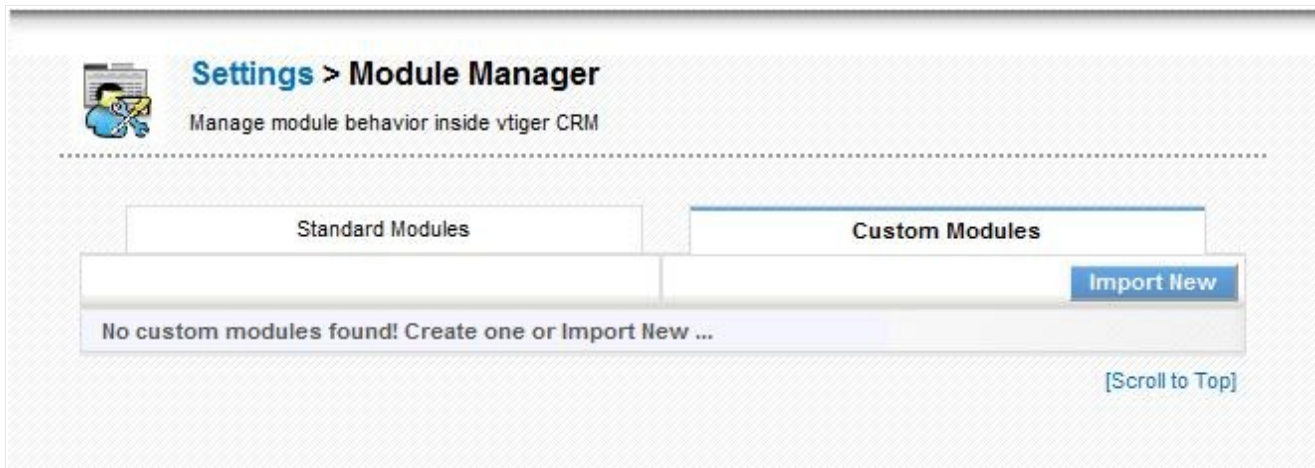
Installation

You can install this module using Module Manager. This section describes the steps involved.

- Download the Mobile-x.y.zip package file.

Step 1: Open Module Manager

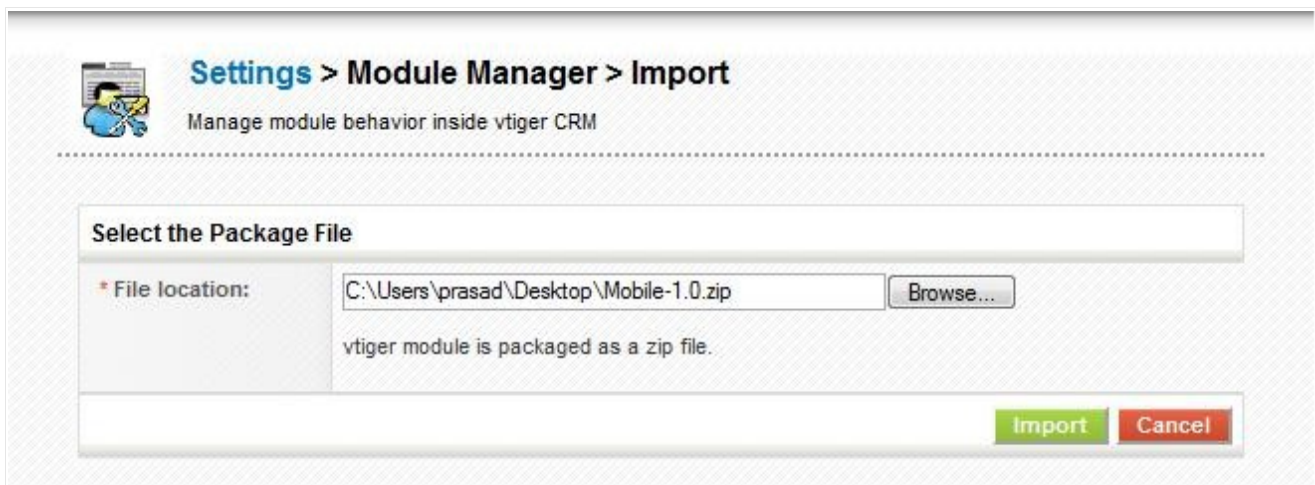
Module Manager can be reached through [Settings](#) » [Module Manager](#) from your vtiger CRM.



Click on the [Import New](#) button to proceed.

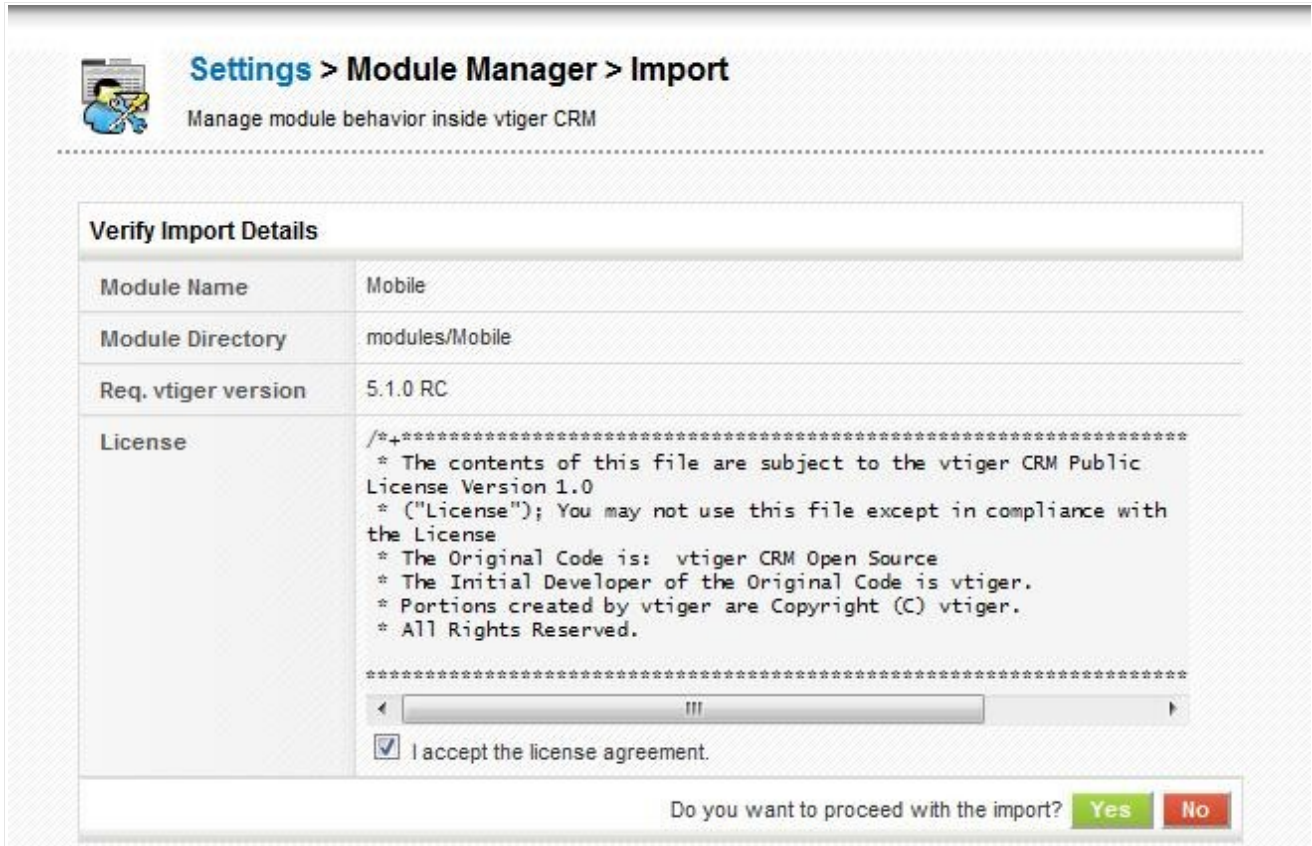
Step 2: Import Module

Select the downloaded module package file and click [Import](#) button to proceed.



Step 3: Verify Import Details

Please verify the import details and agree to the License information. Click [Yes](#) button to proceed.



Settings > Module Manager > Import
Manage module behavior inside vtiger CRM

Verify Import Details

Module Name	Mobile
Module Directory	modules/Mobile
Req. vtiger version	5.1.0 RC
License	<pre>/*+***** * The contents of this file are subject to the vtiger CRM Public License Version 1.0 * ("License"); You may not use this file except in compliance with the License * The Original Code is: vtiger CRM Open Source * The Initial Developer of the Original Code is vtiger. * Portions created by vtiger are Copyright (C) vtiger. * All Rights Reserved. ***** <-----> <input checked="" type="checkbox"/> I accept the license agreement.</pre>

Do you want to proceed with the import? [Yes](#) [No](#)

Step 4: Finish



Settings > Module Manager > Import
Manage module behavior inside vtiger CRM

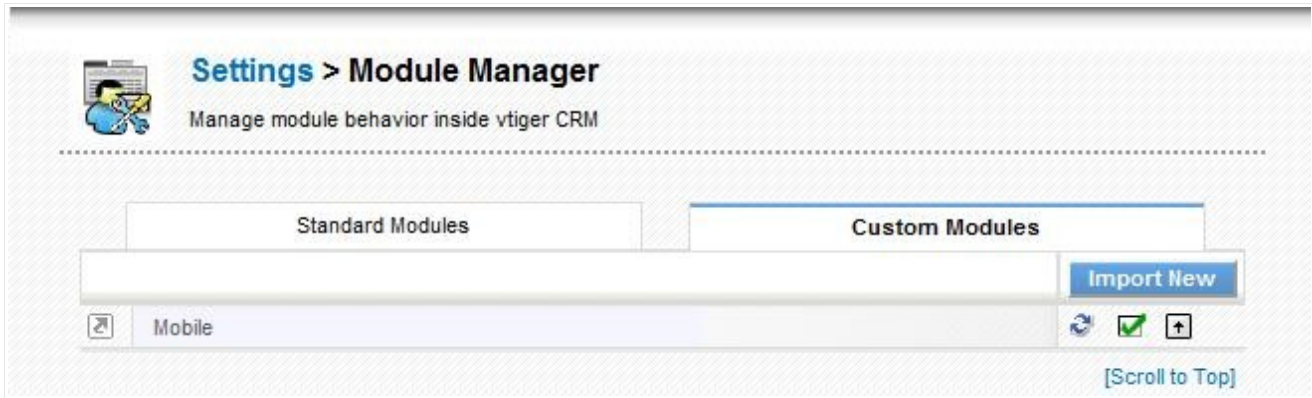
Importing Module ...

Creating Module Mobile ... STARTED
Initializing module permissions ... DONE
Updating tabdata file ... DONE
Creating Module Mobile ... DONE

[Finish](#)

Click on the [Finish](#) button to complete module import.

You can verify the import by opening the Custom Modules tab again.



Usage

After installation the Mobile package through Module Manager, you can access the module directly.

http://urlpath_to_vtiger/modules/Mobile

NOTE: Setup an alias (with shorter url) in Apache to this path, if you want the users to reach it quick.

The sections below provides walk through the features available.

Login

To get into the mobile UI, you will need to login using the credentials that is used for your vtiger CRM login.



Home

After successful login, you will be presented with the Home page which shows list of modules accessible.



Browse Module

Click on the the right arrow next to the module on the Home page, to explore it.



You can click on the module name as well to start browsing.

Module Listview

When you start exploring the module from the Home page, list of records will be displayed.

NOTE: The number of records displayed on the list can be controlled through [Mobile.Config](#)



Next Page

Click on the right arrow on top toolbar (next to Module name) to navigate to next page.



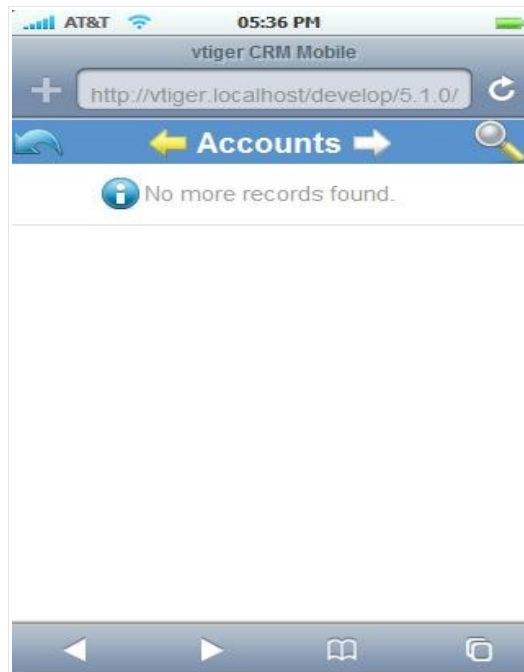
Previous Page

Click on the left arrow on top toolbar (next to Module name) to navigate to previous page.



Last Page

When you are on the last page you will see this message.



Close

You can close the window by clicking the arrow highlighted on the toolbar.



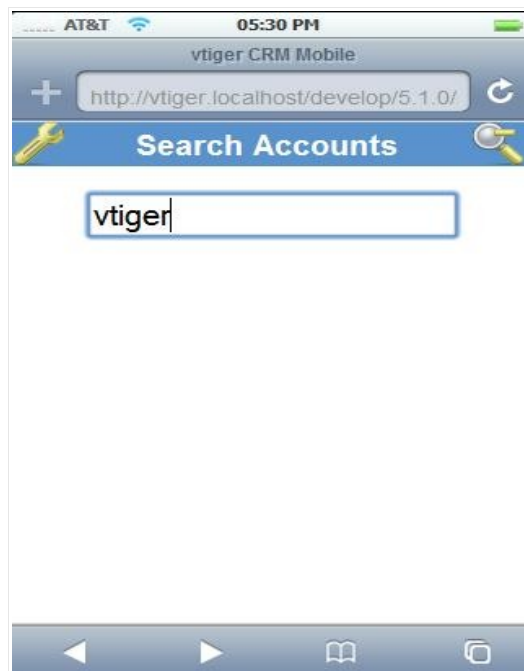
Search

List view provides you the ability to search the records. Click on the magnifying glass on the toolbar.



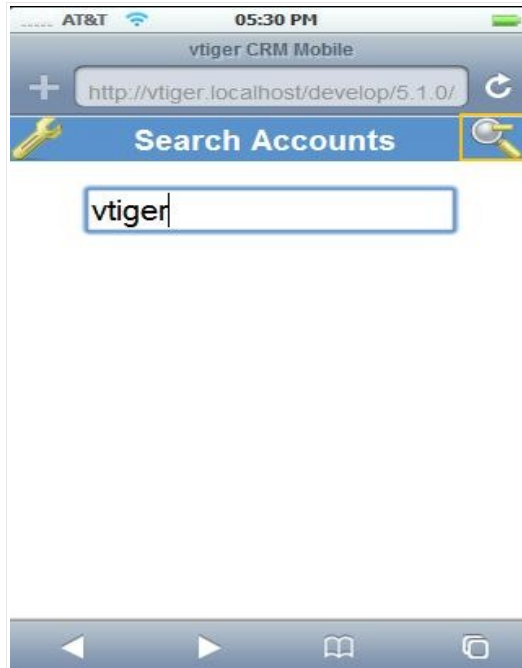
Search View

You can provide the keyword to search in the input box and hit enter.



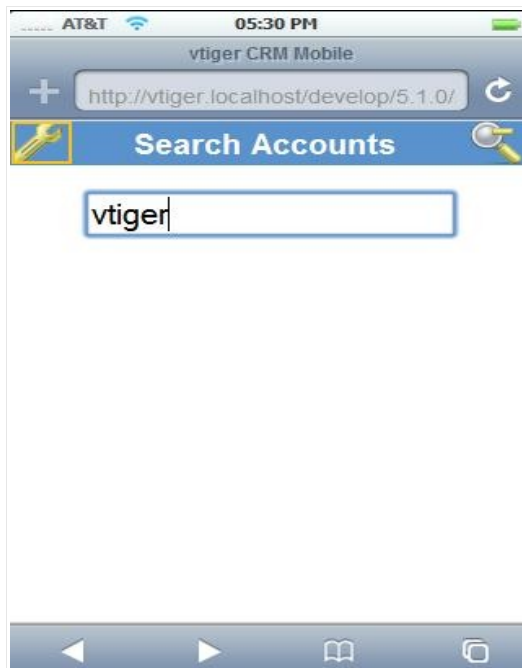
Cancel

Click on the magnifying glass with minus to cancel the search box.



Configuration

By default all the fields of the record (except those referencing other modules) will be selected for searching. You can configure the fields to search in see section below.



Configuration Save

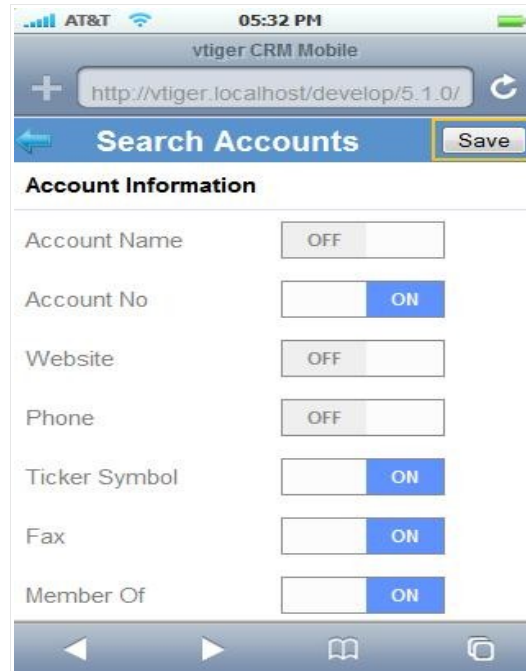
In the search configuration view, you can toggle the fields to enable for searching.

 OFF

Field is enabled for Search, you can turn-it OFF by clicking it.

 ON

Field is not enabled for Search, you can turn-it ON by clicking it.

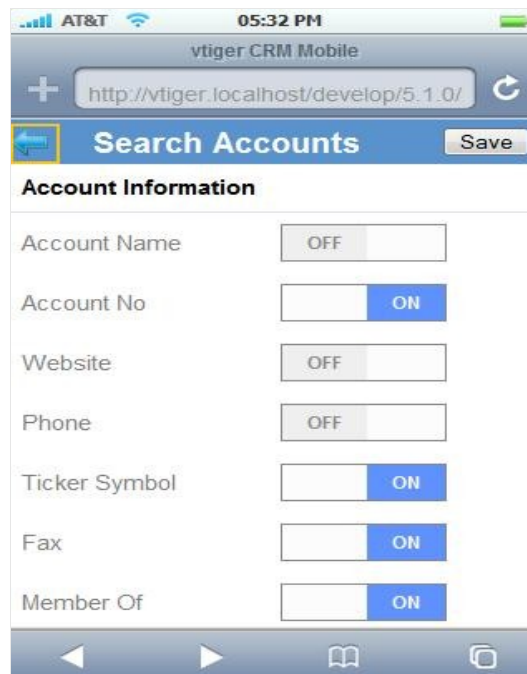


Click on Save button to activate the search field selection.

NOTE: The fields selection will be active until you logout.

Configuration Cancel

Click the left arrow on the toolbar to get back to List view.



Detail View

Click on the right arrow next to the record in the List view to get into the details of the record.



You can click on the record link as well to get into detail view.



Click on the left arrow icon (*or browser back button*) to get back to List view.

NOTE: Fields having non-blank values are displayed.

Logout

Click on the highlighted icon on the Home page toolbar to logout.



Mobile.Config

You can control the configuration of Mobile module through the file Mobile.Config.php that is present in the modules/Mobile folder.

Navigation.Limit	Integer	Set the number of records to be displayed on the listview. This will be common across all the user.
Cache.Info	ture/false	Control caching of the meta information.