Transactions Attributes

- Setting up Transactions Tabs
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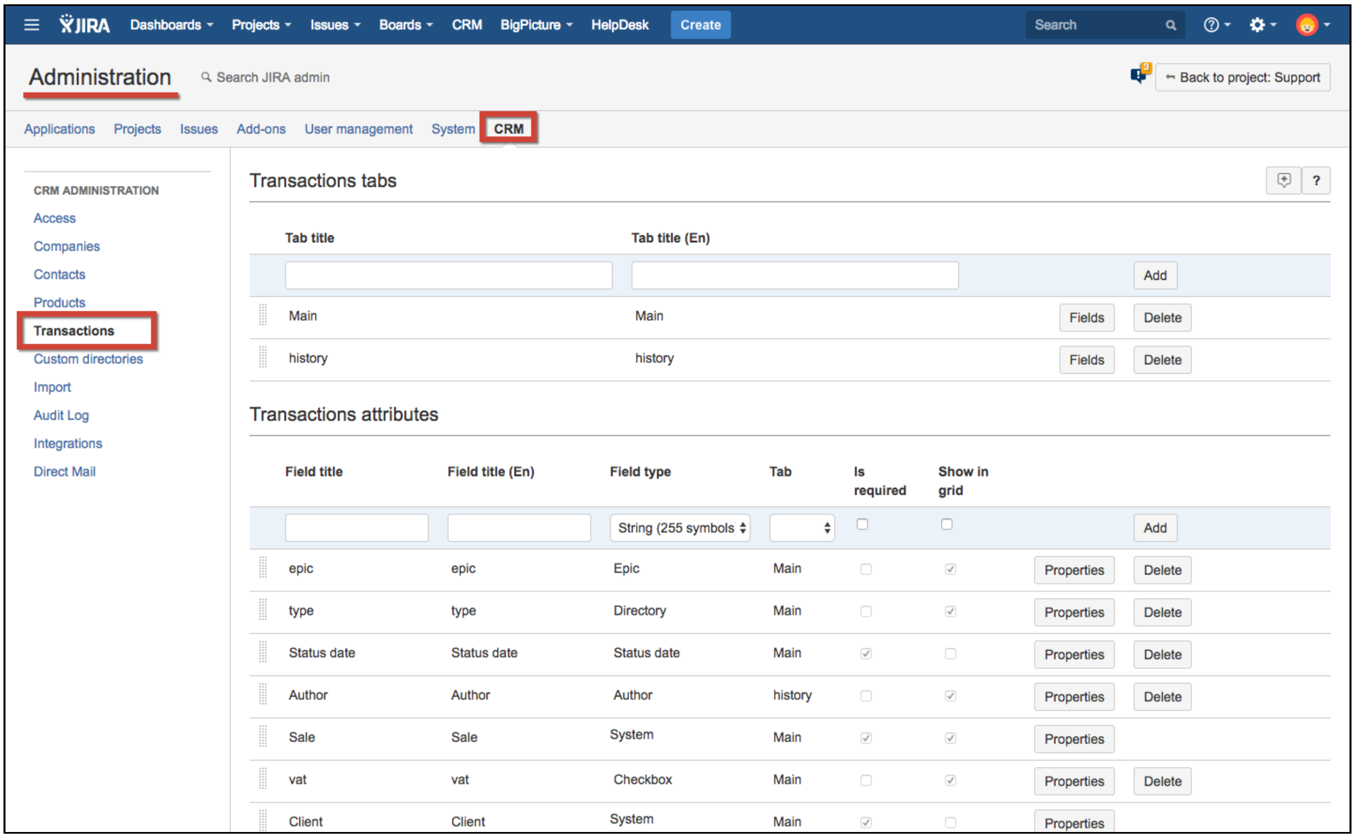
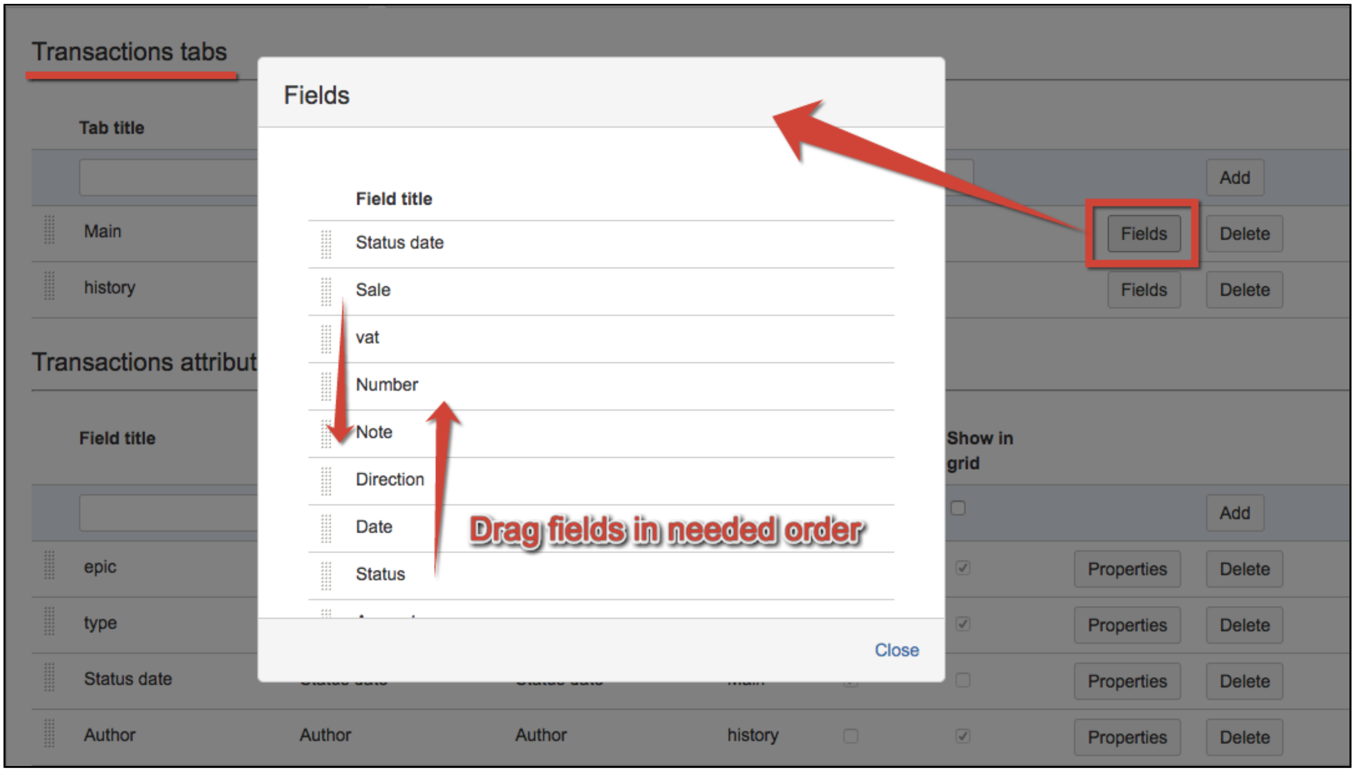
Transactions page can be configured as well as transactions view in issues. Go to CRM Administrator menu / Transactions:

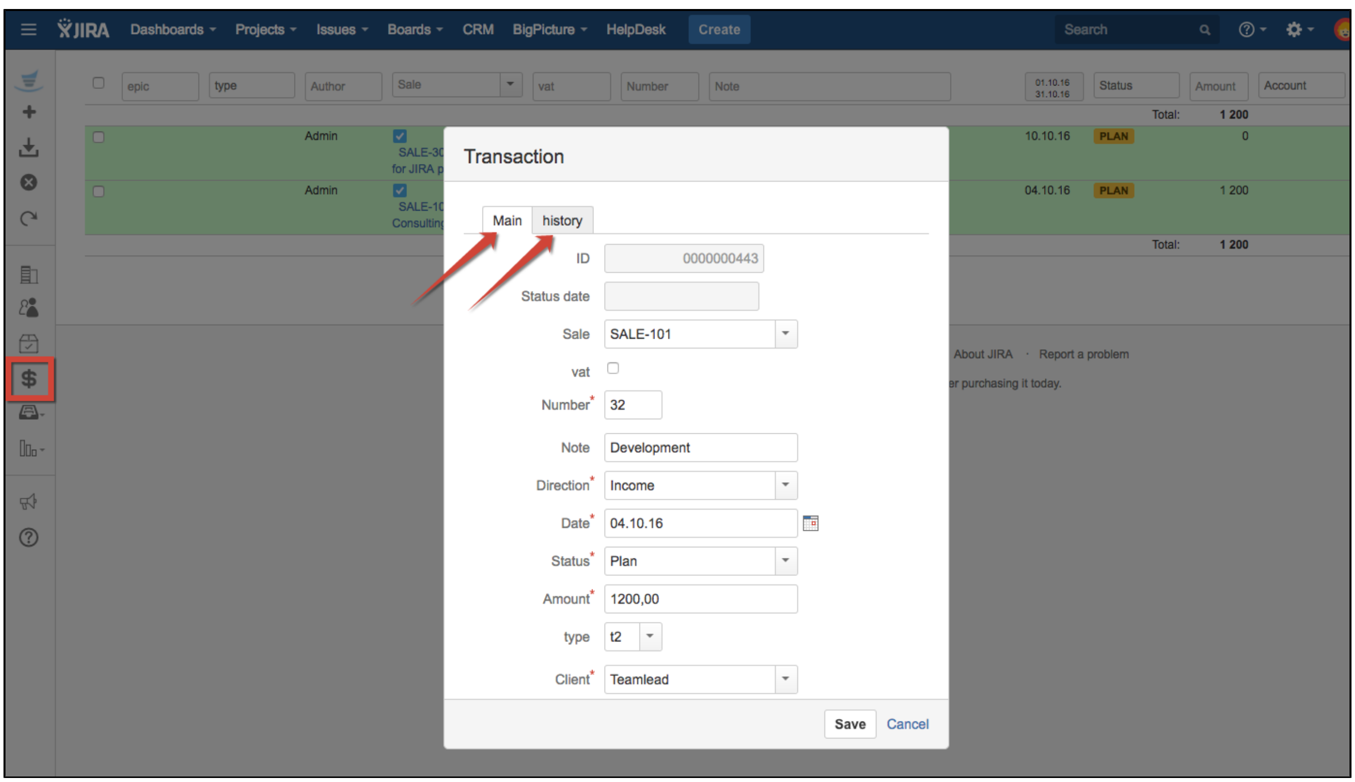


Setting up Transactions Tabs

Create tabs for Transaction cards and configure fields order for these tabs:

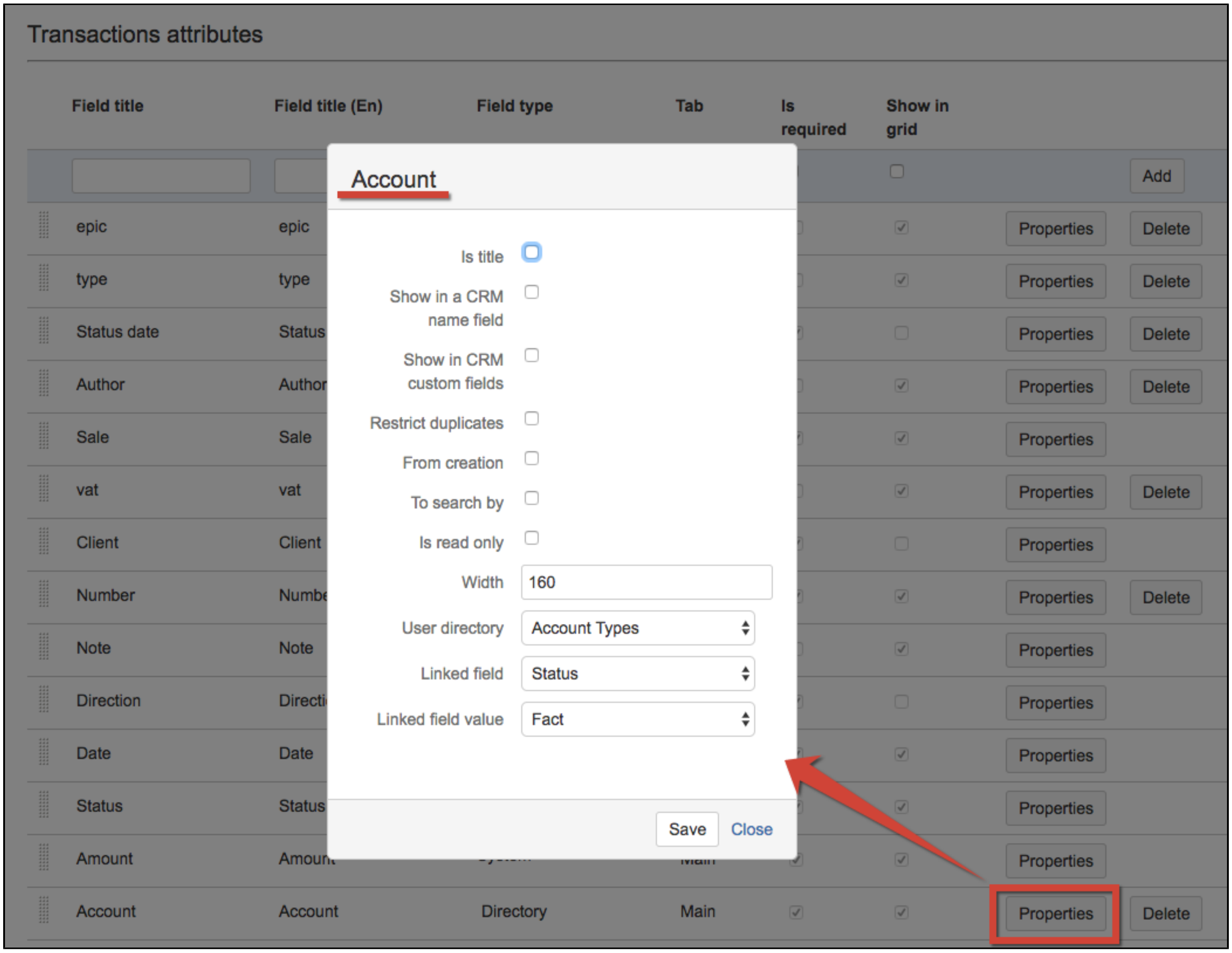


The fields are taken from Transaction Attributes section (see below). The Transaction card will have view with configured tabs with field order set:



Setting up Transactions Attributes

Transactions have attributes and can be customized in Transactions Attribute section:



Linked fields option allows to create autofilling of selected field with default user's directory value depending of linked field value.

Read more about Dictionary Attribute Types and Properties