

Transactions Attributes

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

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Transactions tabs

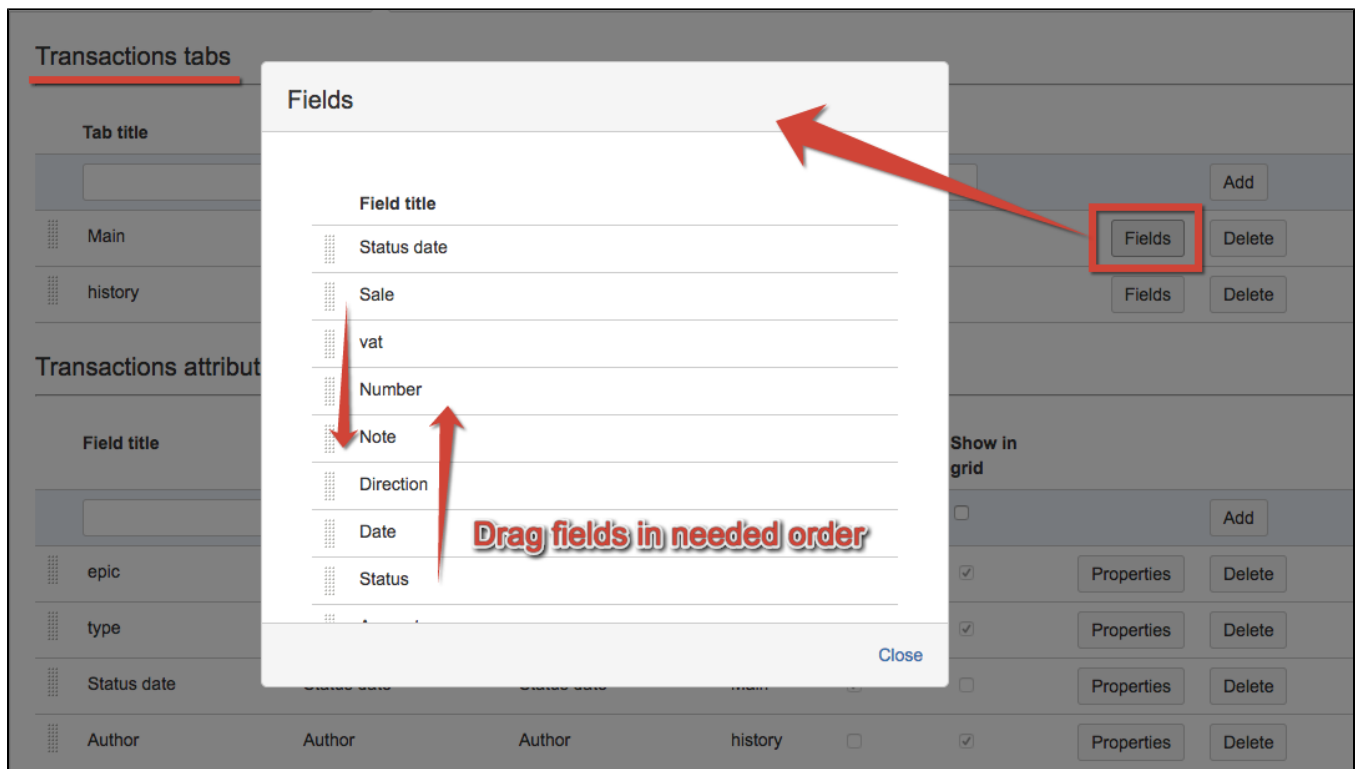
Tab title	Tab title (En)		
		Add	
Main	Main	Fields	Delete
history	history	Fields	Delete

Transactions attributes

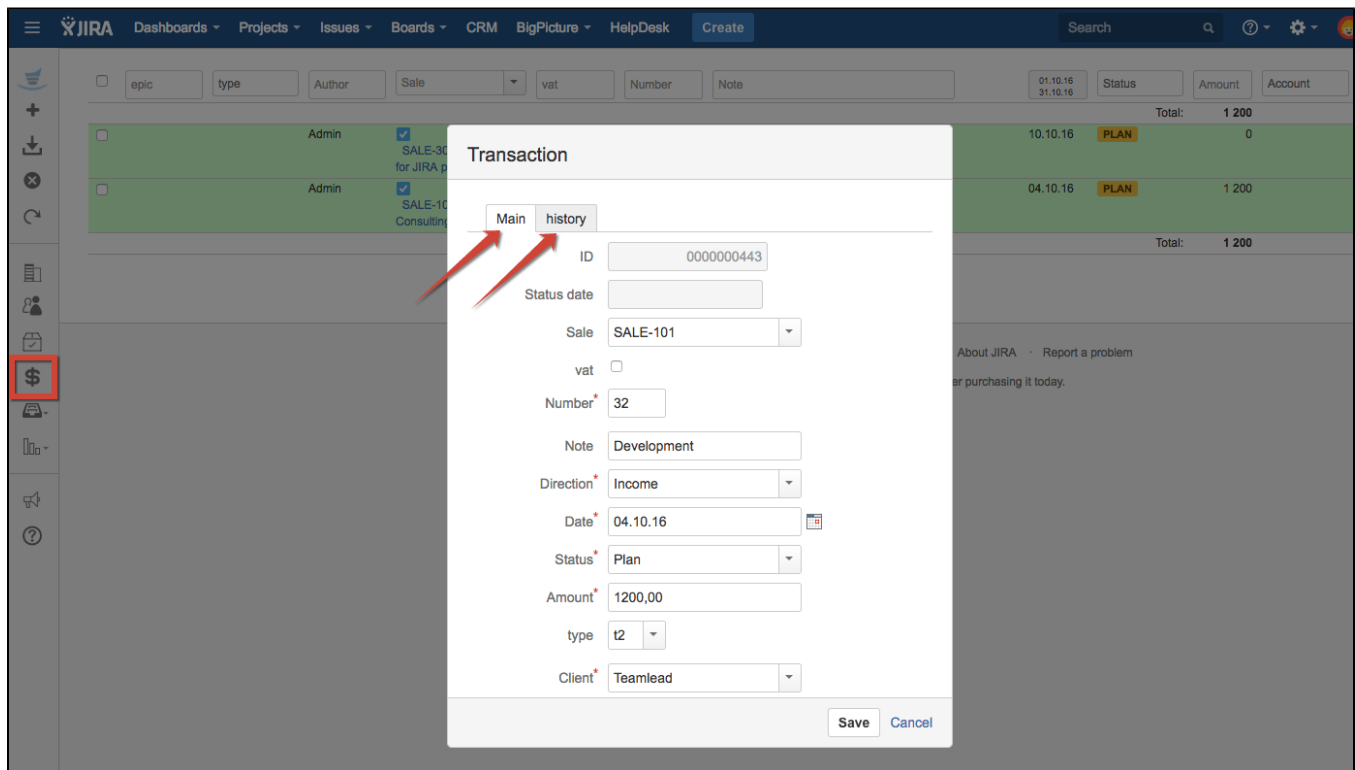
Field title	Field title (En)	Field type	Tab	Is required	Show in grid		
		String (255 symbols)				Add	
epic	epic	Epic	Main			Properties	Delete
type	type	Directory	Main			Properties	Delete
Status date	Status date	Status date	Main			Properties	Delete
Author	Author	Author	history			Properties	Delete
Sale	Sale	System	Main			Properties	
vat	vat	Checkbox	Main			Properties	Delete
Client	Client	System	Main			Properties	

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:

Transactions attributes

Field title	Field title (En)	Field type	Tab	Is required	Show in grid	
					<input type="checkbox"/>	Add
epic	epic			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Properties Delete
type	type			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Properties Delete
Status date	Status			<input type="checkbox"/>	<input type="checkbox"/>	Properties Delete
Author	Author			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Properties Delete
Sale	Sale			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Properties
vat	vat			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Properties Delete
Client	Client			<input type="checkbox"/>	<input type="checkbox"/>	Properties
Number	Number			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Properties Delete
Note	Note			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Properties
Direction	Direction			<input type="checkbox"/>	<input type="checkbox"/>	Properties
Date	Date			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Properties
Status	Status			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Properties
Amount	Amount			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Properties
Account	Account	Directory	Main	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Properties Delete

Account

☐ Is title

☐ Show in a CRM name field

☐ Show in CRM custom fields

☐ Restrict duplicates

☐ From creation

☐ To search by

☐ Is read only

Width160

User directoryAccount Types

Linked fieldStatus

Linked field valueFact

Save

Close

Properties

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](#)