openbiz-cubi

Rapid PHP Application Development Platform

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CubiContactModule
Cubi Contact Module shows latest Cubi UI enhancement
Phase-Implementation

Updated Nov 12, 2012 by rockys...@gmail.com

Introduction

Cubi Contact module provides the common functions for users to manage their contacts. This module also demonstrate many advanced UI enhancements made in latest Cubi release.

What users can do in Contact module

- View all contacts
  - View contacts by list
  - View contacts as cards
  - View contacts as photos
  - View contacts by types
  - View contacts by companies
  - View contacts in map
- Search contacts
- Filter contacts by name, type and groups
- Create, Edit, Delete contacts
- Share contacts in group or everyone
- Upload pictures of a contact
- Specify locations of a contact
- Attach files for a contact
- See change history of a contact data
- Link other contacts to a contact
- Import contacts from csv, xls, google ...
- Manage contact types
  - Set color of a type
  - Set custom fields of a type

Advanced features can be used in other modules

- Sharing and permission control
- Attachments
- Locations
- Pictures
- Types and custom fields
- A new UI element called FormElement that can embed a form in another non-grid form

The following sections will demonstrate Contact module by screenshots.

View Contacts

View contacts by list

View contacts as cards

View contacts as photos

View contacts by types

View contacts by companies

View contacts in map

Manage a Contact

Contact detail page

General contact information

8 Contact Profile

William, Smith

Existing Client

Firstname	William
Lastname	Smith
Company	Netgear Inc.
Department	Marketing
Position	Director

Phone

Phone	650-320-1983	Mobile	650-320-1023
Fax			

Address

Country	USA	Province	CA
City	Mountain View	Street	1020 Castro St
Zipcode	94072		

Extra contact information

Online Contact

Email	wsmith@netgear.com	Webpage	
QQ		ICQ	
Skype	williamsmith	Yahoo	

Extra Information

Locations 0	Picture 0	Attachment 0	ChangeLog 5	Miscellaneous

-- No related location records --

Add Location

Related Data

Contacts 0

Share	ID	Display Name	Company	Phone	Mobile	Type	Action

⊕ Add | Pick Contacts

⤴ Share | ⊕ Add | Edit | Copy | Delete | Back
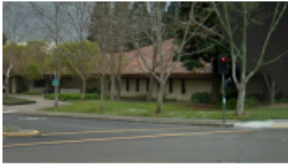
Manage pictures of a contact

Extra Information

Locations 2	**Picture 1**	Attachment 1	ChangeLog 5	Miscellaneous

Mountain View Office
office_view.png (238.33 KB)
Uploaded on: 2012-11-09 15:14:47
Edit Delete

Add Picture

Upload a new picture

New Picture

Please select files from your computer to upload pictures.

Title

New Picture

Files

SELECT FILES

Upload   Clear | Close

Specify locations of a contact

Extra Information

Locations 2	Picture 1	Attachment 1	ChangeLog 5	Miscellaneous
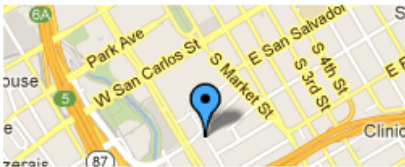
San Jose Office
510 S Almaden Ave San Jose, C
Marketing division office
Updated on: 2012-11-09 15:08:19
Edit Delete

Edit a location

Location Detail

You can edit title and description for a uploaded location.

Title San Jose Office

Address 510 S Almaden Ave San Jose

Description

Marketing division office

Save Close

Attach files for a contact

⊖ Extra Information

| Locations 2 | Picture 1 | **Attachment 1** | ChangeLog 5 | Miscellaneous |

🔗 William Resume

resume_wsmith.doc (54 KB) Uploaded on: 2012-11-09 15:17:32

⬇ Edit Delete

Add attachment

Upload a new file

New Attachment

Please select files from your computer to upload attachments.

Title

New Attachment (1)

Files

SELECT FILES

Upload Clear | Close

See change history of a contact data

⊖ Extra Information

Locations 2	Picture 1	Attachment 1	**ChangeLog 6**	Miscellaneous

Type	Change Time			
✎	2012-11-09 15:30:09			
	Fax	<Empty>	➡	650-320-1024
	System, Admin <admin@yourcompany.com>			
✎	2012-11-09 14:00:08			
	Ordering	30	➡	25
	System, Admin <admin@yourcompany.com>			

See contact misc data

⊖ Extra Information

Locations 2	Picture 1	Attachment 1	ChangeLog 7	**Miscellaneous**

Miscellaneous	
William was hired by Netgear in 2007	
Ordering	25
Group Share	Visible
Other Group	Private
Create By	System, Admin <admin@yourcompany.com>
Create Time	2012-11-09 13:56:28
Update By	System, Admin <admin@yourcompany.com>
Update Time	2012-11-09 15:35:09

Link other contacts to a contact

⊖ Related Data

Contacts 1

Share	ID	Display Name	Company	Phone	Mobile	Type	Action
🖼	5	Jixian, Wang	Openbiz ...	323-2392031		Colleagu...	Remove

⊕ Add | Pick Contacts

Link from another contact

Share contacts in group or everyone

Click on Share button on contact list or detail page will launch sharing dialog

Click Advanced button to control access of individual users

Import Contacts

Import from csv or spreadsheet

Import from google contacts

In order to connect google to fetch the contacts, please make sure php-ssl extension is enabled on your web server. Please find more details of installing php-ssl at http://php.net/manual/en/book.openssl.php

Manage contact types

Contact type allows users to create any type that can be assigned to a contact. The contact module has pre-fill six common types including:

- Colleague
- Potential Client
- Existing Client
- Provider
- Goverment
- Misc

Type attributes

Each type can have the following attributes:

- Name.
- Description.
- Color. An unique color which can help users to identify contact easily.
- Group Share. If group share is enabled, the type can be used by other all users in the same group of the type creator.
- Other Group Share. If group share is enabled, the type can be used by other all users in other groups

Type Custom Fields

Each type can have multiple custom (or called extend) fields. Once the custom fields are defined, they will visible as additional fields of a contact.

Configure a custom field

A custom field can be different element types:

- InputText
- Listbox. The list of values can be defined as "value1;value2;vallue3". A default value can be set as one of the list values.
- Textarea
- Dropdownlist.
- Bool
- Date
- Datetime

You can see additional fields appear in the new contact form.

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