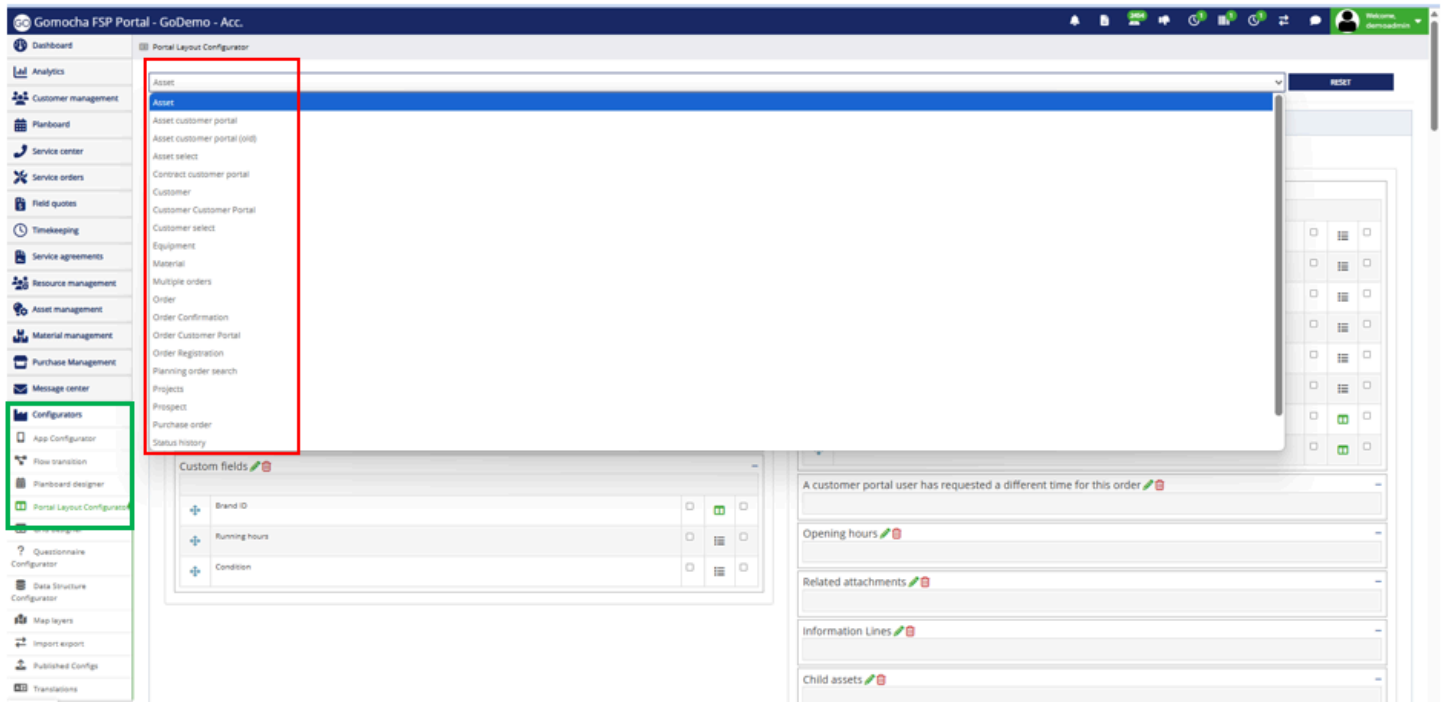


# Portal Layout Configurator

Last updated by | David Mishler Gomocho | Jun 16, 2025 at 2:38 PM GMT+2



## Portal Layout Configurator



## Description

Through the layout configurator, customers can:

- Configure groups and fields of information to their specific organizational needs.
- Configure the on-screen positioning of the groups and fields to their preference.
- When able to configure these items to their preference customers create more efficient and productive work patterns based on their specific needs.

## Value

- Streamlined call handling
- Enhanced planning efficiency
- Higher customer service quality

## Gomocha E5 Pillars

- **Efficiency:** Streamlines information access and decision-making

- **Flexibility:** Adapts to each team's unique workflow
  - **Enablement:** Empowers teams to work smarter, not harder
  - **Performance:** Speeds access to the right information, impacting metrics
- 

## Configurable Portal Items

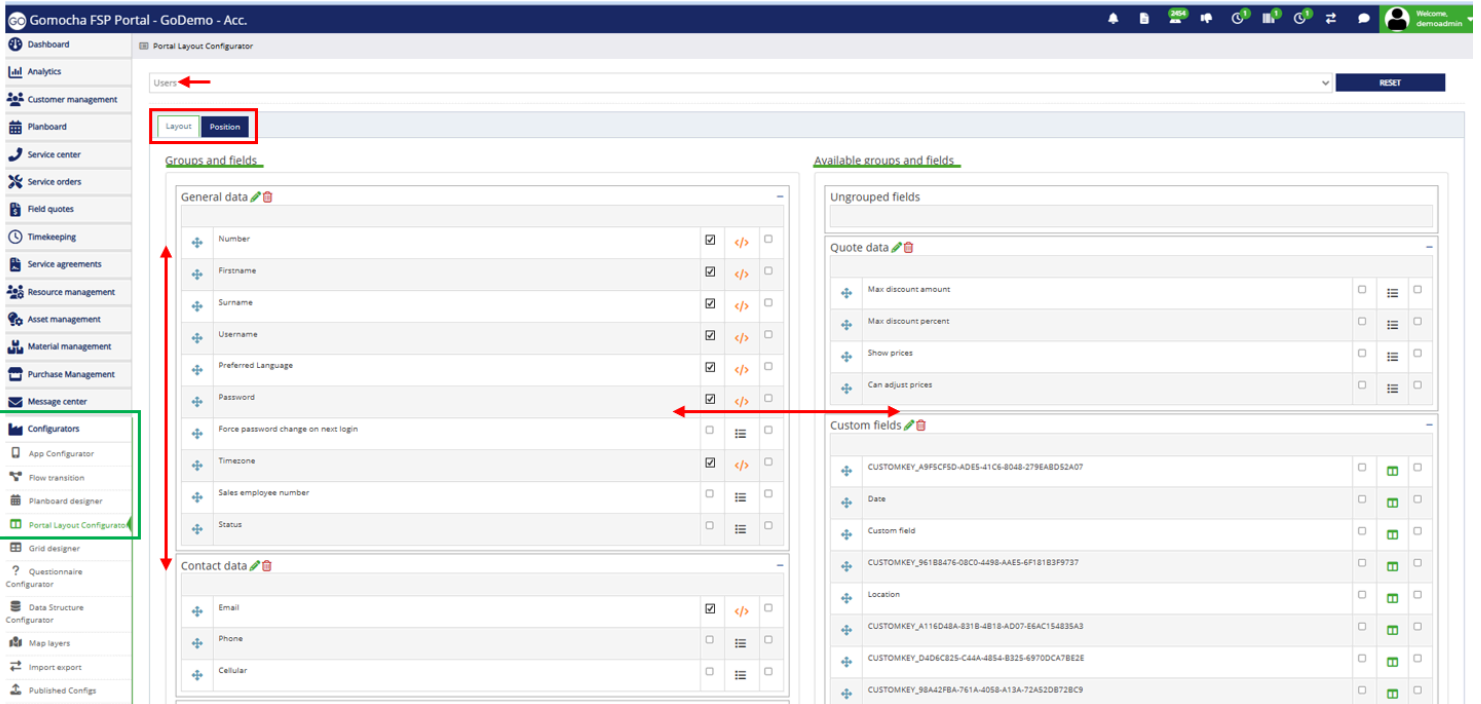
- Asset
  - Asset customer portal
  - Asset customer portal (old)
  - Asset select
  - Contract customer portal
  - Customer
  - Customer Customer Portal
  - Customer select
  - Equipment
  - Material
  - Multiple orders
  - Order
  - Order Confirmation
  - Order Customer Portal
  - Order Registration
  - Planning order search
  - Projects
  - Prospect
  - Purchase order
  - Status history
  - Stock level
  - Users
- 

## General Use Items

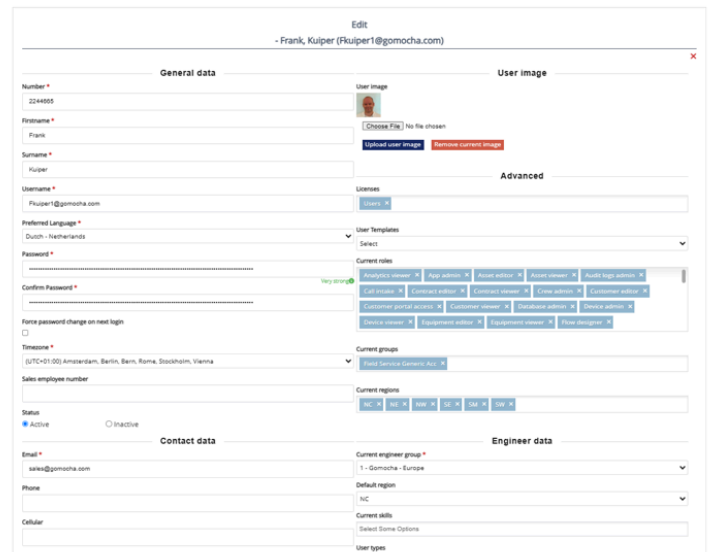
### Layout (All items)

- **Groups and Fields-** The information shown can be edited and customized to meet your organization's specific needs. It reflects what is displayed on each item screen
  - **Fields:** Each item can be individually moved by clicking, dragging, and dropping it into any desired order. This order will be displayed on the corresponding item screen
  - **Groups:** Items can be rearranged using the same click, drag, and drop method. To remove a single field or an entire group, simply drag it to the "Available Groups and Fields" section on the right side of the screen.
    - Group titles can be edited by clicking the edit icon
  - **Mandatory fields:** Use the checkbox to mark a field as mandatory or optional. Fields marked with orange arrows are core data and will always remain mandatory.
  - **Available Groups and Fields:** These are not currently displayed on the item pages. If needed, you can click and drag a field or group to the desired position on the left to include it.
  - **All changes will be immediately reflected** There is no "Save" button
- **Layout Example:** Users

# Portal Configurator



## User Screen/User Creation Screen: Mirrors what is displayed in the Portal Configurator



## Position (All items)

- Allows you to easily drag and drop "Groups" to adjust their placement on the selected item screens. Groups can be moved in any direction (up, down, right, left)
- Groups can also be resized by clicking and dragging from the bottom right corner, as indicated by the blue arrow in the diagram.
- **Position Example**-User Details Screen: Reflects customizations of Layout and Position options in Layout Designer

# Portal Configurator

Portal Layout Configurator

Users RESET

\*Warning! Please make sure that layout groups containing a grid should be at least 2 units wide.

Layout: Position

<p><b>General data</b></p> <p>Number</p> <p>Firstname</p> <p>Surname</p> <p>Username</p> <p>Preferred Language</p> <p>Password</p> <p>Force password change on next login</p> <p>Timezone</p> <p>Sales employee number</p> <p>Status</p>	<p><b>User image</b></p>	<p><b>Advanced</b></p> <p>Current licenses</p> <p>User Templates</p> <p>Current roles</p> <p>Current groups</p> <p>Current regions</p>
<p><b>Contact data</b></p> <p>Email</p> <p>Phone</p> <p>Cellular</p>	<p><b>Engineer data</b></p>	

## User Details Screen

## Advanced Use Items: Available on select items only

### Visible Fields: Order, Order Customer Portal, Order Registration, Projects

- This setting allows you to choose which fields are visible on the Order Creation screen, based on the selected Activity Type.
- When an **Activity Type** is selected during order creation, only the fields configured for that type will appear.
- In the example below, the **Maintenance, Breakdown, and Installation Activity Types** will display only the fields highlighted in blue.
- **Important:** If no visible fields are configured for any Activity Type, *all fields defined on the layout screen* will be shown for *all* Activity Types on the selected screen.

## Portal Layout Configurator: Order-Visible Fields

**Order Creation Screen:** When the Maintenance activity is selected, the fields that appear match those designated as visible in the Layout Configurator.

**Editable Fields:** Customer Customer Portal, Order, Order Customer Portal, Order Registration, Projects

- Gomocha FSP has long supported configuring fields as editable or read-only based on status type.

- This functionality has now been expanded to allow field behavior to depend on the *combination* of both **Activity Type** and Status Type.
- With this enhancement, you can—for example—prevent fields from being updated on orders coming from an ERP system, while still allowing those same fields to be editable for orders created directly in the FMP360 Portal or the Gomocho FSP app.
- **Steps**
  - Configurators > Portal Layout Configurator > Select item > Activity Type > Select Activity Type to edit fields for (Example below: **Order (order creation screen)**)
  - Activity Status > Select status of activity type
  - Field Name > Add or Delete fields user wants associated with corresponding type and status
  - Save
  - Editable fields now available for use on selected screen
  - **Note:** If a field is **Visible** but not **Editable**, it will be set as **Read Only**; If it is **Editable** but not **Visible** it will not be seen on selected screen

## Portal Layout Configurator: Order

The screenshot shows the 'Portal Layout Configurator' interface for the 'Order' screen. The 'Editable Fields' tab is highlighted in green. A red box highlights the 'Activity type' and 'Activity status' sections, which contain buttons for 'Maintenance', 'Inspection', 'Installation', and 'Completed'. The 'Field name' section contains a grid of field names, each with a dropdown arrow, such as 'House Number', 'Internal remark', 'Latitude / Longitude', 'Opening hours', 'Override auto-added skills', 'Predefined addresses', 'Preferred engineer', 'Price agreed with customer', 'Price agreed with customer remark', 'Priority', 'Problem', 'Project Number', 'Quality code', 'Rates overview', 'Recurring order', 'RefToCustomTable', 'Region', 'Remark', 'Reported time', 'Reports', 'Scheduled start time / end time / duration', 'Skills', 'SLA start date / deadline / duration', 'Solution', 'State', 'Street', 'Surcharge code', 'Type', and 'Zip Code'. A green arrow points to the 'Zip Code' field.

## Example of Editable Field Set to Read Only

Order Registrations Questionnaire Status history

Error: Please solve errors and try again:
 

- Type is required

**Order Data**

Order Number  
2332051 : 1

Status  
Created

Assets  
-

Customer  
-

Status date and time  
6/14/2023, 3:23 PM

Reported time  
6/14/2023, 3:23 PM

Reason  
-

Type\*  
-  
Type is required

Remark  
-

Priority  
-

Skills  
Select Some Options

Characteristics  
-

**Address and contact data**

Street  
[Redacted]

House Number  
[ ] [ ]

City  
[ ]

Zip Code  
[ ]

Region\*  
Default

Country  
[ ]

State  
[ ]

Additional Address Info  
[ ]

Latitude  
[ ]

**Order Planning**

Engineer group  
Engineer group

Override auto-added skills

Engineers  
Select Some Options

Default warehouse for engineer  
-

Recurring order  
No

Appointment Fixed?

Engineer Fixed?

Scheduled start date & time  
6/14/2023, 3:28 PM

Scheduled end date & time  
6/14/2023, 4:28 PM

Duration  
000.01:00  
Must be in days.hours:minutes

SLA start date & time  
6/14/2023, 3:28 PM

**Reports**

CANCEL SAVE AND SAVE AND PLAN

### Bulk Update Fields: Equipment, Material, Stock Level, Order,

- Allows users to select and filter which fields are available for bulk updates.
- Add bulk update field by clicking on empty area on search bar for options

### Portal Layout Configurator: Order

Portal Layout Configurator

Order

Layout Position Visible Fields Editable Fields Bulk Update Fields

Field name

Activity x Description x Engineers x Preferred engineer x Scheduled start time / end time / duration x SLA start date / deadline / duration x Status x

### Example: Advance Order Search

- **To perform a bulk update:** : Search orders, Select multiple orders, then right-click to access the **Bulk Update Options** menu.

The screenshot displays a software interface for managing orders. On the left is a navigation sidebar with various modules. The main area shows a table of orders with columns for Order number, Status, Customer Name, Type, Planned start date, Planned start date (withhold), Planned SLA end, Description, Customer reference num..., Reported date, Duration, and Priority. A context menu is open over a selection of rows, with the 'Bulk update' option highlighted in green. The menu also includes options like 'Go to planboard with selection', 'Create new', 'Add orders to', 'Bulk create question list', and 'Assign Supplier'.

Order number	Status	Customer Name	Type	Planned start date	Planned start date (withhold)	Planned SLA end	Description	Customer reference num...	Reported date	Duration	Priority
1893.2	Unplanned	Bredenoord	Maintenance	10/8/2024 12:30 PM	10/8/2024	12/31/2024 8:28 PM	Jaarlijks onderhoud + U01 - T...		10/31/2019 2:40 PM	000:04:00	Normal
1901.1	Unplanned	Amstel	Maintenance	10/7/2024 12:35 PM	10/7/2024	12/31/2024 8:28 PM			11/28/2019 9:07 AM	000:04:00	Normal
1902.1	Unplanned	Amstel	Maintenance	5/27/2025 2:00 PM	5/27/2025	12/31/2024 8:28 PM	Check lock 123		11/28/2019 9:09 AM	000:01:00	Normal
1903.1	Unplanned	Amstel	Maintenance	5/27/2025 12:00 PM	5/27/2025	12/31/2024 8:28 PM			11/28/2019 9:11 AM	000:01:00	Normal
1905.1	Unplanned	Amstel	Maintenance	10/11/2024 12:30 PM	10/11/2024	12/31/2024 8:28 PM	Lock check		11/28/2019 9:47 AM	000:04:00	Normal
1880.1	Unplanned	Bredenoord	Maintenance	10/8/2024 8:00 AM	10/8/2024	12/31/2024 8:28 PM	meldin selast		11/20/2019 2:01 PM	000:04:00	Normal
242999_M,1	Unplanned		Maintenance	2/20/2025 7:08 PM	2/20/2025				2/20/2025 7:08 PM	000:01:00	
2430902_M,1	Unplanned		Maintenance	3/28/2025 3:44 PM	3/28/2025				3/28/2025 3:42 PM	000:01:00	
2430902_M,1	Unplanned	Adriaense 2	Maintenance	4/3/2025 9:36 PM	4/3/2025				4/3/2025 7:17 PM	000:01:00	
2430902_M,1	Unplanned		Maintenance	4/9/2025 9:37 AM	4/9/2025				4/9/2025 11:37 AM	000:01:00	
2430902_M,1	Unplanned		Maintenance	4/19/2025 2:32 AM	4/19/2025				4/19/2025 12:32 AM	000:01:00	
2430902_M,1	Unplanned		Maintenance	4/19/2025 2:32 AM	4/19/2025				4/19/2025 12:52 AM	000:01:00	
2430902_M,1	Unplanned		Maintenance	4/23/2025 9:42 PM	4/23/2025				4/23/2025 10:42 PM	000:01:00	
2430902_M,1	Unplanned		Maintenance	5/1/2025 9:48 PM	5/1/2025				5/1/2025 10:48 PM	000:01:00	
2432344_M,1	Unplanned		Maintenance	5/1/2025 1:17 AM	5/1/2025				5/1/2025 1:17 AM	000:01:00	
2432800_M,1	Unplanned		Maintenance	6/12/2025 1:26 AM	6/12/2025				6/12/2025 1:26 AM	000:01:00	
2432800_M,1	Unplanned		Maintenance	6/16/2025 3:30 PM	6/16/2025			Quote: PMP-00002908	6/16/2025 2:30 PM	000:01:00	
2432800_M,1	Unplanned		Maintenance	6/16/2025 3:30 PM	6/16/2025				6/16/2025 2:30 PM	000:01:00	
2432800_M,1	Unplanned		Maintenance	6/16/2025 3:30 PM	6/16/2025	12/31/2024 8:28 PM			10/15/2021 1:07 PM	000:04:00	Normal
2432800_M,1	Unplanned		Maintenance	6/16/2025 3:30 PM	6/16/2025				4/9/2025 2:01 PM	000:04:00	
bot35647.1	Unplanned	Beek BV	Maintenance								
bottest01.1	Created to be Enriched		Maintenance						1/24/2025 10:16 AM	000:04:00	