



Crm Customer Relationship Management

CRM.Web 15.25.2

ACRM Web Modern Theme Setup Guide

Notices

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Overview

The existing CRM.Web update theme is considered dated. Consequently, a new modern theme has been introduced to align with the current corporate brand standards.

This guide provides instructions for enabling the modern theme within CRM.Web

Before you begin

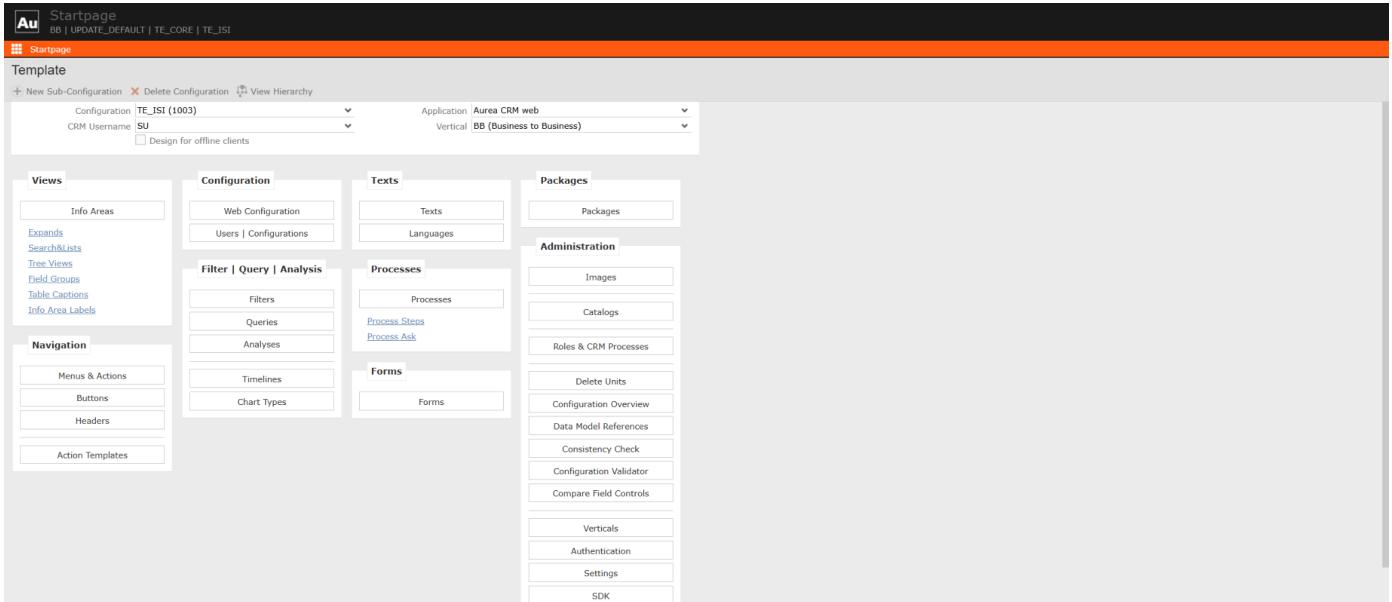
- You will need:
 - Aurea CRM version 15.25.2 or newer must be installed.

Change the theme

By default, Aurea CRM utilizes the update theme. To implement the modern theme, follow the steps detailed below.

Step 1: Change the theme in the CRM.Designer

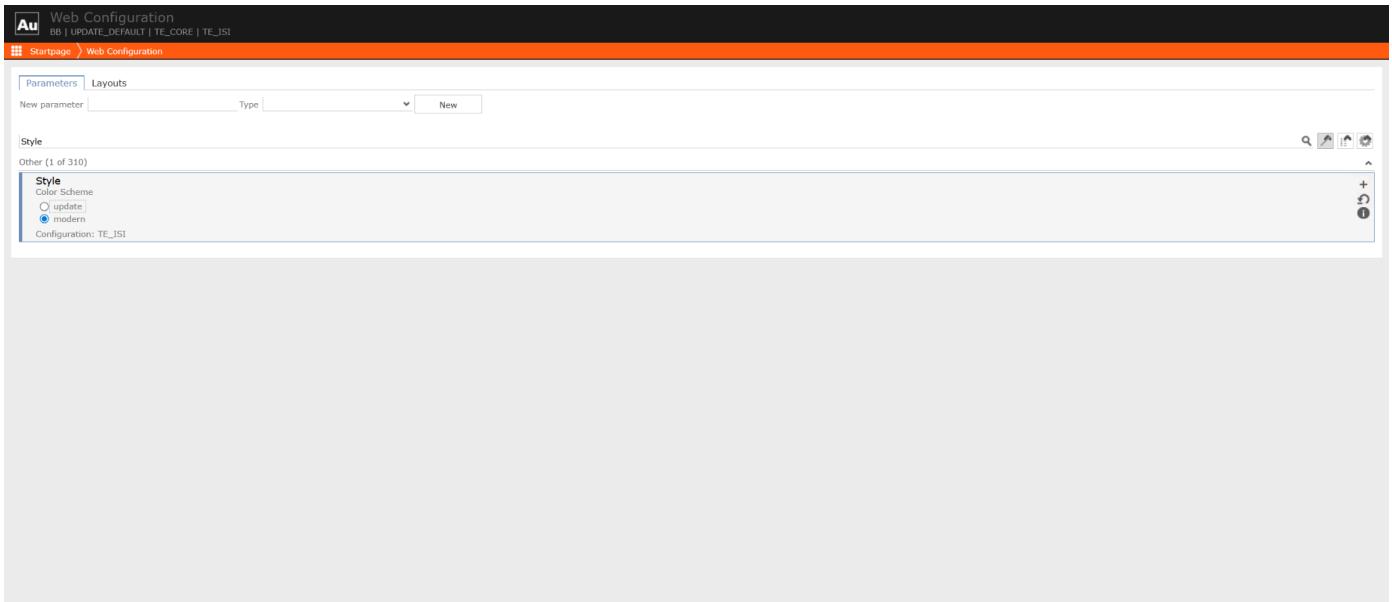
- Open the CRM.Designer and select the appropriate configuration.



The screenshot shows the CRM.Designer application window. At the top, there is a navigation bar with the application logo, the title 'Startpage', and a dropdown menu. Below the navigation bar, there is a search bar and a 'Template' section with a 'New Sub-Configuration' button, a 'Delete Configuration' button, and a 'View Hierarchy' button. The main area is a grid of configuration categories:

Views	Configuration	Texts	Packages
Info Areas	Web Configuration	Texts	Packages
Exands	Users Configurations	Languages	
Search&Lists			
Tree Views			
Field Groups			
Table Cautions			
Info Area Labels			
Navigation	Filter Query Analysis	Processes	Administration
Menus & Actions	Filters	Processes	Images
Buttons	Queries	Process Steps	Catalogs
Headers	Analyses	Process Ask	Roles & CRM Processes
Action Templates	Timelines		Delete Units
	Chart Types		Configuration Overview
		Forms	Data Model References
			Consistency Check
			Configuration Validator
			Compare Field Controls
			Verticals
			Authentication
			Settings
			SDK

- Navigate to "Web Configuration," search for "Style," and select "modern."



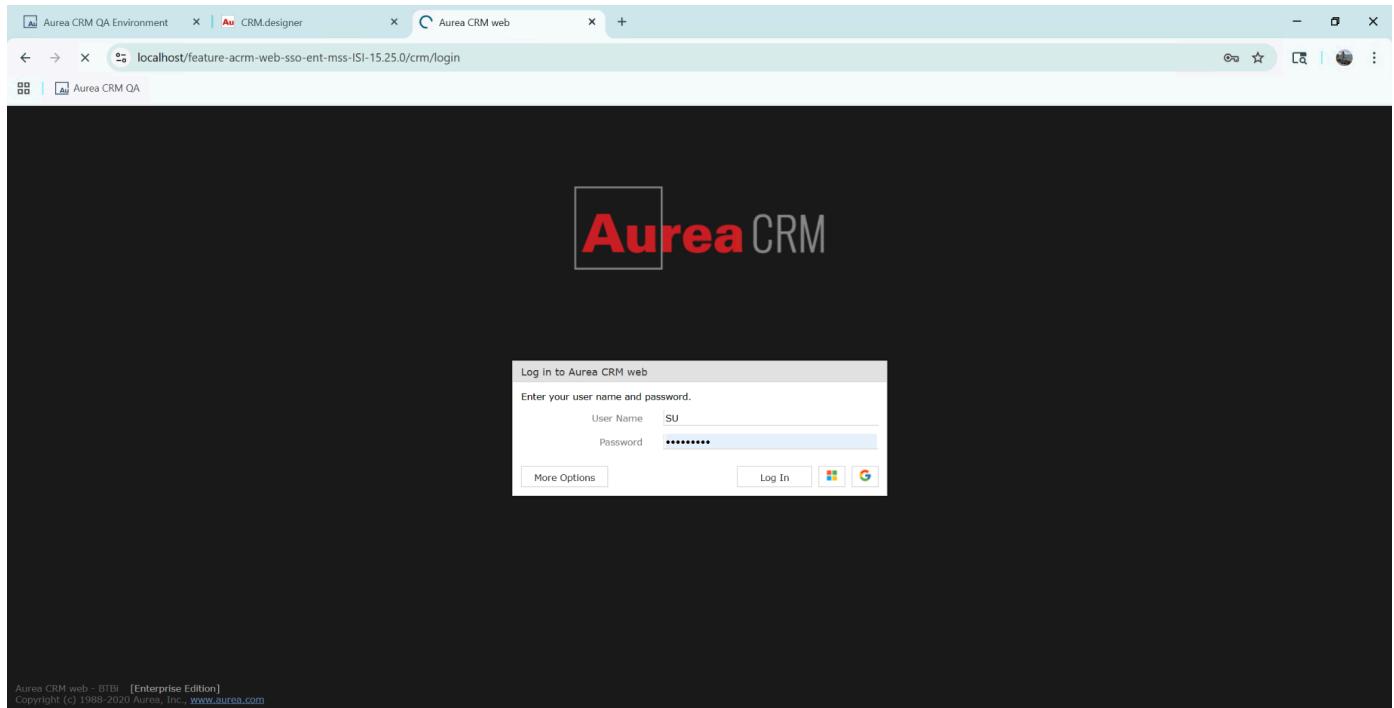
The screenshot shows the 'Web Configuration' screen. At the top, there is a navigation bar with the application logo, the title 'Startpage > Web Configuration', and a dropdown menu. Below the navigation bar, there is a search bar and a 'Parameters' section with a 'Layouts' tab selected. The 'Style' section shows a list of options:

Style
Color Scheme
<input type="radio"/> update
<input checked="" type="radio"/> modern

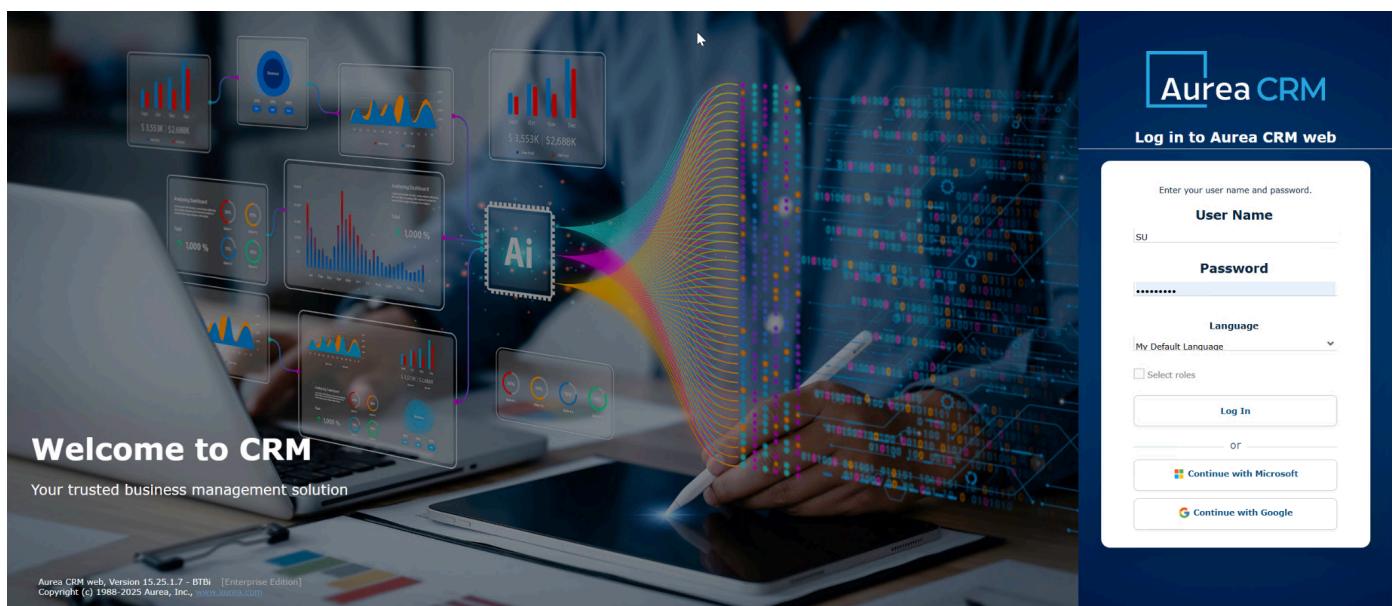
Below the style list, there is a note: 'Configuration: TE_ISI'.

Step 2: OPTIONAL: Change the default login screen

The standard login screen is utilized by default.

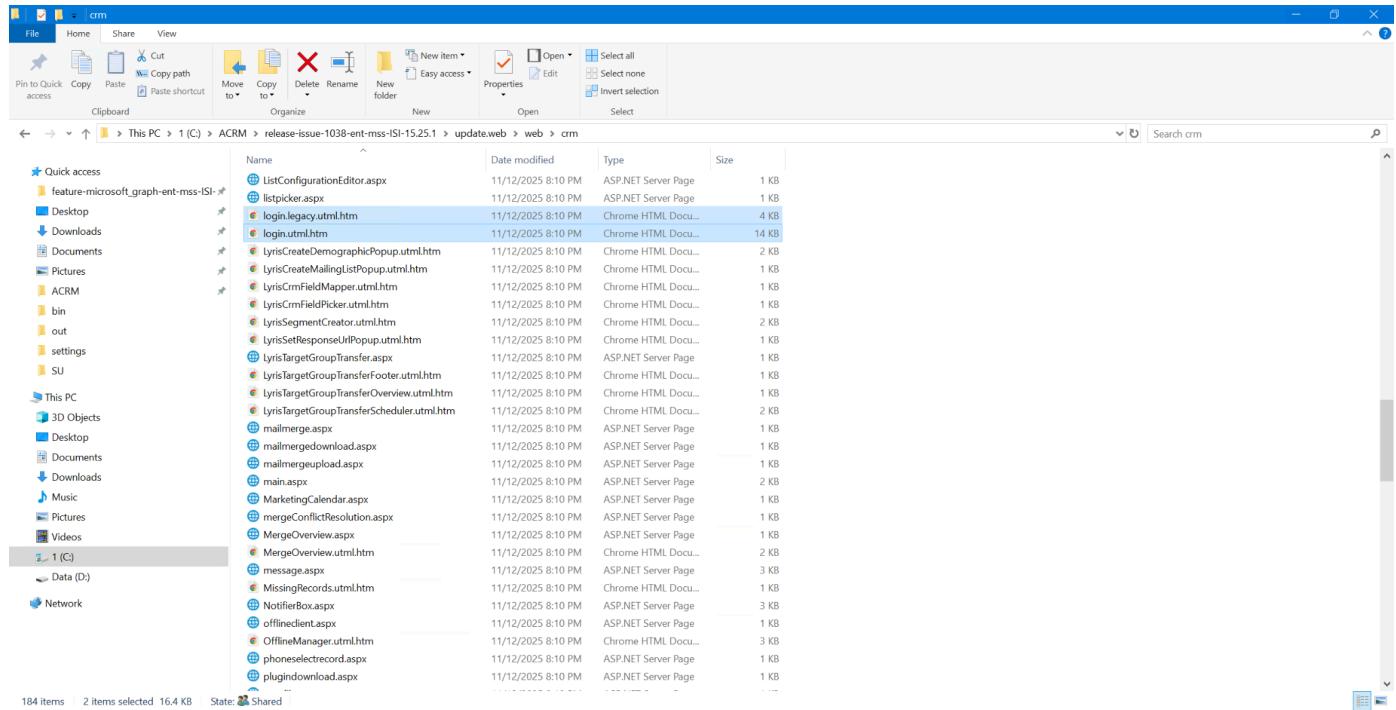


However, it is possible to replace it with the new modern login screen.



To change the default login page, navigate to the `update.web\web\crm` folder within the CRM.Web installation directory. Back up the existing `login.utml.htm` file (e.g., rename it to

`login.legacy.utml.htm`). Subsequently, rename `login.modern.utml.htm` to `login.utml.htm`, as illustrated in the following screenshot.



Step 3: Recycle the application pool

- Open **Internet Information Services (IIS) Manager** on the installation server.
- Navigate to "Application Pools."
- Recycle the Application Pool associated with Aurea CRM.Web.

Internet Information Services (IIS) Manager

File View Help

Connections

Start Page WIN-6QLQ87PVUN5 (WIN19ACRM1\Administrator) Application Pools Sites

Application Pools

This page lets you view and manage the list of application pools on the server. Application pools are associated with worker processes, contain one or more applications, and provide isolation among different applications.

Filter: release Go Show All Group by: No Grouping

Name	Status	.NET CLR V...	Managed Pipe...	Identity	Applications
release-issue-1038-ent-mss-ISI-15.25.1	Started	v4.0	Integrated	ApplicationPoolIdentity	1
release-issue-1038-ent-mss-ISI-15.25.1.designer	Started	v4.0	Integrated	ApplicationPoolIdentity	1
release-issue-1038-ent-mss-ISI-15.25.1.interface	Started	v4.0	Integrated	ApplicationPoolIdentity	1
release-issue-1038-ent-mss-ISI-15.25.1.webservices	Started	v4.0	Integrated	ApplicationPoolIdentity	1

Actions

- Add Application Pool...
- Set Application Pool Defaults...
- Application Pool Tasks
 - Start
 - Stop
 - Recycle... (highlighted)
 - Edit Application Pool
 - Basic Settings...
 - Advanced Settings...
 - Rename
 - Remove
- View Applications
- Help

Note: After recycling the application pool, the modern login page image may temporarily disappear due to the clearing of the image cache. This can be resolved by performing a hard refresh of the browser (CTRL + R).

