

MeetApp for vtenext

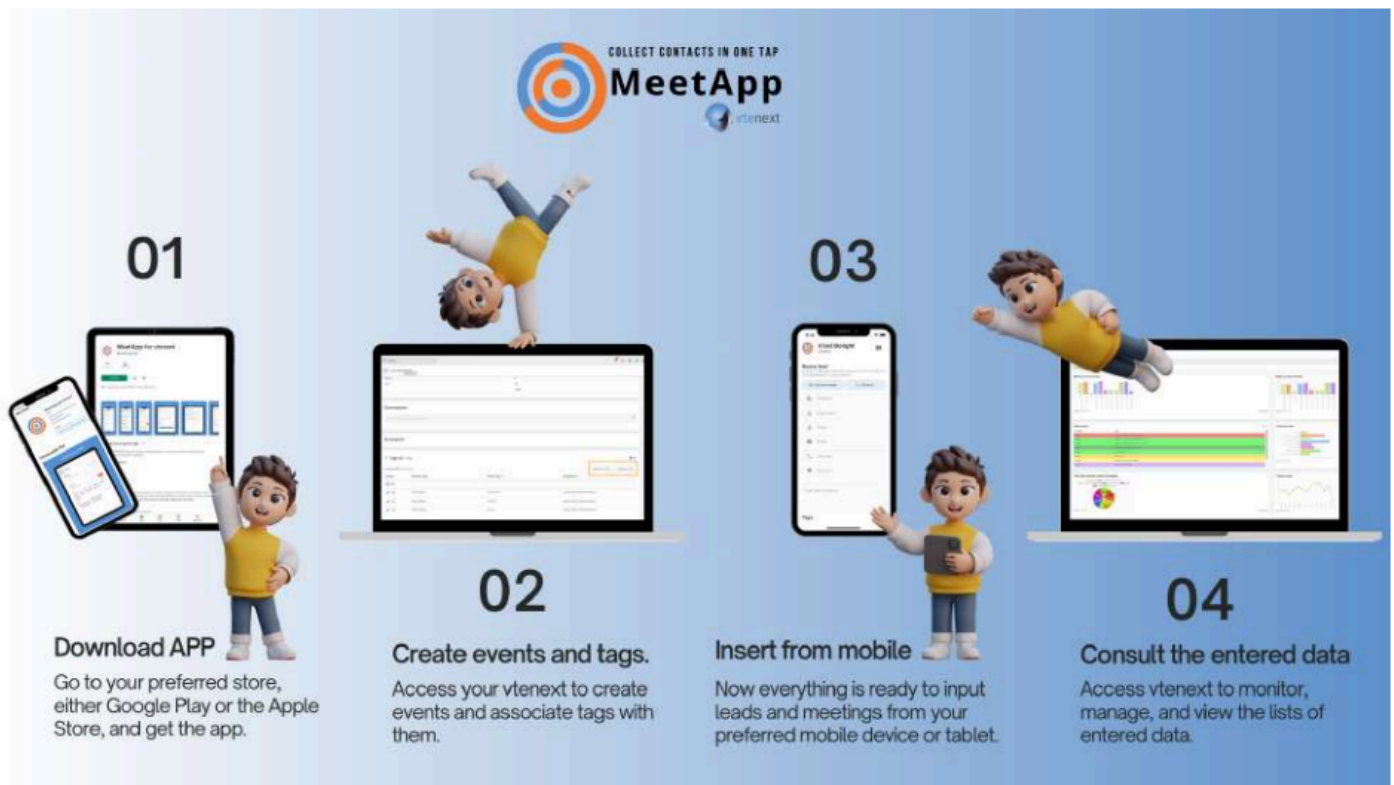
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Introduction to MeetApp for vtenext

Do you have a trade fair, an event, or client meetings? Meetapp for vtenext helps you gather and profile new leads, register meetings at your contacts' events, and instantly obtain all statistics. MeetApp for vtenext synchronizes with your CRM and provides all the useful data to create reports and analyze the ROI of events such as trade fairs, workshops, and networking conferences.

What are the advantages of the APP?

- No post-event data entry activities. Register and/or update directly from your mobile.
- Enter name, surname, and company from your mobile device or tablet to create a new lead.
- Take note of the information exchanged with the lead/contact in the NOTES field and attach photos.
- Define clear and unique objectives for the team by setting precise tags to associate with.
- Analyze the reporting and results obtained on leads, contacts, and accesses.
- PRO Version! Capture personal information directly by scanning the business card.



CRM vtenext

Events

Access vtenext and search among the modules EVENTS.

Create new Event

Click on Create

The screenshot shows a web browser window with a search bar at the top. Below it is a form titled "Creating Event". The form is split into two columns. The left column, "Event Information", has fields for "Event Number" (AUTO GEN ON SAVE), "Start Date" (16-02-2024), "Location" (Italy), "City" (London), "Code", and "Event Type" (Evento online). The right column, "Networking", has fields for "Event Name" (Networking), "End Date" (23-02-2024), "Address" (4 Rowan Rd, London W6 7DU), "State" (UK), "Country", and a "Tag Relationality" checkbox. In the top right corner of the form, there are "Save" and "Cancel" buttons.

Fill in the data Name (mandatory), start date, end date, location, address, city, province, ZIP code, and country/state and click SAVE in the top right corner.

Remember that your event can simply be called Business Meetings for everyday use of the app unrelated to a particular event.

By checking the "Tag Relationality" option, you allow the addition of tags even from mobile. It is advisable to use it only in specific cases to avoid the uncontrolled proliferation of tags.

APP MeetApp for vtenext

Download App

To get the app is easy! Search for "MeetApp for vtenext" on your preferred app store (or click on the App Store or Google Play) and download it.

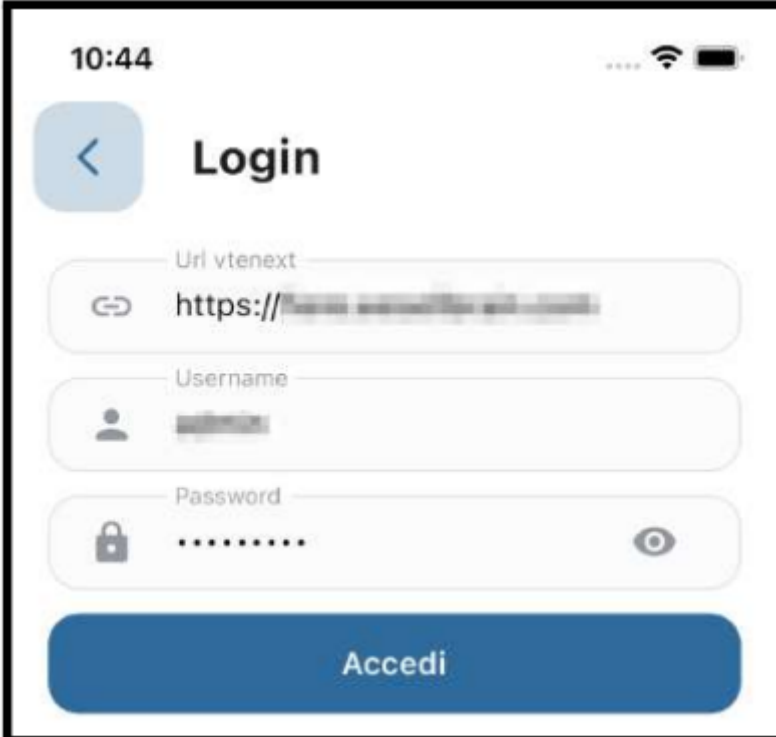
Login

To log in, enter your credentials by clicking on the button in the top right corner and going to settings.

The three pieces of information needed to log in are:

1. URL of your vtenext environment preceded by https://
2. Username of your user
3. Password of your user

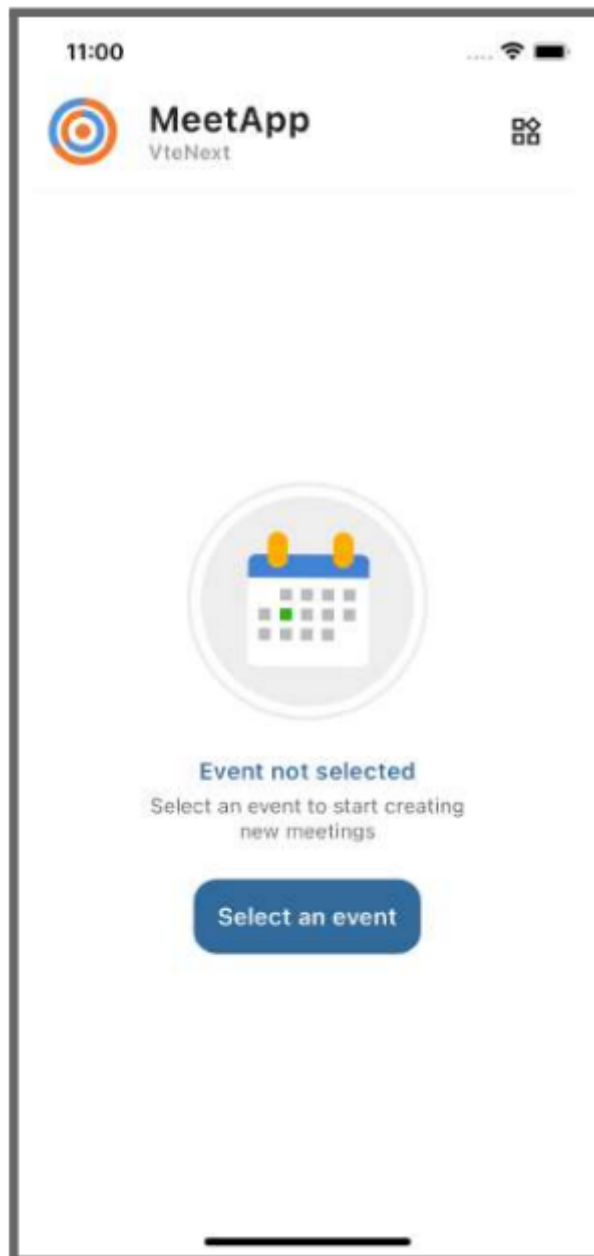
The language of the app changes based on the language of the mobile device.



The screenshot shows a mobile application interface for logging in. At the top, the time is 10:44. The title of the screen is "Login". There are three input fields: "Url vtenext" with a link icon and the text "https://", "Username" with a person icon and a blurred name, and "Password" with a lock icon, a blurred password, and an eye icon to toggle visibility. A large blue button labeled "Accedi" is at the bottom.

Select Event

Select the event you are attending or simply a generic event such as business visits.



Insert a new meeting

When you meet a new person and enter the data such as company, last name, and first name, the meeting will be saved.

The screenshot shows the Vivid Delight VteNext mobile application interface. At the top, the status bar displays the time 11:01, signal strength, Wi-Fi, and battery icons. The app header features the Vivid Delight logo (a stylized 'V' in a circle) and the text 'Vivid Delight VteNext' on the left, and a menu icon (three squares) on the right. Below the header, the section is titled 'New lead' with the instruction 'Fill below to add a new lead or search a contact/lead from existing ones'. There are two buttons: 'Scan' with a QR code icon and 'Search' with a magnifying glass icon. Below these are seven input fields: 'Company*' with a calendar icon, 'Last Name*' with a person icon, 'First Name' with a person icon, 'Email' with an envelope icon, 'Phone' with a telephone icon, and 'Nation' with a location pin icon. A large text area for 'Meeting notes' is positioned below the input fields. At the bottom, the 'Tags' section is partially visible.

To create a lead, you will need to go to the meeting in vtenext, click on the three dots, and select "Convert to Lead."

Search and select an existing contact or lead

You can associate a meeting with an existing contact or lead. To do this, click on "Search," and you will see a list of your contacts and leads based on your visibility in the CRM.

The screenshot shows the Vivid Delight mobile application interface. At the top, the status bar displays the time 11:01, signal strength, Wi-Fi, and battery icons. The app header includes the Vivid Delight logo (a target icon) and the text 'Vivid Delight' and 'VteNext'. A menu icon is visible in the top right corner. The main section is titled 'New lead' with the instruction 'Fill below to add a new lead or search a contact/lead from existing ones'. Below this are two buttons: 'Scan' and 'Search'. The 'Search' button is highlighted with a yellow border. Underneath are several input fields: 'Company*' (with a calendar icon), 'Last Name*' (with a person icon), 'First Name' (with a person icon), 'Email' (with an envelope icon), 'Phone' (with a telephone icon), and 'Nation' (with a location pin icon). At the bottom of this section is a large text area labeled 'Meeting notes'. Below the notes area is a section titled 'Tags'.

To differentiate them from the list, leads are highlighted in green and contacts in yellow.

Save the meeting

On the meeting, you can save useful data such as associating tags, taking notes, dictating through the microphone, and adding photos to the meeting.

11:01

First Name

Email

Phone

Nation

Meeting notes

Tags

Prodotti Formazione Servizi

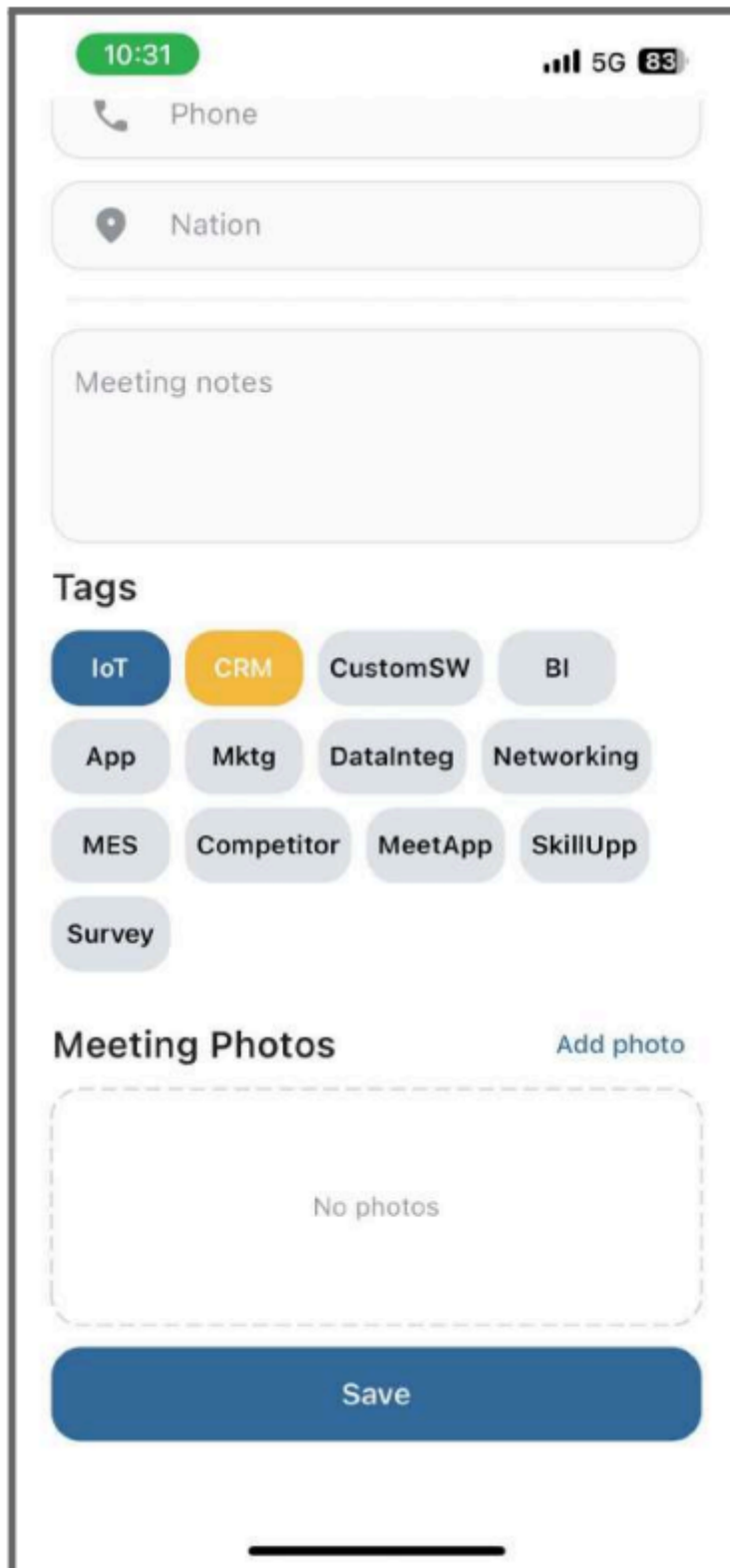
Meeting Photos [Add photo](#)

No photos

Save

Priority Tag

If you wish to highlight a tag as priority, meaning the one you consider most significant for that meeting, such as the interest shown by a potential customer in a specific product, press and hold the desired tag until it turns golden.



Menu

At the top right, you'll find the menu.

11:02



Vivid Delight

VteNext



Settings



Your meetings

New lead

Fill below to add a new lead from existing ones

Scan

Search



Company*



Last Name*



First Name



Email



Phone

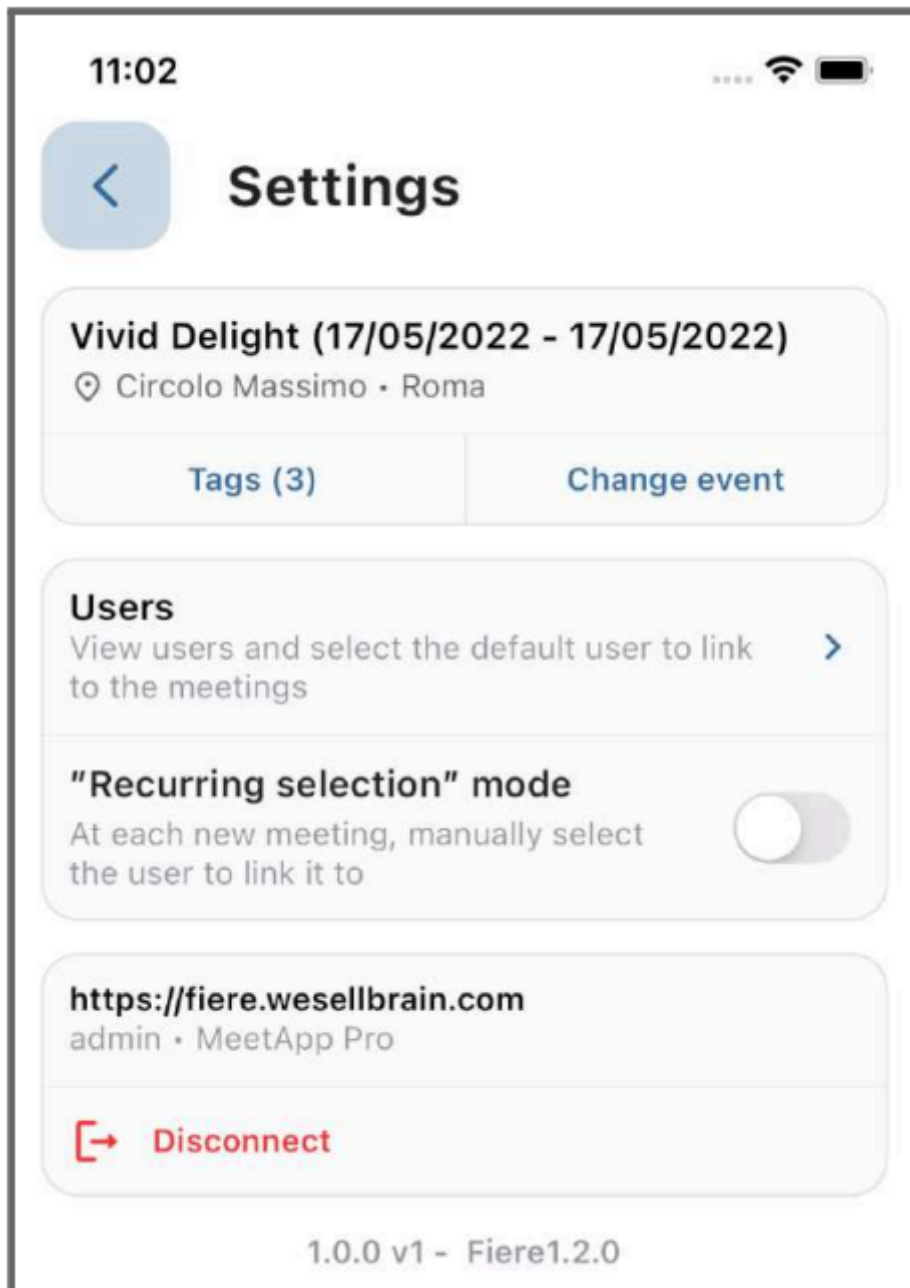


Nation

Meeting notes

Tags

Settings

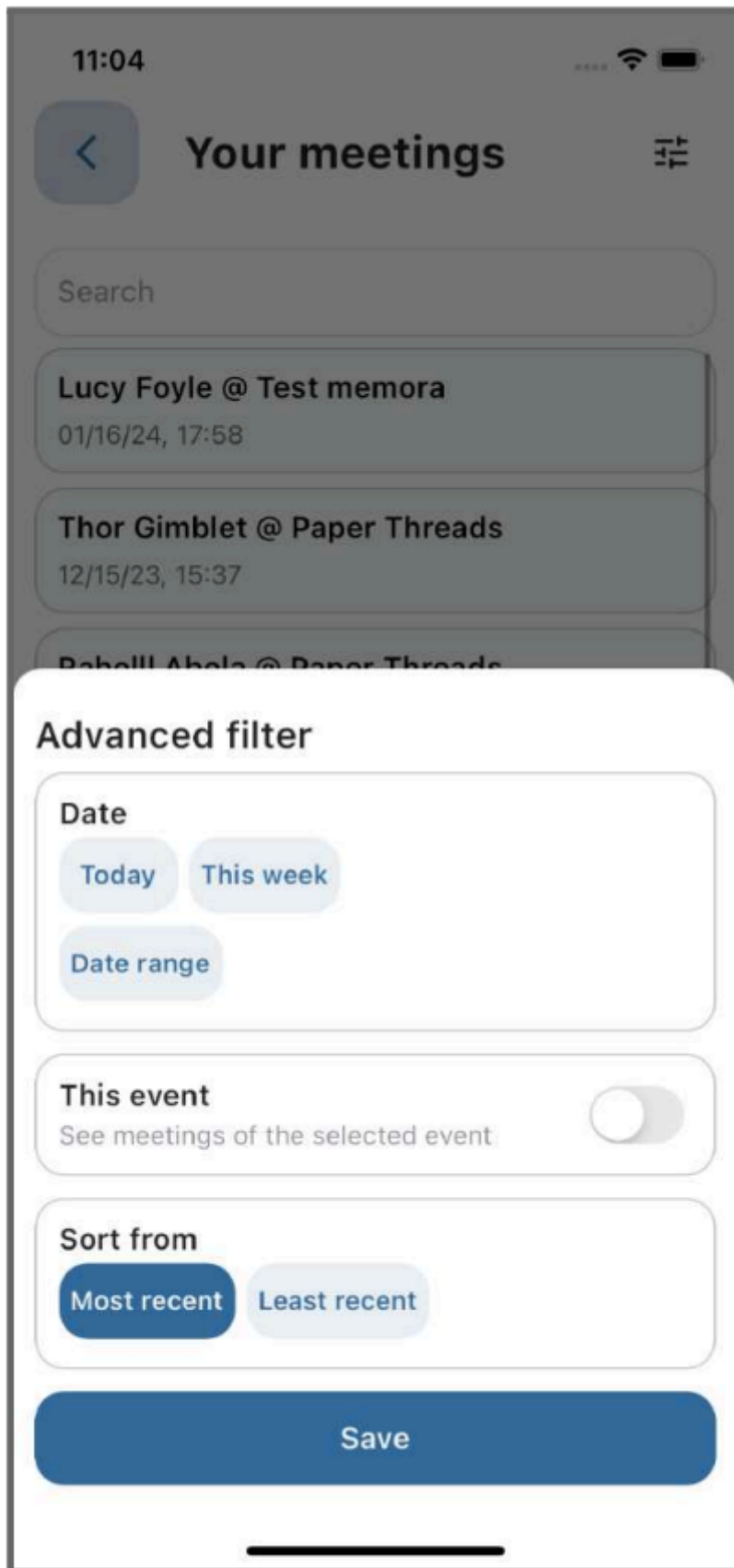


Within the settings, you can:

- Change event (select a new event)
- Tags: view existing tags or create a new one
- Users: view the current user or select a different user
- "Recurrence Selection" mode: if enabled, for each new meeting, you can manually link the user to whom it belongs. This is useful in cases where a single tablet is set up for multiple people to enter data.
- Disconnect

Your Meetings

From the menu, you can click on "Your Meetings" to view the list of saved meetings. Additionally, you can filter the meetings by date, meetings and sort them chronologically or otherwise.



Edit Meeting

By selecting a meeting from the list, you can enter the details and make modifications.

11:04



Edit meeting

Selected lead/contact

You are editing this lead/contact

Lucy Foyle • Francia

lfoyle33@samsung.com - 06 59 27 00 50

Company*



Thoughtmix

Last Name*



Foyle

First Name



Lucy

Email



lfoyle33@samsung.com

Phone



06 59 27 00 50

Nation



Francia

[I don't want to edit this lead/contact anymore](#)

Meeting notes

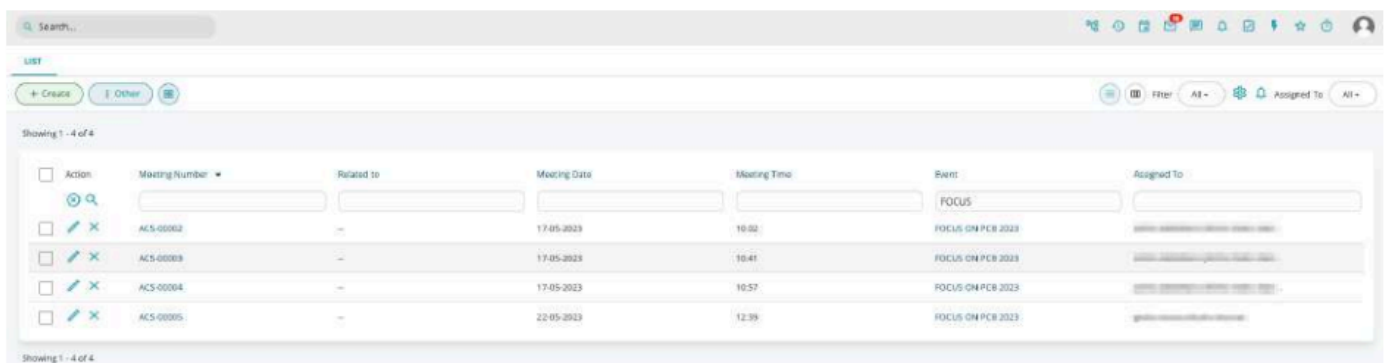
Test

Viewing and Reports on vtenext CRM

From your CRM vtenext, you can access all the data entered through the mobile or tablet app.

View meetings

On the Meetings Module, you can consult the list of meetings saved with the application.



Action	Meeting Number	Related to	Meeting Date	Meeting Time	Event	Assigned To
<input type="checkbox"/>	ACS-00002	-	17-05-2023	10:32	FOCUS ON PCB 2023	[User Name]
<input type="checkbox"/>	ACS-00003	-	17-05-2023	10:41	FOCUS ON PCB 2023	[User Name]
<input type="checkbox"/>	ACS-00004	-	17-05-2023	10:57	FOCUS ON PCB 2023	[User Name]
<input type="checkbox"/>	ACS-00005	-	22-05-2023	12:39	FOCUS ON PCB 2023	[User Name]

Create Reports

Now you have all the relevant data in your CRM to create reports and analyze the ROI of events such as trade shows, workshops, and networking events.

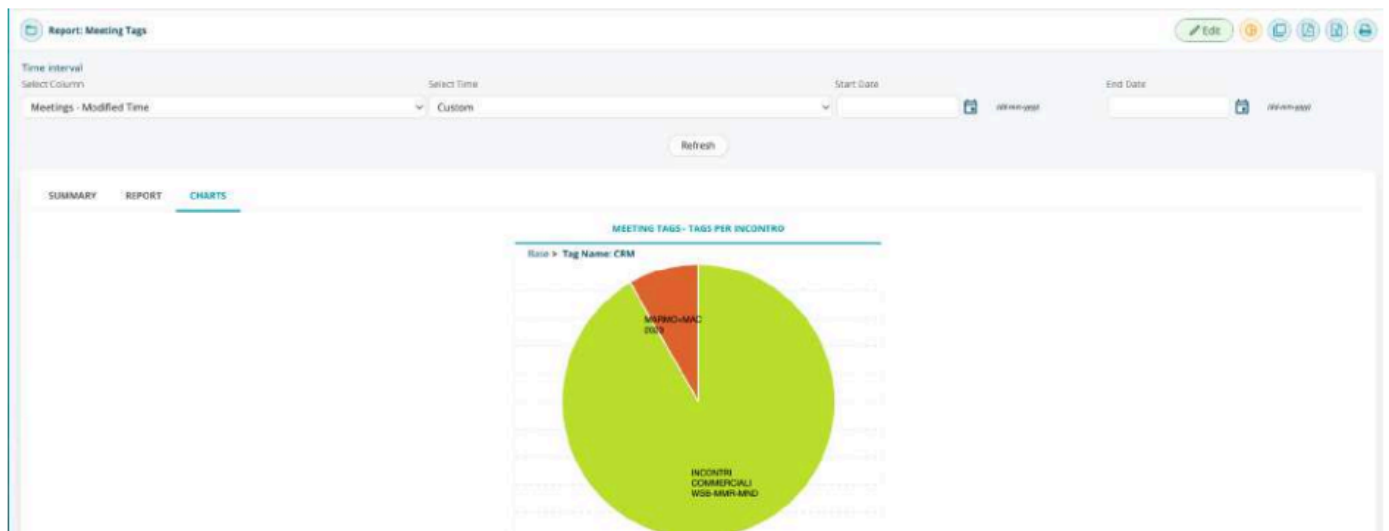
Graphical example of meetings per event.



Example graph of tags associated with meetings.







With drill-down functionality, you can open a tag and view the events associated with it. For example, clicking on CRM.





PRO Version


Thanks to the PRO version, you can access the business card reading feature via the app. By clicking on 'Scan', the fields will be automatically filled in.


11:01  


 **Vivid Delight**
VteNext 


New lead
Fill below to add a new lead or search a contact/lead from existing ones


 **Scan**  **Search**


 Company*

 Last Name*

 First Name

 Email

 Phone

 Nation

Meeting notes

Tags

Capture text from business card

Thanks to the PRO version, you can access the business card reading feature from the app. By clicking on Capture text, the fields will be automatically filled in.

Convert to Leads

By entering a meeting, you can convert the contact into leads by selecting the three dots at the top left and clicking Convert to Leads.

Convert to Visit Report

By entering a meeting, you can convert the meeting into a visit report by selecting the three dots at the top left and clicking Convert to Visit Report. If there is no lead associated, the name will also be converted to leads."

