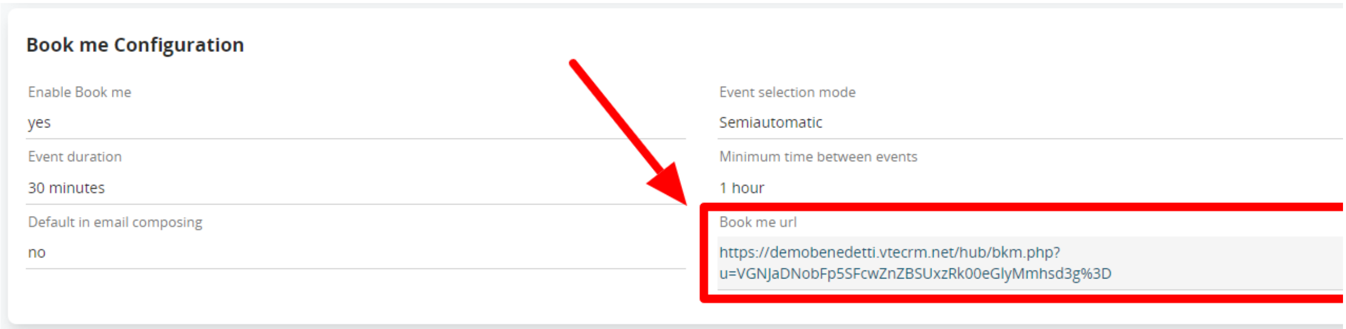
Release Note vtenext 24.08

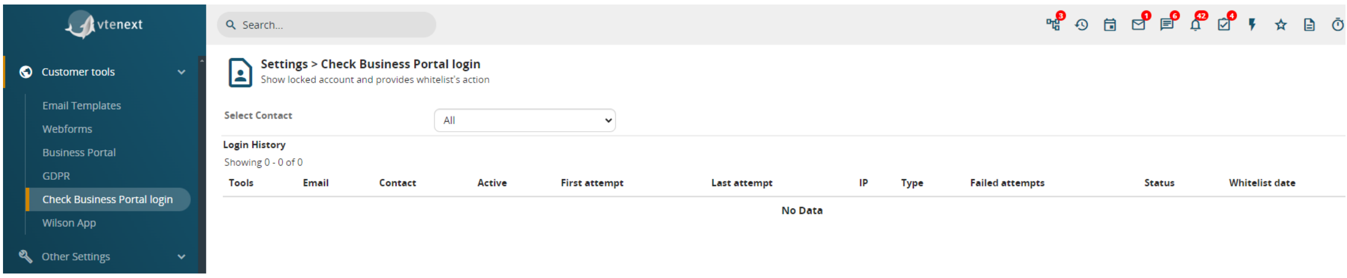
Release Note vtenext 24.08

New Web Features

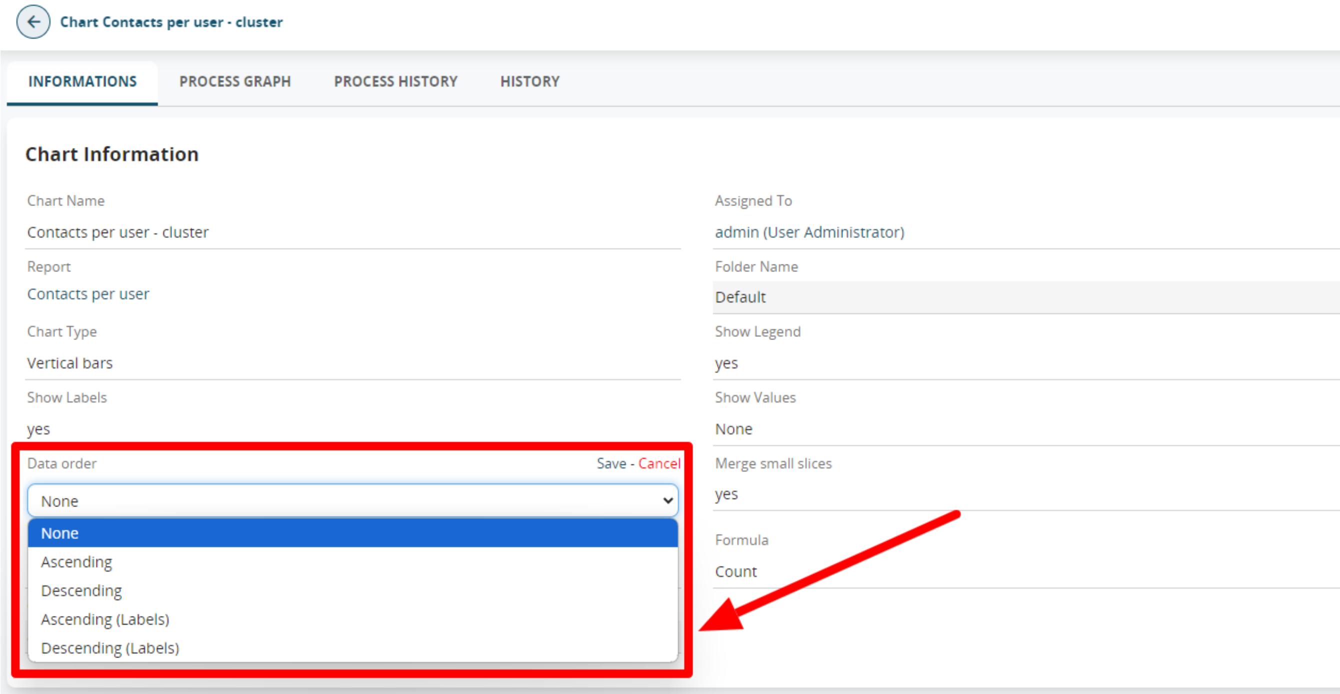
- **Bookme:** In the user preferences, a new option has been added to easily copy the link to your personal calendar. In the previous version, the link was generated directly within the email composition. This update provides greater convenience for sharing.



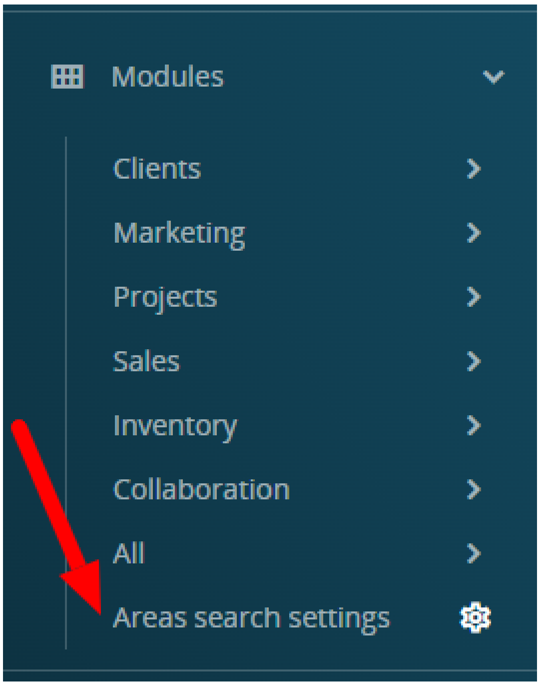
- **Check Business Portal login:** It is now possible to unlock Portal users who have been blocked by the system after too many failed login attempts.



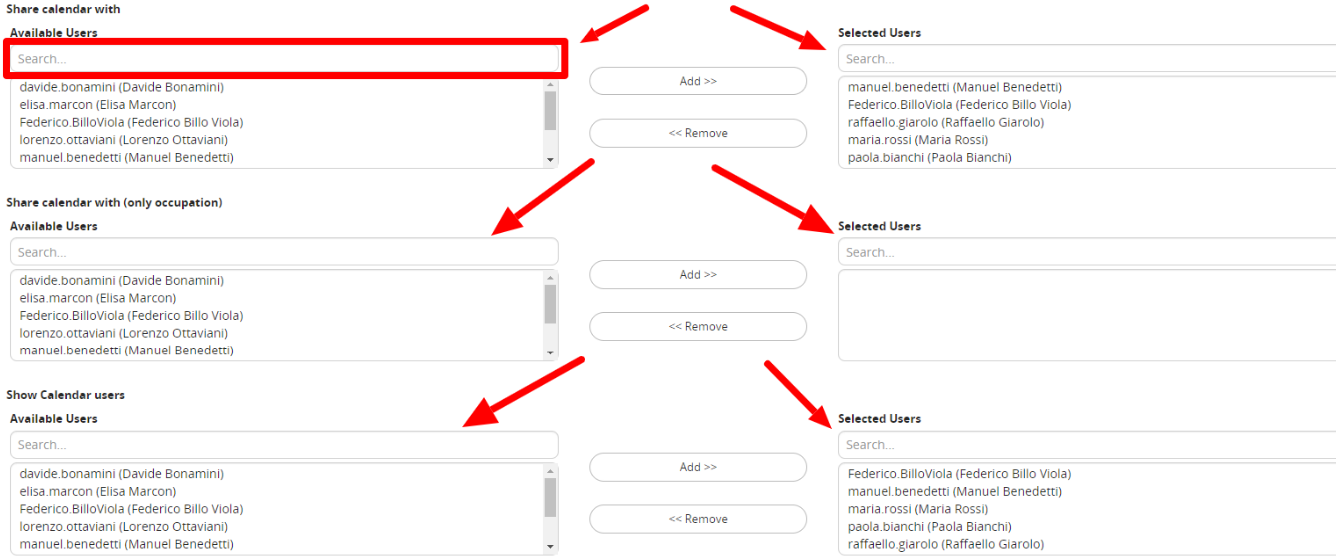
- **Report Graph Label Sorting:** It is now possible to manage the sorting of labels in report graphs. This feature can be found directly in the graph configuration, under the Data Sorting option.



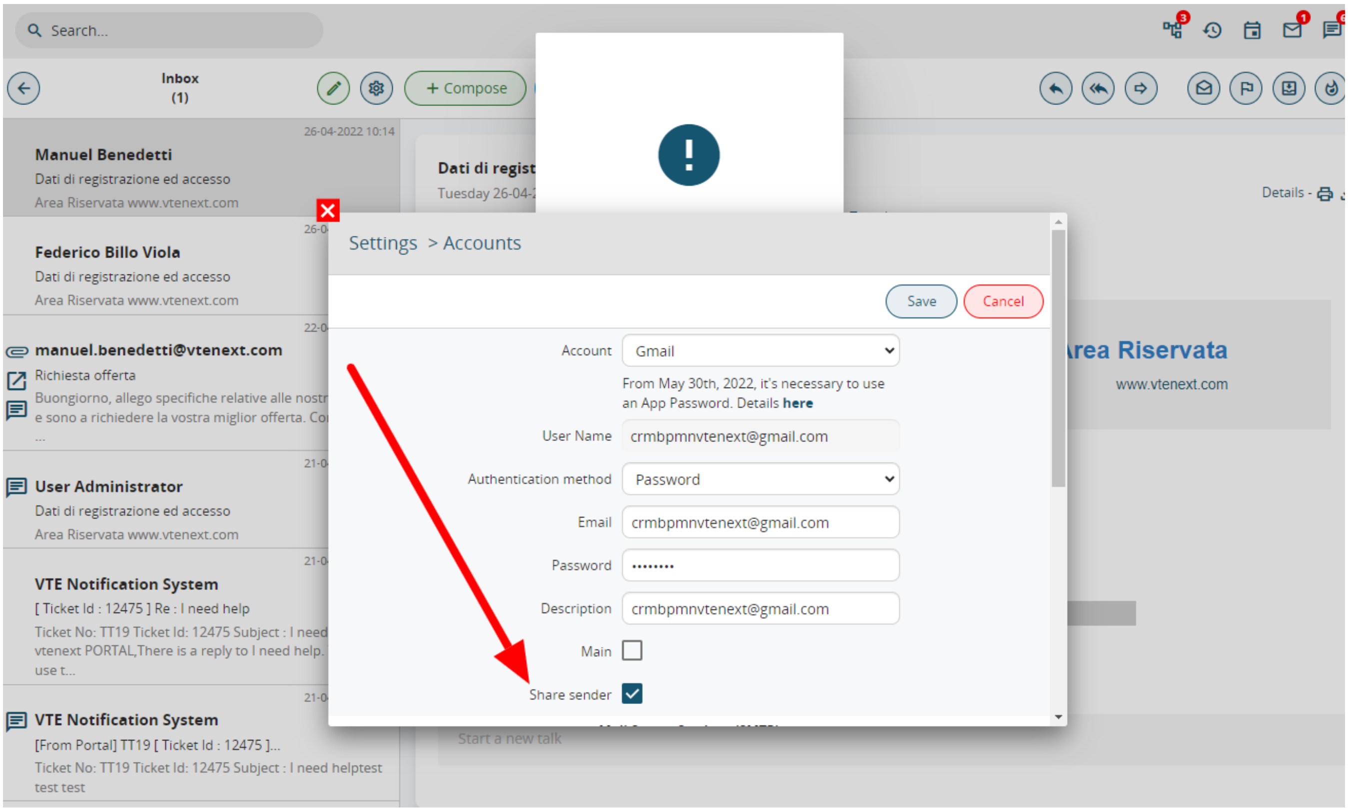
- **Area Search Settings:** A new menu item has been added to the left menu for quick access to manage the CRM's search areas.



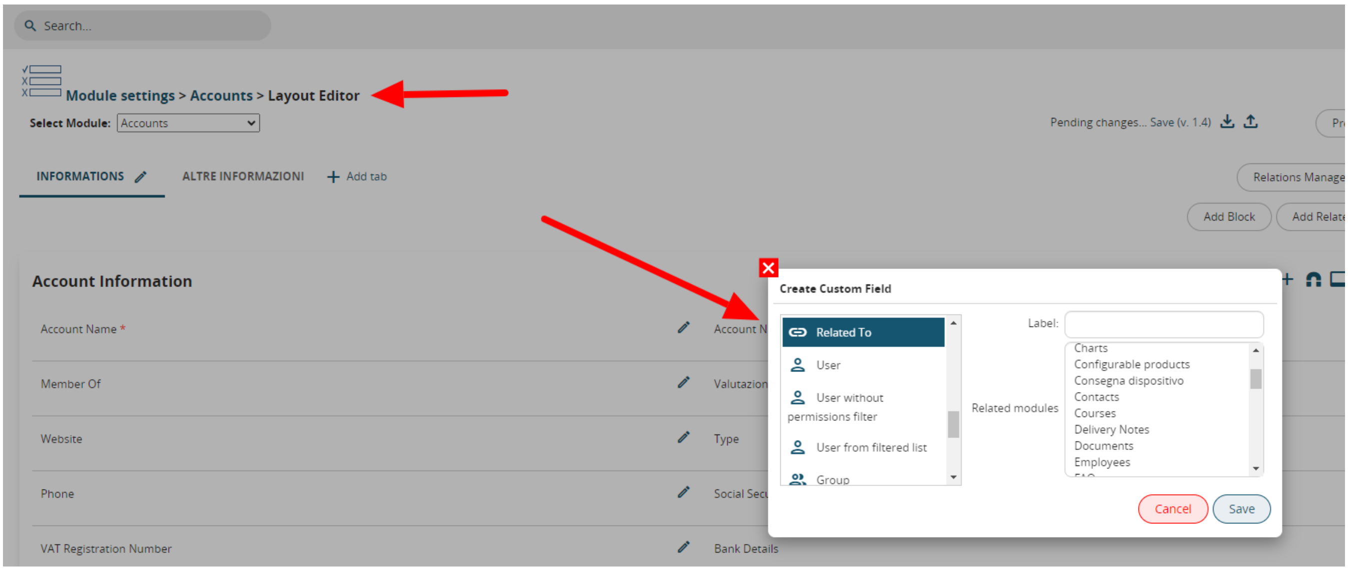
- **User Search in Calendar Preferences:** User search fields have been added in the user preferences, making it easier to configure and share the calendar when dealing with a large number of users.



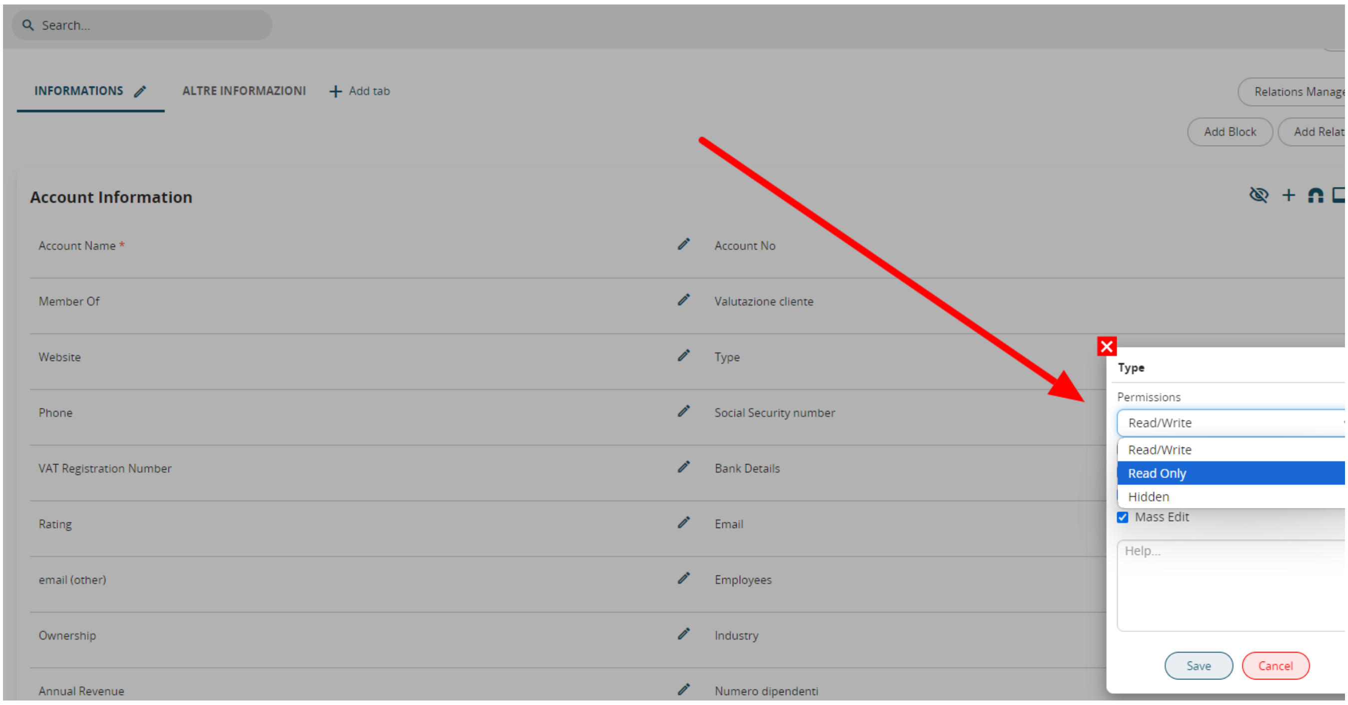
- **Share Sender:** In the Messages module, only the admin user has the ability to configure an email account and flag a field named "Share Sender." This function allows for a shared outgoing mailbox for all users, without needing to configure it for each individual user. While the inbox for this mailbox will not be visible to users, they will still be able to use the shared email account as the sender when sending emails from the Messages module.



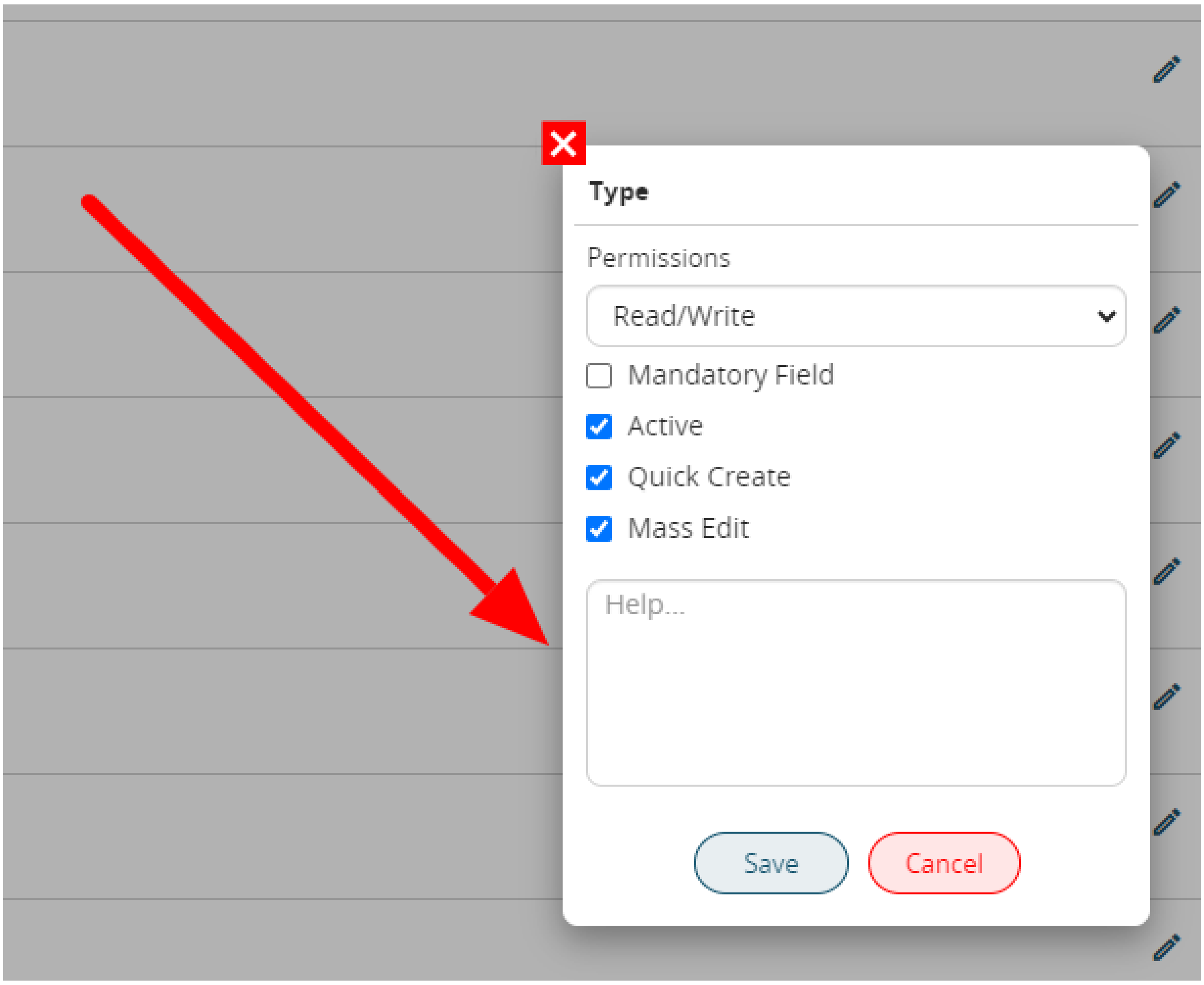
- **UITYPE10 Fields (relation fields) from Layout Editor:** The ability to add relation fields directly from the layout editor has been introduced. This allows you to add all necessary relationships to each module as needed. However, this feature has a limitation: it is not possible to add two relation fields to the same module.



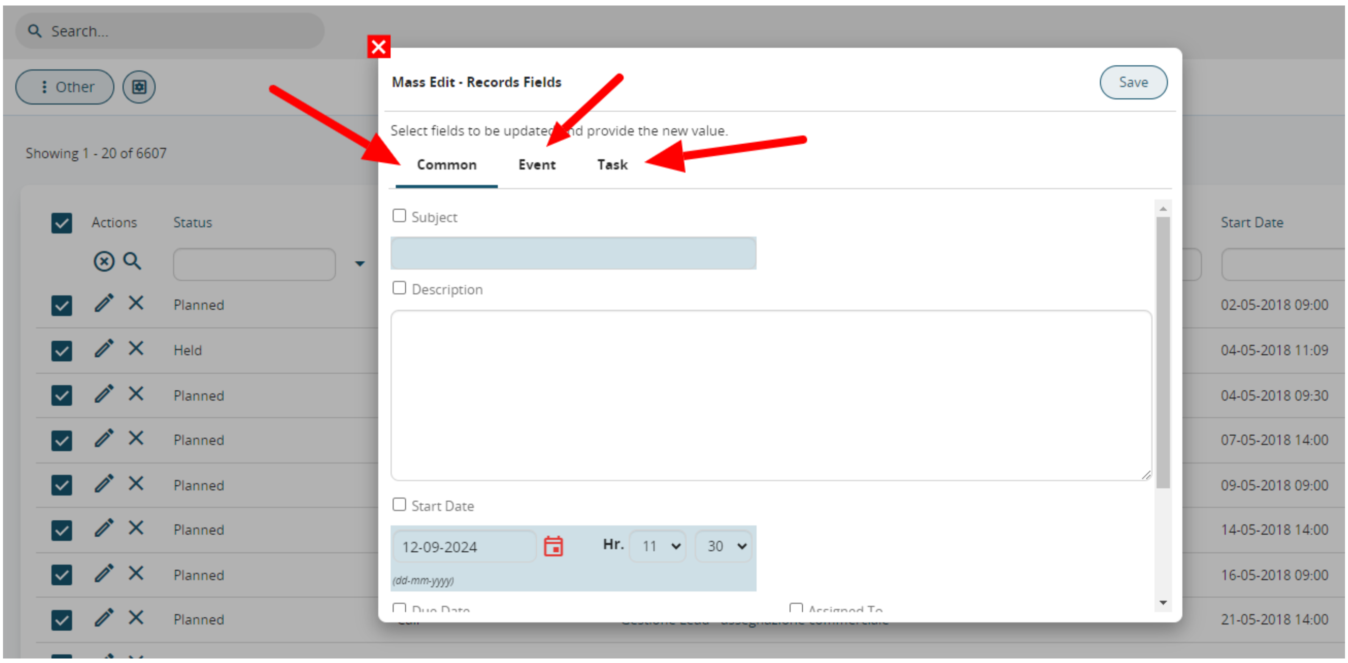
- **Read-only Fields from Layout Editor:** From the settings > layout editor of a module, it is now possible to set a field to read/write, read-only, or hidden by clicking on the pencil icon



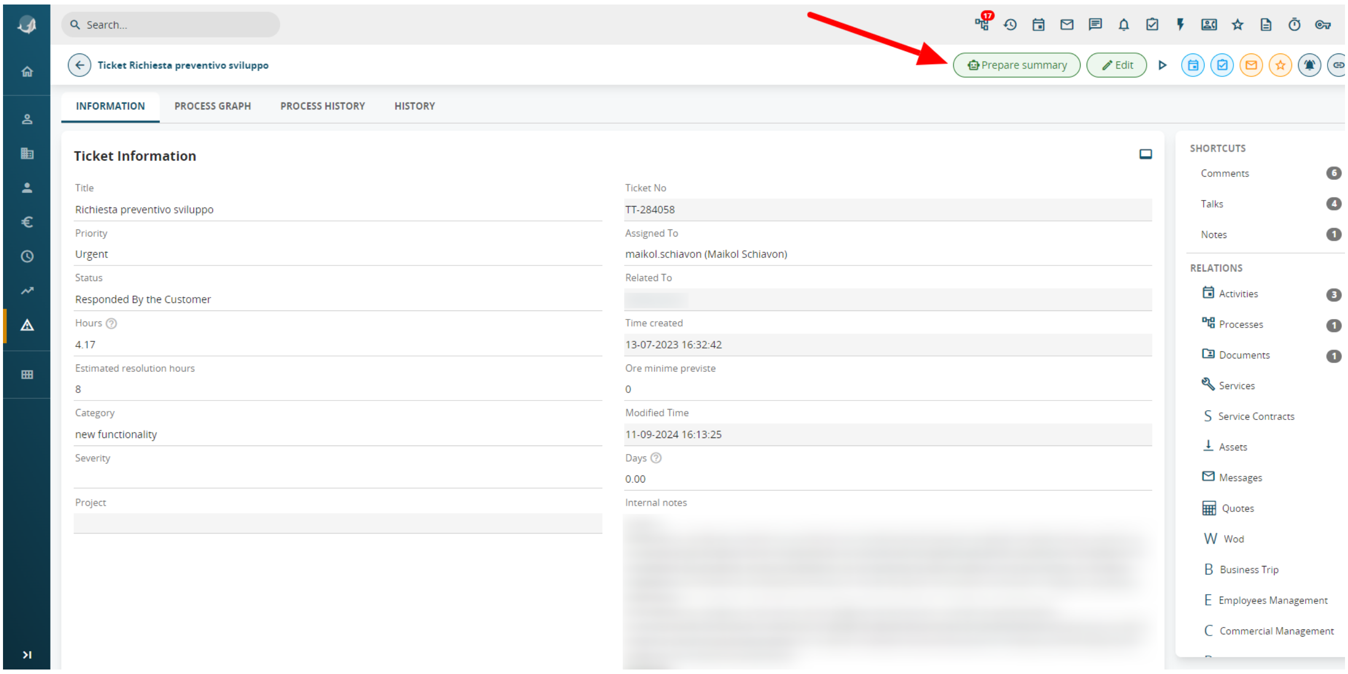
- **Tooltips on Fields:** Also from the layout editor of a module, it is possible to add a tooltip for each field, which is a small help text to guide the user on how to fill in or use that specific field.

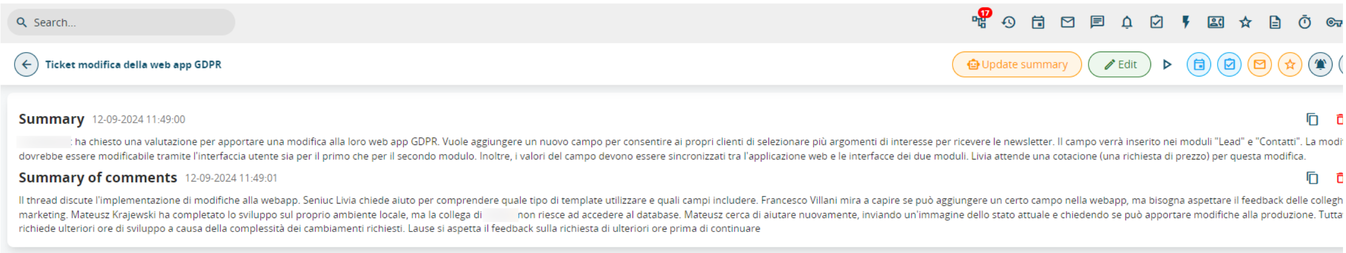


- **Improved Calendar Mass-Edit:** It is now possible to perform mass edits on Common Fields in the Calendar, or specifically on Events or Tasks, thereby increasing productivity.

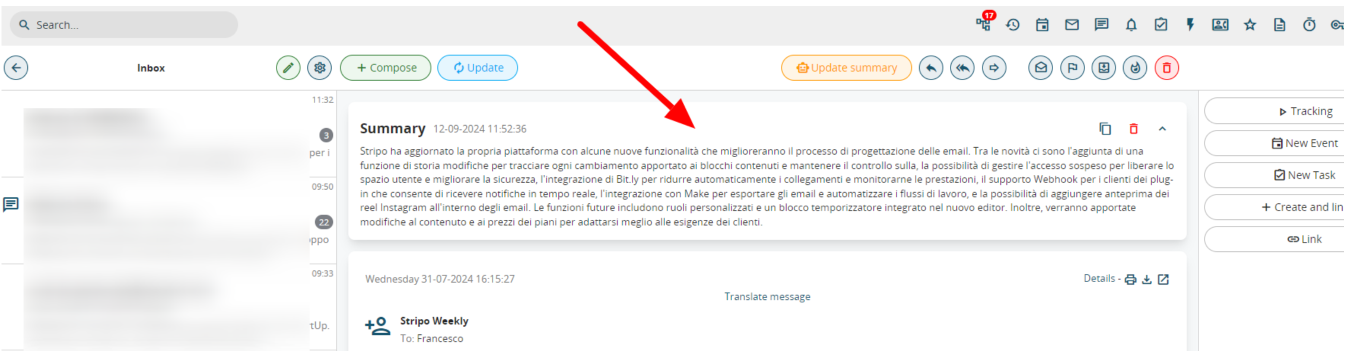


- **GPT Services:** The services we offer are: SUMMARIES, TEXT PROCESSING, DIALOGUE WITH KLONDIE. For example, we can request summaries through a ticket when we are faced with a large amount of information (in the description, comments, etc.) and need a summary to understand the issue (with the possibility of updating the requested summary when there are new details or comments in the ticket itself).

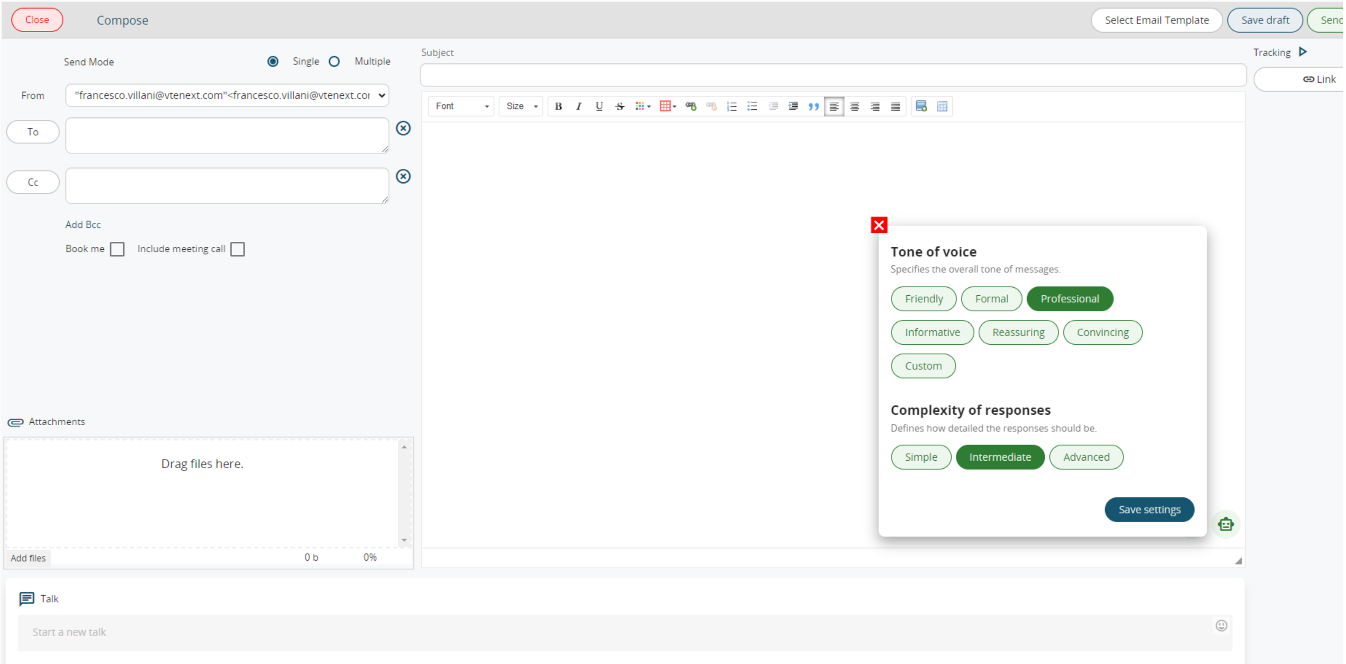




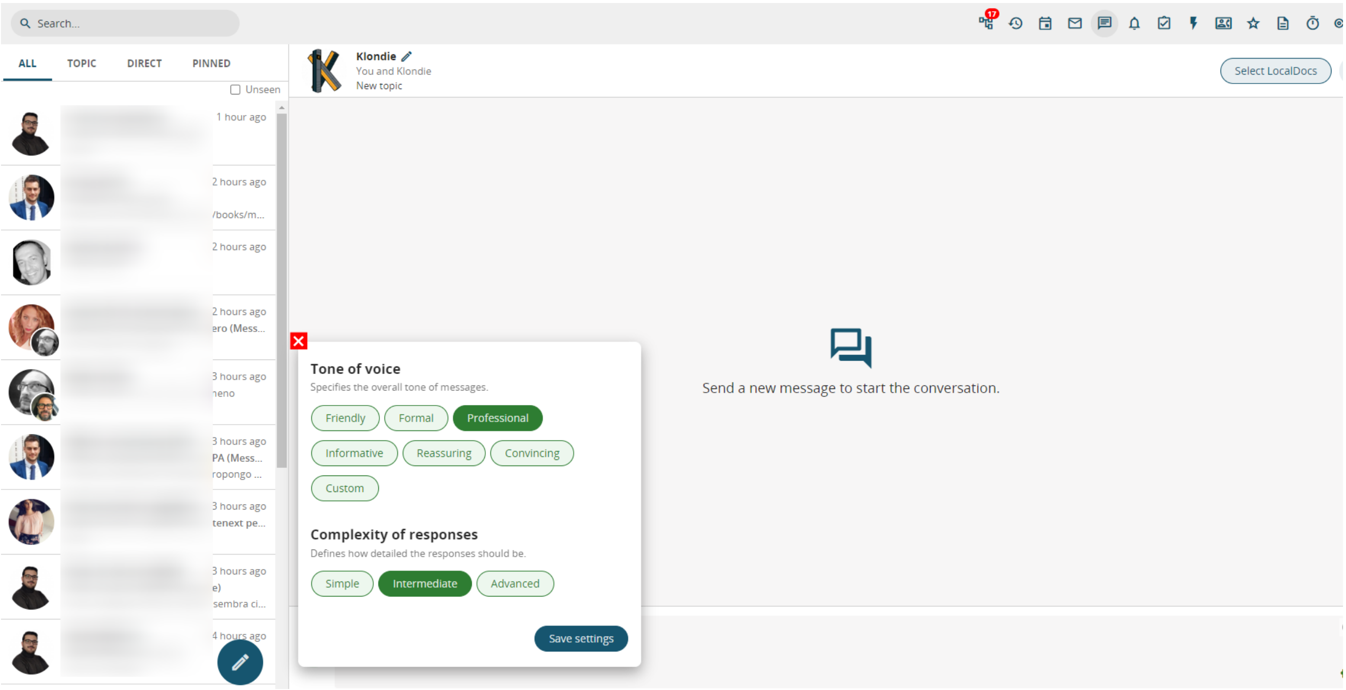
The summary is also available in the message module and summarizes the entire thread.



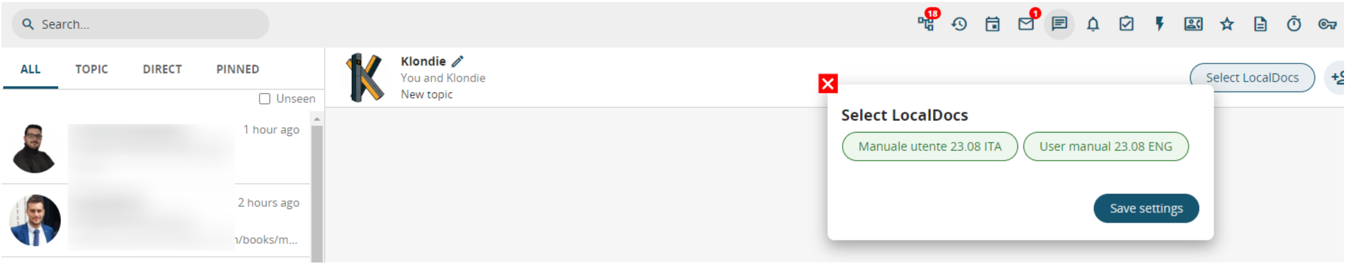
Also in the Messages module, it's possible to have a text processed by the artificial intelligence that meets specific characteristics. Just provide basic instructions on what you want to communicate, choose the type of text the AI should write, and you're all set.

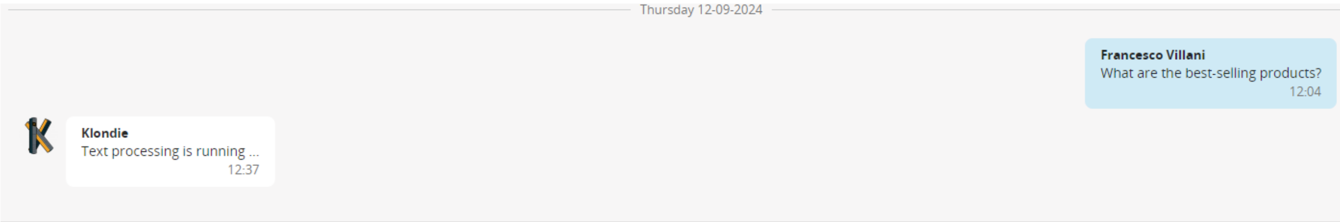


This function is also available in the Conversations module.



From the Conversations module, it is also possible to use Klondie as a Co-Pilot in various modes: general inquiries (like CHAT GPT), internal inquiries, for example, which client has generated the most revenue (for which a specific model will need to be created), and inquiries based on manuals (for instance, asking Klondie how to convert a lead or create a quote, and it will provide an answer based on this online manual or other client-specific sites and manuals).

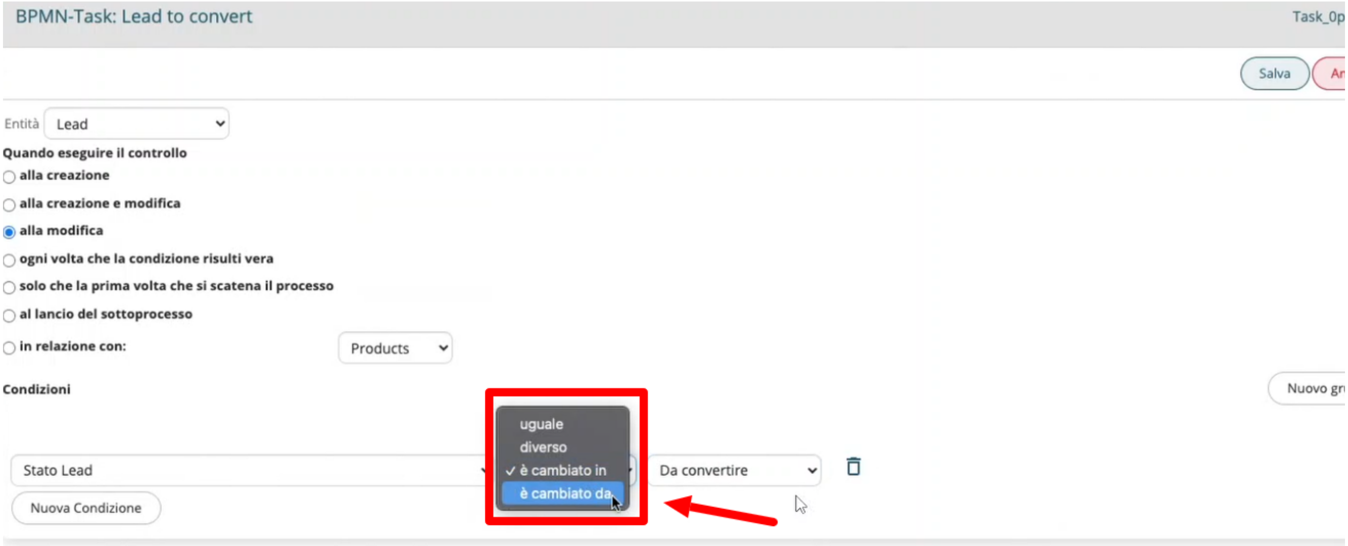




- **Icons on Modules (standard and new):** By running a script from code, you can easily add the desired icons to existing modules or to custom ones created through the interface.
  OAuth2 Server: Ability to configure vtenext as an authentication server.
  Conditional Fields on the Business Portal: Conditional fields are also available directly on the Client Portal and work exactly as they do in vte (with the same configuration done directly on the CRM admin side).
  FIX:
    - Improved compatibility with the Users Resources module (now, if invited to a calendar, they also receive the ICS invitation via email).
    - When the Mail Converter receives an email and links it to an existing ticket, it now allows for the initiation of a process.
    - When the Mail Converter links a customer's reply to a ticket, the Comments area now displays a few lines followed by a "view all" button that allows you to see the rest of the email text. This improves visibility and reduces scrolling in comments.
    - Added a relationship between the Visit Reports module and Documents.
    - Added the ability to insert Documents on the portal as External Links in addition to attachments.
    - The product price in Purchase Orders is now based on the Unit Cost field rather than the Unit Price field (this is the default in new installations, while in updated versions the old management remains and activation must be requested through the customer portal).
    - It is now possible to modify the parameters present in the headers of an external webservice (modify, add, delete).
    - OAuth2 fix for Office365/Outlook (prevents timeout of unnecessary folder synchronization).

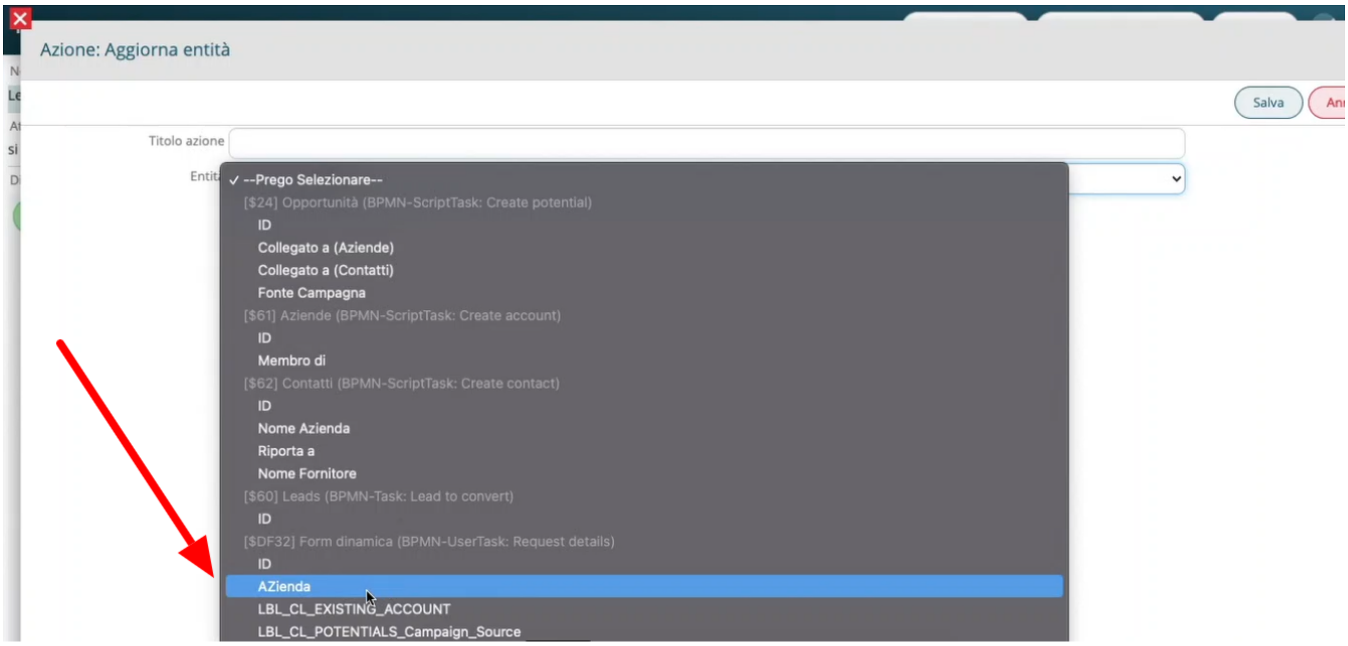
New Features in Processes:

- **New Condition:** In processes, a new condition "has changed from" has been added in addition to the previously available "has changed to," as shown in the following image.

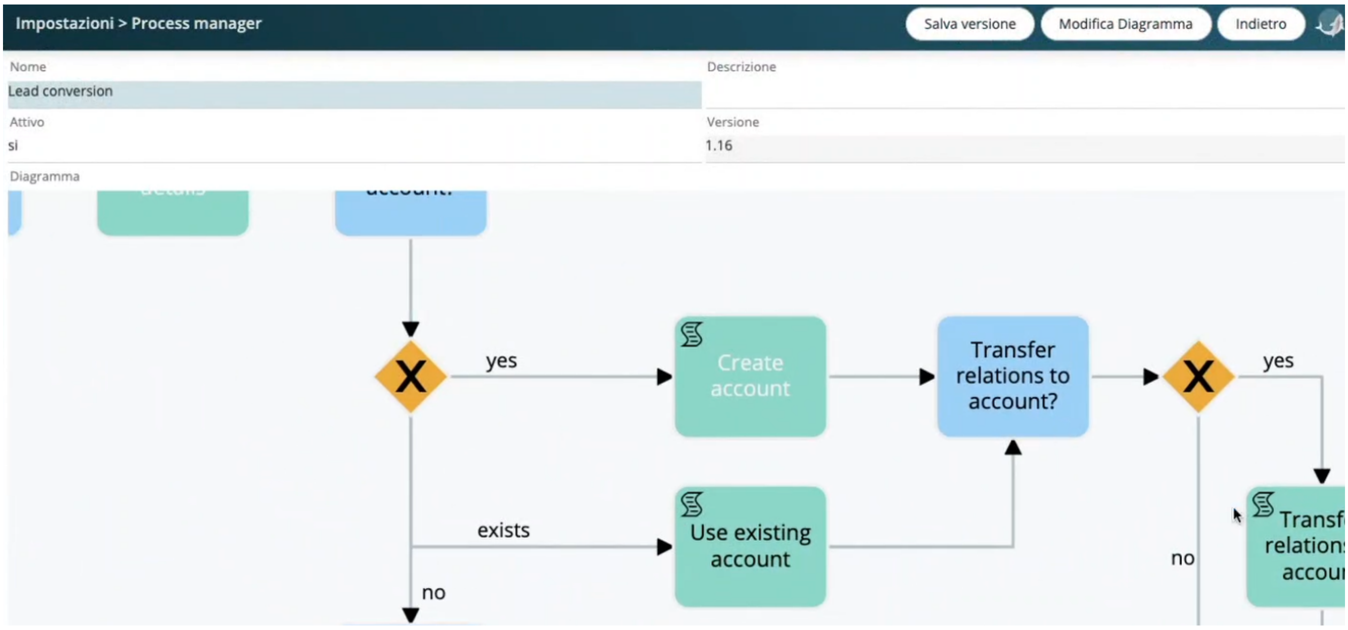


Naturally, when choosing this option, it will be possible to specify the value of the change, i.e., it has changed from value X to value Y.

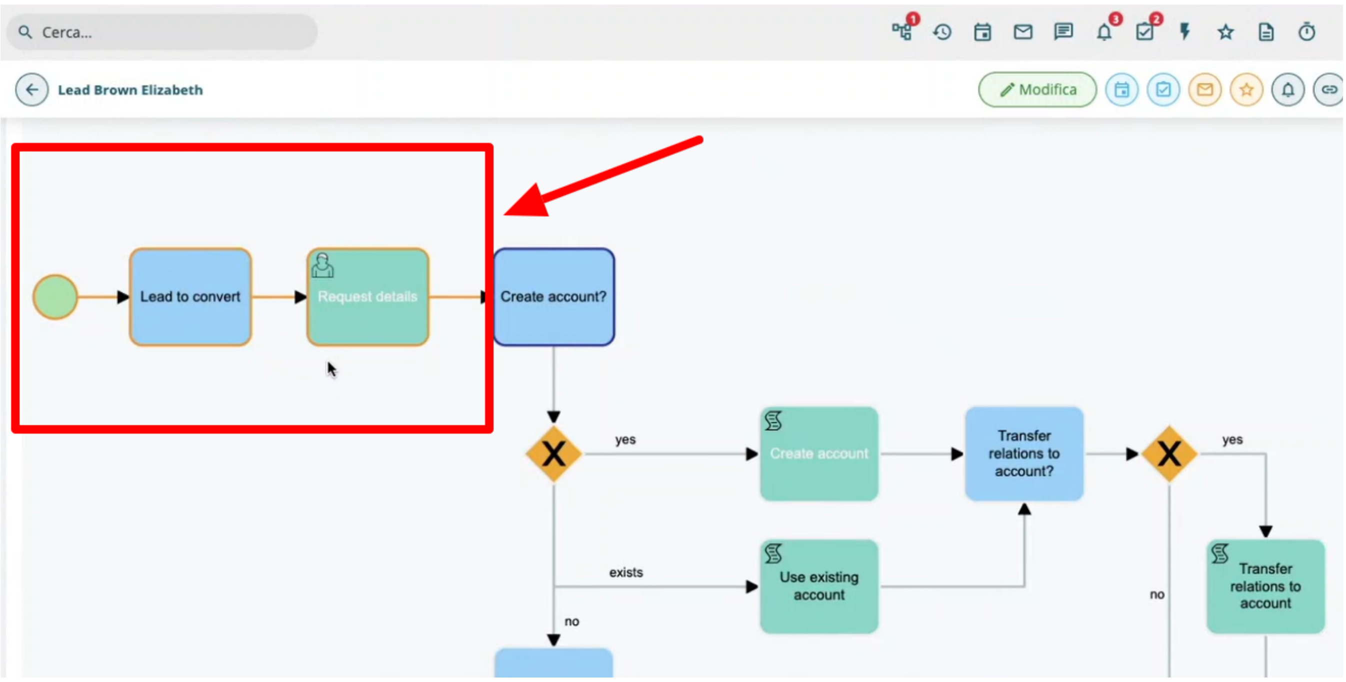
- **Update Dynamic Forms:** In dynamic forms within processes, you can now update fields in related modules, including custom modules. The same procedure applies to the standard "Link Entities" function, allowing you to link entities through dynamic forms.



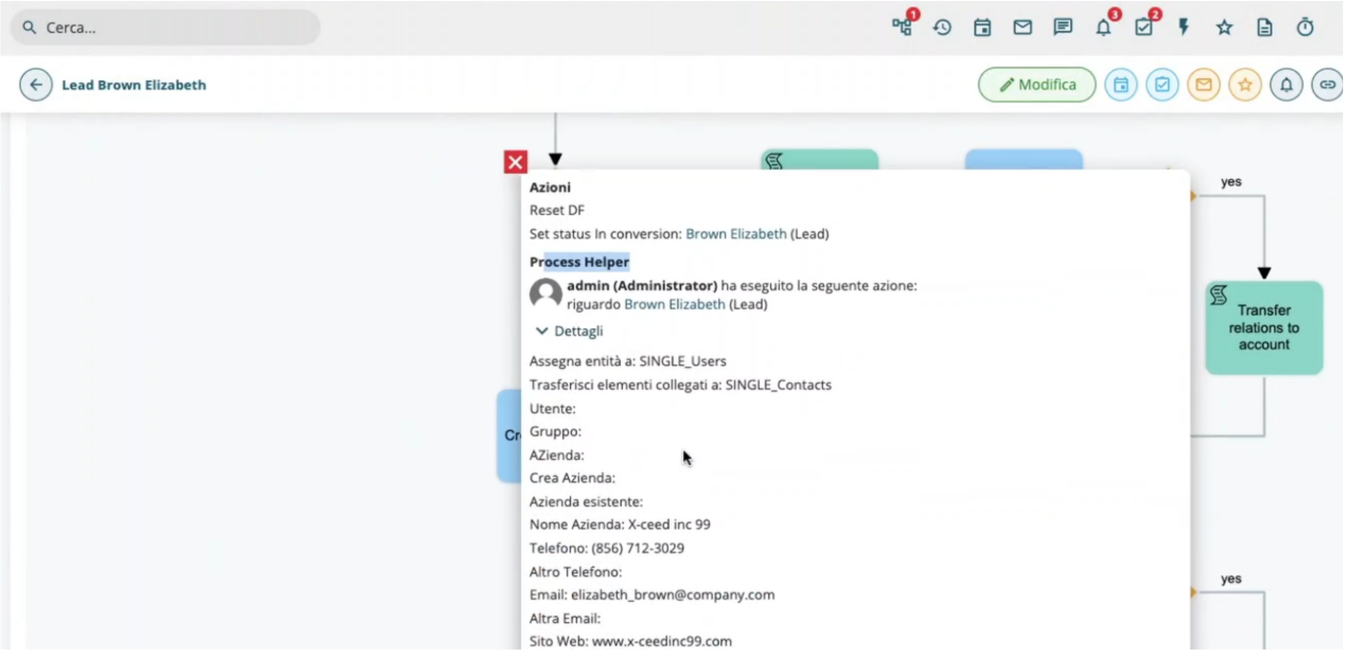
- **Zoom:** You can now zoom in and out on the process diagram by using the mouse scroll wheel (forward and backward). This feature is available not only in the settings but also in the "Process Chart" tab present in each module.



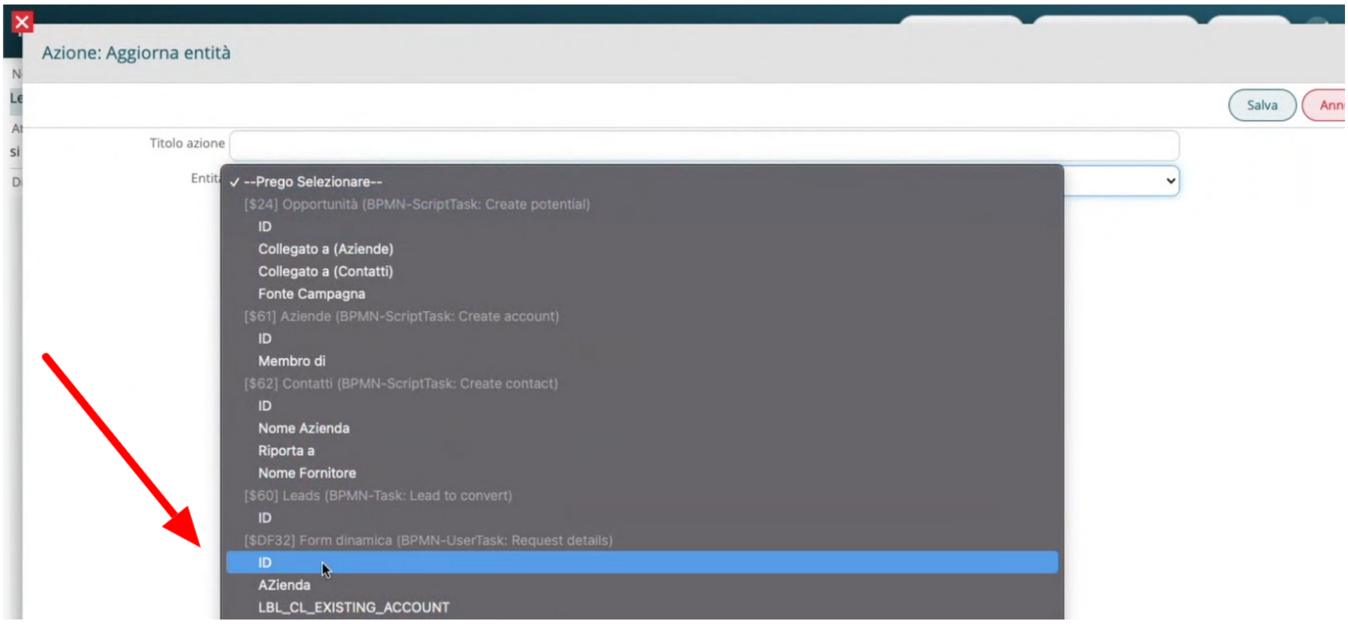
- **Highlighted Path:** Within the "Process Chart" tab in the modules, you can now visualize the path the process has followed, thanks to a yellow highlight (yellow outline) around the various tasks involved.



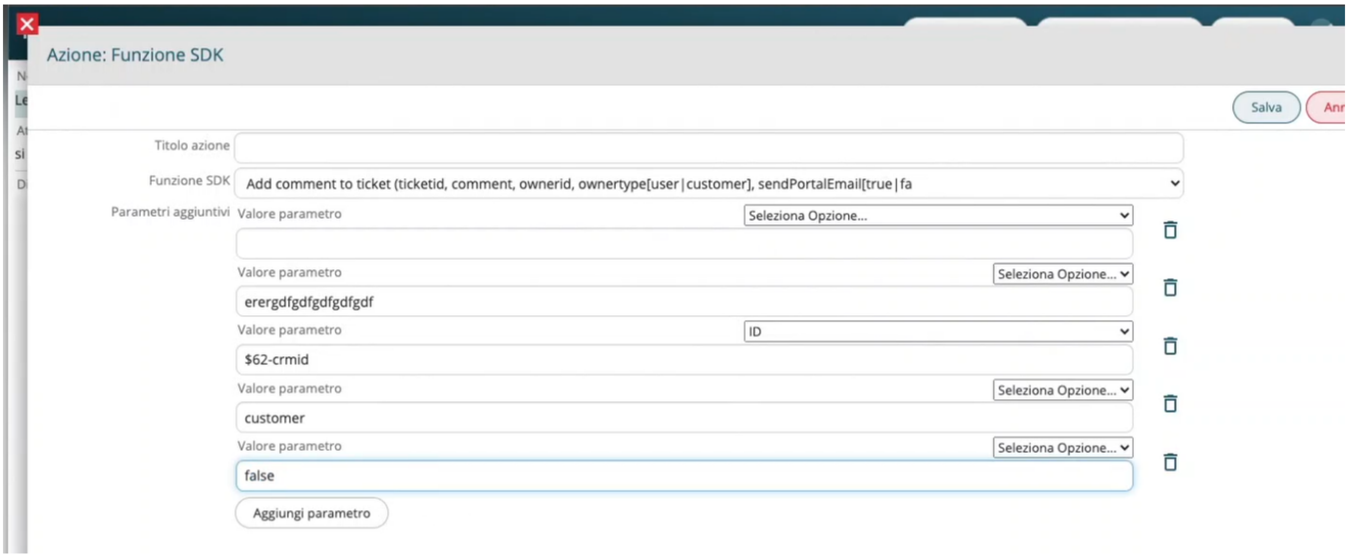
Additionally, by clicking on a process task and selecting "Process Helper," you'll find all the details of the fields involved in that process, along with their current values.



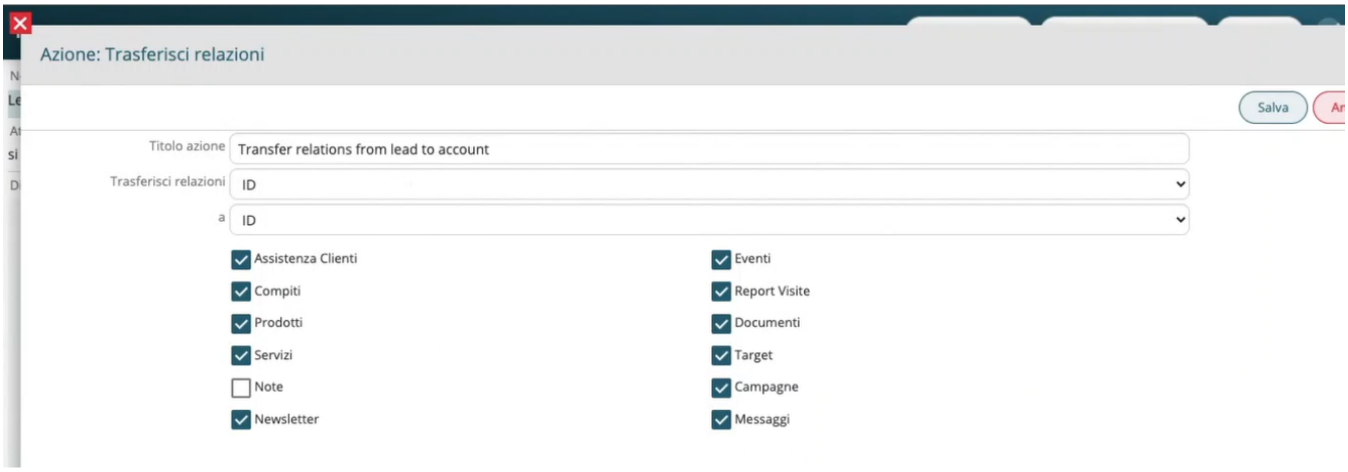
- **Action on Dynamic Forms:** It is now possible to create a new action on a dynamic form and call it from anywhere in a process. This function is useful, for example, to update the values of a specific support field and then use it in other fields. Instead of creating placeholder fields, you can use a hidden dynamic form that can be called from anywhere.



- **Add Comment to Ticket:** A new SDK function allows you to configure certain parameters to add comments to a ticket via a process. You can include various parameters and automations (such as comment, CRM user, portal user, response email sending, etc.).



- **Transfer Relationships in Table Fields:** When selecting this type of action in a process, you will also find table fields among the available modules to choose from.

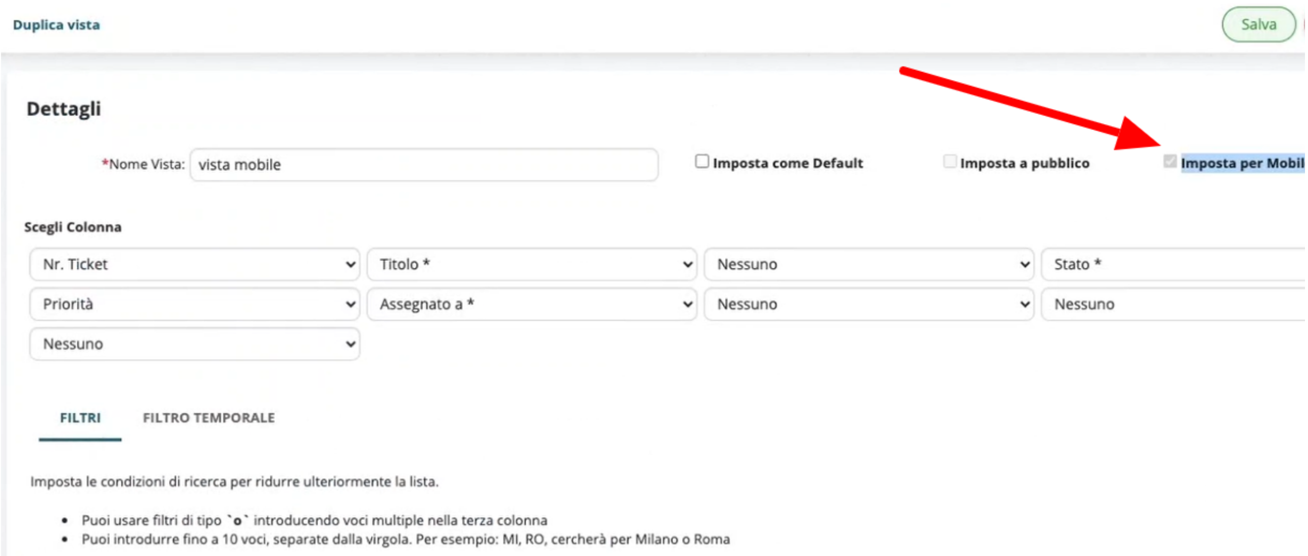


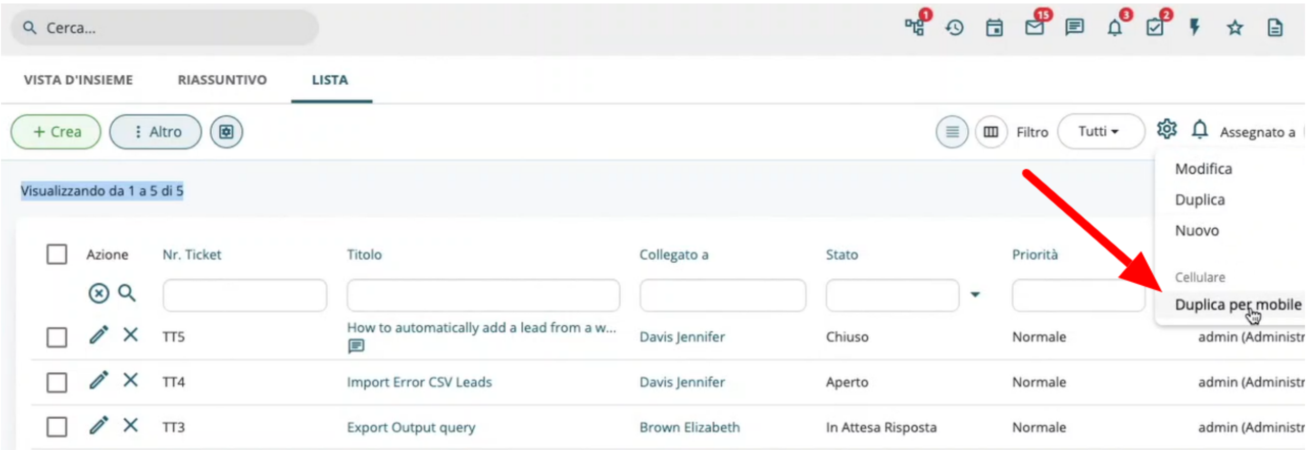
- **New Mathematical Operations:** In processes, you can now handle not just addition but also subtraction, multiplication, and division.

- **FIX:**
  - **Improved Subprocess Management:** In a subprocess task, you can now select only processes that have "initial condition" set to the function "on subprocess launch." Additionally, the main process will not continue during the execution of the subprocess until the subprocess reaches the end cycle task.
  - **Overwrite Headers in External Webservices:** You can now overwrite headers in external webservices by calling them from a process.

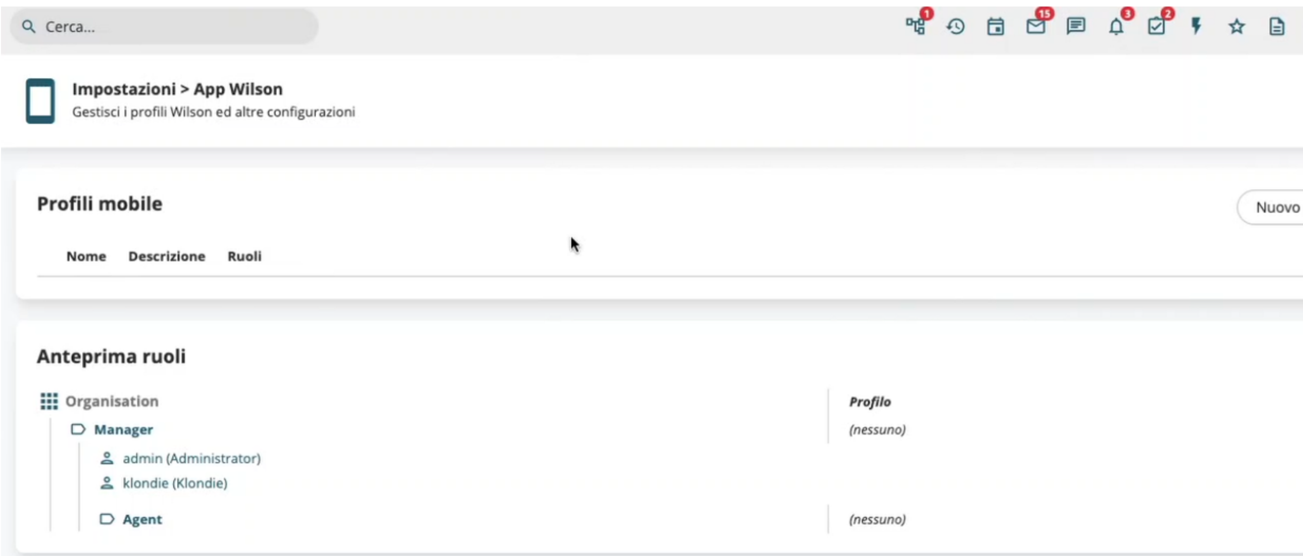
New Features in Mobile APP

- **Filters for Mobile:** Both on the web and in the app, you can now set filters for mobile by either editing the filter itself or using the "duplicate for mobile" function.





- **Mobile Profiles:** From the Wilson app settings, available in the vtenext settings, you can now create new mobile profiles to differentiate views, similar to how it is done for the web.



- **Mobile Scans:** Thanks to NFC **(Near Field Communication)** technology, users can scan tags and import information about the content and geolocation of the object.

Scan Information

Scan No

AUTO GEN ON SAVE

Type

-

Geographic Tracking

Latitude	
Longitude	
Date & Time	
User	

Locate Map | Current position | Clear

Assigned To

User | admin (User Administrator)

Scan Attributes

Scan Information

Attribute Type	Attribute Value