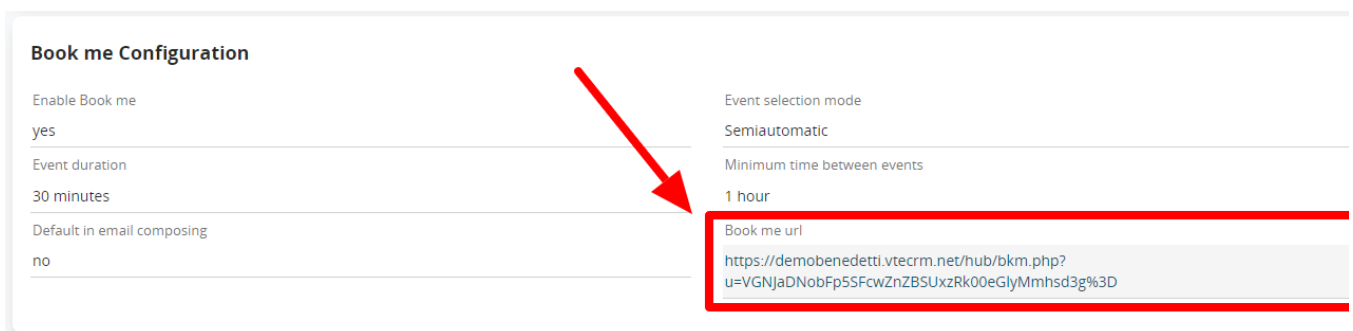


Release Note vtenext 24.08

New Web Features

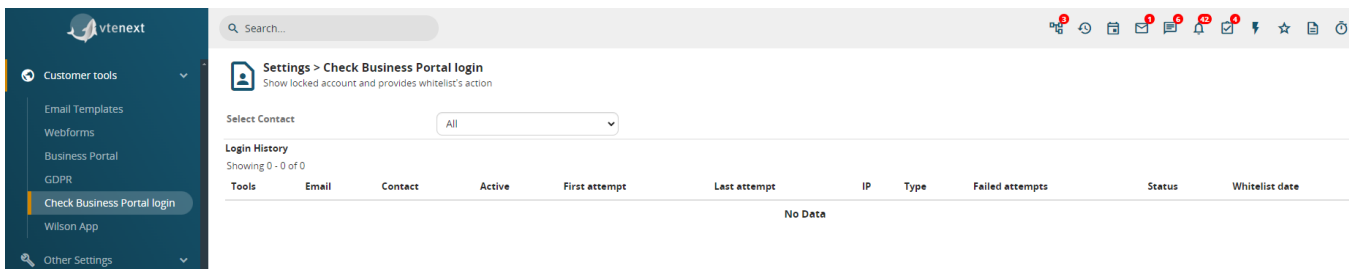
- **Bookme:** In the user preferences, a new option has been added to easily copy the link to your personal calendar. In the previous version, the link was generated directly within the email composition. This update provides greater convenience for sharing.



Book me Configuration

Enable Book me	yes	Event selection mode	Semiautomatic
Event duration	30 minutes	Minimum time between events	1 hour
Default in email composing	no	Book me url	https://demobenedetti.vtecrm.net/hub/bkm.php?u=VGNJaDNobFp5S5FcwZnZBSUxzRk00eGlyMmhsd3g%3D

- **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.



Settings > Check Business Portal login
Show locked account and provides whitelist's action

Select Contact: All

Login History
Showing 0 - 0 of 0

Tools	Email	Contact	Active	First attempt	Last attempt	IP	Type	Failed attempts	Status	Whitelist date
No Data										

- **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.

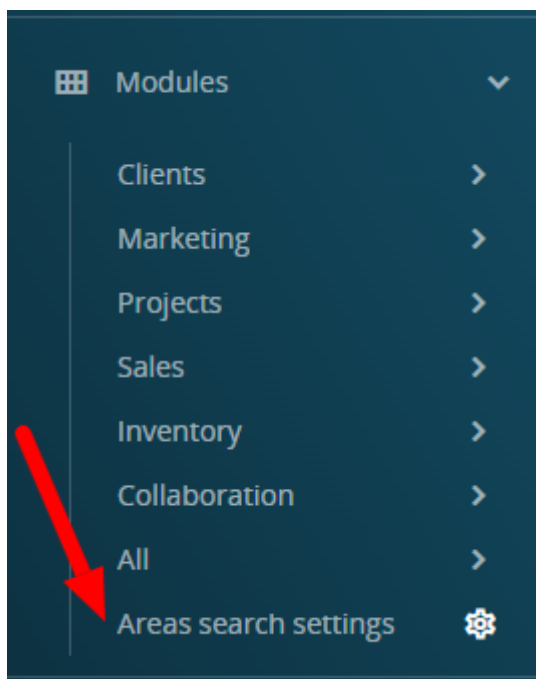
← Chart Contacts per user - cluster

INFORMATIONS PROCESS GRAPH PROCESS HISTORY HISTORY

Chart Information

Chart Name	Contacts per user - cluster	Assigned To	admin (User Administrator)
Report	Contacts per user	Folder Name	Default
Chart Type	Vertical bars	Show Legend	yes
Show Labels	yes	Show Values	None
Data order	None None Ascending Descending Ascending (Labels) Descending (Labels)	Merge small slices	yes
	Save - Cancel	Formula	Count

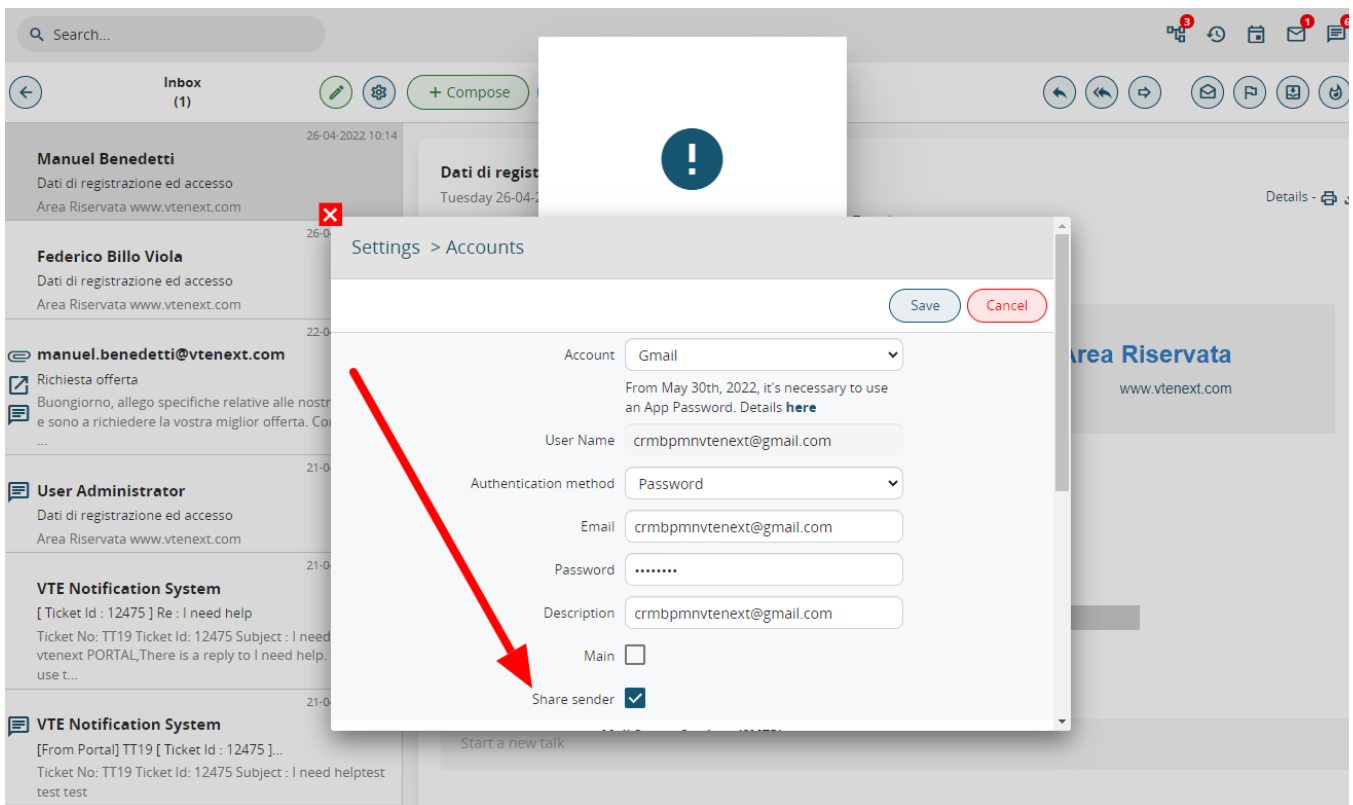
- **Area Search Settings:** A new menu item has been added to the left menu for quick access to manage the CRM's search areas.



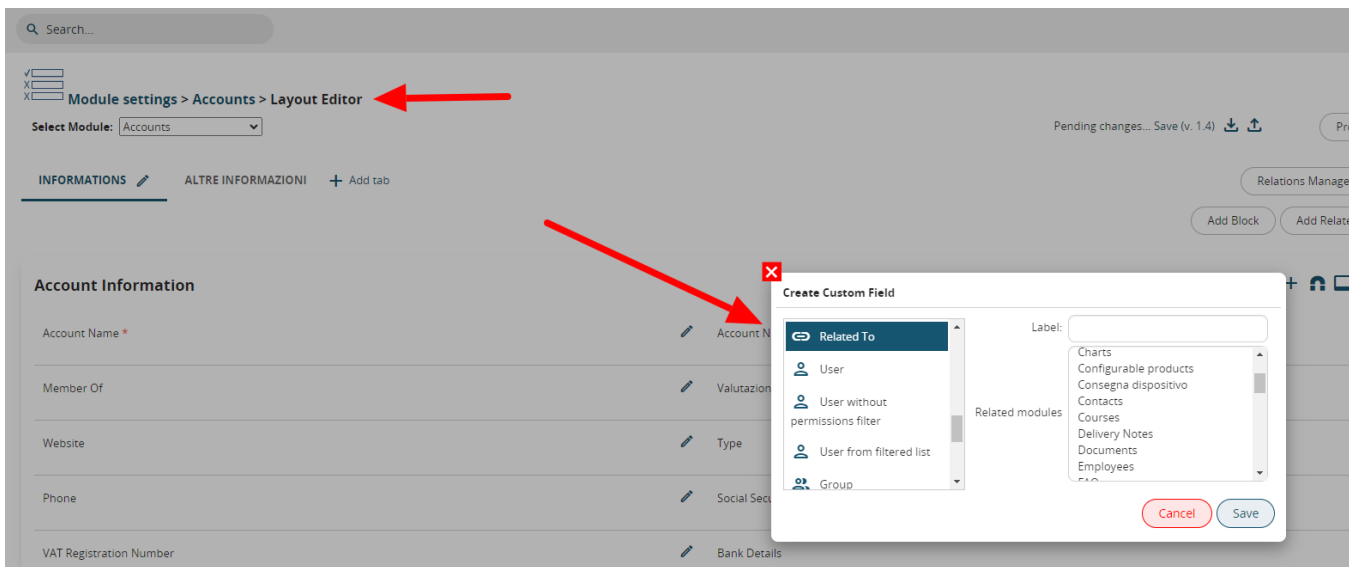
- **User Search in Calendar Preferences:** User search fields have been added in the user preferences, making it easier to configure and share the calendar when dealing with a large number of users.



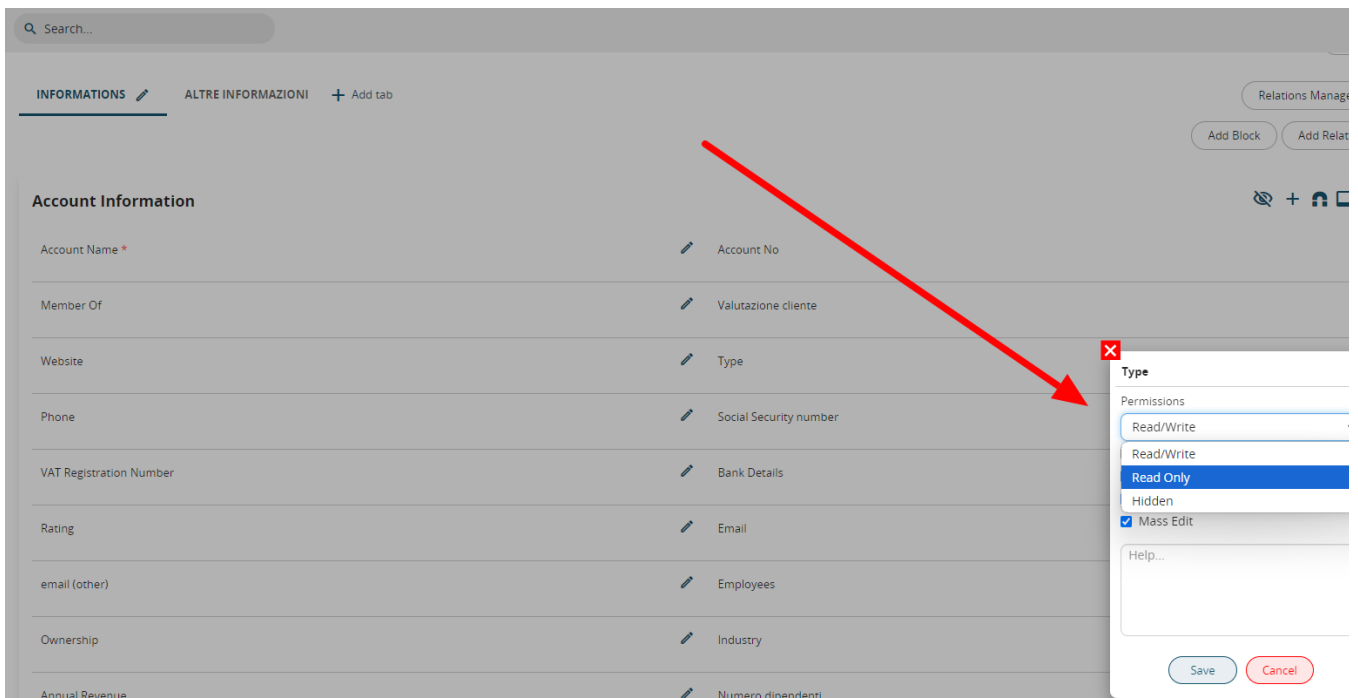
- **Share Sender:** In the Messages module, only the admin user has the ability to configure an email account and flag a field named "Share Sender." This function allows for a shared outgoing mailbox for all users, without needing to configure it for each individual user. While the inbox for this mailbox 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.



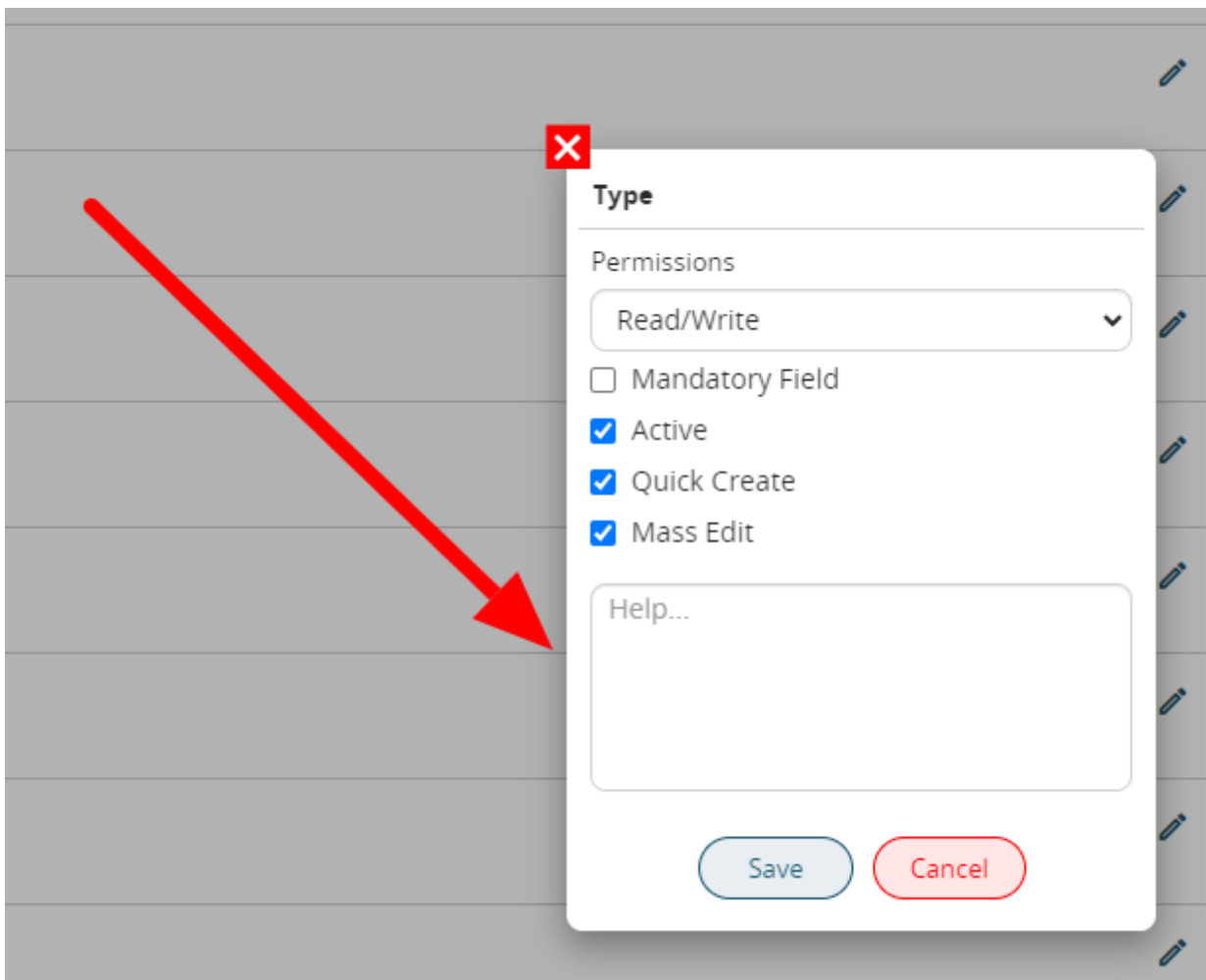
- **UITYPE10 Fields (relation fields) from Layout Editor:** The ability to add relation fields directly from the layout editor has been introduced. This allows you to add all necessary relationships to each module as needed. However, this feature has a limitation: it is not possible to add two relation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



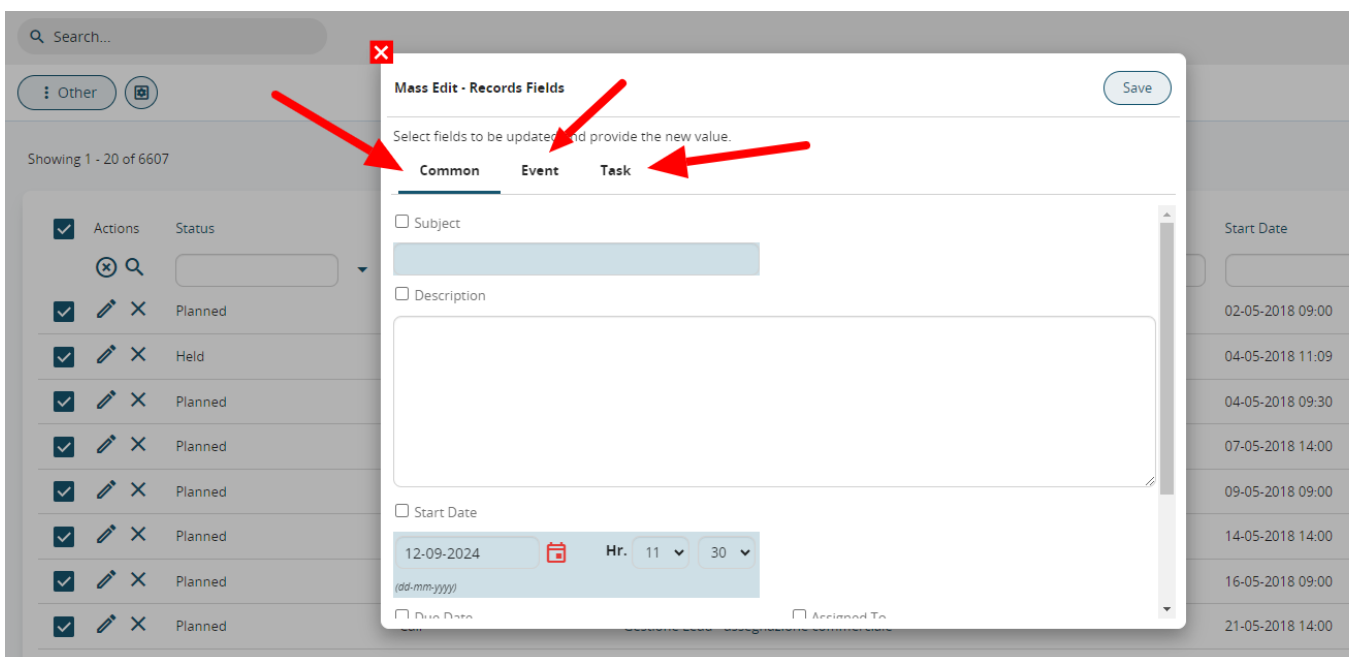
- **Read-only Fields from Layout Editor:** From the settings > layout editor of a module, it is now possible to set a field to read/write, read-only, or hidden by clicking on the pencil icon



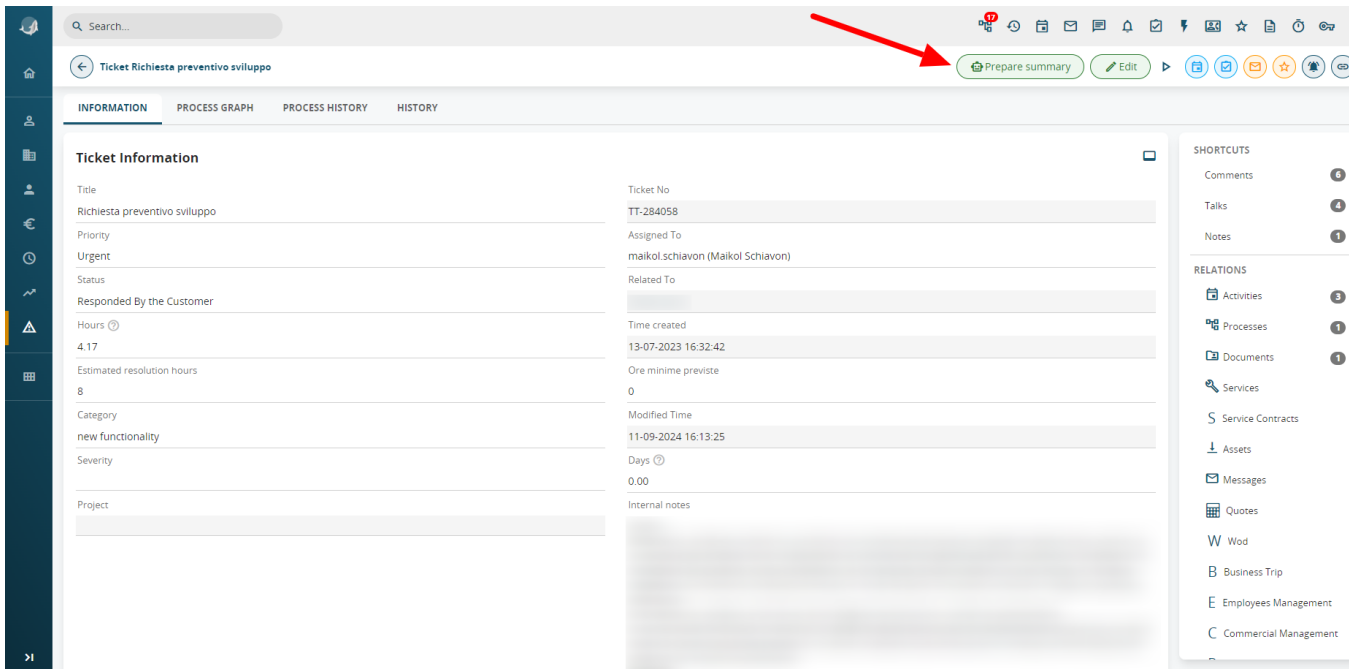
- **Tooltips on Fields:** Also from the layout editor of a module, it is possible to add a tooltip for each field, which is a small help text to guide the user on how to fill in or use that specific field.



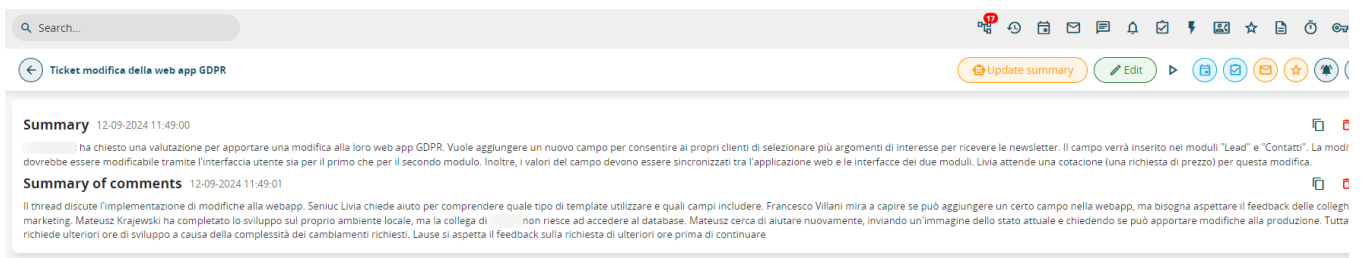
- **Improved Calendar Mass-Edit:** It is now possible to perform mass edits on Common Fields in the Calendar, or specifically on Events or Tasks, thereby increasing productivity.



- **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).

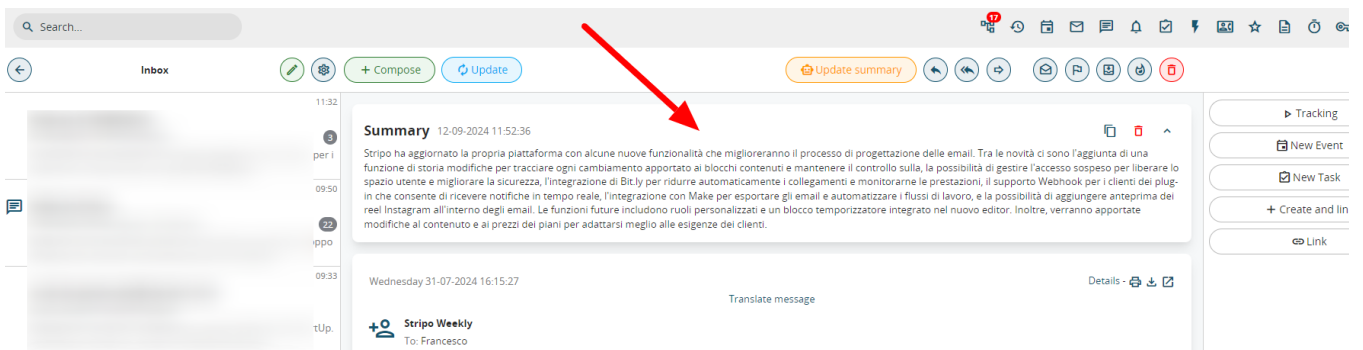


The screenshot shows a ticket titled "Ticket Richiesta preventivo sviluppo". The interface includes a sidebar with navigation icons, a top search bar, and a main content area. A red arrow points to the "Prepare summary" button in the top right corner of the ticket header. The ticket information is displayed in two columns: "Ticket Information" on the left and "Ticket Details" on the right. The "Ticket Details" section includes fields for Ticket No (TT-284058), Assigned To (maikol.schiavon), Related To, Time created (13-07-2023 16:32:42), Ore minime previste (0), Modified Time (11-09-2024 16:13:25), Days (0.00), and Internal notes. A "SHORTCUTS" sidebar on the right lists various modules like Comments, Talks, Notes, Activities, Processes, Documents, Services, Service Contracts, Assets, Messages, Quotes, Wod, Business Trip, Employees Management, and Commercial Management.



The screenshot shows a ticket summary view for "Ticket modifica della web app GDPR". The interface includes a top search bar, a "Summary" section with a timestamp of 12-09-2024 11:49:00, and a "Summary of comments" section with a timestamp of 12-09-2024 11:49:01. The summary text describes a request for a valuation to update the GDPR web app, mentioning the need for a new field for newsletter selection and the importance of synchronization between the web and mobile interfaces. The "Summary of comments" section provides a detailed overview of the discussion, mentioning the need for a new field for newsletter selection and the importance of synchronization between the web and mobile interfaces. A red arrow points to the "Update summary" button in the top right corner of the ticket header.

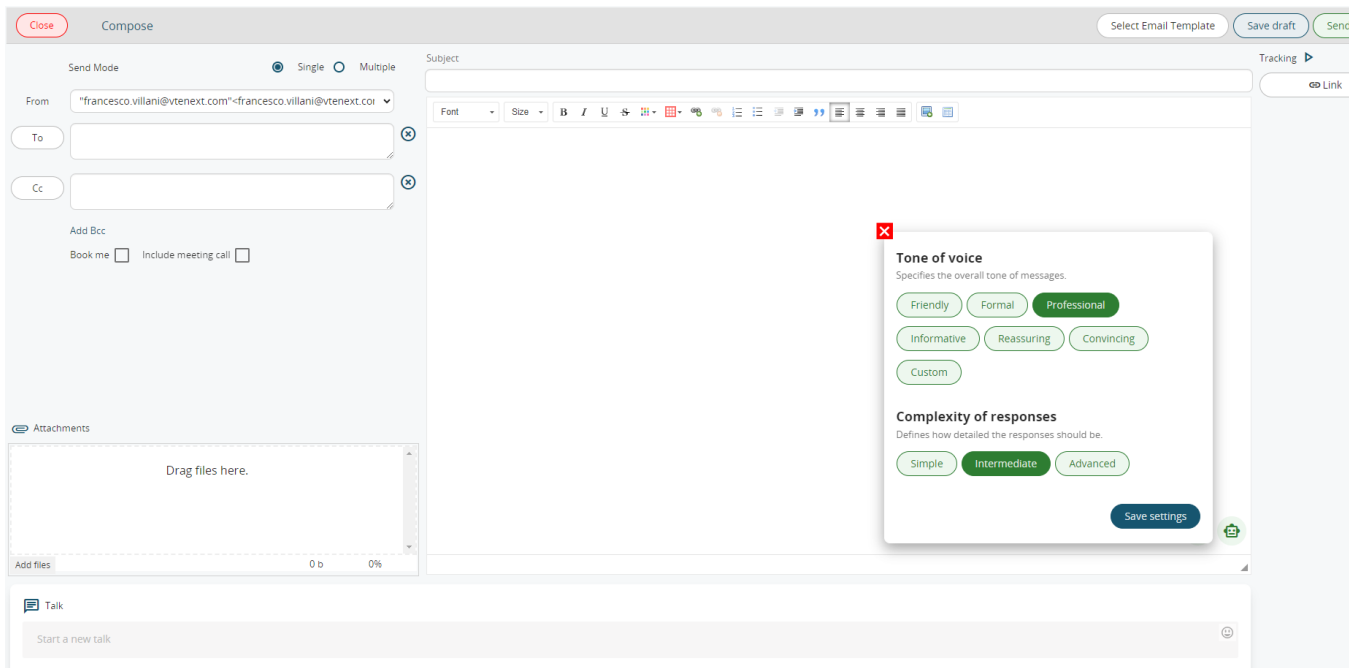
The summary is also available in the message module and summarizes the entire thread.



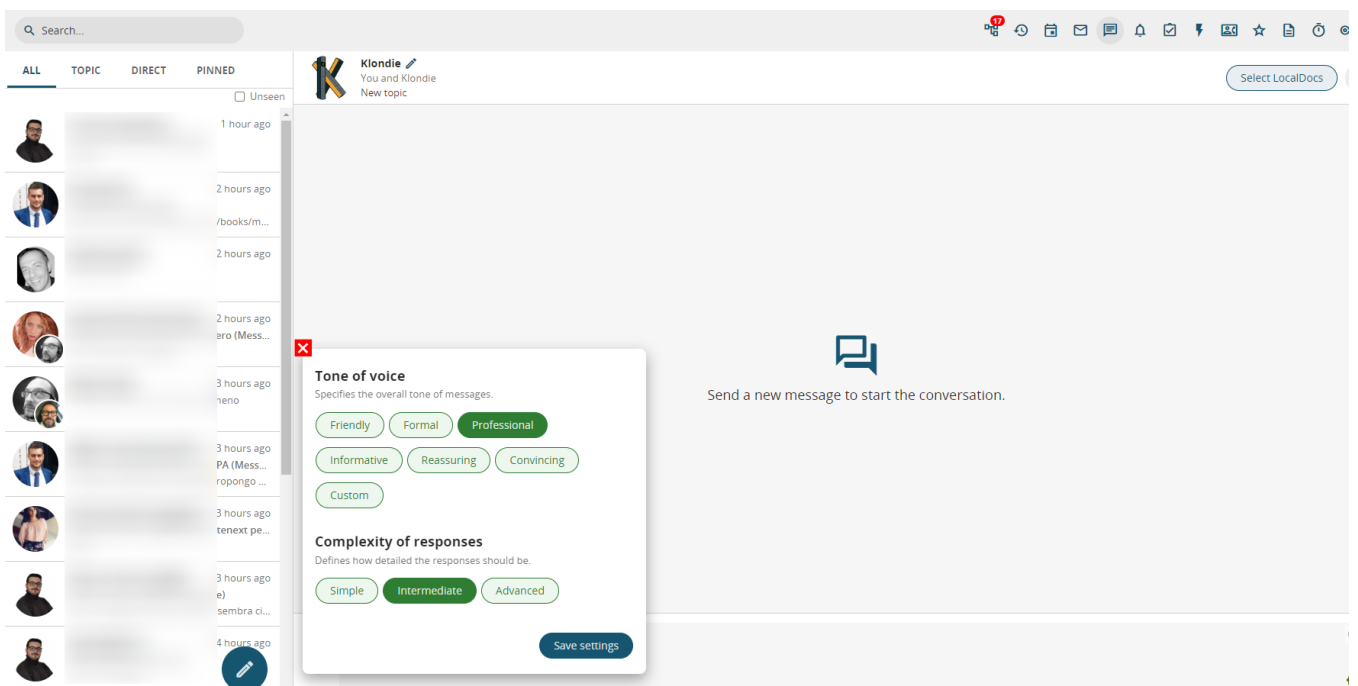
The screenshot shows a message module interface with a top search bar, a "Summary" section with a timestamp of 12-09-2024 11:52:36, and a "Summary of comments" section with a timestamp of 12-09-2024 11:52:36. The summary text describes a request for a valuation to update the GDPR web app, mentioning the need for a new field for newsletter selection and the importance of synchronization between the web and mobile interfaces. The "Summary of comments" section provides a detailed overview of the discussion, mentioning the need for a new field for newsletter selection and the importance of synchronization between the web and mobile interfaces. A red arrow points to the "Update summary" button in the top right corner of the message header.

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

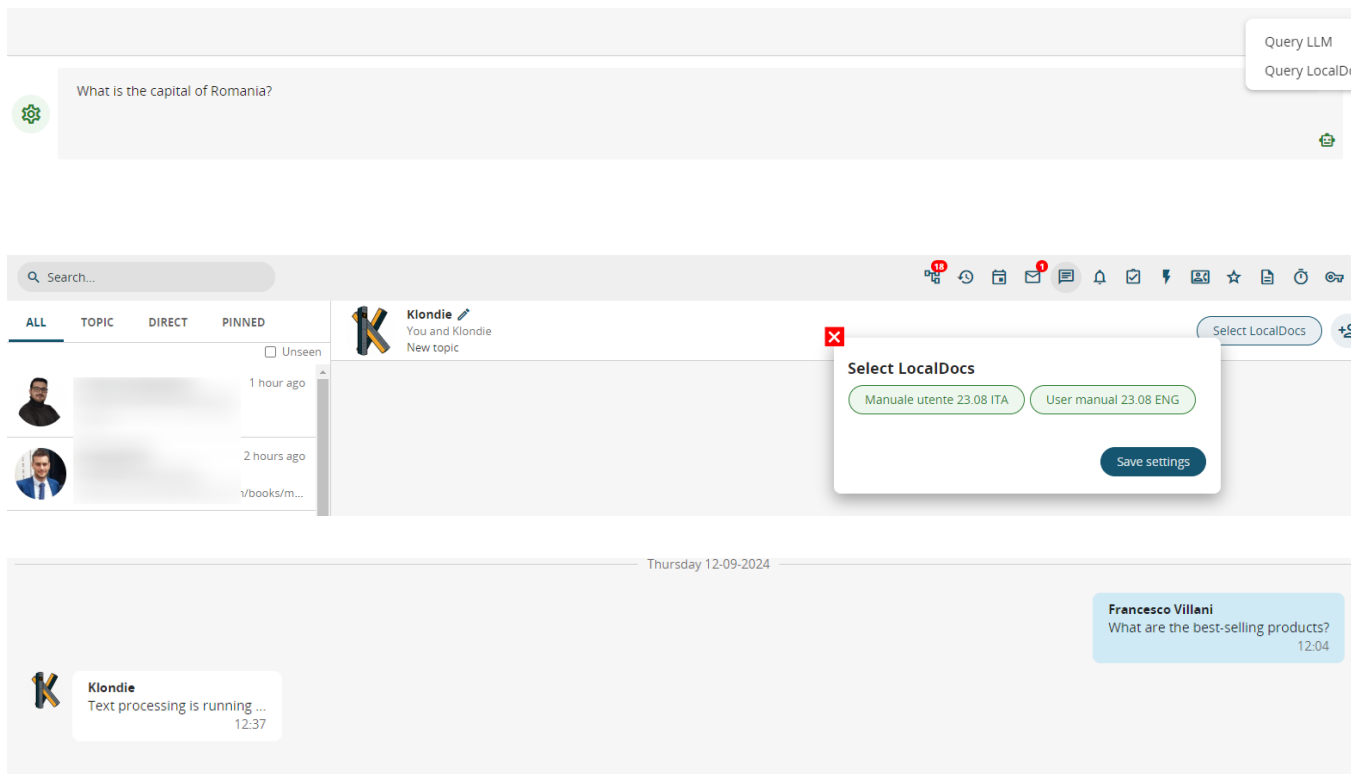
want to communicate, choose the type of text the AI should write, and you're all set.



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.

BPMN-Task: Lead to convert

Task_Op

Salva An

Entità: Lead

Quando eseguire il controllo

- ☐ alla creazione
- ☐ alla creazione e modifica
- ☒ alla modifica
- ☐ ogni volta che la condizione risulti vera
- ☐ solo che la prima volta che si scatena il processo
- ☐ al lancio del sottoprocesso
- ☐ in relazione con: Products

Condizioni

Nuovo gn

Stato Lead

Nuova Condizione

uguale
diverso
✓ è cambiato in
è cambiato da

Da convertire

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.

Stato Lead

Nuova Condizione

è cambiato da

In conversione

to

Freddo

- **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.

Azione: Aggiorna entità

Salva An

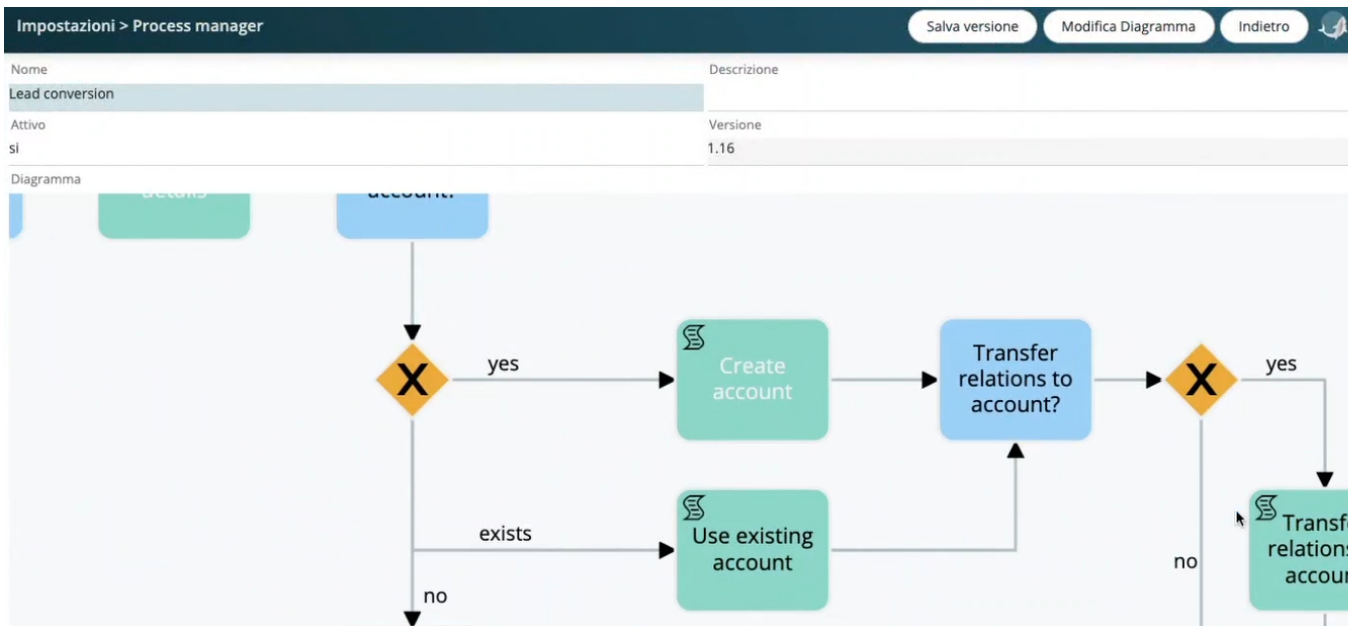
Titolo azione

Entità

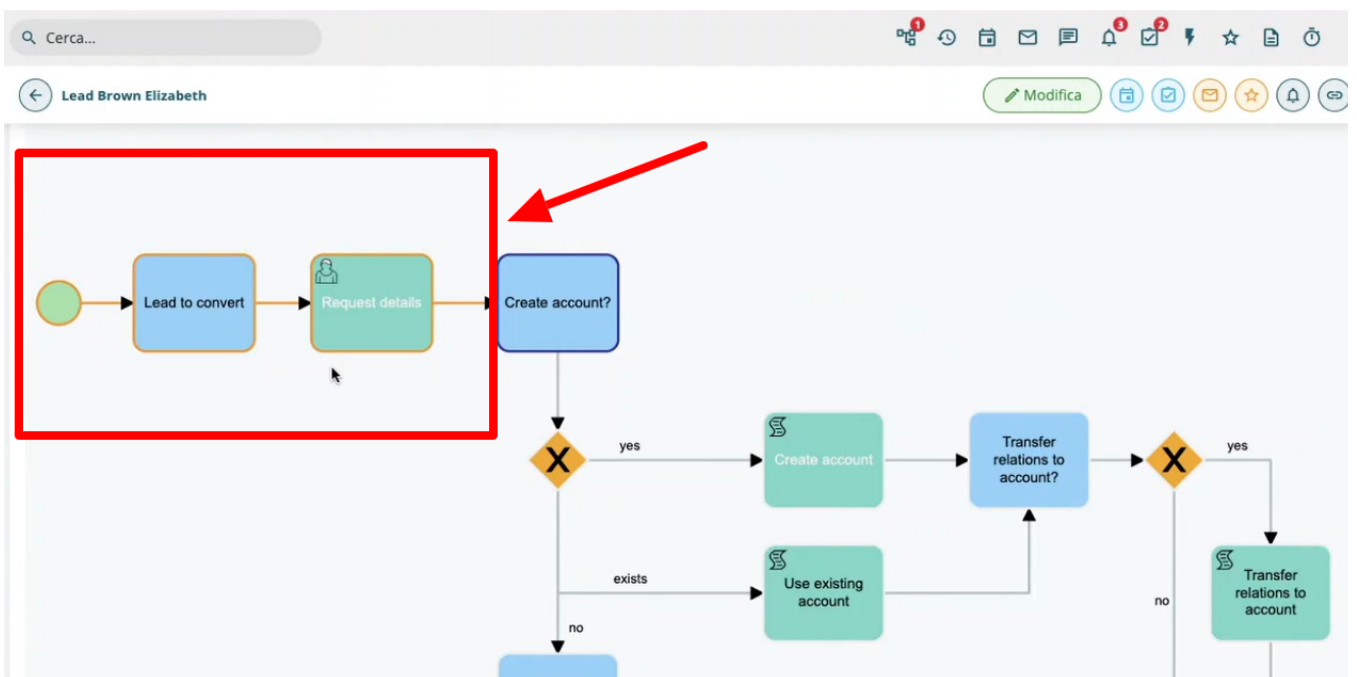
--Prego Selezionare--

- [\$24] Opportunità (BPMN-ScriptTask: Create potential)
- ID
- Collegato a (Aziende)
- Collegato a (Contatti)
- Fonte Campagna
- [\$61] Aziende (BPMN-ScriptTask: Create account)
- ID
- Membro di
- [\$62] Contatti (BPMN-ScriptTask: Create contact)
- ID
- Nome Azienda
- Riporta a
- Nome Fornitore
- [\$60] Leads (BPMN-Task: Lead to convert)
- ID
- [\$DF32] Form dinamica (BPMN-UserTask: Request details)
- ID
- Azienda
- LBL_CL_EXISTING_ACCOUNT
- LBL_CL_POTENTIALS_Campaign_Source

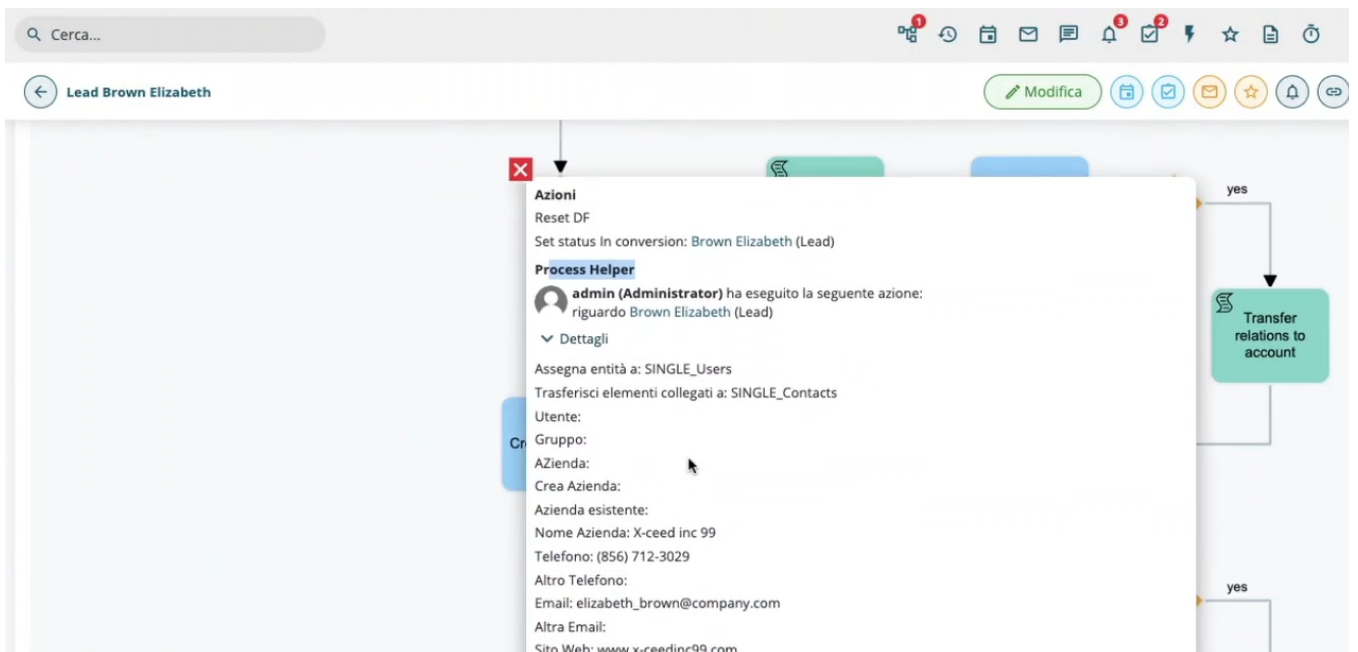
- **Zoom:** You can now zoom in and out on the process diagram by using the mouse scroll wheel (forward and backward). This feature is available not only in the settings but also in the "Process Chart" tab present in each module.



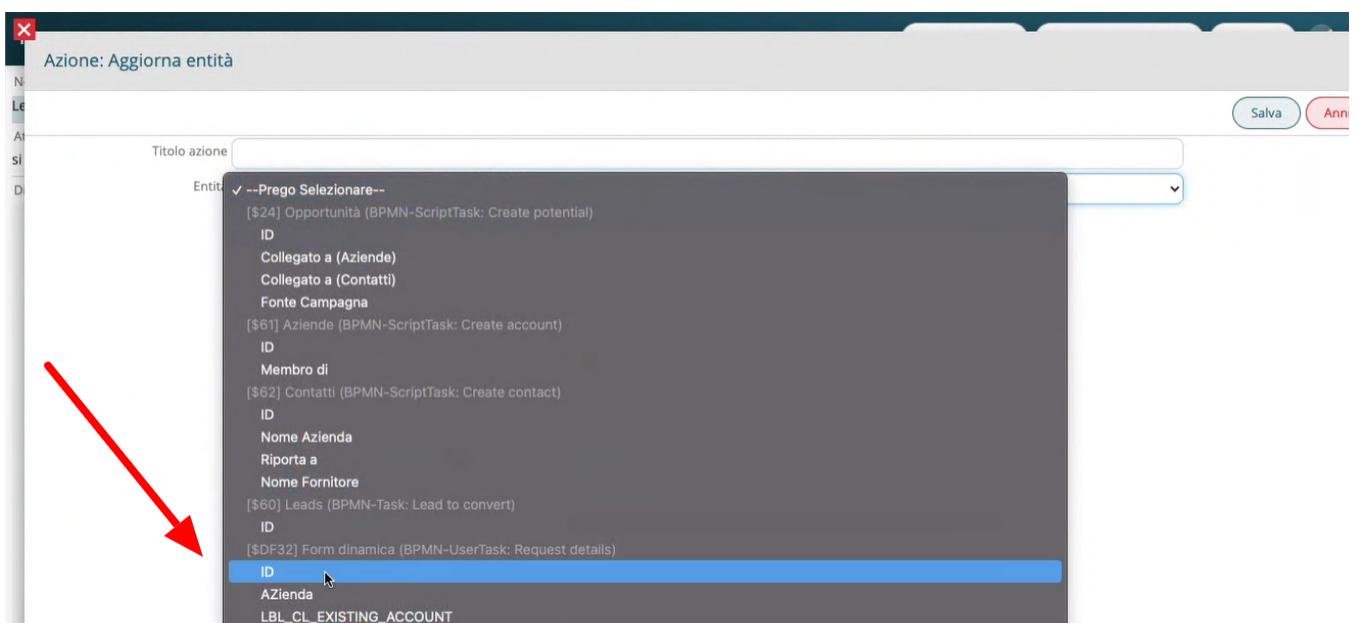
- **Highlighted Path:** Within the "Process Chart" tab in the modules, you can now visualize the path the process has followed, thanks to a yellow highlight (yellow outline) around the various tasks involved.



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.

Dettagli

*Nome Vista:

☐ Imposta come Default

☐ Imposta a pubblico

☒ Imposta per Mobili

Scegli Colonna

Nr. Ticket	Titolo *	Nessuno	Stato *
Priorità	Assegnato a *	Nessuno	Nessuno
Nessuno			

FILTRI

FILTRO TEMPORALE

Imposta le condizioni di ricerca per ridurre ulteriormente la lista.

- Puoi usare filtri di tipo `o` introducendo voci multiple nella terza colonna
- Puoi introdurre fino a 10 voci, separate dalla virgola. Per esempio: MI, RO, cercherà per Milano o Roma

Cerca...



VISTA D'INSIEME

RIASSUNTIVO

LISTA

+ Crea

: Altro



Filtro

Tutti



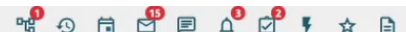
Assegnato a

Visualizzando da 1 a 5 di 5

☐	Azione	Nr. Ticket	Titolo	Collegato a	Stato	Priorità	
☐							
☐		TT5	How to automatically add a lead from a w...	Davis Jennifer	Chiuso	Normale	admin (Administr
☐		TT4	Import Error CSV Leads	Davis Jennifer	Aperto	Normale	admin (Administr
☐		TT3	Export Output query	Brown Elizabeth	In Attesa Risposta	Normale	admin (Administr

- **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.

Cerca...



Impostazioni > App Wilson

Gestisci i profili Wilson ed altre configurazioni

Profili mobile

Nuovo

Nome Descrizione Ruoli

Anteprima ruoli



Organisation



Manager

admin (Administrator)

klondie (Klondie)



Agent

Profilo

(nessuno)

(nessuno)

- **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

Geographic Tracking

Latitude

Longitude

Date & Time

User

Locate Map



Current position



Clear



Type

-

Assigned To

User



admin (User Administrator)

Scan Attributes

Scan Information

Attribute Type

Attribute Value

Revision #16

Created 2024-09-11 08:13:08 UTC by Admin

Updated 2024-10-08 10:44:56 UTC by Admin