

2 First steps: how to browse vtenext

This section consists in a brief introduction to vtenext for those who are accessing the system for the first time. The goal is to provide to the user with the basic knowledge to become familiar with this tool, which is designed to be intuitive and easy to use.

The following basic horizontal tools will be illustrated:

Login: how to access vtenext;

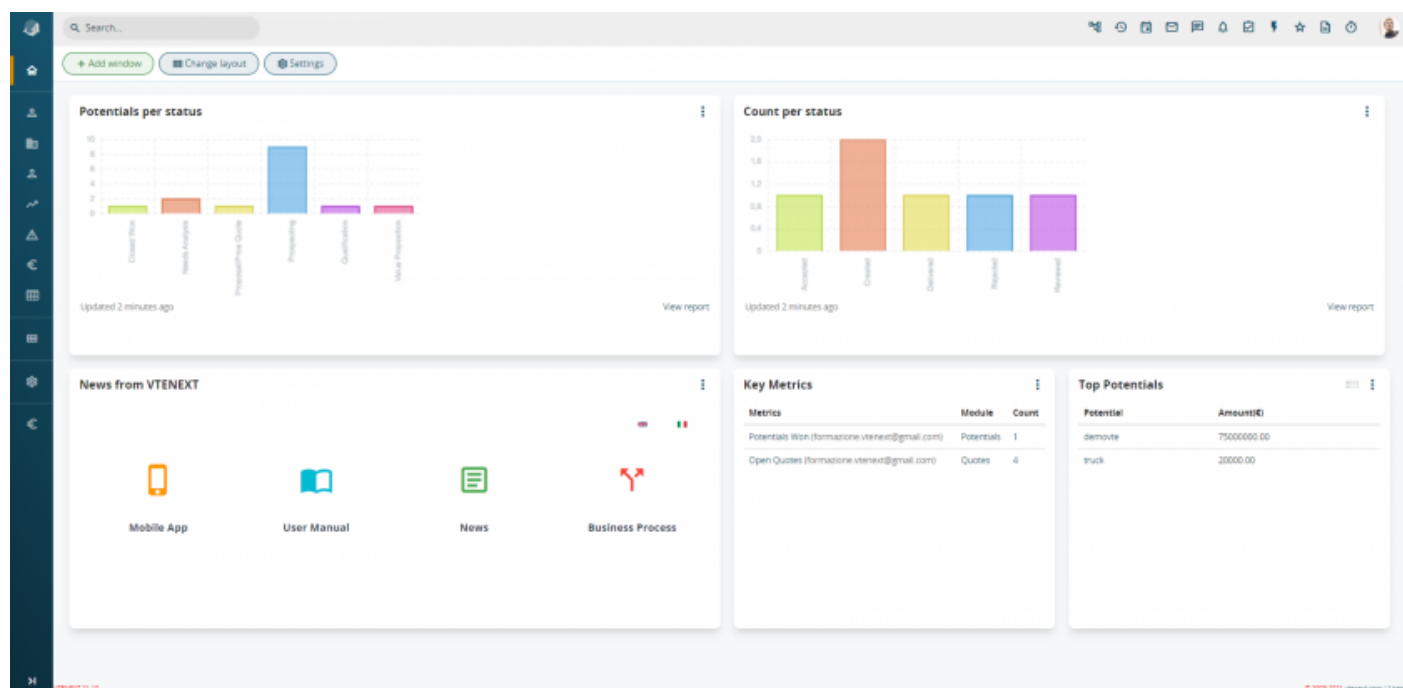
Home Page: personal splash screen;

Navigation: menus and icons;

Search functions: simple and advanced search, in each module and global;

Modules and records: what they are and how they are structured;

User preferences: personal information, notifications and more.



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Account CRM Invest A/S
Edit

INFORMATION
PROCESS GRAPH
PROCESS HISTORY
HISTORY

Account Information

| | |
|--|--|
| Account Name | |
| CRM Invest A/S | |
| Website | |
| www.crminvestas.com | |
| Fax | |
| | |
| Phone (other) | |
| | |
| e-mail (other) | |
| | |
| Industry | |
| Banking | |
| Type | |
| | |
| Annual Revenue (€) | |
| 0.00 | |
| VAT Registration Number | |
| | |
| External Code | |
| 12345 | |
| Assigned To | |
| formazione.vt@next@gmail.com (Francesco Villani) | |
| Date created | |
| 30-04-2018 14:44:33 | |
| Email | |
| test123@test123.com | |

| | |
|--|--|
| Account No | |
| ACC2 | |
| Phone | |
| (237) 093-7872 | |
| Member Of | |
| XCEED INC 99 | |
| Employees | |
| 0 | |
| Dwenship | |
| | |
| Rating | |
| Active | |
| Lock Automatic Emails | |
| NO | |
| Bank Details | |
| | |
| Social Security number | |
| | |
| Receive newsletter | |
| yes | |
| Time modified | |
| 23-11-2021 16:41:13 | |
| Creator | |
| formazione.vt@next@gmail.com (Francesco Villani) | |
| Daily cost (€) | |
| 0.00 | |

SHORTCUTS

- Tasks
- Notes
- Accounts Hierarchy

RELATIONS

- Contacts 3
- Products 3
- Sales Order 3
- Potentials 3
- Quotes
- Invoice
- Activities
- Documents
- Trouble Tickets
- Campaigns
- Delivery Notes
- Services
- Assets
- Project Plans
- Visit Report

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