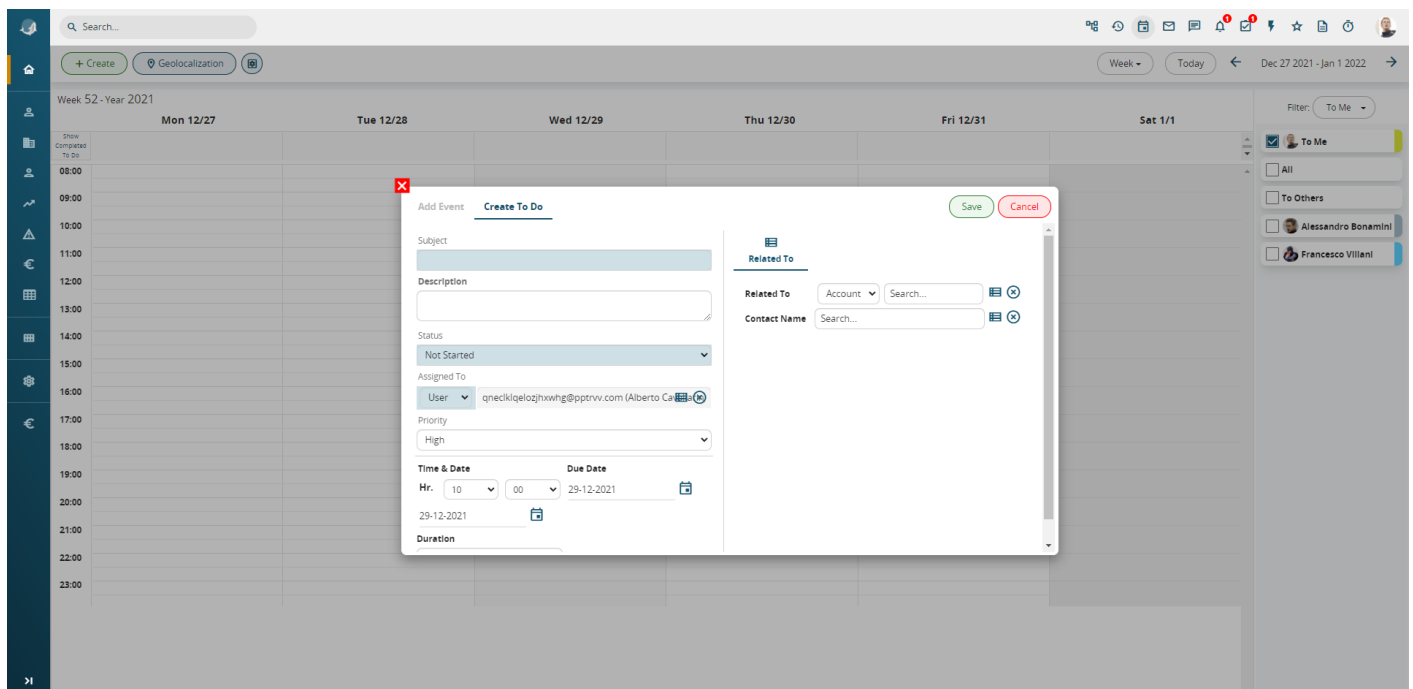


4.2 To-Dos

To-dos are always assigned to a user or a group of users; it is not however possible to invite other users or link more than one contact. The to-do can be transferred to another user by changing the assignee.

The input procedures are the same as for the events: from the related object, from the Calendar module graphic interface, or using the CREATE button.



| | |
|-------------------------------------|--------------------------------------------------------------------------------------------------------------|
| Subject | Enter a name (title) for the to-do |
| Priority | Set a priority level |
| Description | Add a short description to the to-do |
| Status | By default the status is “not started”; the value can be changed if necessary |
| Assigned to | By default, the user who creates the task is the assignee, with the facility to change the user if necessary |
| Time & Date and Due Date | Each to-do has a start and end and it can proceed also over several days |

The to-dos to be completed are displayed in the upper area of the calendar.

You can view the list of open to-dos from any point of vtenext by clicking on the icon in the menu on the right side.

The screenshot displays the vtenext application interface. On the left is a dark sidebar with navigation icons. The main content area is divided into two sections: 'Potentials per status' and 'News from VTENEXT'. The 'Potentials per status' section features a bar chart with the following data:

| Status | Count |
|----------------------|-------|
| Client Won | 1 |
| Needs Analysis | 2 |
| Proposal/Price Quote | 1 |
| Prospecting | 10 |
| Qualification | 1 |
| Value Proposition | 1 |

The 'News from VTENEXT' section contains four cards: 'Mobile App', 'User Manual', 'News', and 'Business Process'. On the right side, a 'Todos' sidebar is visible, showing a single task: 'Schedule an appointment with client' with a sub-note 'Will expire in 8 hours'. The sidebar includes 'All' and 'Create' buttons and sorting options for 'BY DATE' and 'BY DURATION'.

Revision #1

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