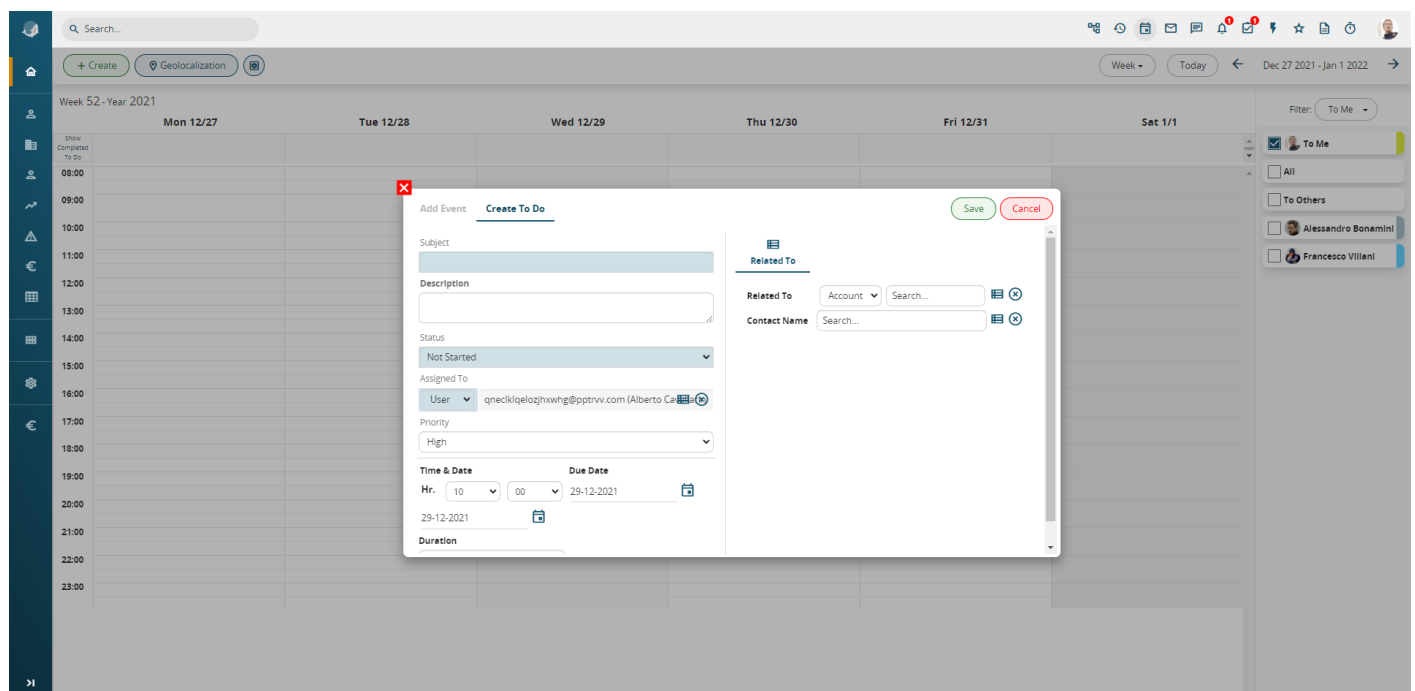


4.2 To-Dos

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.

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Potentials per status

Status	Potentials
Closed Won	2
Needs Analysis	2
Proposal/Price Quote	2
Prospecting	10
Qualification	2
New Proposal	2

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Todos

BY DATE | BY DURATION

☐

Schedule an appointment with client
Will expire in 8 hours