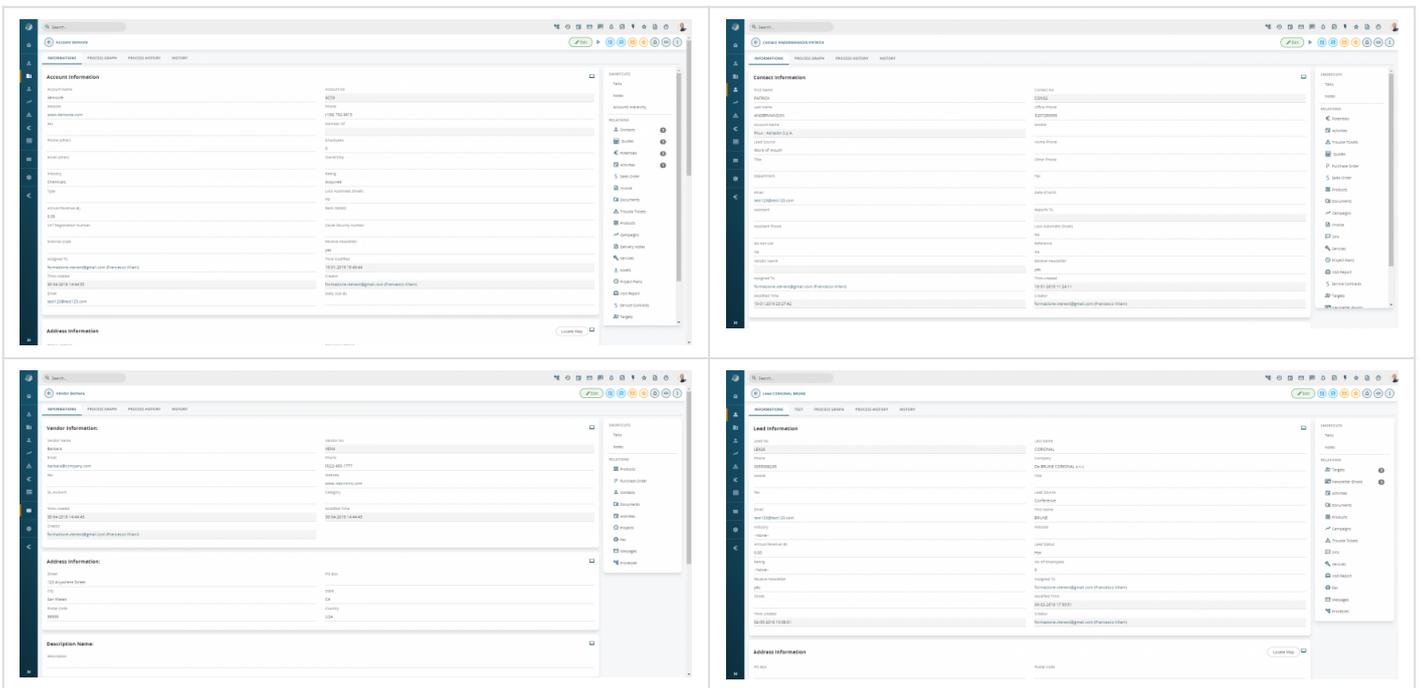


3 Customers records and basic data management

vtenext identifies 4 types of customer records:

- **Leads:** potential customers;
- **Accounts:** acquired customers or customers in negotiations, defined by name (including ex-customers, partners, distributors...);
- **Contacts:** people with whom you have commercial relations (company handlers, private customers, partners...);
- **Vendors:** companies that supply goods and services.

This chapter illustrates the customer list modules, which are of central importance for all the other activities managed by vtenext, the basic data management functions available in the majority of the modules (mass edit, duplicate, import/export), and geolocation.



Revision #1

Created 14 November 2022 11:10:42 by Admin

Updated 14 November 2022 11:10:42 by Admin