Release Note vtenext 23.08

- **New Customer Portal**
  It's possible to configure the customer portal with customized profiles for each client, creating personalized homepages with buttons and functions tailored to each portal user. Additionally, you can publish any module present in vtenext, including custom ones.

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  User Portal Profile Details

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  Button configuration details for portal homepage

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  Interface details for new customer portal

- **Two-Factor Authentication for Users**:
  From user preferences, it is possible to decide how to access vtenext by enabling two-factor authentication either through the Wilson app or via email.

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  User Preferences for Two-Factor Authentication Activation

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  Details for Two-Factor Authentication PIN Entry

- **Integration with Zapier**:
  From the vtenext settings, it is possible to add a synchronization with Zapier to the Synchronizations section. All the configuration will be done on Zapier first, and then transition to vtenext to create a process that allows Zapier to interact with the CRM.

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  Configuration Screen Details for Zapier

- **New Lead Conversion**:
  An updated and more functional version of lead conversion has been introduced. Now,

everything is based on an editable process, and it will be possible to independently manage the fields to be completed during the conversion.

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New button for lead conversion.

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Furthermore, during the conversion, it will be possible to choose whether to link the data to an existing record.

- **Leaving a Conversation**:
  Option to click the "ABANDON" button to exit a conversation that you no longer intend to follow.
- **New Calendar Features**:
  Capability to drag and drop an Event with the choice to either duplicate it or simply move it. Practical shortcuts have also been added using specific button combinations.
- **Mark as Spam**:
  In the Messages module, a quicker option to mark emails as spam has been incorporated.

WILSON APP

- **Push Notifications**:
  For the Wilson App, push notifications have been introduced. It will be possible to activate them from the web and receive alerts whenever an email, a conversation, or any type of notification arrives. All of this can be configured through the settings available on the App.

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- **Biometric Fingerprint Access**:
  It is possible to add biometric authentication for accessing the App through fingerprint recognition.

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