

1 Introduction

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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.

FOTO

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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Introduction

vtenext supports management of all customer-related flows, from acquisition to assistance, allowing also intelligent internal/external communication. Customer activities and communications are stored and available for consultation: vtenext centralises all information around the customer, in particular, information that is unstructured by nature (events, emails, documents, messages), thus increasing the value of the company's database. Furthermore, integration towards external systems (mobile, email server, ERP and e-commerce software and so forth) makes vtenext an ideal single working environment.

vtenext is released in two versions:

- **vtenext Business:** version with assistance fee guaranteeing constant support, updates and bug fixing;
- **vtenext Community:** free version, with limited functionalities and updates compared to the Business version.

vtenext is the leading open source CRM platform on the Italian market, with more than 19,000 registrations logged to date;

Issued with AGPL-3 license, which provides access to the unencrypted and editable code that can be released to the entire development community;

- Based on internal and community development activities;
- Supported by a certified network of more than eighty partners in Italy and Europe;
- Can operate with MySQL, Oracle and SQL Server and can be installed in Linux or Windows environments;

Can be integrated with the main systems:

- ERP platforms, namely Zucchetti, SAP, Teamsystem, Mago, Esa Software, As400;
- Email: GMail, Zimbra (server side) and Outlook, Thunderbird (client side);
- Documentary references (CMS) and company websites through the use of vtenext web services;
- Vtenext quality standards are based on unique development and design logic;
- Tested in extreme situations with millions of records and hundreds of users working simultaneously;
- Updated according to technological standards and to developments released by the open source community and by the top European software houses;
- Based on Enterprise logic;
- Multiplatform: Windows or Linux;
- Multi-database: Oracle, SQL Server, MySQL; Certified on Red hat;
- Verticalised for the main Manufacturing and Service sectors.

1.1 Examples of vtenext application areas

Customer Acquisition & Sales

- Automated acquisition of potential accounts via contact webform; Lists allocation to sales personnel concerned;
- Management of corporate hierarchies, partners, etc.;
- Shared calendar to plan customer actions; Sales negotiations management with forecast reports;
- Sales and administration steps management: Quotes, Sales Orders, Invoices, Delivery Notes;
- Exportation to PDF of offers, invoices, etc. with customised forms.

Communication & Marketing

- Management of multiple personal mailboxes;
- Mail and link conversion towards other CRM objects;
- Target management (segments) of customers database according to key-information;
- Transmission of newsletters and campaign statistics;
- Internal communications through Conversations linked to CRM entities. → Talks

Customer Service & Projects

- Customer assets management: installed products and pending contracts;
- Collection of after-sales requests through different channels;
- Management of queued work processes and SLA times;
- Online customer portal for direct communications and documents sharing;
- Activities tracking and resources scheduling;
- Orders management through Projects, Operations, Deadlines and Gantt charts. → Project Tasks – Milestones

Reports & advanced tools

- Reports and charts on all data in the CRM;
- Notification management system on both hierarchical and personal basis for users (Groups, Roles and Profiles);
- Privileges and security administration through advanced rules and exceptions; CRM layout customisation;
- Workflows (automations);

- Creation of interface side customised modules; Schedulable data importation from database;
- Report and supervision of user activities and accesses.

BPMN and company processes mapping:

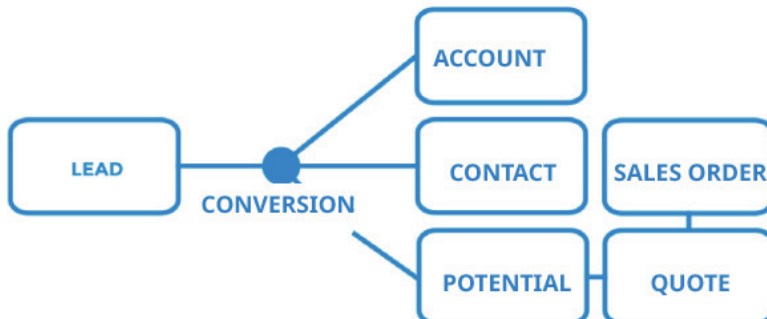
- Improve company efficiency;
- Execution of company procedures in standard and unequivocal manner;
- Reduction of human error;
- Reduction of execution times;
- Checking of bottlenecks in the organisation;
- Reduction of procedure learning times;

1.2 Flows managed by vtenext

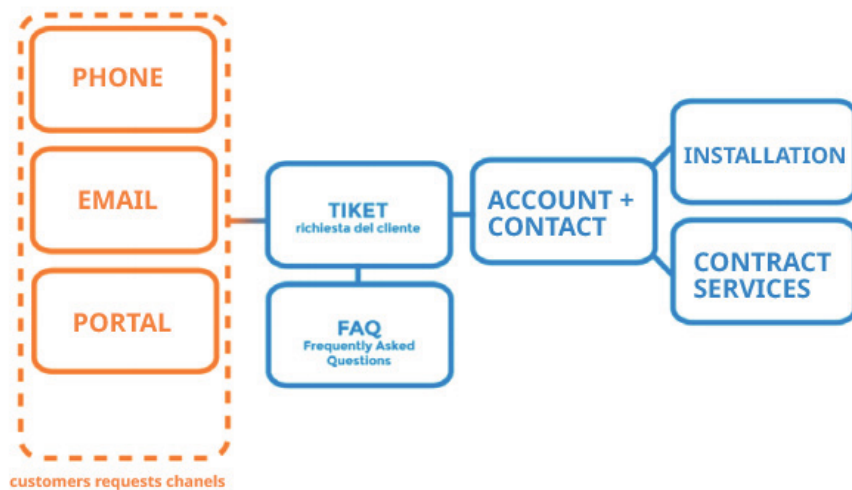
Customer acquisition cycle



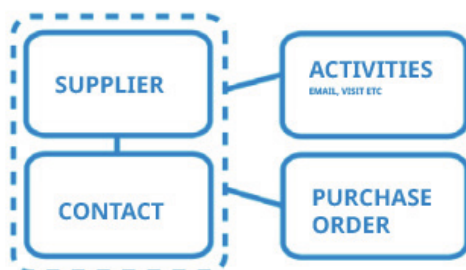
Acquired customer cycle



Assistance cycle



Purchasing cycle (vendors)



1.3 Notes on the manual (Disclaimer)

The images and functions of vtenext shown in this manual may be subject to minor changes with the release of updates and described according to the version and the current graphic theme.

Screenshots may vary (colours, icons) depending on the configuration.