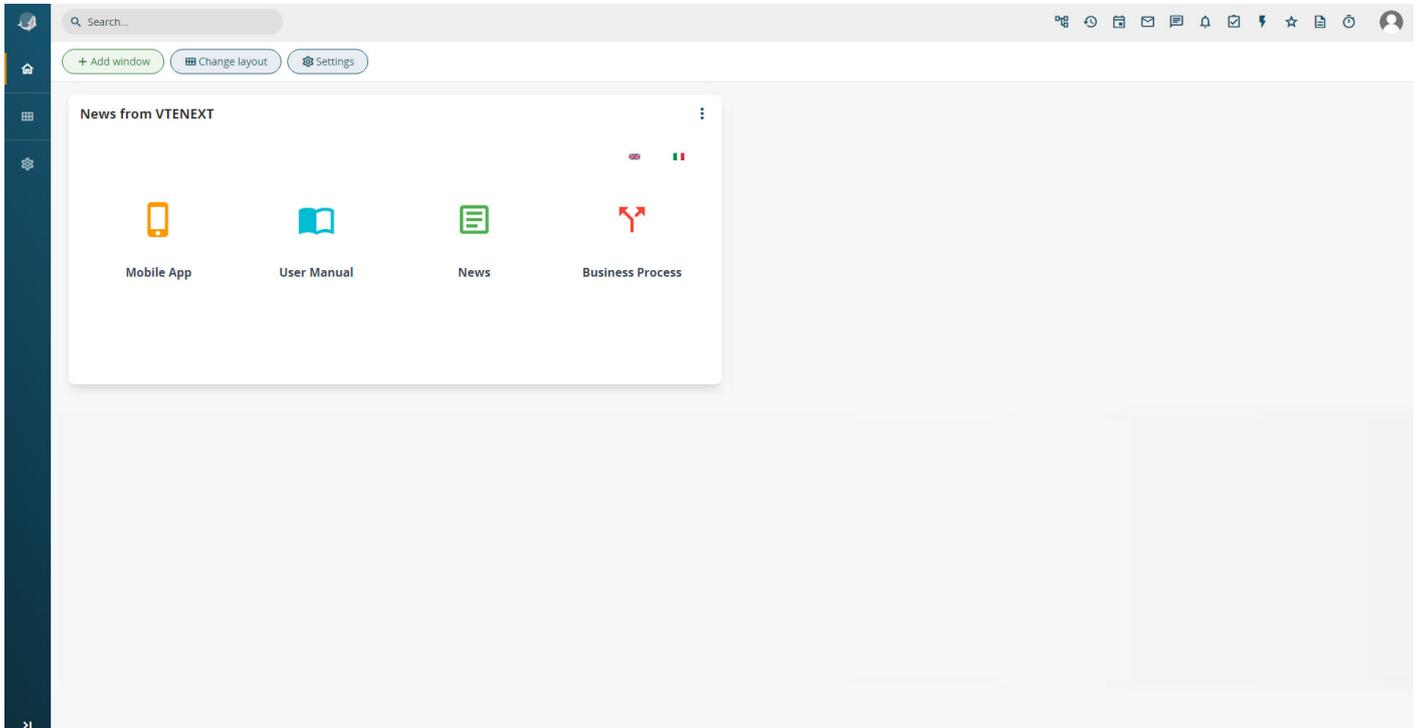


2.2 Home

When the user logs in to the CRM the user-specific home page can be displayed (this setting is editable by individual users in User Preferences).

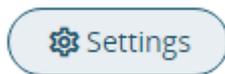


The Home page is composed of a set of elements (dashboards) that retrieve information from vtenext. The dashboards can be composed of:

- filters from modules
- RSS to receive feeds from your favourite channel
- the graphics from reports
- windows that allow you to view websites

The configuration is at the discretion of the user, who can enable default elements or create new ones. Each user must create his/her own dashboards which cannot be made public. To enable or

disable a preset dashboard click on the



icon to access "my preferences".

ATTENTION: home graphics have a 24h cache memory so they DON'T refresh everytime the homepage is refreshed.

The following is a list of the available blocks (which can be activated from "User preferences"):

News and Manual

The latest vtenext updates box and a link to the Online Manual

N.B.: My files has been eliminated from the Homepage, all present files were moved in the folder "My private files" inside the module Documents.

+ Add window

To create a new customised element click on

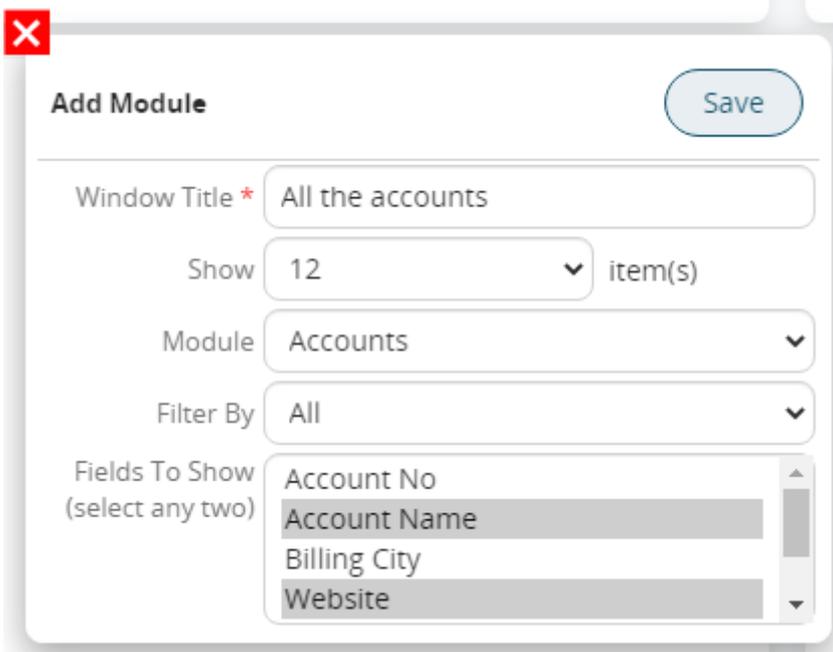
and choose the type of element to add.

The screenshot displays the Vtenext dashboard interface. At the top, there is a search bar and a navigation menu with icons for home, grid, and settings. Below the search bar, there are three buttons: "+ Add window", "Change layout", and "Settings". A red box highlights the "+ Add window" button, and a red arrow points to a dropdown menu that is open, showing the following options: "Module", "RSS", "Chart", and "Website".

The dashboard contains several widgets:

- Accepted**: A bar chart showing values for Accepted, Created, Delivered, Rejected, and Retrieved. The y-axis ranges from 0 to 1,000,000. Updated 18 minutes ago. View report.
- Potentials per status**: A bar chart showing values for various statuses: Closed Lost, Closed Won, Id. Decision Makers, Needs Analysis, Negotiation/Review, Perception Analysis, Budgeting, Open, Proposal/Price Quote, Prospecting, Qualification, and Value Proposition. The y-axis ranges from 0 to 10. Updated 18 minutes ago. View report.
- News from VTENEXT**: A section with two main items: "Mobile App" (with a smartphone icon) and "User Manual" (with a book icon). There are also flags for UK and Italy, and a red double-headed arrow icon at the bottom.

For example, if you wish to add a new Module, you will be presented with a screen similar to the following:



Add Module Save

Window Title * All the accounts

Show 12 item(s)

Module Accounts

Filter By All

Fields To Show (select any two)

- Account No
- Account Name
- Billing City
- Website

You must enter a title for this new window (e.g. All companies), indicate the number of elements to display (e.g. 10), which filter to use for displaying that dashboard (e.g. All filter) and finally, establish which fields are to be displayed, with a maximum of 2 (e.g. Company Name and Phone number).

The result of this configuration can be seen in the following screen:

Search...

+ Add window Change layout Settings

All the accounts

Account Name	Phone
Abdullah NGO	227718409
Administrator Inc	921686935
Alegre	611551329
Atlantic LLC	987886329
Aziz SpA	570780293
Azmak Sas	403911549
Beerkens LLC	750973308
Belanger SpA	89854463

Total per status

Updated 40 minutes ago

The order of the boxes can be changed by dragging them to the required position with the mouse.

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