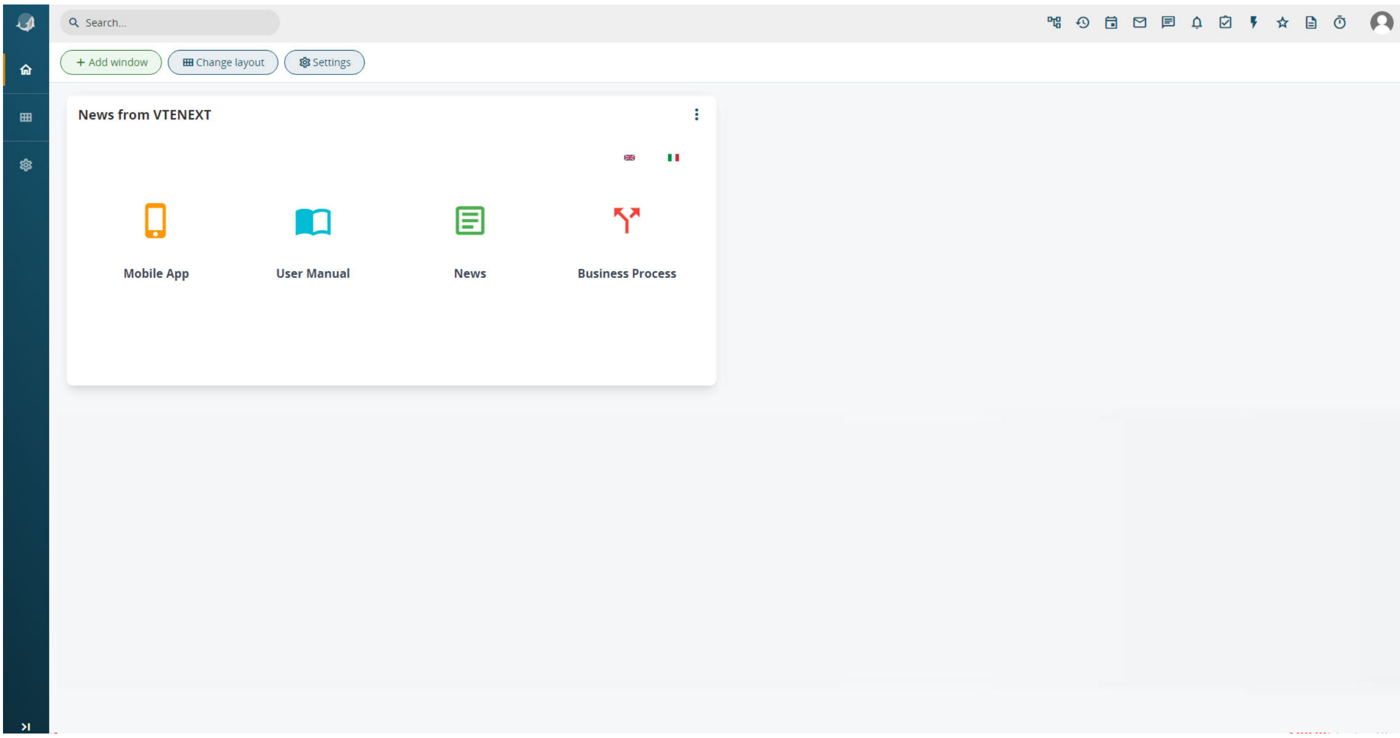
2.2 Home

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 

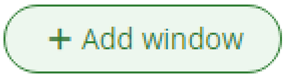
icon to access “my preferences”.

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

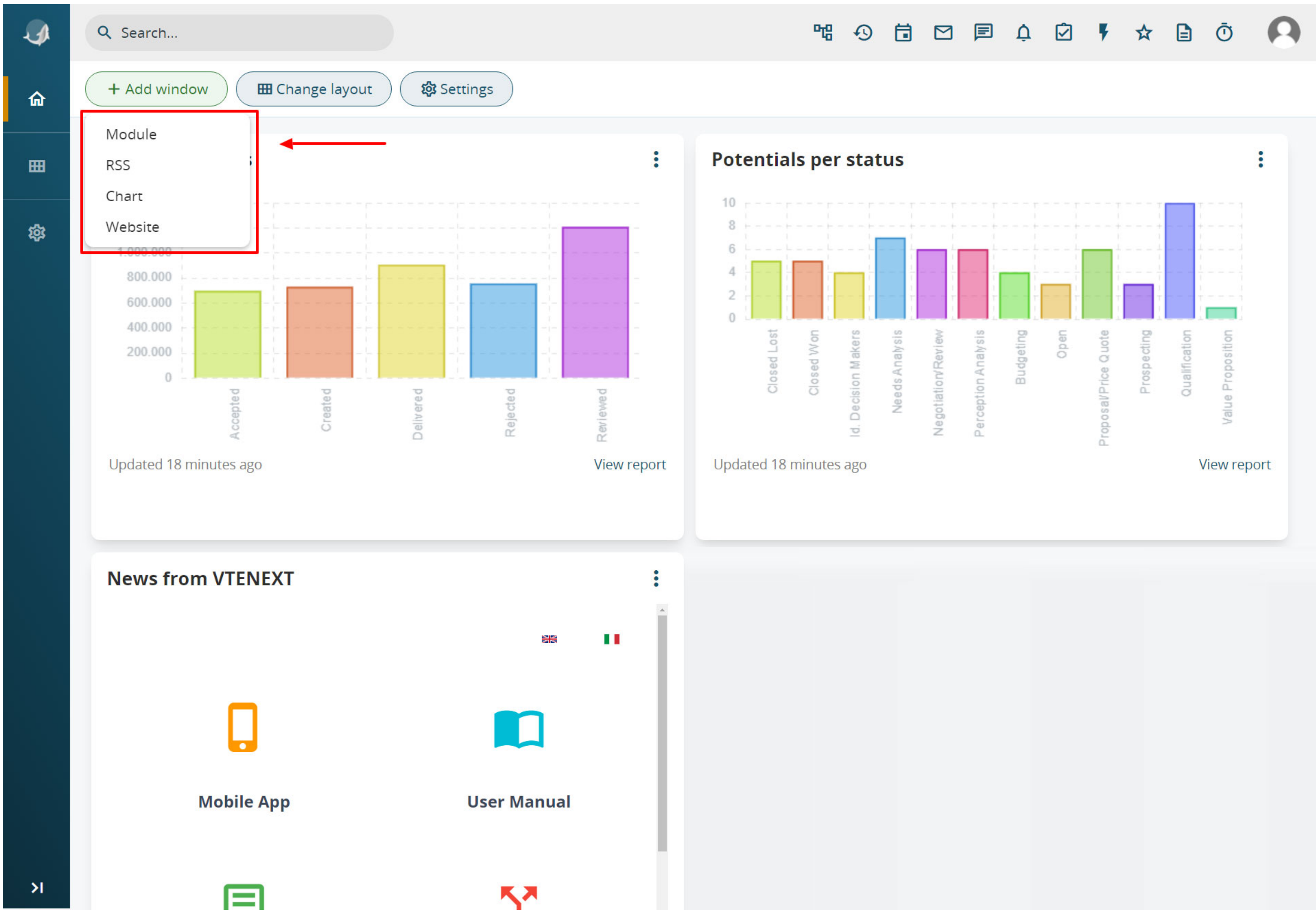
The following is a list of the available blocks (which can be activated from "User preferences"):

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

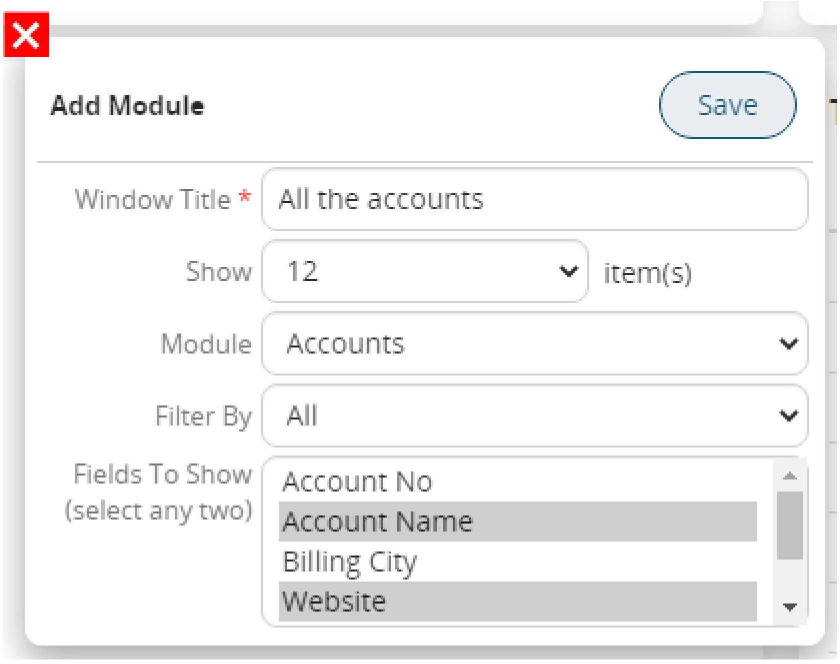
N.B.: My files has been eliminated from the Homepage, all present files were moved in the folder "My private files" inside the module Documents.

To create a new customised element click on 

and choose the type of element to add.

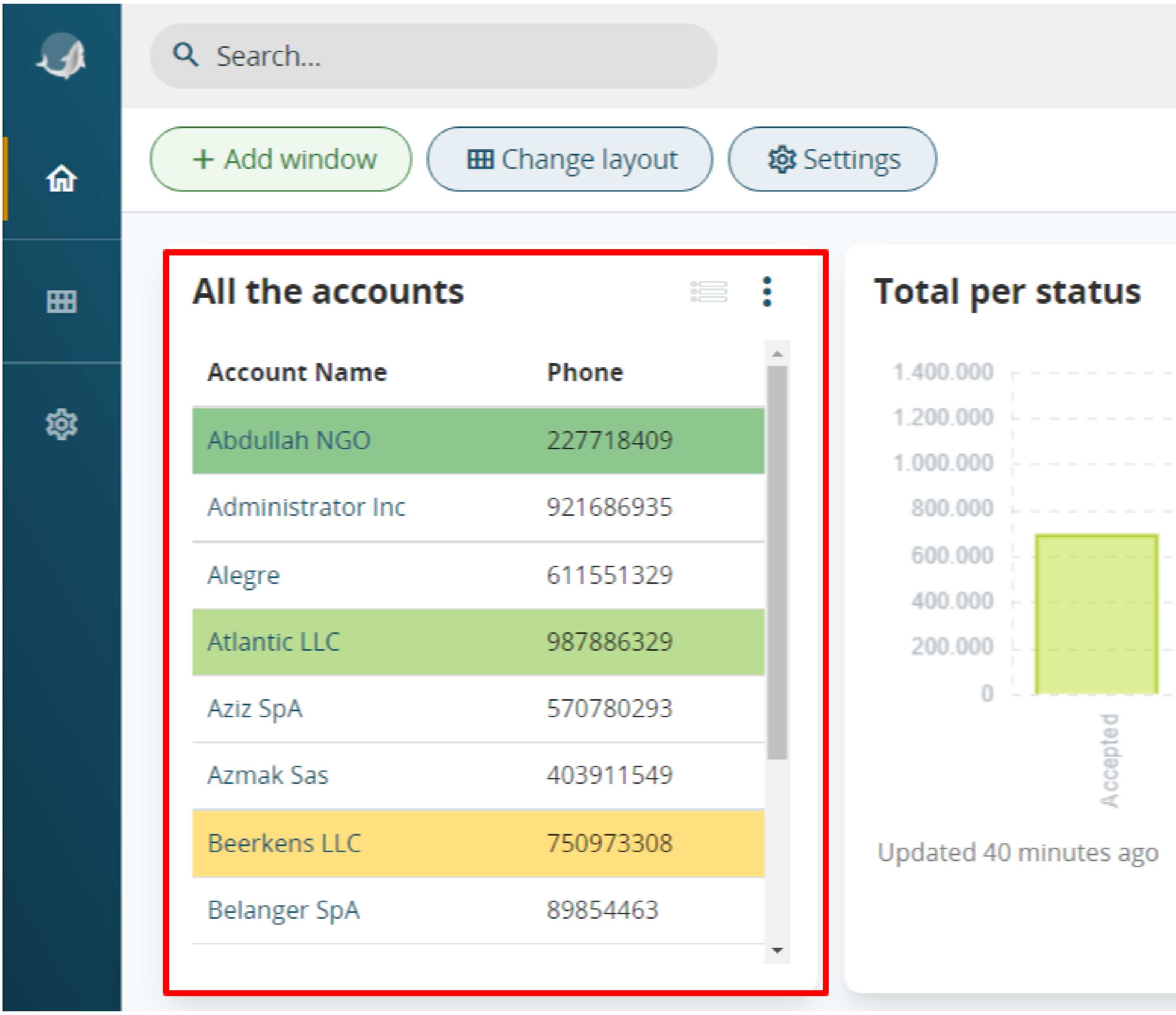


For example, if you wish to add a new Module, you will be presented with a screen similar to the following:



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:



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

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