

4 Calendar and Activities

The vtenext calendar allows you to award a priority to your activities, specifying the users or contacts involved and the subject connected to the activity.

A simple click is sufficient to access the related content, postpone an activity that you have been unable to start, or close an activity.

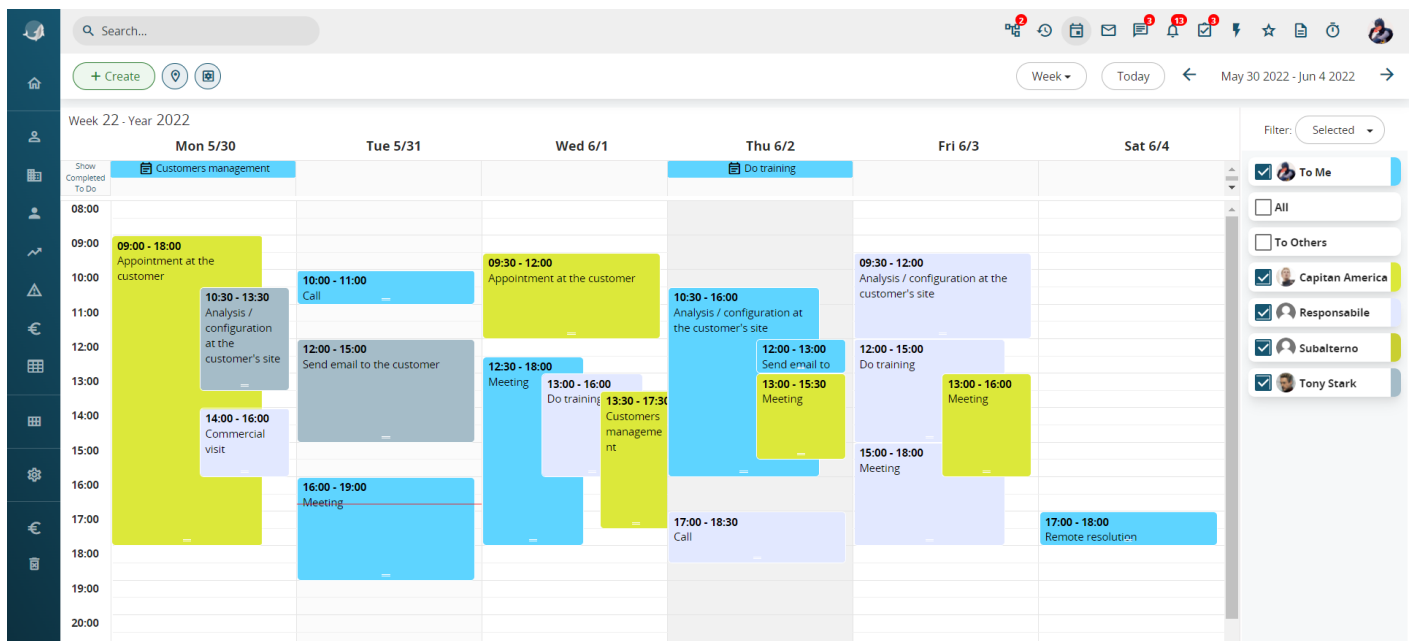
Furthermore, the calendar of each user can be shared with the calendars of the other users.

vtenext offers two different activity types:

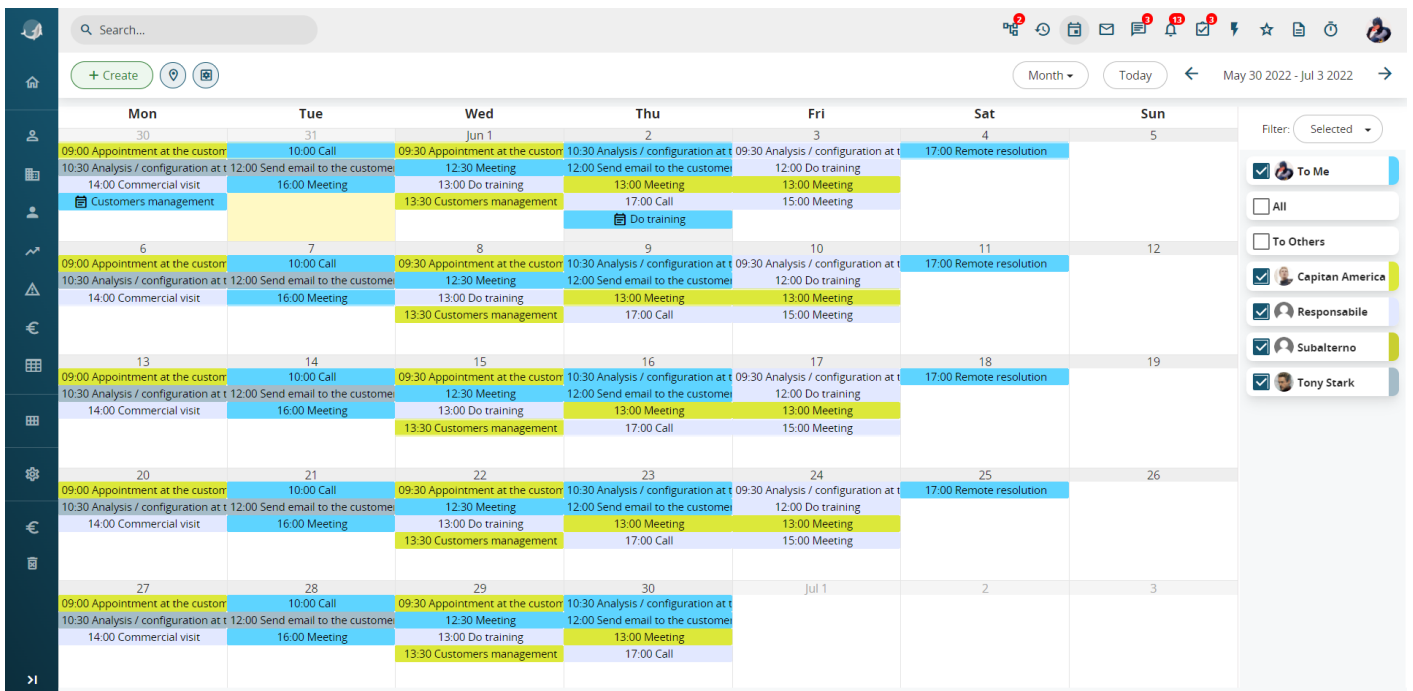
- **Event:** activities with clearly defined start/end times, which may involve other users or contacts. There are also some default events that are in turn classified in accordance with the activity type (call, meeting, etc.).
- **To-do:** defines a personal activity to carry out over one or more days without any hourly restrictions. To-dos are similar to personal memos.

vtenext allows you to keep track of activities by providing suitable tools to manage the entire corporate organisation efficiently.

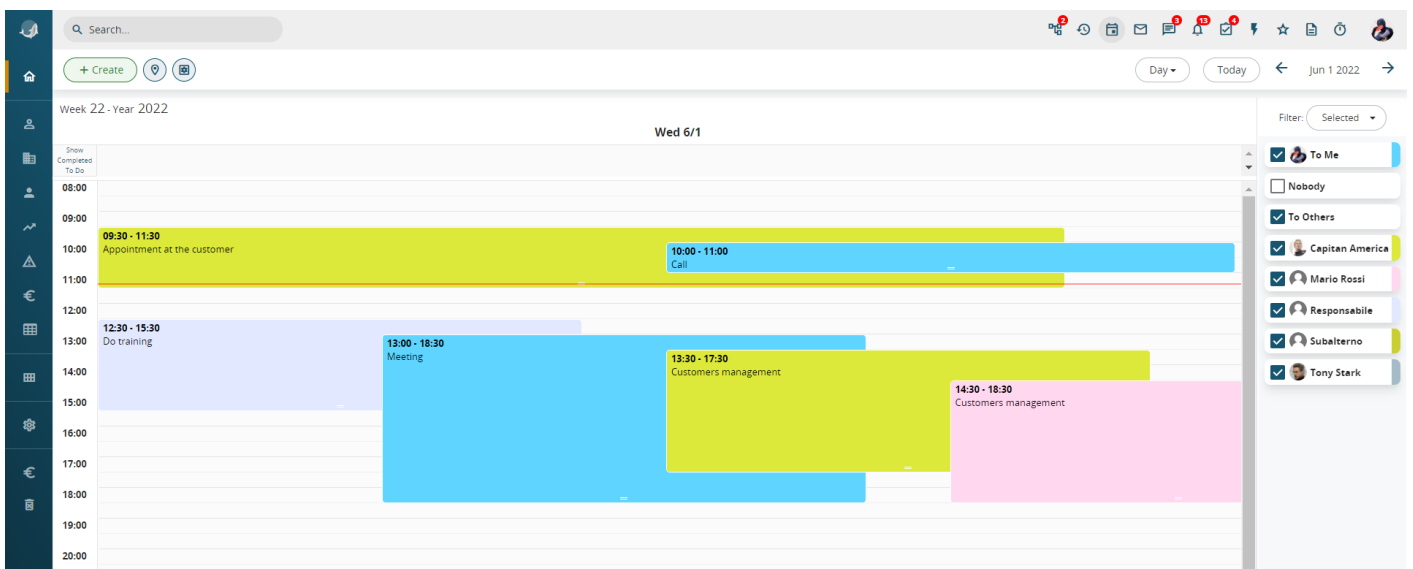
The Calendar module appears as shown below:



Week view



Month view



Day view

- The menu at the top left allows you to choose the view type (Day, Week, Month, List and Geolocation);
- The large central section shows the calendar (display of events/to-dos, drag an event to shift it in time, click for rapid creation of a new event/to-do, click to view the event details, click to file the event in completed status);
- The right side of the page contains a list showing users with whom the event can be shared. When you enable one or more users their agenda will be displayed on top of yours;
- The “Show/Hide Completed To-dos” button (upper left) allows you to enable or disable the display of completed to-dos; furthermore, by clicking on the toolbar you can expand the to-dos display area;

- the item **HOLIDAYS**, in the user list on the right of the calendar (day / week / month view) has been inserted to explain to the user that the gray color indicates holidays, like a legend. For this reason, the field is disabled (not clickable also with the admin user).

| | Mon 5/30 | Tue 5/31 | Wed 6/1 |
|----------------------------|------------|----------|---------|
| Show Completed To Do | Send email | | |
| 08:00 | | | |

“List view” mode allows you to work in the calendar using the same search, filter, and mass edit tools and so forth provided for all the other modules.

Search...

Other

List

Filter

All

Assigned To

All

Showing 1 - 20 of 367

<<

<

Page 1

>

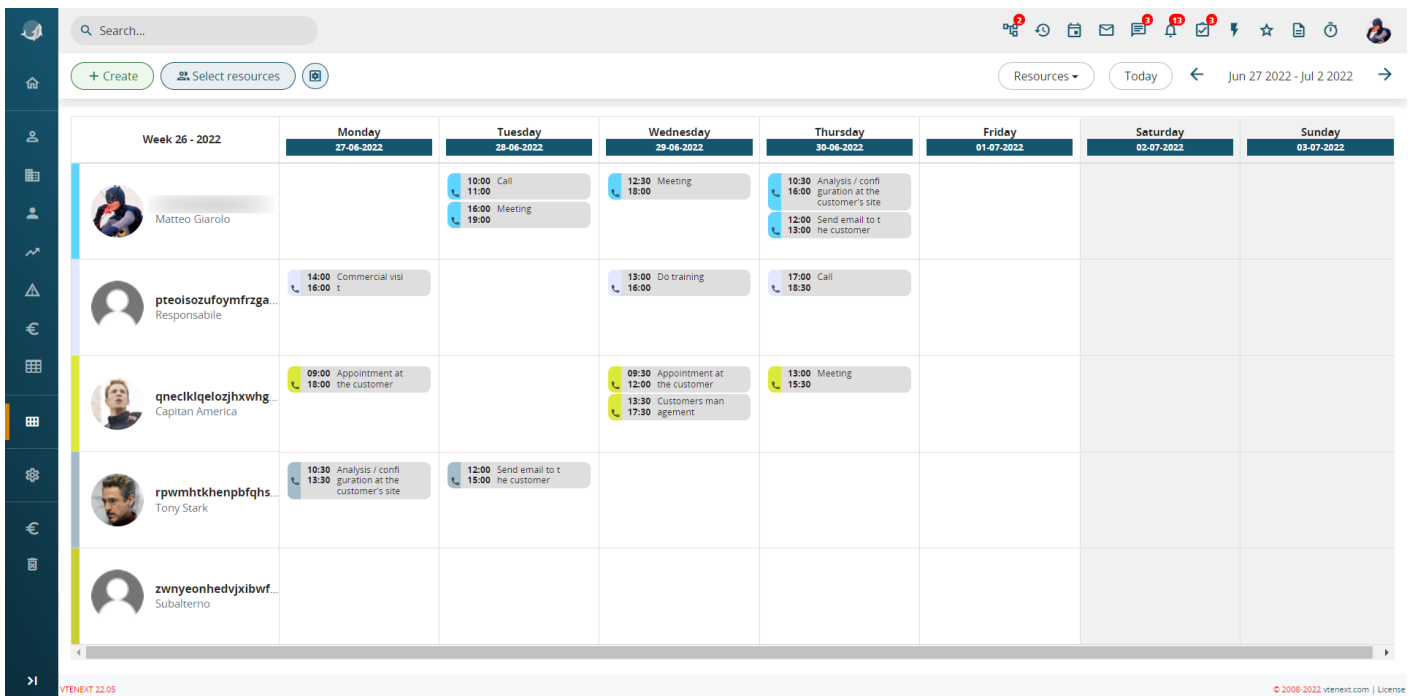
>>

| <input type="checkbox"/> | Actions | Status | Activity Type | Subject | Related to | Start Date | Due Date | Assigned To |
|--------------------------|---------|---------|---------------|--|---------------------------------------|------------------|------------|-------------|
| <input type="checkbox"/> | | Planned | Call | Meeting - Conference Partnership | demovte | 02-05-2018 09:00 | 02-05-2018 | |
| <input type="checkbox"/> | | Held | Tracked | Import Error CSV Leads | vtenevt - Import Error CSV Leads | 04-05-2018 11:09 | 04-05-2018 | |
| <input type="checkbox"/> | | Planned | Call | Contact Meeting | vtenevt Customisation Accounts module | 04-05-2018 09:30 | 04-05-2018 | |
| <input type="checkbox"/> | | Planned | Call | Gestione Lead - assegnazione commerciale | .. | 07-05-2018 14:00 | 07-05-2018 | |
| <input type="checkbox"/> | | Planned | Call | Meeting - Partnership Conference | .. | 09-05-2018 09:00 | 09-05-2018 | |
| <input type="checkbox"/> | | Planned | Call | Gestione Lead - assegnazione commerciale | .. | 14-05-2018 14:00 | 14-05-2018 | |
| <input type="checkbox"/> | | Planned | Call | Meeting - Trade Show | .. | 16-05-2018 09:00 | 16-05-2018 | |
| <input type="checkbox"/> | | Planned | Call | Gestione Lead - assegnazione commerciale | .. | 21-05-2018 14:00 | 21-05-2018 | |
| <input type="checkbox"/> | | Planned | Call | Meeting - Conference Partnership | .. | 23-05-2018 09:00 | 23-05-2018 | |
| <input type="checkbox"/> | | Planned | Call | Gestione Lead - assegnazione commerciale | .. | 28-05-2018 14:00 | 28-05-2018 | |
| <input type="checkbox"/> | | Planned | Call | Meeting - Conference Partnership | .. | 30-05-2018 09:00 | 30-05-2018 | |
| <input type="checkbox"/> | | Planned | Call | Gestione Lead - assegnazione commerciale | .. | 04-06-2018 14:00 | 04-06-2018 | |
| <input type="checkbox"/> | | Planned | Call | Meeting - Conference Partnership | .. | 06-06-2018 09:00 | 06-06-2018 | |

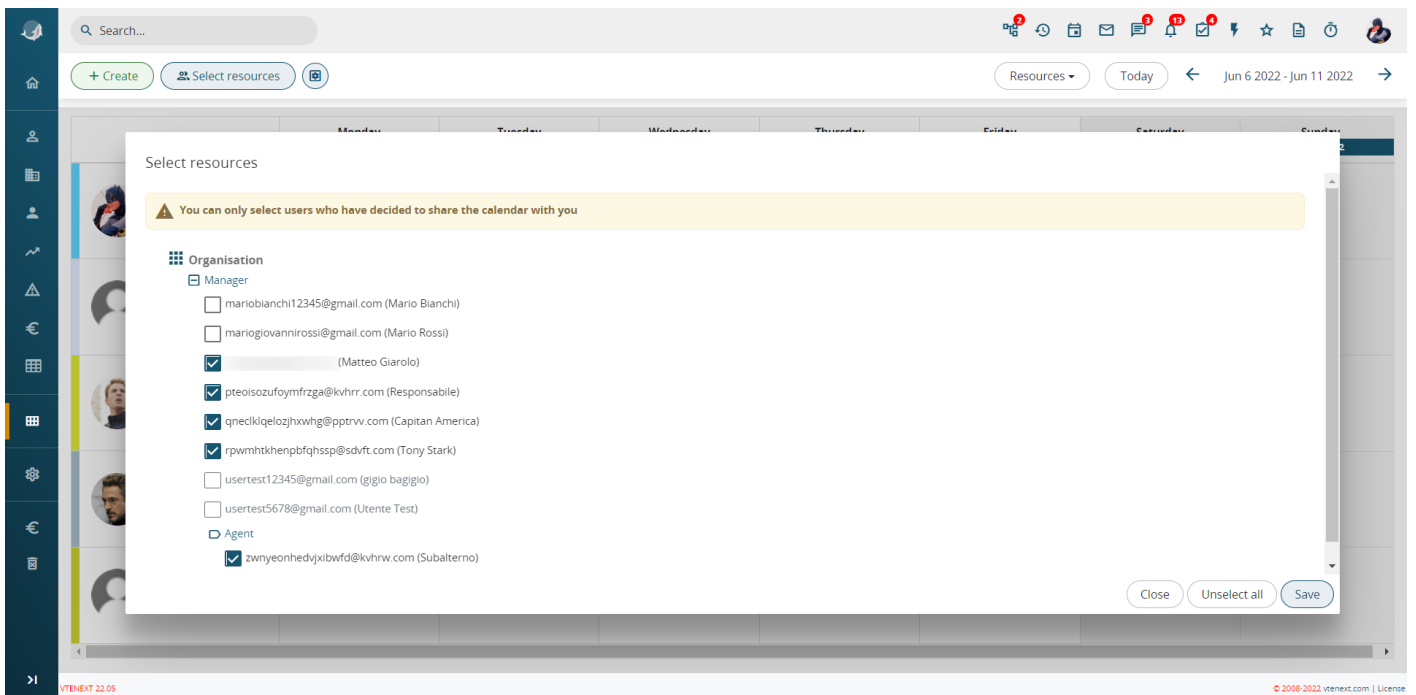
From 20.04 version, is also available events displayed by Resources.

This setting improves the user's visibility of the weekly activities planned by his team. Every user can select other users who shared the calendar with each other (see User Preferences).

The list of users is displayed based on the role scale set by the administrator.



Resources view



Select Resources view

By clicking on the **SELECT RESOURCES** button, on the top left, a pop-up will open. It will allow us to select the available resources according to the aforementioned rules.

Revision #1

Created 2 September 2024 07:58:58 by Admin

Updated 2 September 2024 07:58:58 by Admin