

10.6 Installations

Some companies need to associate a specific serial or registration number to a sold product. vtenext allows you to store this information in a special module that links customer and products. The Installations module allows you to track all the registration numbers that have been sold/hired to customers, while also monitoring the history of any assistance provided on the individual model. For example, today you sell a "Brand – Model X" boiler to a customer, and you file it away with serial number XYZ1234 that identifies the model and the location (room 1). Tomorrow the same customer buys another boiler from you, the "Brand – Model X" to be located in room 2. It will be stored among the installations related to the customer with the JKW8900 serial line.

When the customer reports a fault in the first boiler, the ticket will be connected not only to the customer and to the generic product Boiler "Brand – Model X", but also to the serial XYZ1234.

An installation must necessarily be linked to:

- A product, with which the article in the catalogue is identified;
- A unique serial/registration number;
- A customer (company);
- An identification name (you can make it match the serial number in order to simplify any search);
- A status to distinguish active machines from decommissioned ones.

The screenshot displays the vtenext web application interface. On the left is a dark blue sidebar with navigation links: Home, Leads, Accounts, Contacts, Campaigns, Trouble Tickets, Potentials, Reports, Modules (expanded), Clients, Marketing, Projects, Sales, Inventory, Collaboration, All, Accounts, Assets (selected), and Calendar. The main content area is titled 'Asset Test' and features a search bar at the top. Below the search bar are tabs for 'INFORMATIONS', 'PROCESS GRAPH', 'PROCESS HISTORY', and 'HISTORY'. The 'INFORMATIONS' tab is active, showing a form with two columns of fields. The left column includes: Asset No (A552), Serial Number (EPX123), Date Sold (25-02-2022), Status (In Service), Invoice Name, Shipping Tracking Number, Customer Name (demoite), Modified Time (25-02-2022 11:23:30), and Creator (qnecklqelozjhwng@pptrvv.com (Capitan America)). The right column includes: Product Name (Product a), Assigned To (qnecklqelozjhwng@pptrvv.com (Capitan America)), Date in Service (25-02-2022), Tag Number, Shipping Method, Asset Name (Test), Created Time (25-02-2022 11:23:30), and Sales Order. On the far right, there is a 'SHORTCUTS' panel with links to Talks, Notes, Trouble Tickets, Documents, Messages, and Processes. At the bottom of the main area is a 'Notes' section with a text input field.

From the company registry, it will be possible to view, for example, the fleet of machines sold to the customer.

Assets (1) - List

Showing 1 - 1 of 1

Add Asset

Action	Asset No	Asset Name	Customer Name	Product Name
	ASS2	Test	demovite	Product a

The historical assistance on the product will be visible from the installation data.

Trouble Tickets (1) - List

Showing 1 - 1 of 1

Select Trouble Tickets

Add Ticket

Action	Ticket No	Subject	Related To	Status	Priority	Assigned To
	TT12	Software issue	@	Wait For Response		

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