

2 First steps: how to browse vtenext

This section consists in a brief introduction to vtenext for those who are accessing the system for the first time. The goal is to provide to the user with the basic knowledge to become familiar with this tool, which is designed to be intuitive and easy to use.

The following basic horizontal tools will be illustrated:

Login: how to access vtenext;

Home Page: personal splash screen;

Navigation: menus and icons;

Search functions: simple and advanced search, in each module and global;

Modules and records: what they are and how they are structured;

User preferences: personal information, notifications and more.

The screenshot displays the vtenext user interface. On the left is a dark blue sidebar navigation menu with options: Home, Leads, Accounts, Contacts, Campaigns, Trouble Tickets, Potentials, Reports, Modules, Settings, View credit, and Clear demo data. At the top of the main content area is a search bar and utility buttons for '+ Add window', 'Change layout', and 'Settings'. The main content area features three large promotional cards: 'Wilson Mobile App' (with a smartphone image), 'Il Motore BPM' (with a flowchart diagram and a red circle containing the number '2'), and 'vtenext CRM' (with a 'Prenota la tua Demo' button). Below these cards are four dashboard widgets: 'Totale Ordini - Polar' (a polar chart), 'Conteggio per stato' (a line chart), 'Totale Ordini' (a donut chart), and 'Leads' (a table listing customer records).

LAST NAME	COMPANY
COSSTRAVEL	Wallback - COSSTRAVEL S.p.A.
Davis	Vtecrm
DONATIELLES	EffeEse donatielles s.a.s.
FANTASIA	Doliveria S.p.A.

vtnext

Q Search...

LIST WIZARD

+ Create Other

Filter Lista Assigned To All

Showing 1 - 12 of 12

Action	Account No	Account Name	Annual Revenue	Phone	Email	Rating	Type	Billing State	Assigned To
> <input type="checkbox"/>	ACC17	De BRUNE CORIONAL s.n.c.	0.00	3395088235	test123@test123.com	Lost Customer	Azienda Cliente	MI	giuseppe.verdi@email.it (Giuseppe Verdi)
> <input type="checkbox"/>	ACC3	EDFG Group Limited	0.00	(150) 009-5971	test123@test123.com	Active	Azienda Cliente	MI	vtnext2604@gmail.com (Francesco Villani...)
> <input type="checkbox"/>	ACC13	Leram	0.00	125789415	test123@test123.com	Lost Customer	Azienda Cliente	TO	giuseppe.verdi@email.it (Giuseppe Verdi)
> <input type="checkbox"/>	ACC15	Pilux - Adrestin S.p.A.	0.00	3207296999	test123@test123.com	--None--	Concorrente	VR	vtnext2604@gmail.com (Francesco Villani...)
> <input type="checkbox"/>	ACC10	samplevte	0.00	(705) 302-9904	test123@test123.com	Active	Potenziale Cliente	TO	giuseppe.verdi@email.it (Giuseppe Verdi)
> <input type="checkbox"/>	ACC2	I3M Invest A/S	0.00	(237) 093-7872	test123@test123.com	Active	Potenziale Cliente	MI	vtnext2604@gmail.com (Francesco Villani...)
> <input type="checkbox"/>	ACC7	usable-vte	0.00	(589) 877-1783	test123@test123.com	--None--	Potenziale Cliente	CA	giuseppe.verdi@email.it (Giuseppe Verdi)
> <input type="checkbox"/>	ACC1	vtecrm	0.00	(528) 002-7746	test123@test123.com	Active	Partner	MI	giovanna.bianchi@email.it (Giovanna Bian...)
> <input type="checkbox"/>	ACC4	vteCRM inc	0.00	(256) 725-7719	test123@test123.com	Suspended	Partner	VR	giovanna.bianchi@email.it (Giovanna Bian...)
> <input type="checkbox"/>	ACC14	VTENEXT s.r.l.	0.00	(8888)4684572	test123@test123.com	Active	Altro	VR	giovanna.bianchi@email.it (Giovanna Bian...)
> <input type="checkbox"/>	ACC9	vteuser	0.00	(548) 900-8144	test123@test123.com	Suspended	Altro	TO	giovanna.bianchi@email.it (Giovanna Bian...)
> <input type="checkbox"/>	ACC5	X-CEED INC 99	0.00	(928) 276-0853	test123@test123.com	Permanently Closed	Altro	MI	giovanna.bianchi@email.it (Giovanna Bian...)

Showing 1 - 12 of 12

vtnext

Q Search...

Account EDFG Group Limited

Edit

INFORMATION ADDITIONAL INFORMATION PROCESS GRAPH PROCESS HISTORY HISTORY

Account Information

Account Name	EDFG Group Limited	Account No	ACC3
Website	www.edfgrouplimited.com	Email	test123@test123.com
Type	Azienda Cliente	PEC	
Member Of		Phone (other)	
Rating	Active	Phone	(150) 009-5971
Employees	0	Industry	Chemicals
Annual Revenue (€)	0.00	Daily cost (€)	500.00
External Code		Receive newsletter	yes

Informazioni Fiscali Azienda

Bank Details	Social Security number
	26879730278
VAT Registration Number	cnv

SHORTCUTS

- Talks 1
- Notes
- Accounts Hierarchy

RELATIONS

- Targets 2
- Campaigns 2
- Contacts 2
- Invoice 2
- Job Orders 1
- Potentials 1
- Project Plans 1
- Quotes
- Sales Order
- Activities
- Documents
- Trouble Tickets

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