

vtenext 25.02 Release Note

Cases Module

The **Cases** module is designed to manage reports, issues, and internal requests within the company, enabling a structured and traceable workflow. Here are the main features and functionalities of the **Cases** module, which specifically handles internal cases and subcases:

- **Case Creation and Management**
- **Subcase Management**
- **Workflow and Automation**
- **Communication and Collaboration**
- **Reporting and Analysis**
- **Integration with Other CRM Modules**

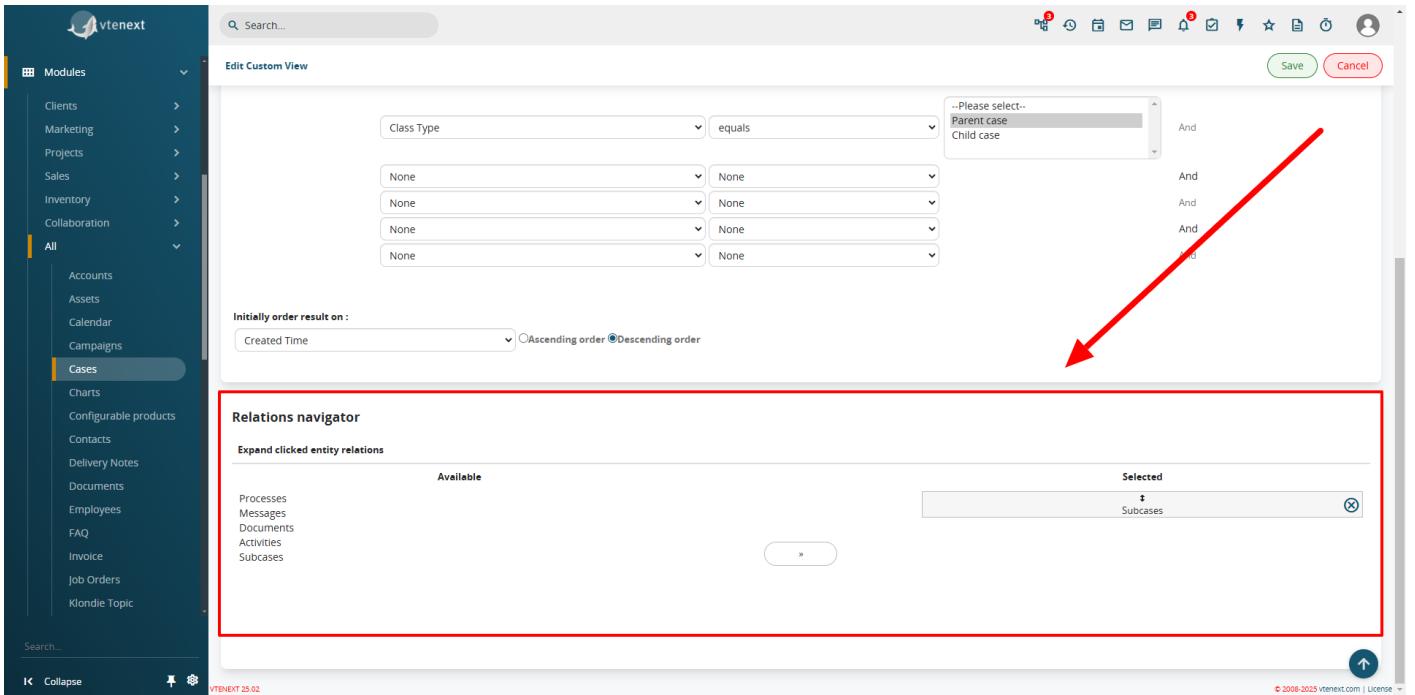
A well-structured **Cases** module improves operational efficiency, reduces request handling time, and increases transparency within the company.

The screenshot displays the vtenext interface for the Cases module. On the left is a dark sidebar with a menu including Modules, Clients, Marketing, Projects, Sales, Inventory, Collaboration, All, Accounts, Assets, Calendar, Campaigns, Cases (highlighted), Charts, Configurable products, Contacts, Delivery Notes, Documents, Employees, FAQ, Invoice, Job Orders, and a search bar. The main content area shows a 'LIST' view of cases. At the top, there's a search bar, a '+ Create' button, and an 'Other' button. Below that, there are filter options for 'Parent cases', 'Assigned To', and 'All'. The main table shows one case: CASE-1, 'Primo Caso', with status 'Open', 'Not expired', '25.00%' progress, and '31-03-2025' alarm date. Below this, a 'Cases (4) - List' popup shows a list of subcases: CASE-5 (Specifiche, Waiting for response, Expired), CASE-4 (Altro Sottocaso, Closed, Expired), CASE-3 (Secondo Sottocaso, Assigned, Not expired), and CASE-2 (Primo Sottocaso, Open, Not expired). The bottom of the interface shows 'Showing 1 - 1 of 1' and a footer with 'vtenext 25.02' and '© 2008-2023 vtenext.com | License'.

How the Cases Module Appears and the Display of Subcases Already Available in the List View

Relations Navigator (Expandable List View)

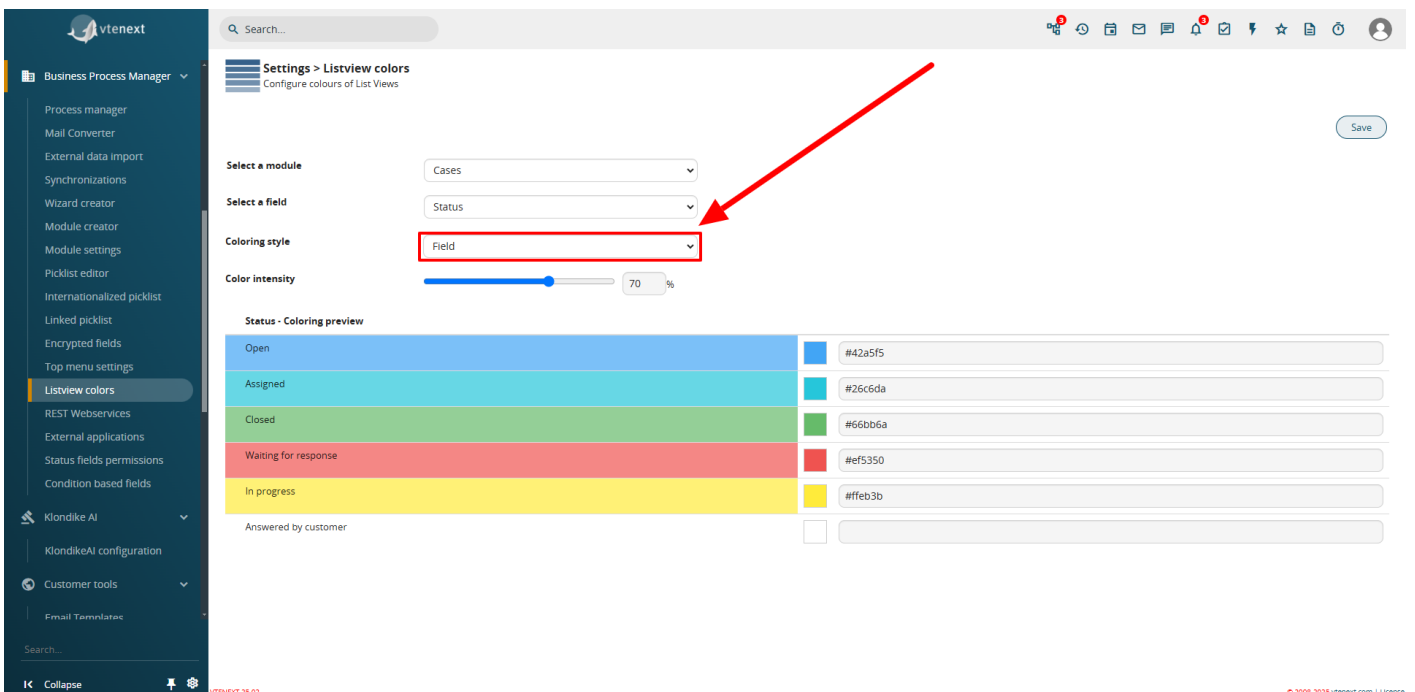
As already seen in the Cases module, an additional function has been introduced in the filters: the expansion of list views. This feature allows related module views to be propagated within a filter. For example, in a Company record, you can directly see all linked Contacts from the filter. This function is available for all CRM filters.



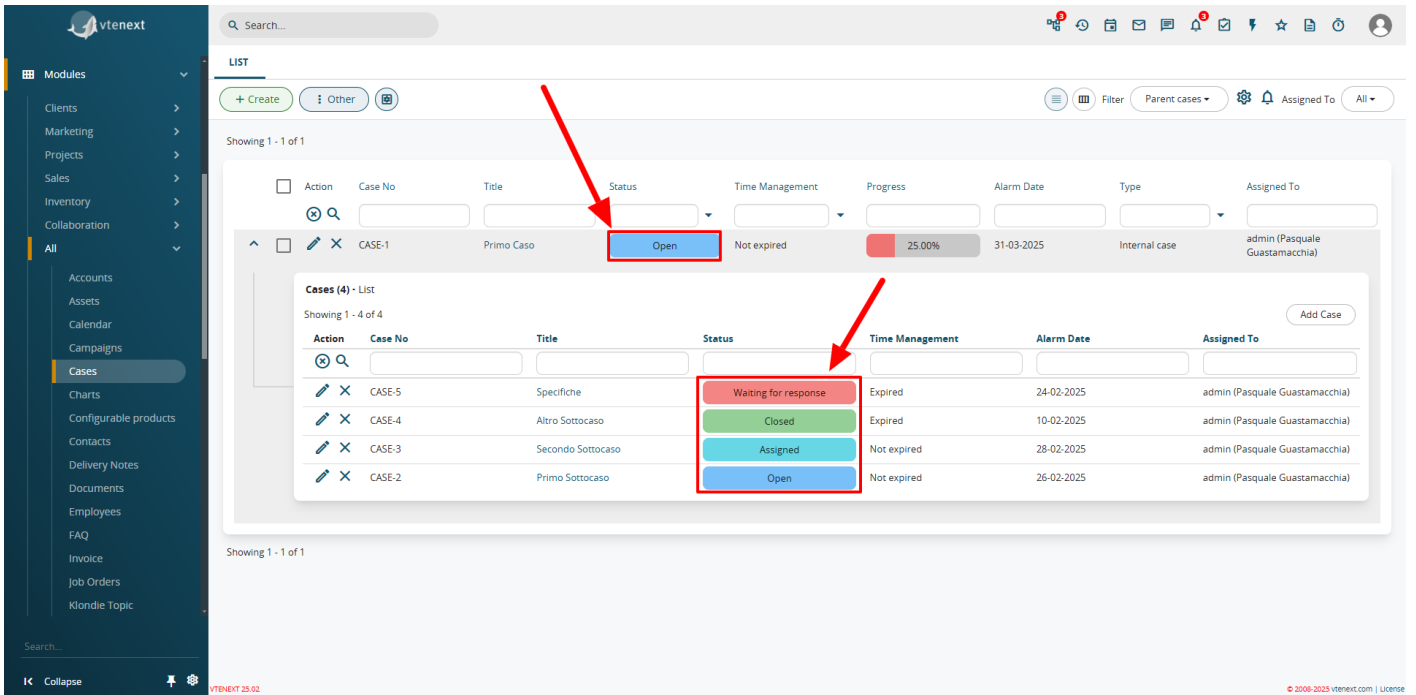
In the filter settings, the Relations Navigator configuration is available

Field Coloring in List View

From **SETTINGS > LIST VIEW COLORING**, the **Field Coloring** option is available. This feature allows you to apply colors to specific fields in the list view, such as the status of a Ticket or a Case, improving visibility and usability.



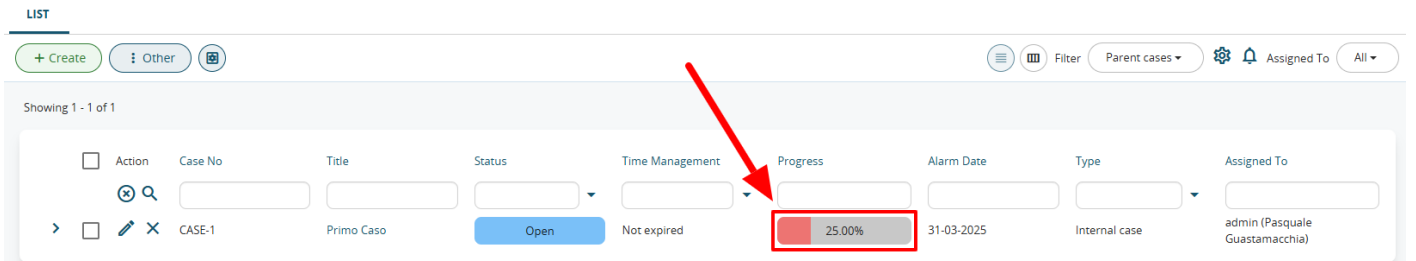
Configuration View from Settings



Colored Field View in List

Progress Bar

A new field type, **uitype 1024**, has been introduced as a progress bar. This feature can only be enabled and configured via code. A pre-installed progress bar is available in the **Cases module**, which automatically calculates and updates the percentage of **Closed Subcases**.



Detailed View of the Progress Bar Field

Preinstalled Processes for Case Management

The update includes two new processes to automate the management of the Case module.

Settings > Process manager

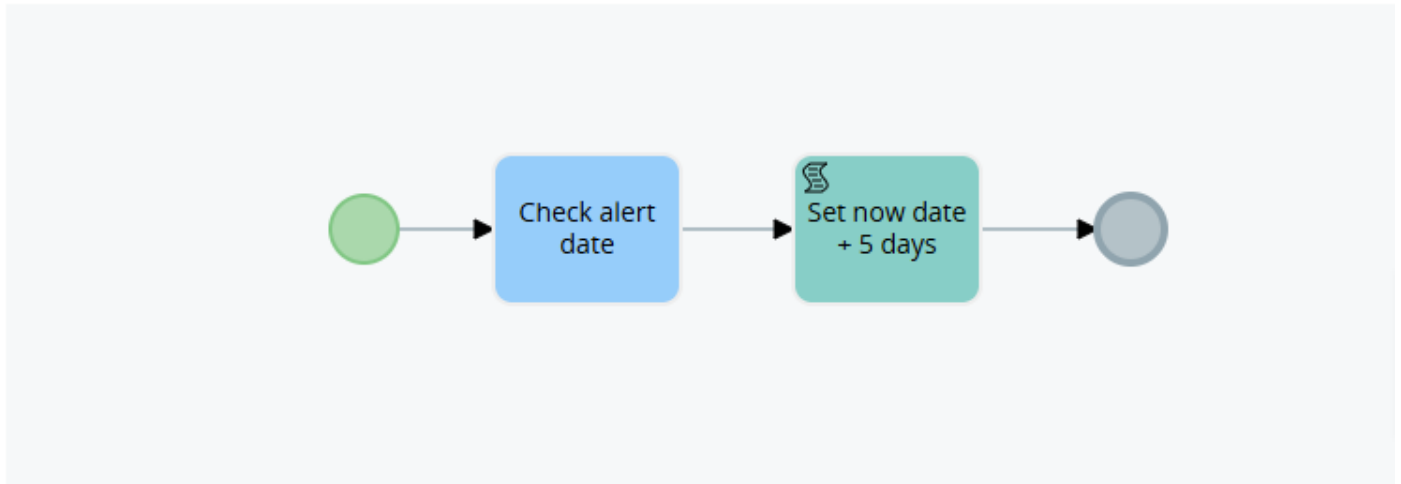
Name

Set alert date

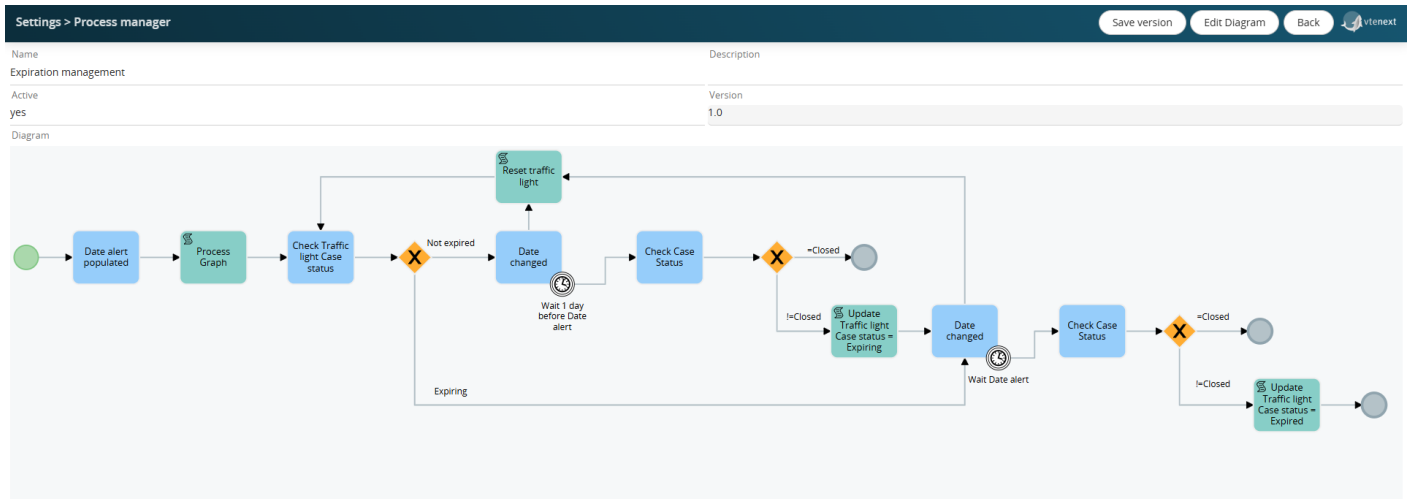
Active

yes

Diagram



"Set Alert Date" is the process that automatically sets the alert expiration date to 5 days from today's date (considering that the case is being created today) if left empty during the creation of a Case.



"Expiration Management" is the process that checks the dates, and one day before the expiration date, sets the case status to "expiring" or "expired."

Field Mapping of the Products Block

In the configuration of the products block in the layout editor, it is possible to define the mapping of custom fields to inherit values from another module.

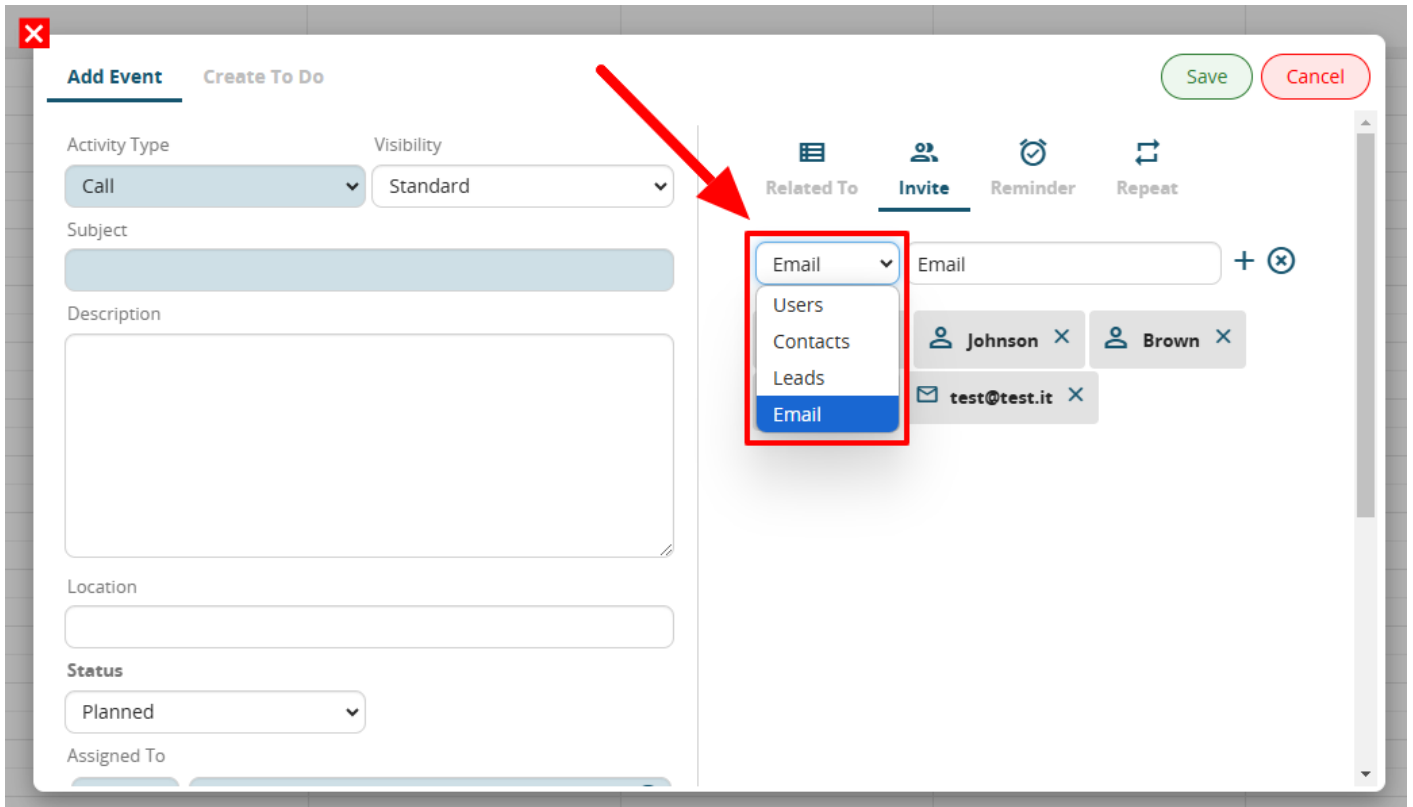
For example, in the products block of quotes, if a "Partner Discount" field has been created and you want this field to be populated into a custom field named "First-Level Discount" in the products

block of the sales order upon its generation, you will be able to manage this function through processes.

The mapping is not applied upon saving (as with formulas) but is simply pre-filled during creation. It is automatically applied in the "Copy products block" action of the processes.

Invite Leads and Emails to the Calendar

This feature allows you to invite Leads and Emails directly to Calendar Events. The Leads and Emails will receive an email notification, which they can accept or decline, and their response will be visible directly in the calendar event.



Note the dropdown menu for invitations, now with the new selectable entities

Two-Factor Authentication (2FA) in the Business Portal

Two-factor authentication has been implemented on the customer portal, achievable via email. Through the SDK, other types of authentication (e.g., SMS) can be implemented. The Portal Contact who has activated this feature will need to enter the code received via email to access the portal.

vtnext

Search...

Settings > Business Portal > Viewing "Default"
Viewing access privileges for "Default"

Define Privileges for <Default>
Use the options below to set privileges

Save Cancel

General

Select the user or group to which the records created by the portal will be assigned.

User admin (Pasquale Guastamacchia)

Select two-factor authentication type
With email

Select fallback two-factor authentication type
With email

Notifications

Template used to send the mail of subscription to the portal
Portale - Dati di registrazione ed accesso

Template used to send the mail after change password
Portale - Cambio password

Template used to send the mail for password recovery
Portale - Recupero password

Template used to send the mail to the customer when there is a new ticket
Portale - Nuovo ticket

Template used to send the mail to the customer when there is a reply in a ticket
Portale - Risposta al ticket

SMTP account for sending emails
Default

Sender mail

Sender name

Home

Configure buttons for quick actions
Add Button

Conditionals

No rules set

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