

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 web application interface. On the left is a dark blue sidebar navigation menu with icons and labels for 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 buttons for '+ Add window', 'Change layout', and 'Settings'. The main content area features three large promotional cards: 'Wilson Mobile App' showing a smartphone, 'Il Motore BPM' with a flowchart and a red circle containing the number '2', and 'vtenext CRM' with descriptive text and 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 leads with columns for LAST NAME and COMPANY). The table includes entries like COSSTRAVEL, Davis, DONATIELLES, and FANTASIA.

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

vtnext

Search...

Home

Leads

Accounts

Contacts

Campaigns

Trouble Tickets

Potentials

Reports

Modules

Settings

View credit

Clear demo data

Search...

Collapse

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
											
>	☐	 	ACC17	De BRUNE CORONIAL s.n.c.	0.00	3395088235	test123@test123.com	Lost Customer	Azienda Cliente	MI	giuseppe.verdi@email.it (Giuseppe Verdi)
>	☐	 	ACC3	EDFG Group Limited	0.00	(150) 009-5971	test123@test123.com	Active	Azienda Cliente	MI	vtnext2604@gmail.com (Francesco Villani...)
>	☐	 	ACC13	Leram	0.00	125789415	test123@test123.com	Lost Customer	Azienda Cliente	TO	giuseppe.verdi@email.it (Giuseppe Verdi)
>	☐	 	ACC15	Pilux - Adrestin S.p.A.	0.00	3207296999	test123@test123.com	--None--	Concorrente	VR	vtnext2604@gmail.com (Francesco Villani...)
>	☐	 	ACC10	samplevte	0.00	(705) 302-9904	test123@test123.com	Active	Potenziale Cliente	TO	giuseppe.verdi@email.it (Giuseppe Verdi)
>	☐	 	ACC2	13M Invest A/S	0.00	(237) 093-7872	test123@test123.com	Active	Potenziale Cliente	MI	vtnext2604@gmail.com (Francesco Villani...)
>	☐	 	ACC7	usable-vte	0.00	(589) 877-1783	test123@test123.com	--None--	Potenziale Cliente	CA	giuseppe.verdi@email.it (Giuseppe Verdi)
>	☐	 	ACC1	vtecrm	0.00	(528) 002-7746	test123@test123.com	Active	Partner	MI	giuseppe.verdi@email.it (Giuseppe Verdi)
>	☐	 	ACC4	vteCRM Inc	0.00	(256) 725-7719	test123@test123.com	Suspended	Partner	VR	giuseppe.verdi@email.it (Giuseppe Verdi)
>	☐	 	ACC14	VTENEXT s.r.l.	0.00	(8888)4684572	test123@test123.com	Active	Altro	VR	giuseppe.verdi@email.it (Giuseppe Verdi)
>	☐	 	ACC9	vteuser	0.00	(548) 900-8144	test123@test123.com	Suspended	Altro	TO	giuseppe.verdi@email.it (Giuseppe Verdi)
>	☐	 	ACC5	X-CEED INC 99	0.00	(928) 276-0853	test123@test123.com	Permanently Closed	Altro	MI	giuseppe.verdi@email.it (Giuseppe Verdi)

Showing 1 - 12 of 12

Revision #1

Updated 2026-07-06 15:07:38 UTC by Admin