

2.3.2 Fixed Icons

	Processes: clicking on this icon gives access to the detailed view of all processes implemented in the CRM.
	Last viewed: by clicking on this icon you can visualize the user's lists consulted recently.
	Calendar: Access to a simplified mini-calendar which allows, at a glance, to visualize all (open and closed) the pre-set commitments in the chosen month. Laterally it is reported the list of all the upcoming events.
	Messages: Direct access to the Messages module and to the composition of a new email. The icon will show, in case of new emails, a number in the upper right corresponding to the number of not read messages.
	Talks: Solution for the handling of information exchanges among the users. Every talk can be published to one or more users. Furthermore it can be related to every other elements of the CRM.
	Notifications: Functionality with the purpose of updating users on issues and data of their interest. The system allows to mark as read or not read the notification, even in massive form. The notifications of invitations or activities allow to accept or not them without positioning on the related reference.
	Tasks: Direct access to the expiring tasks with the possibilities to create new ones.
	Quick Creation: it allows, in any point, to create a new entity (Account, Contact, Event, Lead, Vendor, Task, Document, Ticket and Potential). By clicking on this entity, a new browser tab containing the creation mask will open.
	Favorites: Quick access to the customers lists through the icon favorites (star). Each user can define his/her own list and modify it constantly. If you want a customer record to appear among the Favorites, it is necessary to turn on the star with a click on the mouse from the detail view. If you don't want a customer record to appear among the Favorites, turn off the star with a click on the mouse from the detail view.

	Notes: A panel in which there are summarized all the notes created by the user opens. There is also the possibility to compose new ones and to convert every note in other CRM objects.
	Tracking: accesses the screen that displays the trackings in progress and paused.

Revision #1
Created 2026-07-06 15:07:38 UTC by Admin
Updated 2026-07-06 15:07:38 UTC by Admin