

1. Access and Homepage

Wilson for vtenext allows you to work anywhere, just as if you were sitting in your office in front of a computer. The App connects to the vtenext service (both Cloud and On Site) and offers direct operation on data to manage diary entries, contacts, potential customers, projects, and much more. With Wilson for vtenext you do not even need the native smartphone/tablet instruments, like for example the calendar and address book.



Welcome to Wilson

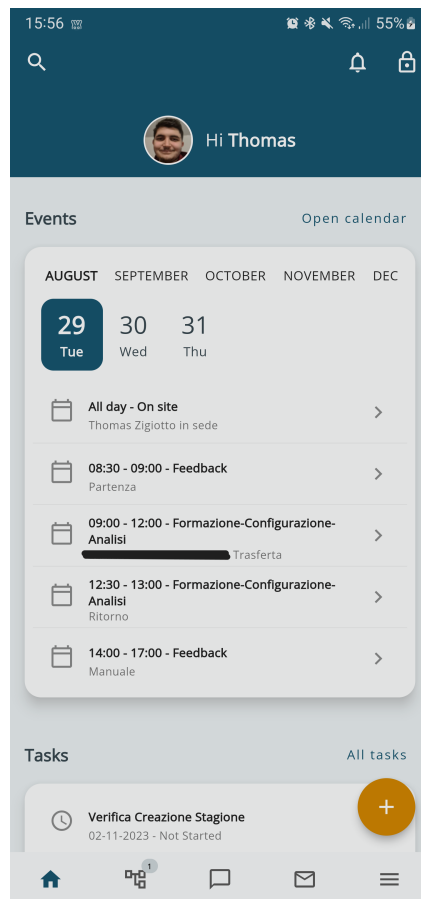



Login

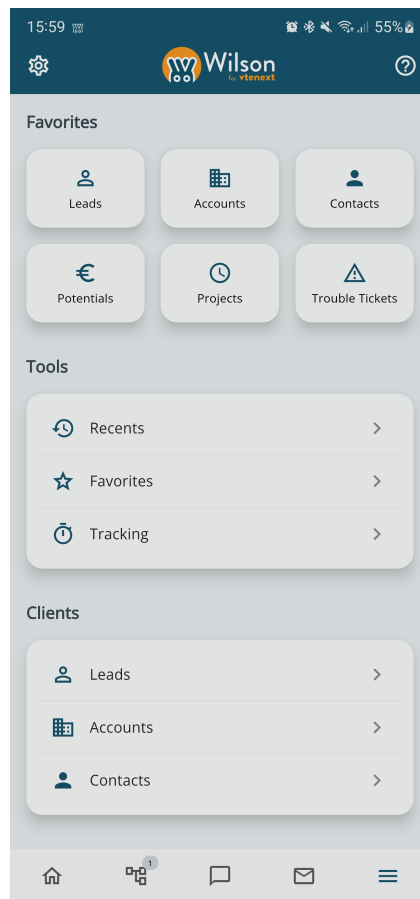
Wilson for vtenext App Access window

Once the App is running on your mobile device, you see the screen illustrated above. You are asked to enter your username and password (the same as those for vtenext) and the address of the cloud service (if you do not specify a protocol, <https://> is the default).

After login the Homepage opens immediately, showing all the available modules with the same functions as the desktop version of vtenext. For more information about the purpose and content of each module, refer to the vtenext manual at the website www.vtenext.com, or contact us at the e-mail address info@vtenext.com




Scrolling down from the initial screen reveals all the modules available in the CRM accessible by the user (according to their profile). Clicking on the three short lines at the lower right  gives access to other options and modules as shown in the following illustration.



In the Homepage and other modules, three new functions have been added (visible in the tools section):

- Recent (last items viewed in the CRM)
- Favorites (all items marked as favorites with the star icon)
- Tracking (to view all ongoing tracking directly in the app)

Also note the instrument bar at the bottom of every screen, functioning as follows:

	Go to Homepage
	Display Process notifications
	See and reply to Conversations
	See and manage e-mail Messages
	Button for list of available Modules

Revision #5

Created 6 July 2022 07:46:15 by Admin

Updated 29 August 2023 14:00:14 by Thomas