2.1 Instrument Bar and Icons

The instrument bar on every page of the App has the following icons.

Starting from the left:

- **Homepage:** to go to the initial page of the App.
- **Processes:** to display processes underway requiring the attention of the user.
- **Conversations:** to open the module of the same name and reply to users as required (a notification indicates the number of unread conversations).
- **Messages:** to open the messages module and read your e-mail (the number of unread messages is indicated).
- **Others:** to return to the page listing all modules.

Each module also includes a search field and the + button to add a new record in the current module.
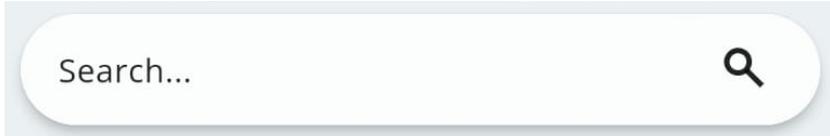
Entering a module you might see the following icons at the top alongside the logo (starting from the left):

- **Settings:** for accessing the settings for connecting the App to the Cloud or On Site CRM.
- **Exit:** to logout from the Wilson for vtenext mobile App.

In the list display mode, or when viewing the list of records within a module, there are other icons to help navigate and use the App:

	Gives access to the list of filters available for the present module

+ CREATE	Allows creation of a new record within the module

Inside each card (Company, Contact, Lead, etc.) there is a series of icons that enable different actions:

💬	Conversations regarding the displayed record
📄	Notes about the displayed record
📅	Calendar events involving the displayed record
✅	Tasks involving the displayed record
⬍	Access to the list of available relations in the displayed record ← 👤 roberto / Lead ☆ 💬 📄 📅 ✅ ⬍ **Lead Information** Relations 💬 Talks 📄 Notes 📄 PDFMaker 📅 Activities ✅ Tasks 🖼 Documents 🔲 Products 🏠 🔗² 💬¹ ✉² ☰
✎ EDIT	Allows modification of the displayed record
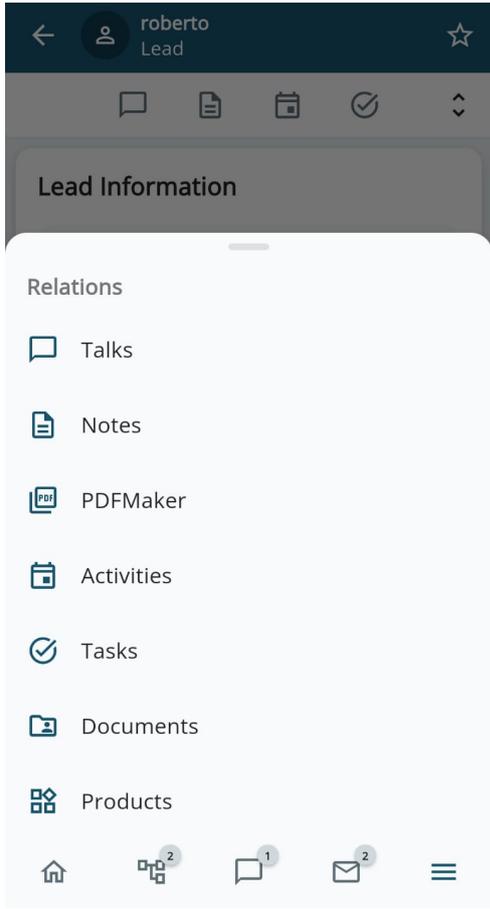
The cards contain a number of fields that function as follows:

partner ☐

✉ Email

🌐 Website

✉ email (other)

👤 User

👥 Group

← Utenti

alberto.cavallarin (Alberto Cavallarin) >

alessandro (Alessandro Bonamini) >

A alessio.forasiepi (Alessio Forasiepi) >

alex.roggero (Alex Roggero) >

A andrea.defendi (Andrea Defendi) >

A .com (Andrea Ventriglia) >

"Assigned to" field: it is possible to select/display the assignee of the item, in other words the CRM owner User or Group

Account External CRM Reference

Text field: for inserting a name, number, information, etc.

Type

Customer Prospect ✕ ▼

📞 Phone

partner ☐

✉ Email

--None--

Customer Prospect

Potenziale Rivenditore

Account

Customer
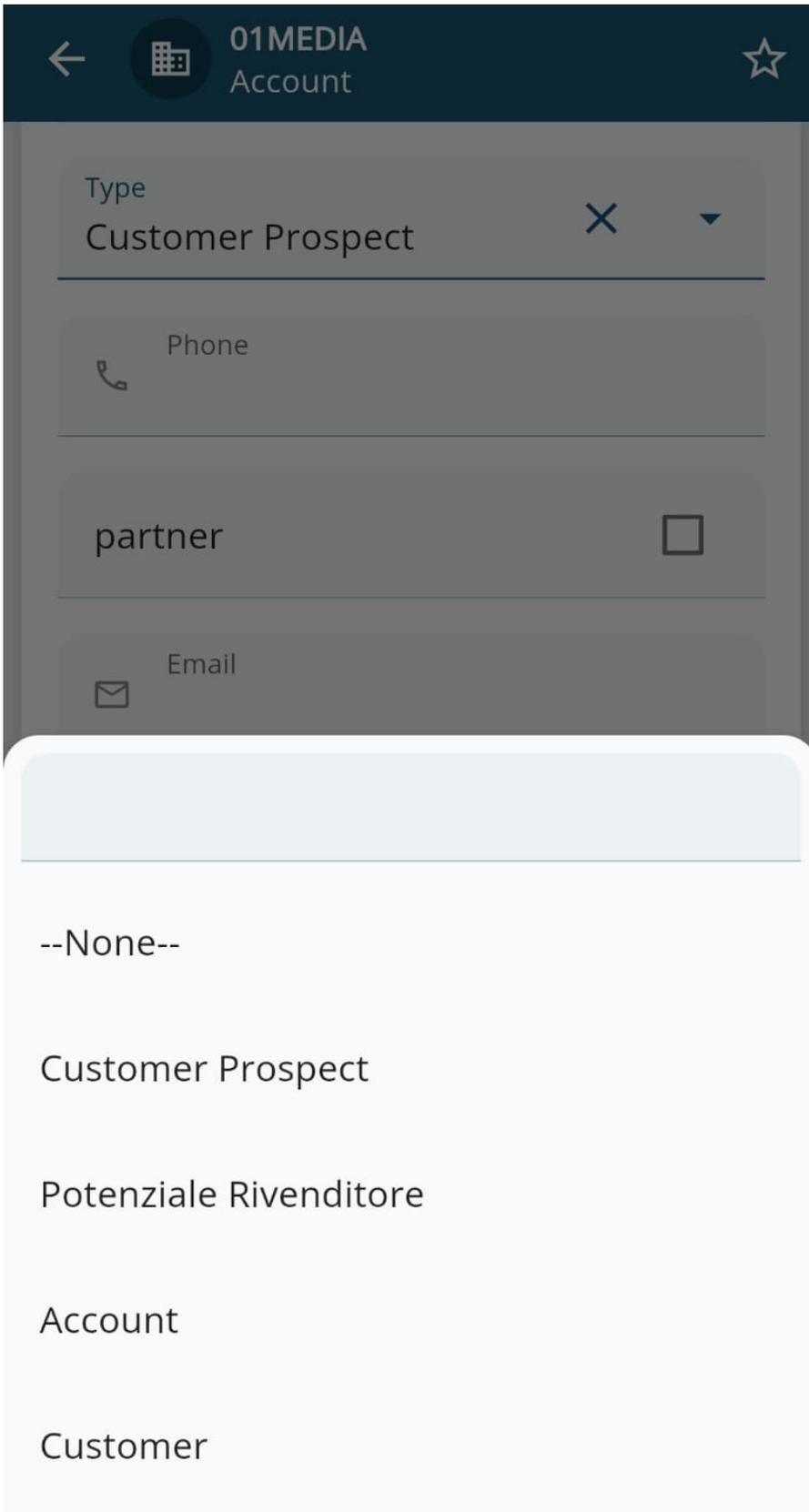
Pick-list field (drop-down menu): allows selection of a single value from those in the list
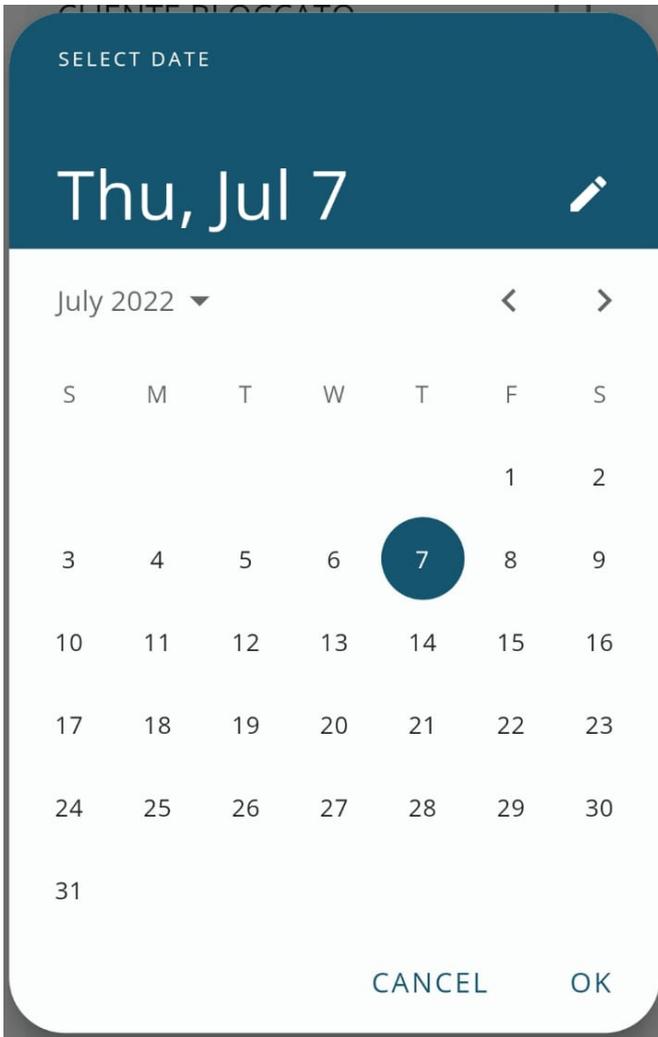
Field for selecting the date

Text Area field: allows, for example, an extended text description

Revision #6
Created 6 July 2022 08:10:10 by Admin
Updated 7 July 2022 08:29:36 by Admin