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BUSINESS CASE FOR VTIGER CRM

Introduction

The Business Case module developed by IT-Solutions 4You is new module for vtiger CRM. The intention was to create the module which gives you better overview and control of your business. Using Business Case (BC) module you can simply divide and group your business into the several business cases. It means, BC module captures even all of entity modules and their records in one place. In addition, you can define for each BC its status, priority, description and other important information.

The main Business Case module benefits are:

- better overview, search and control
- supported mostly for all modules
- simple addition, edit or deletion of the related module records in one place

Your Business using business case module

Who needs Business Case module?

Business Case module can be used for many reasons:

- **Does your business comprise several different areas?**
  - ➢ Divide your business into several smaller parts called "business case" to have better control and overview.
- **Is it boring to switch between several modules in order to start new business?**
  - ➢ Create the business case and add/create all necessary related records from one place.
- **Don't you know whether your business is going well?**
  - ➢ Define your expectations for each business case and compare them with actual performance measurements to make correct decisions.

Business Case professional benefits

Business Case professional gives you several benefits opposite to free version. Most import benefits are:

- customization of the business case work area (changing sequence of the related modules, activating and deactivating related modules) – see chapters 5.1.1, 5.1.2
- additional *More Information* tab which extends work area – chapter 5.1.3
- additional "Expectations & Actuals" fields giving you performance measurements – chapter 6.1
- automatic adding of the related records from modules Opportunities, Quotes, Sales Order and Invoice – see chapter 6.2
- automatic display of the related modules records in DetailView – see chapter 3.3

Content

License agreement

- The Business Case License will be referred to as "The license" in the remainder of this text.
- This irrevocable, perpetual license covers all versions 2.xx of Business Case.
- This license gives the holder right to install Business Case on ONE productive vtiger CRM installation and ONE develop vtiger CRM installation for unlimited users.
- The license holder is allowed to make modifications to the Business Case sources but in no event will the original copyright holders of this library be held responsible for action or actions resulting from any modifications of the source.
- The license holder is not required to publicize or otherwise make available any software used in conjunction with Business Case.
- The license holder may not re-distribute the library or versions thereof to third party without prior written permission of the copyright holder.
- Business Case License does not allow the library to be redistributed as part of another product.
- The license may be transferred to another vtiger CRM installation only with prior written permission.
- The wording of this license may change without notice for future versions of Business Case.

Terms and conditions

We accept all major credit cards, PayPal and Bank transfer. Our deliveries:

- Credit Card: delivered immediately
- PayPal: delivered immediately
- Bank transfer: delivered in 2 - 5 days

After payment you will obtain email with link for download Business Case and your license key as well.

Private policy

During installation it is necessary to exchange following information:

- vtigerCRM version (e.g. 5.4.0)
- Business Case version (e.g. 540.2.0)
- Date and time
- Domain in md5 coding format (e.g. 916b25c201a77a6721003c0030977f3b)
- Action provided by you (INSTALL, REACTIVATE, DEACTIVATE)

1 How to install Business Case

Please provide following steps in order to install Business Case:

It is highly recommended to finish the installation without any interruption. For successful installation we need to exchange information (see "Private policy" for details).

1. Install the .zip package of the Business Case module via Settings -> Module Manager. Click on the **[Import New]** button.
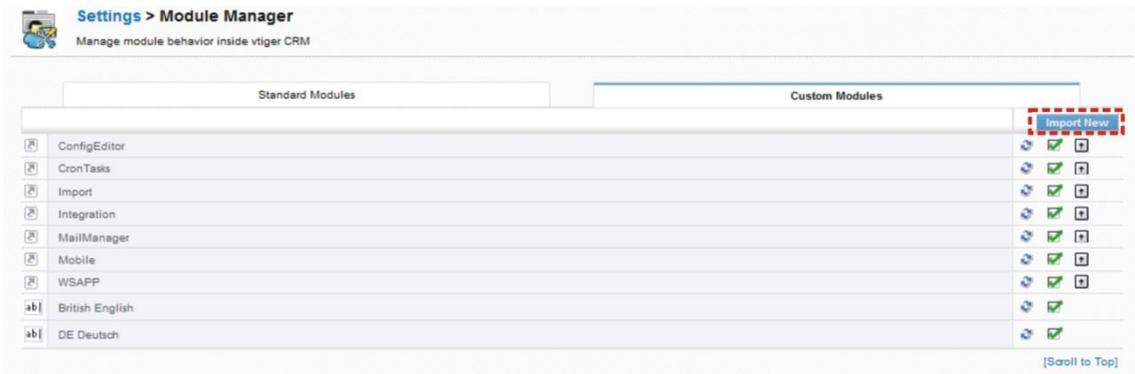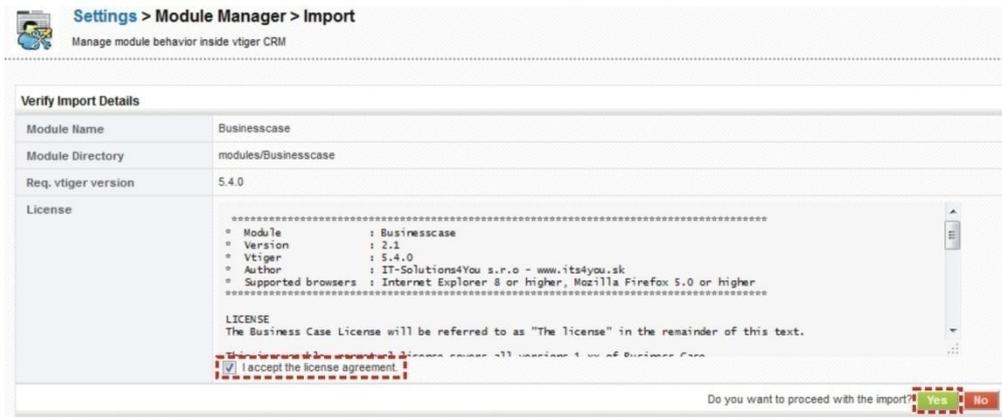

Picture 1.1 Installation of Business Case – step 1

2. Select the module zip (package) file that was previously exported or created. Click on the **[Import]** button.
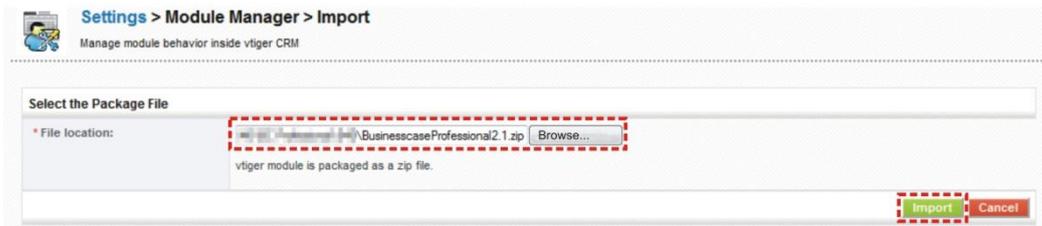
Picture 1.2 Installation of Business Case – step 2

3. Verify the import details parsed from the zip file. Please check that you accepted the license agreement and click **[Yes]** to proceed or **[No]** to cancel.

Picture 1.3 Installation of Business Case – step 3

4. Click on **[Finish]** to complete the module import.
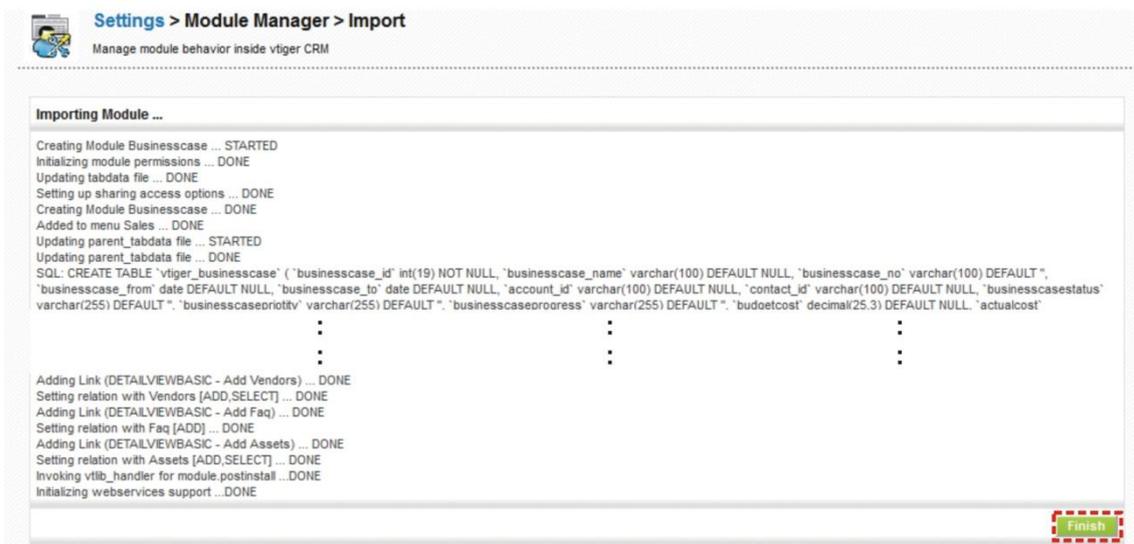
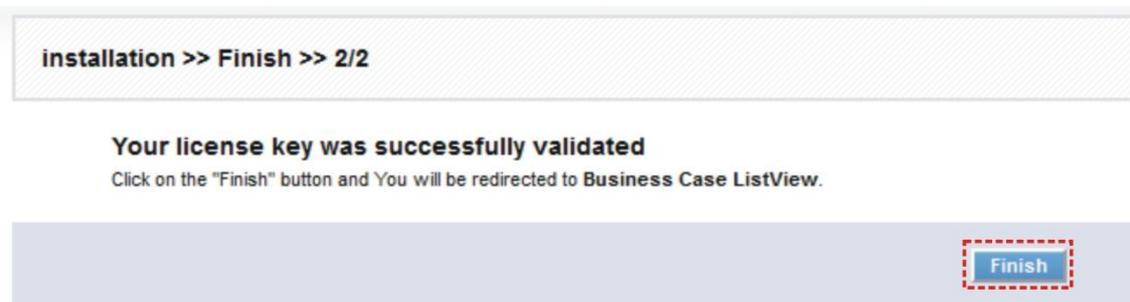**Picture 1.4 Installation of Business Case – step 4**

In order to finish installation, please provide following validation steps.

1. Business Case Validation Step. Please insert a license key and make sure that your server has internet access. Click on **[Validate]**.

Picture 1.5 Validation step

2. If the Business Case is installed successfully you will see following screen. Click on **[Finish]** button. You will be redirected to the Business Case ListView.

Picture 1.6 Finish installation

Please refer to chapter 6.3 for details about licensing and chapter 5.2 to see how to upgrade the Business Case module.

1.1 Modification of the Popup.php after installation

Although the modification of the Popup.php file is not necessary for correct working of the BC module it is recommended. The modification allows better behavior of the select buttons `Select Quotes` and `Select Vendors`. Simply add following code into Popup.php for case 'Quotes' and case 'Vendors' as it is shown in the Picture 1.7.

```php
if(isset($_REQUEST['return_module']) && $_REQUEST['return_module'] !='')

$smarty->assign("RETURN_MODULE",vtlib_purify($_REQUEST['return_module']));
```

```php
116    case 'Quotes':
117        require_once("modules/$currentModule/Quotes.php");
118        $focus = new Quotes();
119        $log = LoggerManager::getLogger('quotes_list');
120        $smarty->assign("SINGLE_MOD",'Quote');
121        if(isset($_REQUEST['return_module']) && $_REQUEST['return_module'] !='')
122            $smarty->assign("RETURN_MODULE",vtlib_purify($_REQUEST['return_module']));
123        $alphabetical = AlphabeticalSearch($currentModule,'Popup','subject','true','basic',$popuptype,"","",$url);
124        break;
125    case 'Invoice':
126        require_once("modules/$currentModule/Invoice.php");
127        $focus = new Invoice();
128        $smarty->assign("SINGLE_MOD",'Invoice');
129        if(isset($_REQUEST['return_module']) && $_REQUEST['return_module'] !='')
130            $smarty->assign("RETURN_MODULE",vtlib_purify($_REQUEST['return_module']));
131        $alphabetical = AlphabeticalSearch($currentModule,'Popup','subject','true','basic',$popuptype,"","",$url);
132        break;
133    case 'Products':
134        require_once("modules/$currentModule/$currentModule.php");
135        $focus = new $currentModule();
136        $smarty->assign("SINGLE_MOD",getTranslatedString('SINGLE_'.$currentModule));
137        if(isset($_REQUEST['curr_row']))
138        {
139            $curr_row = vtlib_purify($_REQUEST['curr_row']);
140            $smarty->assign("CURR_ROW", $curr_row);
141            $url_string .="&curr_row=".vtlib_purify($_REQUEST['curr_row']);
142        }
143        if(isset($_REQUEST['return_module']) && $_REQUEST['return_module'] !='')
144            $smarty->assign("RETURN_MODULE",vtlib_purify($_REQUEST['return_module']));
145        if (isset($_REQUEST['select'])) $smarty->assign("SELECT",'enable');
146        $alphabetical = AlphabeticalSearch($currentModule,'Popup','productname','true','basic',$popuptype,"","",$url);
147        break;
148    case 'Vendors':
149        require_once("modules/$currentModule/Vendors.php");
150        $focus = new Vendors();
151        $smarty->assign("SINGLE_MOD",'Vendor');
152        if(isset($_REQUEST['return_module']) && $_REQUEST['return_module'] !='')
153            $smarty->assign("RETURN_MODULE",vtlib_purify($_REQUEST['return_module']));
154        $alphabetical = AlphabeticalSearch($currentModule,'Popup','vendorname','true','basic',$popuptype,"","",$url);
155        break;
```

Picture 1.7 Edit Popup.php file after installation

2   Start Business Case module

After successful installation you can start Business Case module using link located under the *More Tab* and *Sales* column (Picture 2.1).

Picture 2.1 Start Business Case

The screenshot below (Picture 2.2) shows Business Case ListView after installation. You can click button in order to start the business case creation.
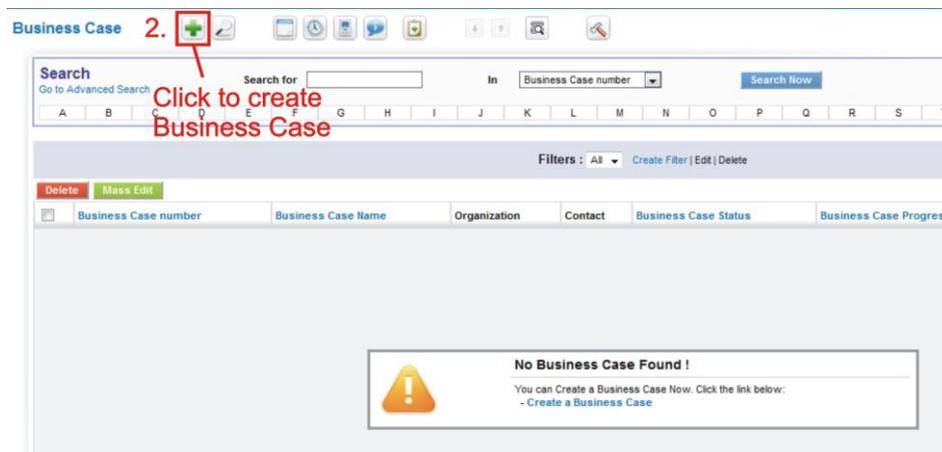
Picture 2.2 Start business case creation

Please refer to the next chapter related to work area of business case module before start of the work.

3 Work area

The Work Area of Business Case consists of:

- ListView – used for common tasks like add new business case, delete or mass edit of business case and access to others tools, create filters and search records
- DetailView – shows already created business case in details and allows creation or selection of the related records, recalculation of actual, addition of comments, etc.
- EditView – allows edit basic business case fields

3.1 ListView

The Business Case ListView will appear on your screen if you click on More -> Business Case link. The common tasks like add/delete business case or start editing can be initiated via Business Case ListView.
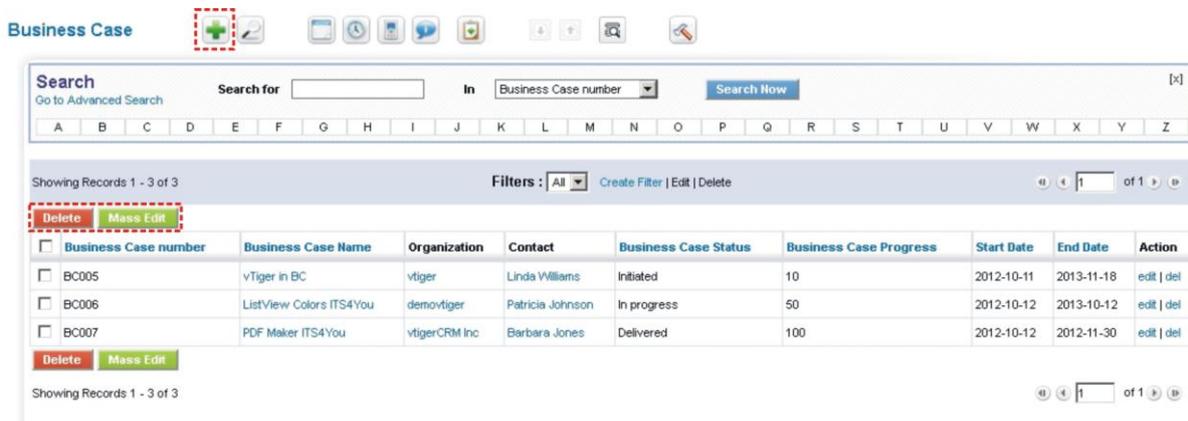
Picture 3.1 ListView

Click on button ![plus] in order to create new business case. The main part of the Business Case ListView shows you list of your business cases. It gives you basic information about business case as shown in the picture above. In the list you can also select one or more BCs and consequently delete them by button ![Delete] or provide mass edit using button ![Mass Edit]. It is also possible to use links in the "Action" column in order to edit or delete already created business cases directly from the ListView. In addition you can simply use custom view functionality.

3.2 EditView

From ListView you can directly open any business case in EditView. The EditView is simple and allows editing business case fields which are divided into following parts:

- Basic info part – gives basic information of the business case. Although only BC Name is required field it is recommended to define as much as possible fields in the basic info part.
- Expectations – business case expectations represented by "Budget cost", "Expected ROI (%)" and "Expected Revenue". Please refer to chapter 6.1 for definitions of mentioned fields.
- Description – short description of the business case.

Picture 3.2 EditView

3.3 DetailView

The DetailView shown in the picture below is divided into several parts:

- Basic info - gives basic information of the business case
- Expectations & Actuals – expected and actual performance measures of BC (see 6.1 for details)
- Description - short description of the business case
- Comments – comments with comments' author, date and time of creation
- Related modules – contains related modules (see 4.2, 4.3 for details)
- Action links – create Business Case related records (see 4.2 for details)
- More information tab – additional place for related modules (see 5.1.3 for details)

Picture 3.3 DetailView of the BC

4   Editing

The Business case editing in contrast to editing of the records of the other standard vtiger modules is different. The reason is that business case consists of the basic business case fields and business case related records. Therefore process of editing the business case consists of:

The editing consists of:

- editing business case fields (see chapter 4.1)
- creation of the business case related records (see chapter 4.2)
- filling up the business case with already existing records (see chapter 4.3)

In addition to above mentioned edit possibilities, there is special feature for related records of the modules Opportunities, Quotes, Sales Order and Invoice. Please refer to chapter 6.2 for details.

4.1   Editing business case fields

In the EditView (Picture 4.1), define business case information fields, expectations and describe the business case. Although "Business Case Name" is mandatory field it is recommended to edit as much as possible fields for later use and better identification of the business case.

Picture 4.1 Creation of the template in EditView

4.2 Create business case related records

Beside BC fields the business case involves tens or hundreds of the related records and creates connections among them. So after creation of the business case, described in the previous chapter, you can create new related records directly from Business Case module. In order to create new record and add it into the business case provide following steps:

1. Click on action links on the right side in the DetailView of the Business Base module or use blue buttons "Add" inside each related module (see Picture 4.2).
2. You will be redirected into related module where you can create and save record. Click **[Save]** button.
3. The new record will be saved and automatically added into your business case. In addition you will be automatically redirected back to your business case.

Picture 4.2 Create business case related records

4.3 Fill up business case with existing records

In case that business case was created after some records and you would like add them into business case you have to use different approach. In order to add already created records into business case, please use green "Select" buttons. In pop up window select related record(s). Selected records will be added into business case.
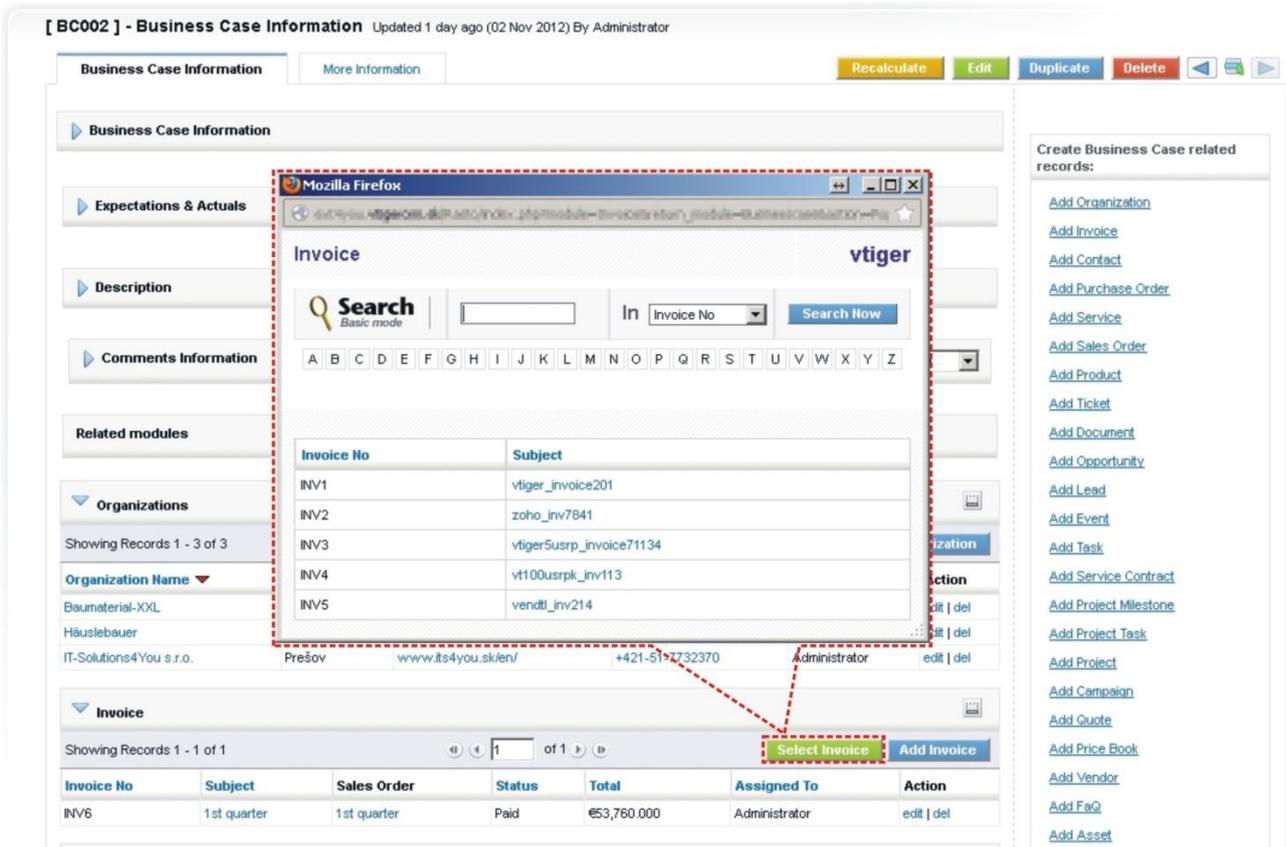

Picture 4.3 Fill up business case

5 Settings

The Business Case module Settings can be initiated from ListView using button ![icon] as you can see in the picture below (Picture 5.1). In the Settings you can find:

- Standard vtiger settings
  - *Layout Editor* - configures the layout of a module
  - *Field Formulas* - allows you to define custom rules for custom fields
  - *Tooltip Management* - utility to view detailed information of a record in the ListView when you hover on it
  - *Workflow List* – a simple interface to add actions upon save of an entity. These actions will be triggered when the given conditions are met.
- Additional ITS4You settings
  - Arrange Relatedlist – a tool to customize work area (see chapter 5.1)
  - Business Case License – a interface to deactivate and reactivate license key (see chapter 6.3)
  - Upgrade – allows to initiate upgrade of the BC module (see chapter 5.2)
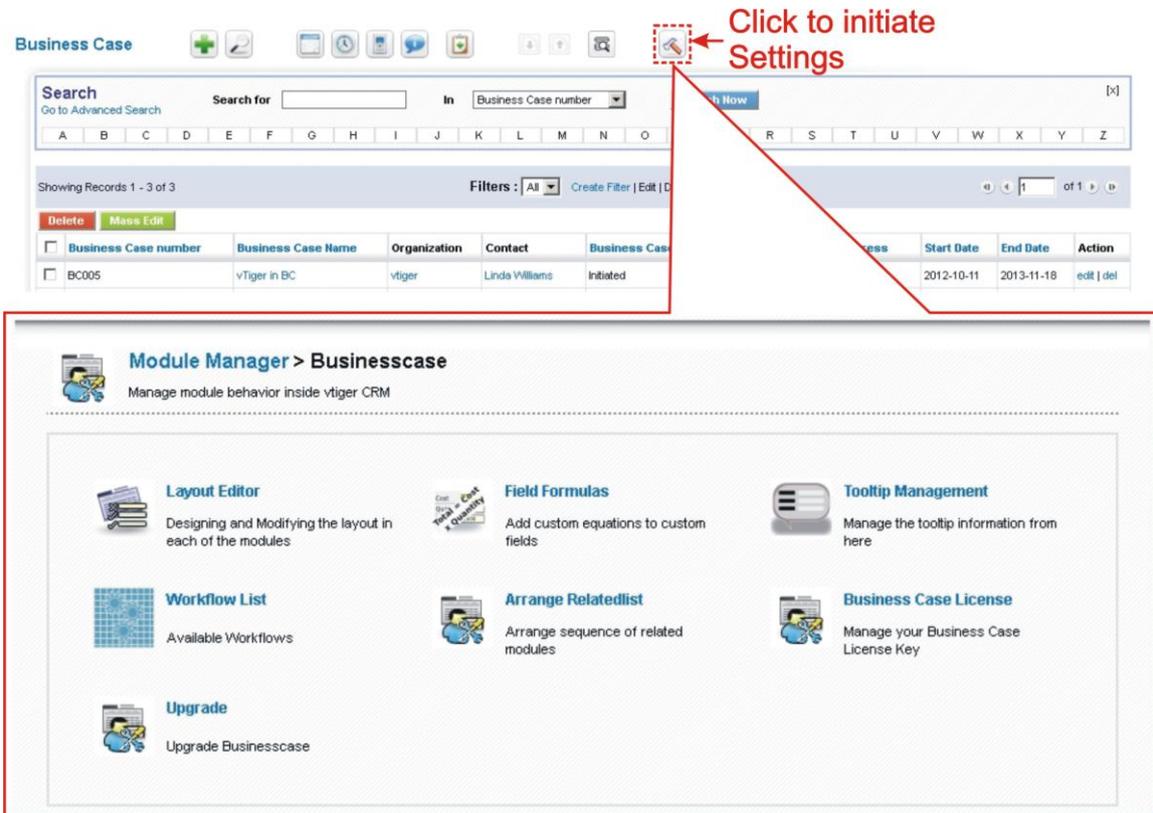
Picture 5.1 How to initiate Business Case module settings

5.1 Customizing Work Area

As you can see in the previous chapter 3.3 DetailView, part "Related modules" is quite huge. Depending on your business area default order of the related modules or their visibility would not fill up your needs. Therefore you can simply customize your business case module work area by:
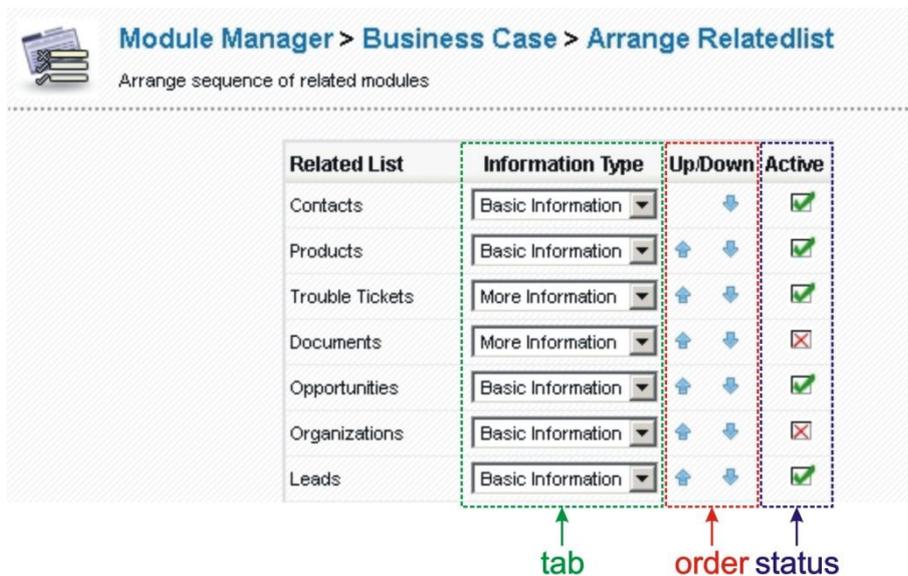
- changing sequence of the related modules (see chapter 5.1.1)
- activating and deactivating related modules (see chapter 5.1.2)
- moving related modules to More Information tab (see chapter 5.1.3)

In order to customize work area click on *Arrange Relatedlist* link in the Settings (Picture 5.2).

Picture 5.2 Arrange Relatedlist start

In the following window (Picture 5.3) you can simply customize your work area. Please refer to following subchapters for details.

Picture 5.3 Customizing work area

5.1.1 Changing sequence of the related modules

The changing sequence of the related modules is simple but very useful feature which allows customizing related modules part according to your needs. Please change sequence of the related modules using blue arrows ⬆ ⬇ (see Picture 5.4 (1.))
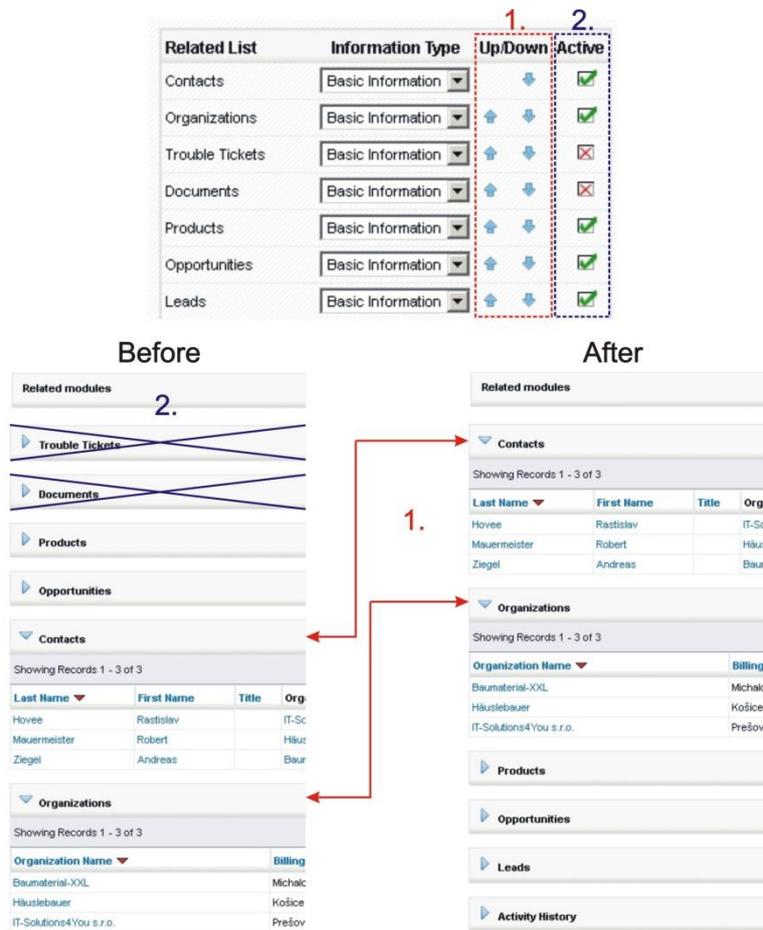
Picture 5.4 Customizing the "Related modules" part

5.1.2 Activating and deactivating related modules

Additional useful feature is activating and deactivating related modules. In order to de/activate related modules please use correspondent checkboxes ☑ ☒ (see Picture 5.4 (2.)).

Please notice following:

- if you deactivate related module, you cannot add or select of the related module record until this related module is in inactive state. If you again need to work with deactivated related module, please make it active firstly
- if the related module contains records within business case and is deactivated, records are not lost after deactivation and will be again available after next activation.

5.1.3 Moving related modules to More Information tab

The More Information tab was introduced due to huge part of the work area "Related modules". You can simply move few or all related modules from Business Case Information tab to More Information tab according to your needs. In order to move related module please select tab (Basic Information / More Information) in *Information Type* column as shown in the picture below.
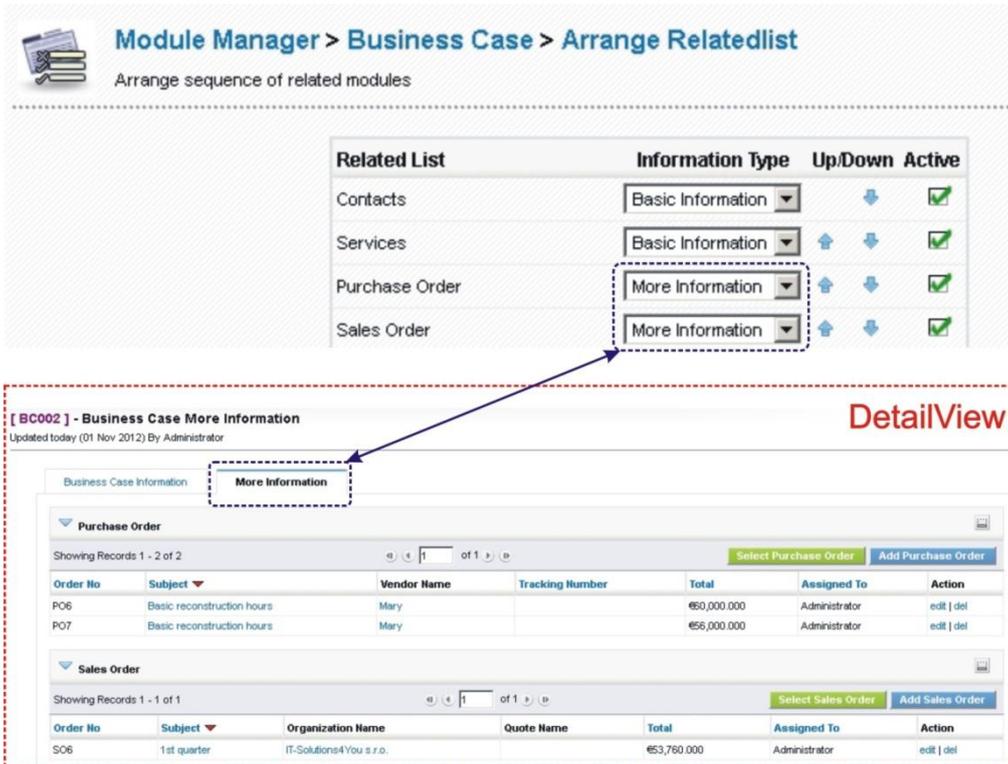
Picture 5.5 More Information tab

5.1.4 Changing visible columns of the related modules

As you can see in the picture below, it is possible to add, remove or change visible columns order of the related modules. This change requires additional effort and change of vtiger core files. If you need to change default columns please ask for additional information via info@its4you.sk or ask your vtiger support centre.

It is not recommended to provide changes by yourself in order to change columns of the related modules.
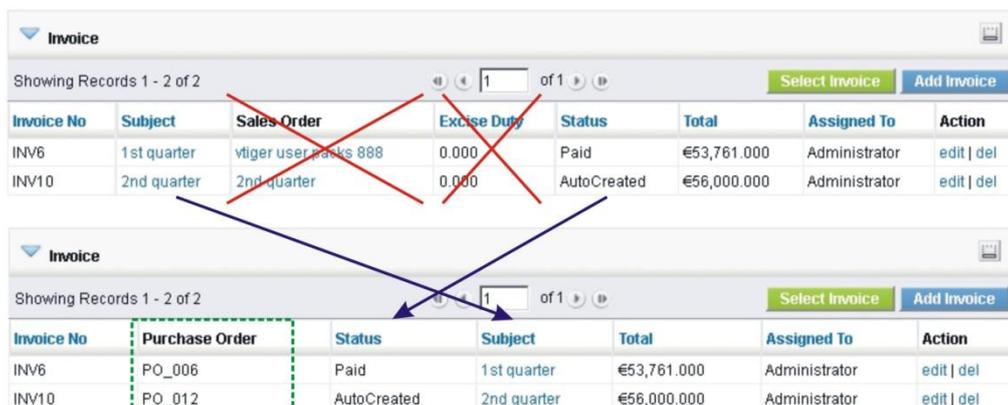
Picture 5.6 Changing visible columns of the related modules

5.2 Upgrade of the Business Case module

The upgrade of BC module can be started using *Upgrade* link in the Settings (see Picture 5.7).

Picture 5.7 Initiate upgrade of Business Case module

In the next window please browse the package for upgrade and click on button **[Upgrade]**.
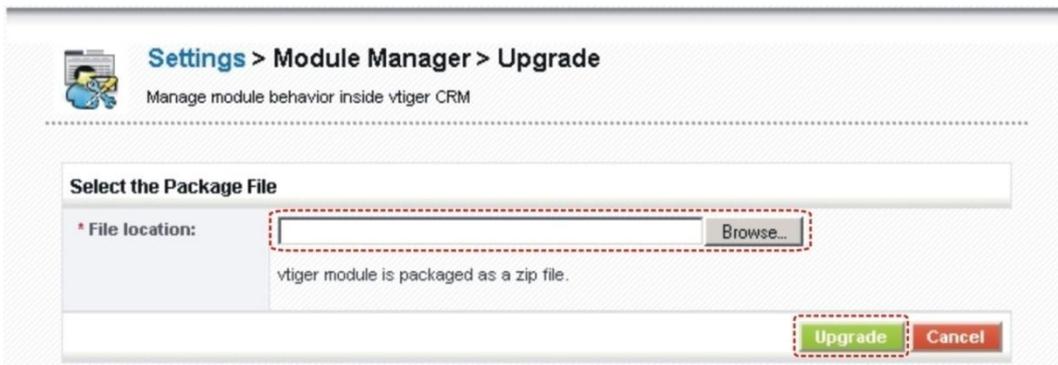
Picture 5.8 Upgrade Business Case module

In case that installed version of BC module matches package version, upgrade will be not provided and following information will appear on the screen.
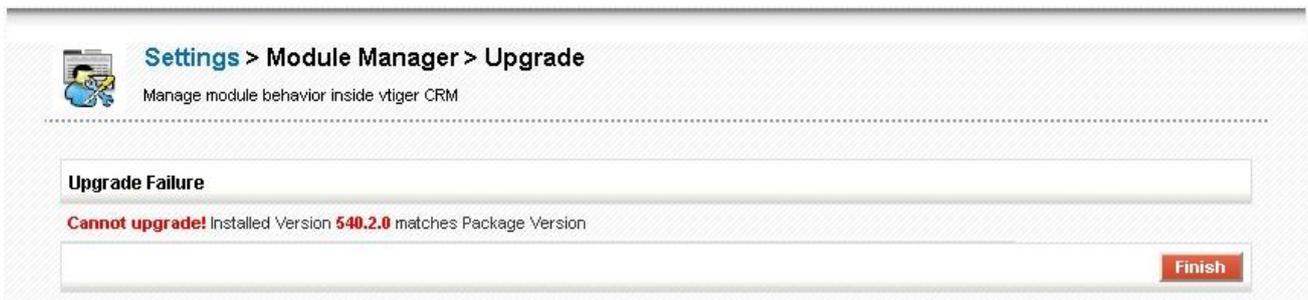
Picture 5.9 Upgrade failure

Next steps are similar with installation of the Business Case module, therefore please refer to chapter 1 for additional information.

6 Additional features

6.1 Calculation of the actuals

The "Expectations & Actuals" is part of work area which informs you about your business case from "success" point of view using some performance measurements called "Actuals". As was described in the chapter 3.2, you can define some expected values (Table 6-1). During "life" of your business case you can compare these values with real actual values. This comparison as well as other actual performance measurements (Table 6-2) can help you to make marketing decisions or improvements of your business case.

Picture 6.1 Expectations & Actuals

Name	Description
Budget Cost (€)	Expected budget (Purchase orders)
Expected Revenue (€)	Expected sum of invoices
Expected ROI (%)	Expected return of investment (%); range [100 and higher]; 100 means no profit; values higher than 100 → profit

Table 6-1 Expectations

Name	Description
Accepted Quotes (%)	$$Accepted\ Quotes\ (\%) = \frac{\sum Accepted\ Quotes}{\sum All\ Quotes} * 100\%$$
Actual Cost (€)	Sum of all purchase orders
Actual Revenue (€)	Sum of all invoices in state "Paid"
Actual ROI (%)	Actual return of investment (%); range [0 and higher]; values less than 100 → loss; 100 means no profit; values higher than 100 → profit $$Actual\ ROI\ (\%) = \frac{\sum All\ Invoices}{\sum All\ purchase\ orders} * 100\%$$
Sum of Sales Orders (€)	Sum of all sales orders; Any "Status"

Table 6-2 Actuals

6.2 Automatic adding of the related records

The Automatic adding of the related records is special feature related only to records from modules Opportunities, Quotes, Sales Order and Invoice. This feature adds related records of the mentioned modules also in case that they were created outside the Business Case module. The only requirement is that first record has to be created within BC module (see example below for better understanding).

Picture 6.2 Automatic adding of the related records

6.3 Deactivate/Reactivate license key

In case that some problem occurs with license key or in case you need to reinstall Business Case you have to deactivate and reactivate license key. To deactivate license key please provide following steps:

1. Go to Business Case module manager and click on *Business Case License* link.
2. Click on **[Deactivate]** button.
3. Click on **[OK]** button to confirm deactivation of the license key.
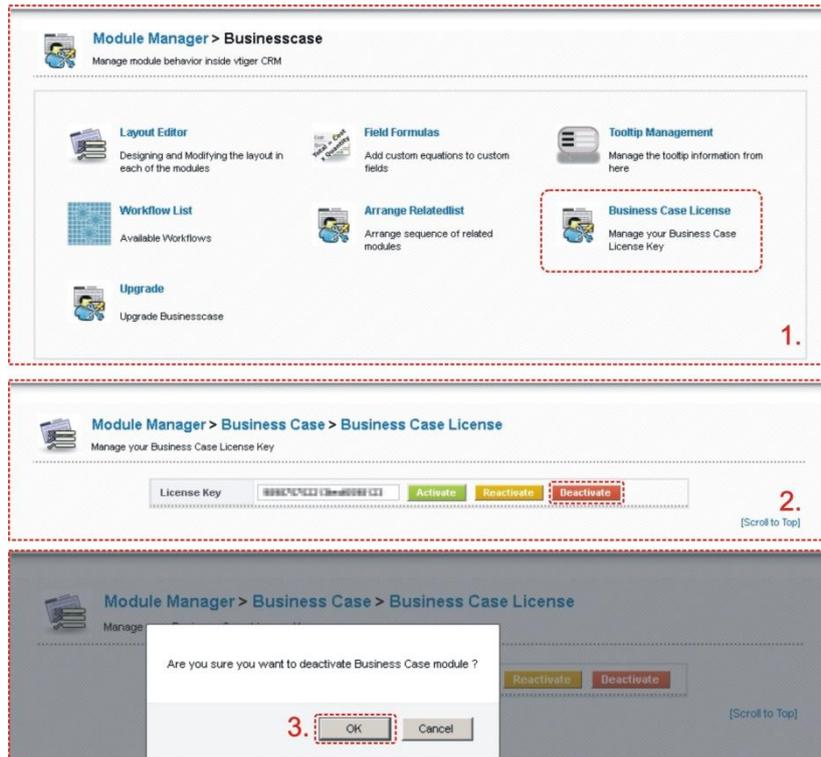
Picture 6.3 Deactivate license

After deactivation of license work with Business Case module is not possible and you have to reactivate your license.

The reactivation of the license can be started by two ways:

1. In order to start reactivation, click on CRM Settings > Module Manager > Custom Modules > ![tool icon] or start Business Case module and you will be immediately redirected to page for license reactivation (see step 2.).
2. Insert the license key and click on button **[Activate]** if you are reactivating license after previous deactivation, or click on button **[Reactivate]** if you are reactivating license after previous migration of the server.
3. If license key is correct you will be informed about successful reactivation. Just confirm via **[Finish]** button.
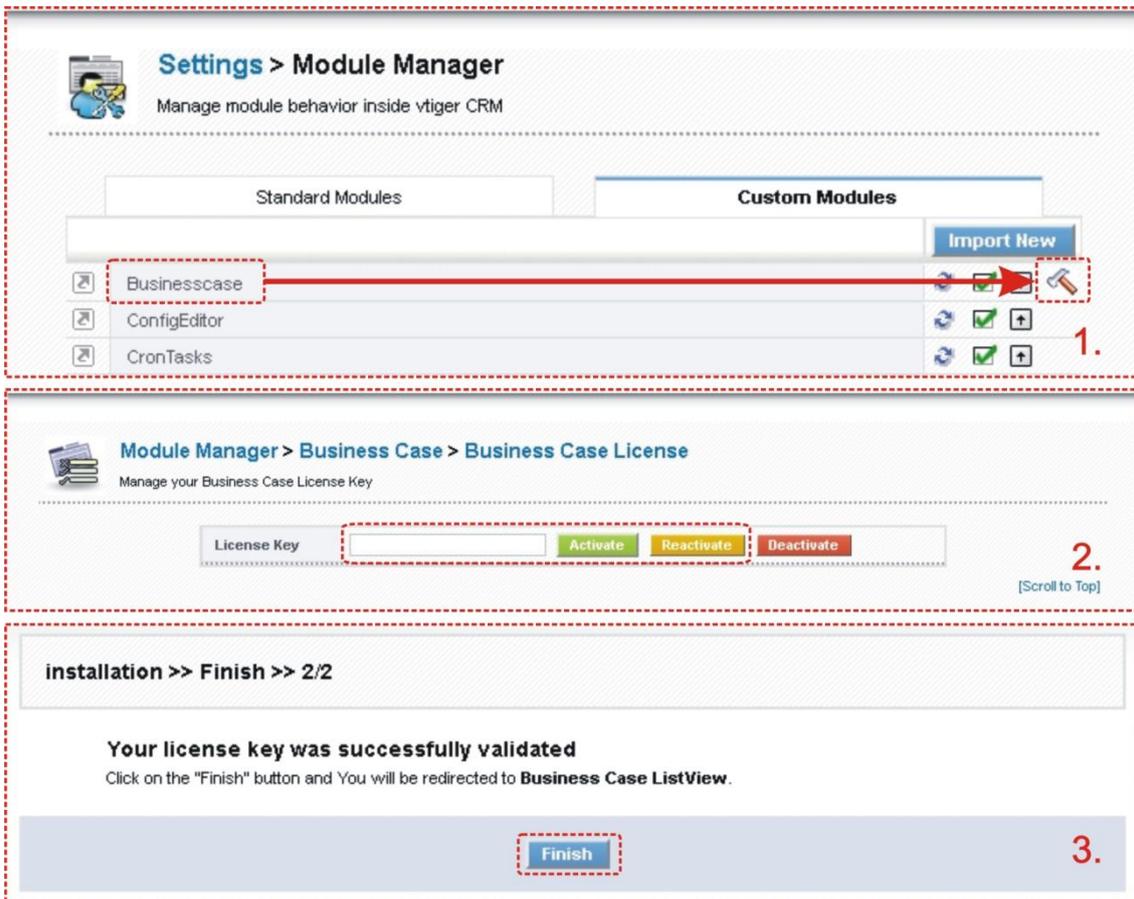
Picture 6.4 Reactivate license

6.4   Descriptions 4You in Business Case module

The Descriptions 4You (Desc4You) is vTiger extension which allows you to create well formatted descriptions according to your needs. Desc4You was already integrated into Business Case module. If the Descriptions 4You is enabled for Business Case module you can simply use it within EditView of the BC module.
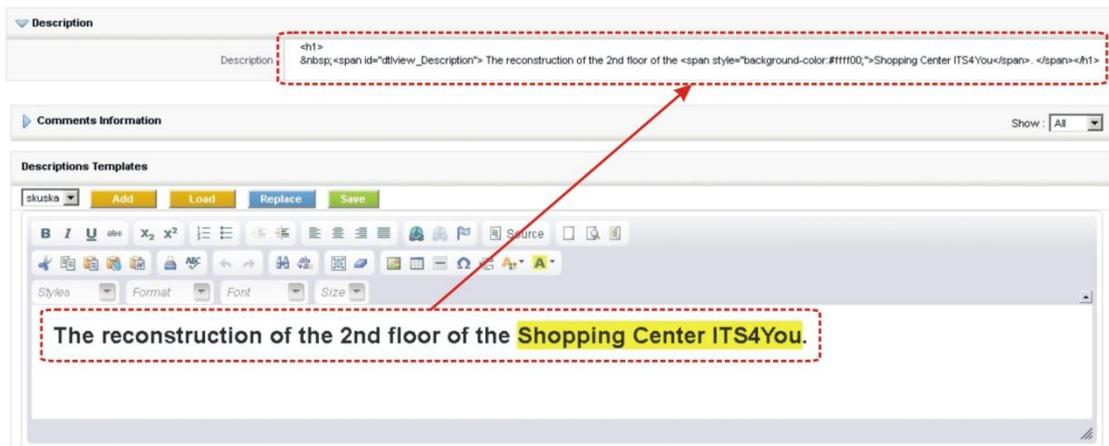
Picture 6.5 Desc4You in BC module

6.5   ListView Colors 4You in Business Case module

The ListView Colors is extension tool designed for vtiger CRM. You can define colors of rows in ListView depending on picklist and checkbox values separately for each module. This gives you better view, faster orientation and more information using same data in ListView.

The ListView Colors is also supported under Business Case module (Picture 6.6). You can define BC ListView colors depending on values of BC status, priority and progress (see Picture 6.6 part "ListView"). In addition ListView Colors is supported in DetailView of the BC module for related modules (see Picture 6.6 part "DetailView"). Please refer to our web page http://www.its4you.sk/en/vtiger-extensions/list-view-colors.html for details.

Picture 6.6 ListView Colors 4You in BC module