MULTI COMPANY 4YOU FOR VTIGER CRM

Introduction

The Multi Company 4You module with its accessory module Custom Numbering 4You allow in easier way to manage your companies within one vtiger CRM installation. It means you can define additional companies (name, address… and lot of additional fields) and create new records under these companies. In addition, records related to the new companies can be separately numbered with their specific prefix according to your needs. This helps you no more to mix records of different companies and gives you better overview.

The Multi Company and Custom Numbering 4You benefits are:

- supported mostly for all modules
- no necessary extra installation for additional companies
- save money by buying extension tools ones, not per company
- no necessary logout for switching between companies (depends on user)

Who needs Multi Company 4You?

Please try to answer by yourself to following questions to see whether Multi Company 4You and Custom Numbering 4You can make your business life easier:

1. Would you like to use one installation for more companies?
2. Would you like to be able to define separate numbering of the records for your companies?
3. Are you missing some additional fields in company details?
4. Would you like to have better control of your business?

If you mostly answered yes it looks that you are good candidate to use our new modules Multi Company 4You and Custom Numbering 4You. Also from our experience we see that our modules are required also for "one-company installation" due to their features.

Content

License agreement

- The Multi Company 4You and Custom Numbering 4You are covered by one common license which will be referred to as "The license" in the remainder of this text.
- This irrevocable, perpetual license covers all versions 1.xx of Multi Company 4You and Custom Numbering 4You.
- This license gives the holder right to install Multi Company 4You and Custom Numbering 4You 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 Multi Company 4You and Custom Numbering 4You 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 Multi Company 4You and Custom Numbering 4You.
- The license holder may not re-distribute the library or versions thereof to third party without prior written permission of the copyright holder.
- Multi Company 4You and Custom Numbering 4You 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 Multi Company 4You and Custom Numbering 4You.

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 Multi Company 4You and Custom Numbering 4You and your license key as well (you will obtain common link and common license for both modules).

Private policy

During installation it is necessary to exchange following information:

- vtigerCRM version (e.g. 5.4.0)
- Multi Company 4You and Custom Numbering 4You version (e.g. 540.01.01)
- Date and time
- Domain in md5 coding format (e.g. 916b25c201a77a6721003c0030977f3b)
- Action provided by you (INSTALL, REACTIVATE, DEACTIVATE)

1 How to install

Both modules, Multi Company 4You and Custom Numbering 4You are installed within one installation. It means that no separate installation for Custom Numbering 4You is necessary. Please provide following steps in order to install Multi Company 4You and Custom Numbering 4You:

> It is highly recommended to finish the installation without any interruption. For successful installation we need to exchange following information (see previous chapter for details):
>
> - vtigerCRM version (e.g. 5.4.0)
> - Multi Company 4You and Custom Numbering 4You version (e.g. 540.01.01)
> - Date and time
> - Domain in md5 coding format (e.g. 916b25c201a77a6721003c0030977f3b)
> - Action provided by you (INSTALL, REACTIVATE, DEACTIVATE)

1. Install the .zip package of the Multi Company 4You and Custom Numbering 4You modules via Settings -> Module Manager. Select the *Custom Modules tab* and click on the [Import New] button.
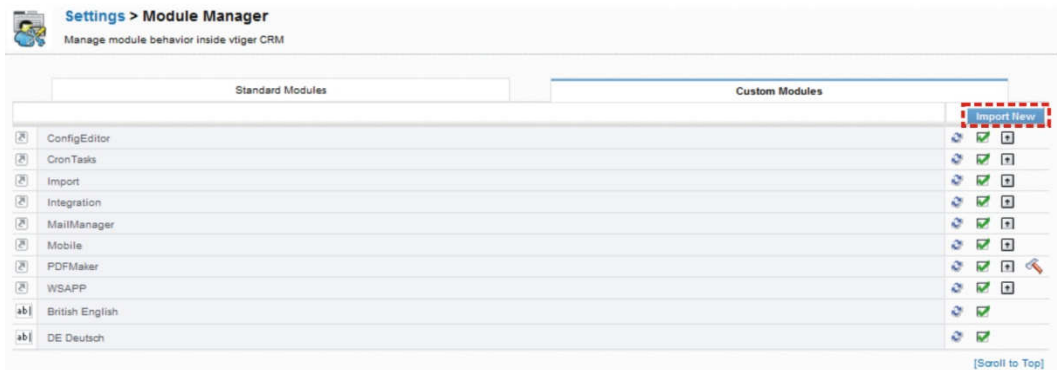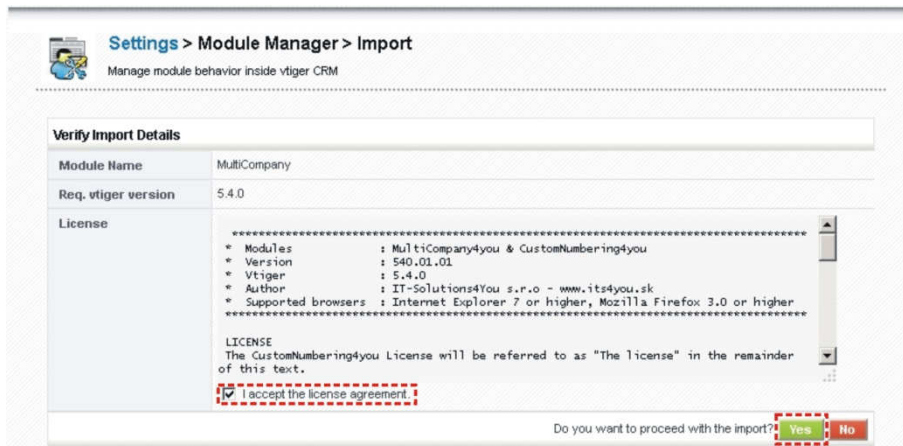

Picture 1.1 Installation of Multi Company – step 1

2. Select the module zip (package) file that was previously exported or created. Click on the [Import] button.
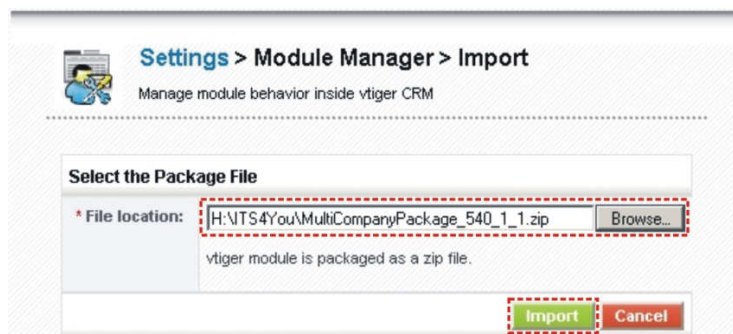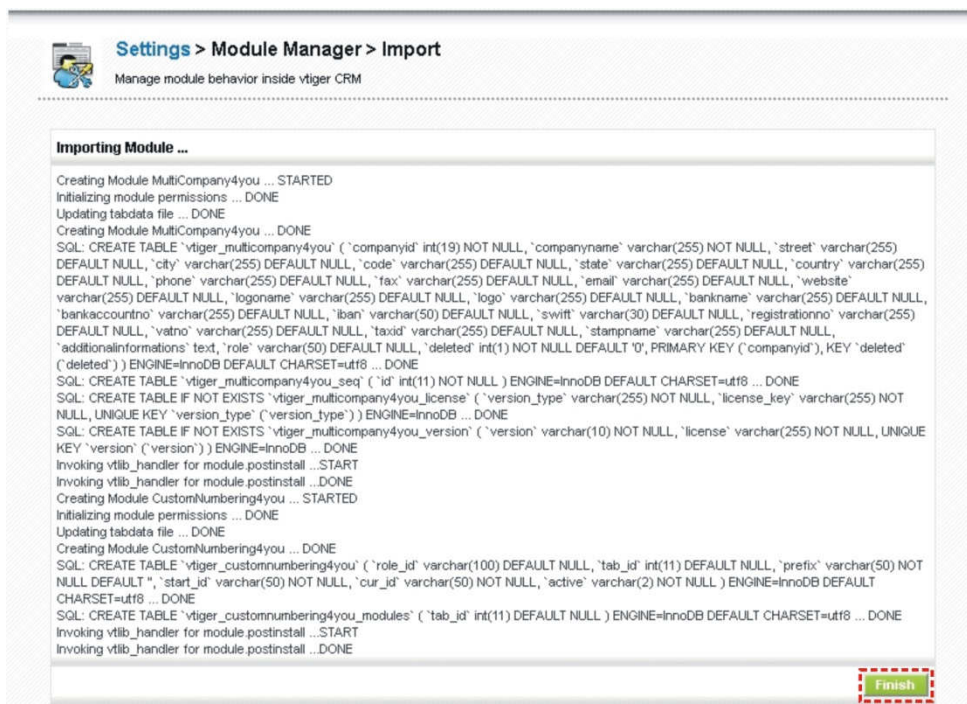

Picture 1.2 Installation of Multi Company – step 2

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.
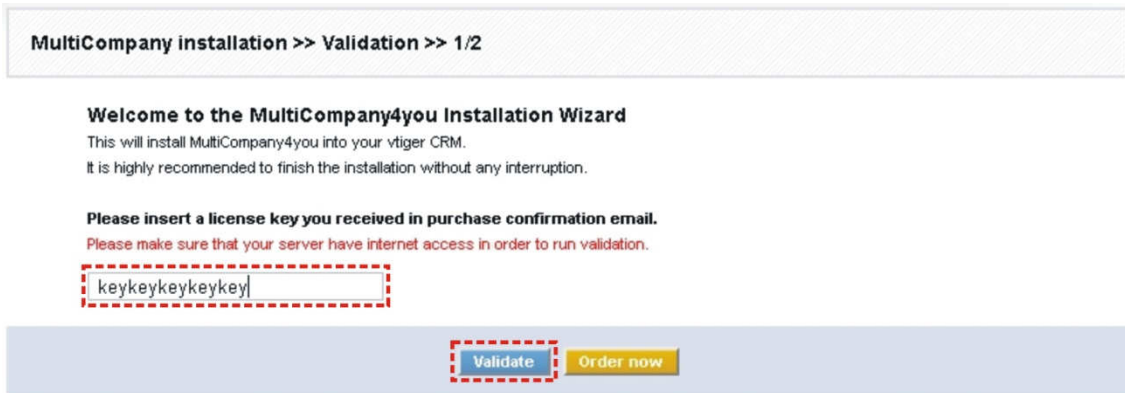

Picture 1.3 Installation of Multi Company – step 3

4. Click on [Finish] to complete the module import.
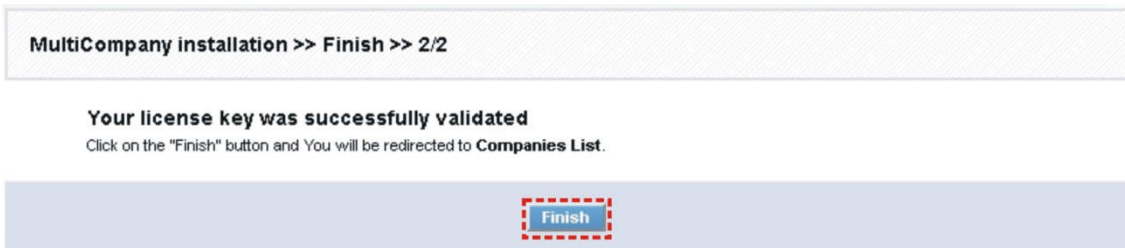

Picture 1.4 Installation of Multi Company – step 4

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

1. Multi Company 4You and Custom Numbering 4You Validation Step. Please insert a license key and make sure that your server has internet access. Click on Validate.

Picture 1.5 Validation step 1

2. If Multi Company 4You and Custom Numbering 4You are installed successfully you will see following screen. Click on Finish button.


Picture 1.6 Validation step 2 – Finish installation

2 How to set up more companies

Multi Company 4You and Custom Numbering 4You are modules which you need to set up correctly at the beginning and let them do their work on the background. It doesn't mean that you cannot add additional company later or change some settings related to numbering. Before you start definition of additional companies within Multi Company 4You and Custom Numbering 4You it is necessary to define new companies' roles (profiles) and users. So the whole set up comprises definition of:

- roles (profiles is necessary) – standard vtiger functionality (see chapter 0)
- users – standard vtiger functionality (see chapter 2.2)
- companies – Multi Company 4You functionality described in chapter 0
- custom numbering – Custom Numbering 4You functionality described in chapter 2.4

How to initialize Multi Company 4You and Custom Numbering 4You settings is shown in the below picture.
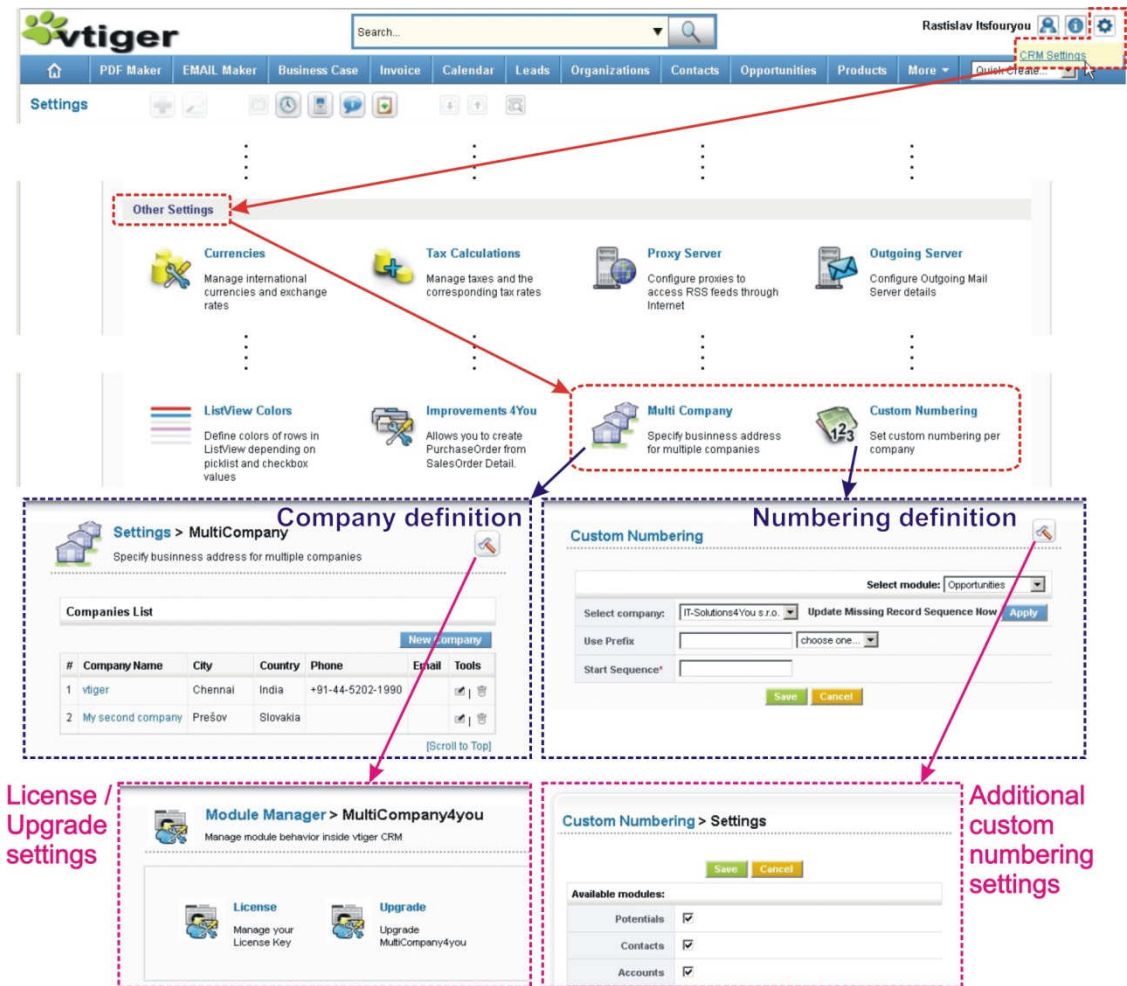

Picture 2.1 Multi Company 4You and Custom Numbering 4You settings

Please refer also to chapters related to license (5.1), upgrade (5.2) and additional custom numbering settings (see chapter 5).
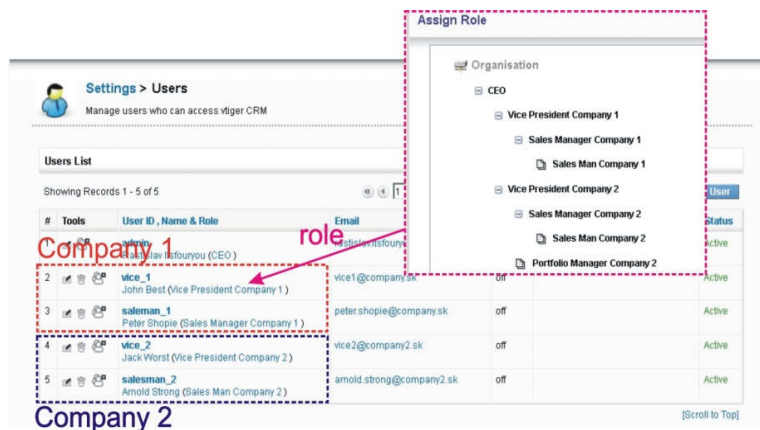
2.1 Definition roles

During definition of roles you have to assign at least one profile. In case you don't need for new companies separate profiles, you can start definition of roles, otherwise define firstly new profiles (https://wiki.vtiger.com/index.php/Profiles). Definition of roles is standard vtiger CRM functionality so please refer for example to https://wiki.vtiger.com/index.php/Roles or other web manuals.
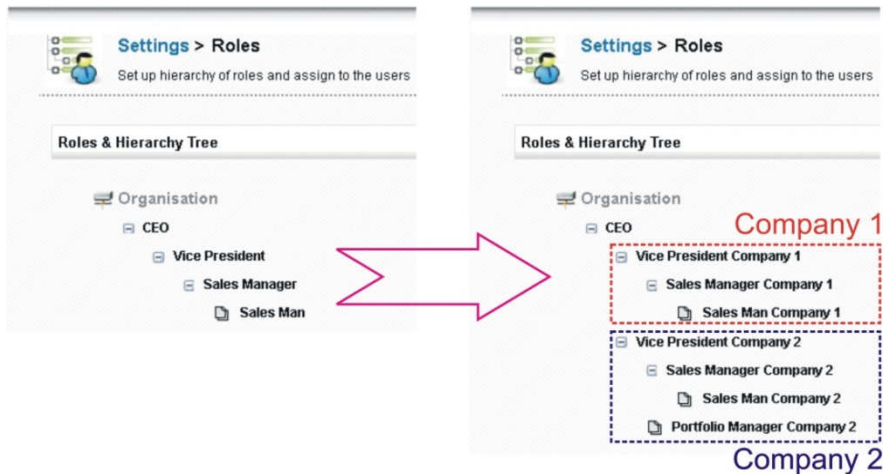
Picture 2.2 Definition roles

2.2 Definition users

After definition of roles you have to assign to users their new company related roles. Because the definition of users is also standard vtiger CRM function please refer to https://wiki.vtiger.com/index.php/Users for details.


Picture 2.3 Definition users

2.3 Definition of the new companies

In case the roles are defined you can beside your original company define the additional companies. The new company can be easily defined using following steps:

1. Go to CRM settings -> Other settings -> [icon] Multi Company
2. Click on button `New Company`.
3. In appeared window please specify company details according to your needs.
4. Save the new company using button `Save`.

NOTE A.: Your original company details are automatically copied, so you don't need to insert its details again. But you can edit it or fill up additional details fields.

NOTE B.: As you can see in the picture below, we introduced several additional company details fields.
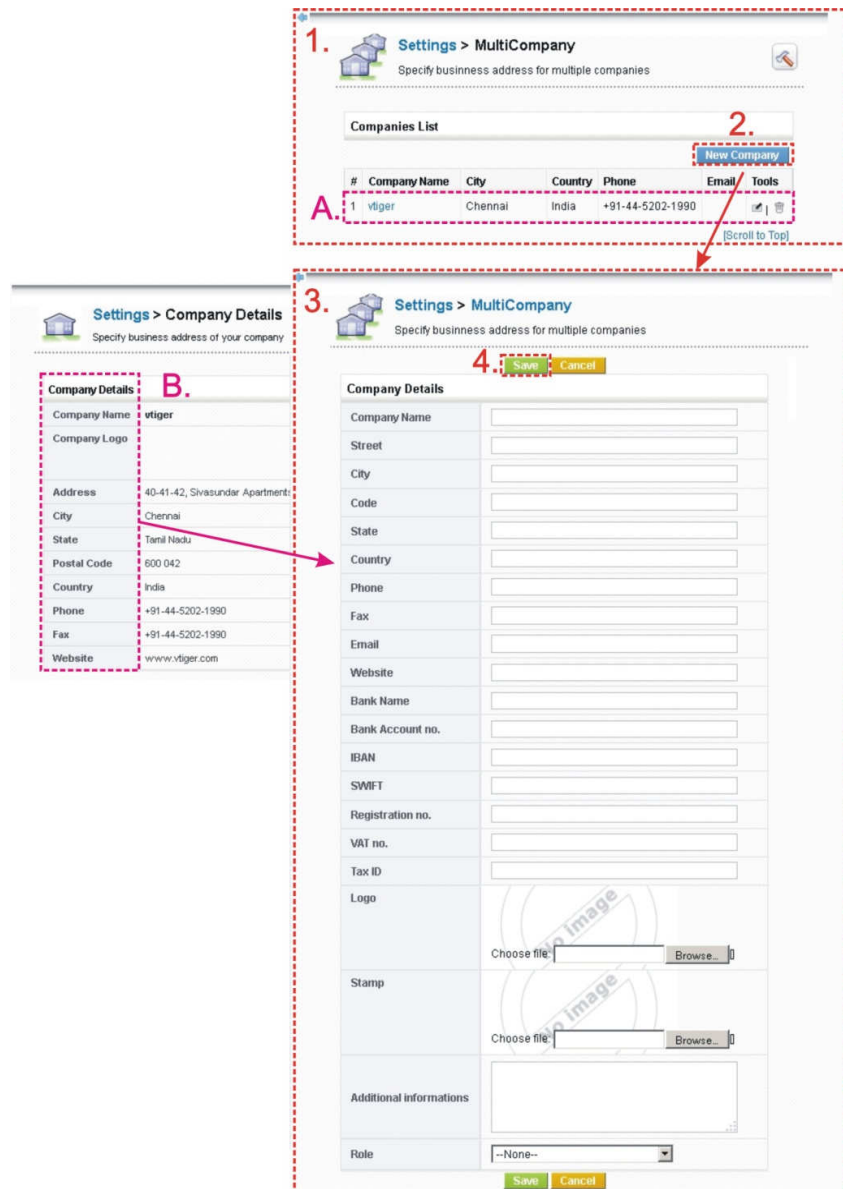
Picture 2.4 Definition of the new company

You can find in company details also new field "Role". It is mandatory field for correct working of the new module (Note: You are allowed to save new company without definition of the "Role", but please don't forget to define it before you start real work with your vtiger CRM and Multi Company 4You and Custom Numbering 4You modules.). So if you skipped definition roles/users and you already started definition of the new company, please select Role=--none—and continue with previous steps. After definition of roles for your new company please edit the company details and select the role.

Next sections show why the role is important for correct working of the new modules. There is one common rule how the custom numbering is applicable for companies. As you can see in the picture (Picture 2.5) the custom numbering predetermined will be applicable to all roles belongs to this role, i.e. will be inherited. Picture 2.5 shows example where all users/roles belong to "Company 1" will use Custom Numbering 4You settings and only users of Role 2.2 and its all "child" roles will use Custom Numbering 4You settings. Role Company 2, 2.1 etc. will use original vtiger CRM custom numbering.
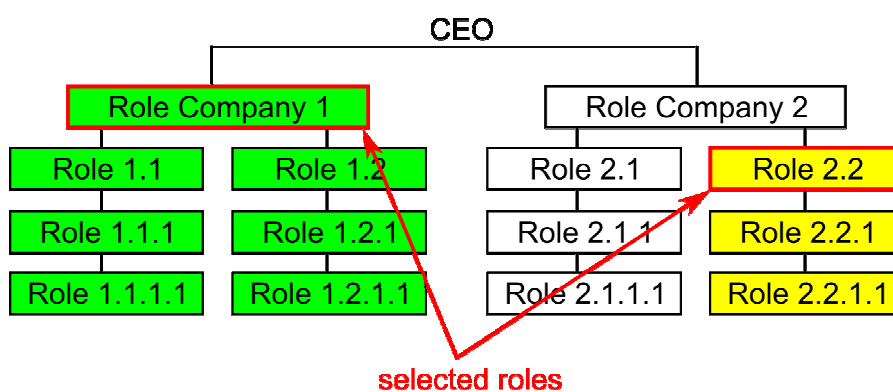
Picture 2.5 Role selection for custom numbering

Based on this rule two different recommend settings of the roles for more companies are shown below:

a) For each company the highest role except CEO is selected – in this scenario the custom numbering settings is applicable for all users of separate company 1 or 2 but not for CEO

b) CEO is included in the first company – custom numbering is always applicable for all users

Picture 2.6 Recommended role settings for more companies

For sure you can setup your own roles according to your needs, but please don't forget how it is applicable.

2.4 Definition of the custom numbering

Within custom numbering 4You you can define numbering per company and per module according to your needs.

Picture 2.7 Definition of the custom numbering

Additional custom numbering settings consists of the following steps:

1. Select the module.
2. Select the company.
3. Define the prefix – here you can combine your text together with fields $year$ and $month$
4. Define start sequence – you can use for example 1, 01, 0020 etc.

3   How to use

This chapter is here just to notice that Multi Company 4You and Custom Numbering 4You are modules which you don't need to work with daily. After correct setting defined in previous chapters you can let both modules to do their work.

On the other hand if you need to change some roles, user, or custom numbering settings, it is also possible any time. Just please refer to previous chapters. Also here are some examples how to proceed if you need:

1. to add new company which will not use custom numbering 4You but original custom numbering
    • provide steps described in chapter 2 except chapter 2.4 Definition of the custom numbering
2. to change already defined custom numbering 4
    • provide same steps as defined in chapter 2.4, new custom numbering will be set
3. to add role for which custom numbering will be not applied
    • please refer to chapter 2.3, Picture 2.5 Role selection for custom numbering. Please note that you cannot select CEO for any company because then you cannot exclude some users/roles

4 Additional features

4.1 Support of the PDF Maker

The PDF Maker is extension tool designed by ITS4You for vtiger CRM. It is powerful and flexible tool which allows users of vtiger CRM to create own pdf templates. Beside introduction of Multi Company 4You and Custom Numbering 4You the PDF Maker was updated to support new modules.

In case you are using PDF Maker for a longer time it is necessary to adapt your templates before continuing to use PDF Maker. This adaptation is necessary only to templates which use company details fields. How to adapt your templates is shown below (Picture 4.1):

1. Open your template using PDF Maker in the Edit View.
2. Go to the tab Other Information. Here you can find new "MultiCompany" group of fields.
3. Replace original fields with new Multi Company 4You fields.
4. Save the template.
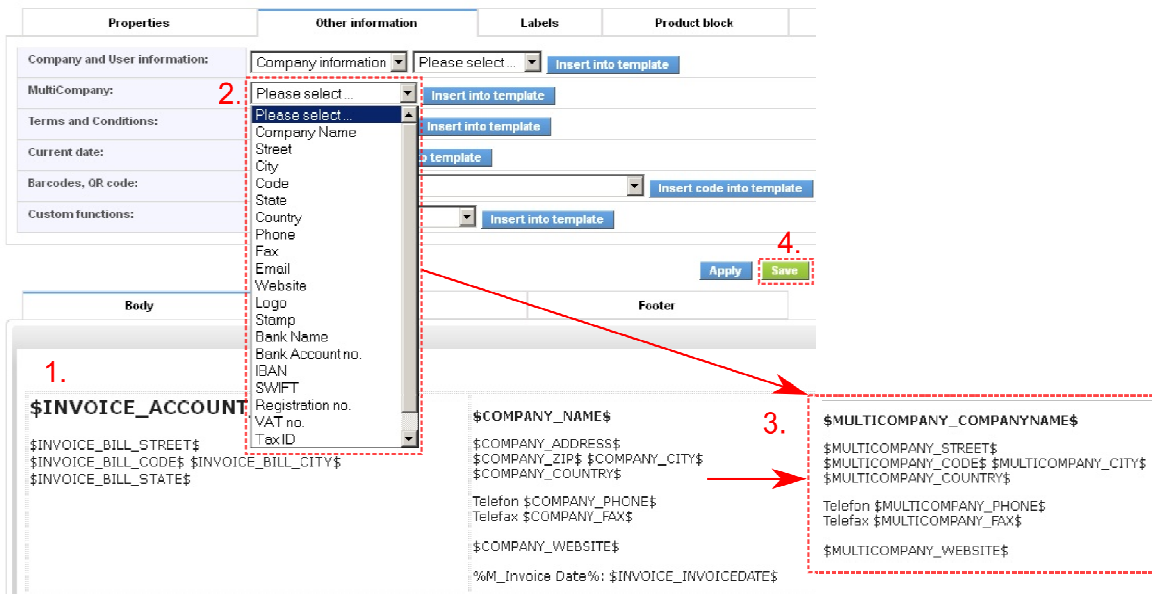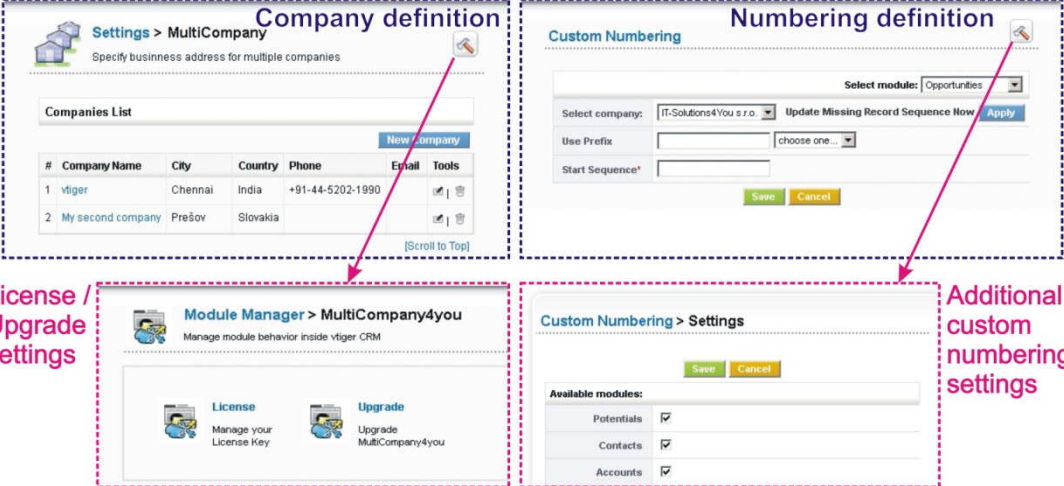

Picture 4.1 Support of the PDF Maker

After above adaptation same PDF templates can be used within more companies and final PDF document will always use correct data.

5 Settings

The additional settings related to Multi Company 4You and Custom Numbering 4You is described in this chapter (Picture 5.1):

- License – common settings for both modules (see chapter 5.1)
- Upgrade – common settings for both modules (see chapter 5.2)
- Additional custom numbering settings (see chapter 5.3)

Please refer to following subchapters for details.

Picture 5.1 Multi Company CRM settings items
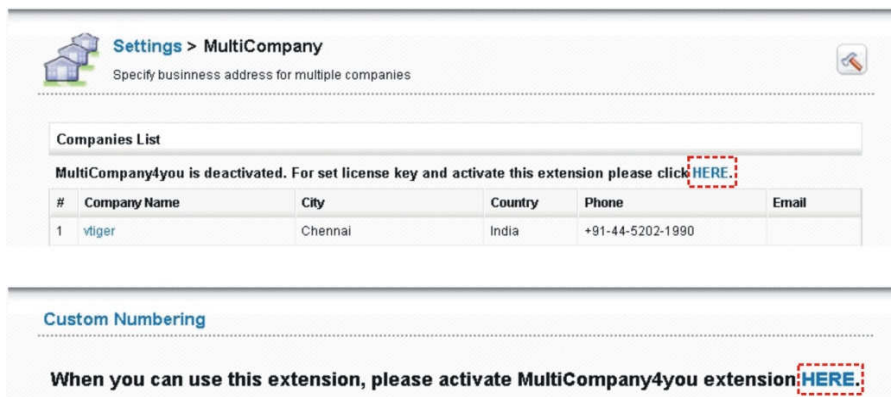
5.1 Deactivate/Reactivate license key

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

1. Click on Deactivate license .
2. Confirm deactivation using OK button in next window.
3. You will be informed about successful deactivation. Click on OK .
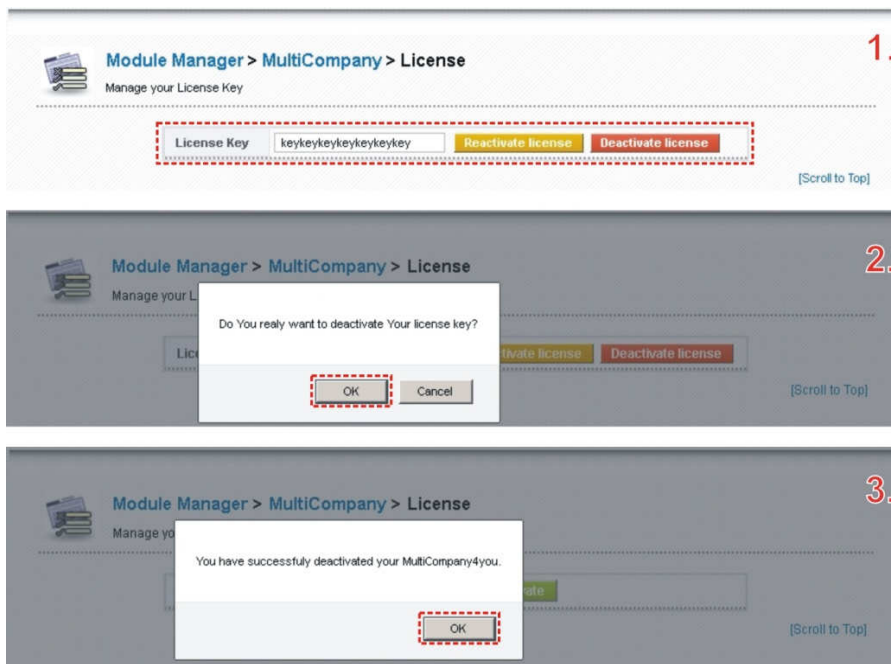
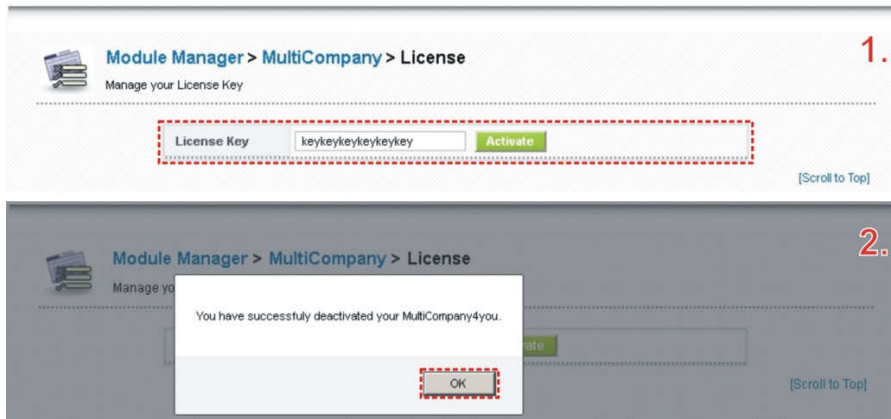**Picture 5.2 License deactivation**

After deactivation you are not allowed to change companies' details and custom numbering in modules is not working. As you can see below (Picture 5.3) you are informed in both modules about deactivation of the modules. You can directly use links HERE to initiate license activation.

Picture 5.3 Multi Company 4You and Custom Numbering 4You modules after license deactivation

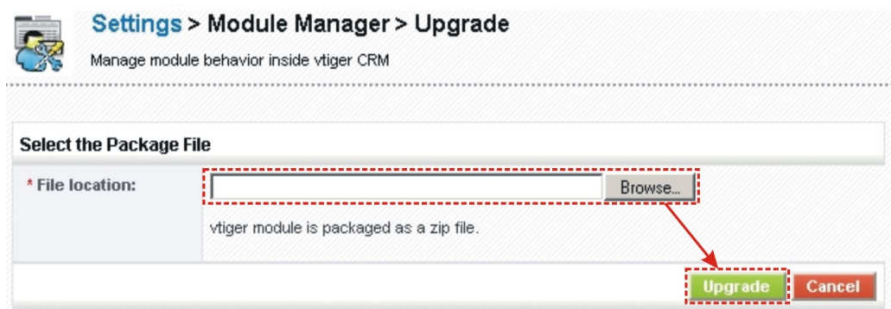To reactivate license you have to provide following steps:

1. Insert the license key and click on button [Activate].
2. Confirm by [OK].

**Picture 5.4 License activation**

5.2 Upgrade of the Multi Company

The upgrade of Multi Company can be started using [icon] Upgrade link in the Settings. Please browse the package using button [Browse...] and click on button [Upgrade].

Picture 5.5 Upgrade of Multi Company

In case that installed version of Multi Company matches package version, upgrade will be not provided and following information will appear on the screen.
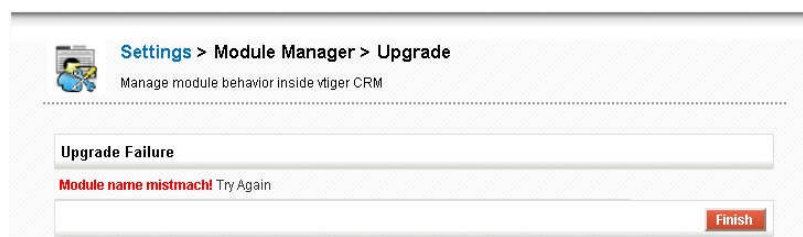

Picture 5.6 Upgrade failure

Next steps are similar with installation of the Multi Company, therefore please refer to chapter 1 for additional information.

5.3 Additional custom numbering settings

This additional custom numbering settings is used to set up list of modules for which custom numbering will be applied. So just use checkboxes to enable/disable custom numbering for particular modules. Please not that if you disable module you will use common vtiger CRM numbering again. But if you again enable Custom Numbering 4You you will continue with company specific numbering, i.e. the settings are not lost by disabling custom numbering 4You for particular timeframe.
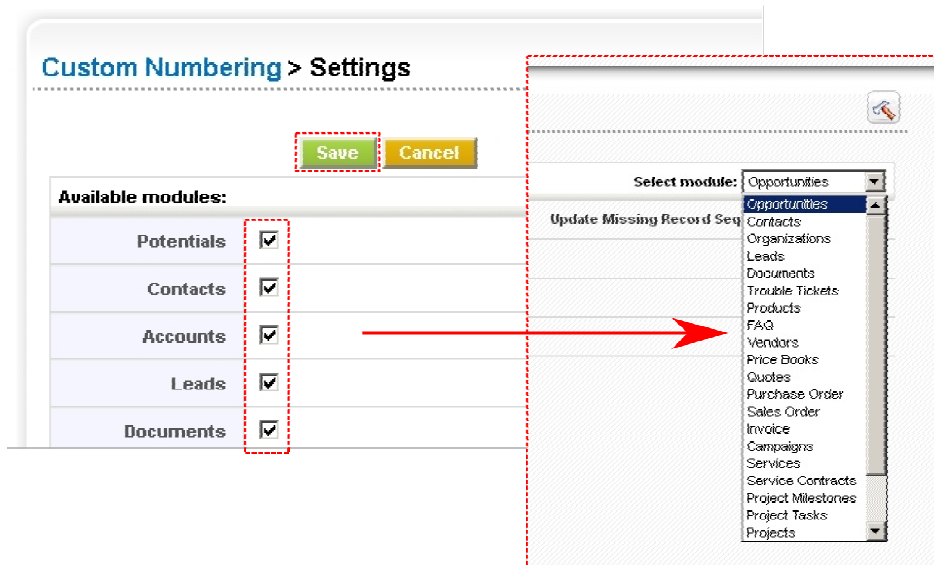
Picture 5.7 Additional custom numbering settings