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CALCULATE FIELDS for VTIGER CRM 6.x

Introduction

The Calculate Fields for vtiger CRM is the tool which allows calculating values for numbered fields. The unique feature of our tool is that the calculation for particular fields is based and provided on fields of the related modules and defined filters for these modules. This makes this tool powerful and flexible to provide a lot of various business indicators. The usage of this tool is simple and requires only basic knowledge of the vtiger CRM custom fields and filters/custom views creation.

The Calculate Fields benefits are:

- supported mostly inside all modules

- provides sum, avg, min, max, count values

- automatic calculations using scheduler

- calculation based on fields from related modules

- using standard vtiger functionality (filters, custom fields)

- your own already created filters can be used for calculated fields

- unlimited number of calculated fields

Calculate Fields 4 You

better overview of your business

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Who needs Calculation Fields

There is no specific target group of vtiger CRM users for Calculation Fields. The Calculation Fields can be used by anybody within your organization and the usage depends only on requirement of the particular employee. The new calculated fields can be defined and will be calculated in order to obtain better overview and make quicker and better decisions in the area of interest.

Content

License agreement

- The Calculate Fields License will be referred to as "The license" in the remainder of this text.
- This irrevocable, perpetual license covers all versions 2.xx of Calculate Fields.
- This license gives the holder right to install Calculate Fields 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 Calculate Fields 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 Calculate Fields.
- The license holder may not re-distribute the library or versions thereof to third party without prior written permission of the copyright holder.
- Calculate Fields 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 Calculate Fields.

It is strongly required to deactivate the license before moving installation to another server (different url) in order to avoid any license conflicts.
After movement and repeated installation you can reactivate your license.

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 info for download and your license key as well.

Private policy

During installation it is necessary to exchange following information:

- vTiger CRM version (e.g. 6.x)
- Calculate Fields version (e.g. 2.xx)
- Date and time
- Domain in md5 coding format (e.g. 916b25c201a77a6721003c0030977f3b)
- Action provided by you (INSTALL, REACTIVATE, DEACTIVATE)
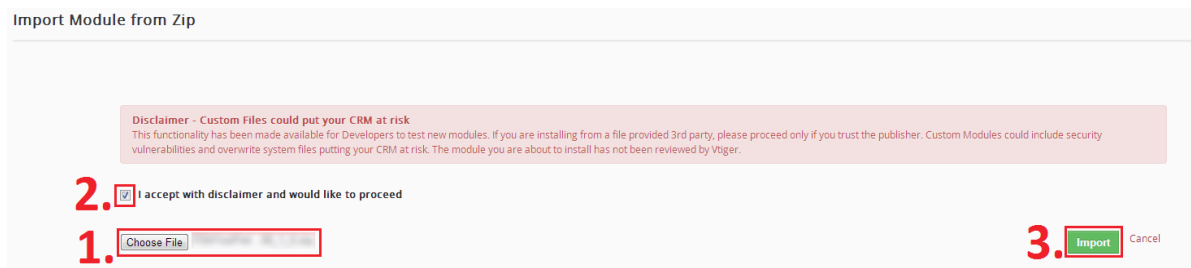
1 How to install Calculate Fields

Please provide following steps in order to install Calculate Fields:

1. Install the .zip (package) file of the Calculate Fields module via **CRM Settings -> Module Manager**. Click on the **Install from Zip** .
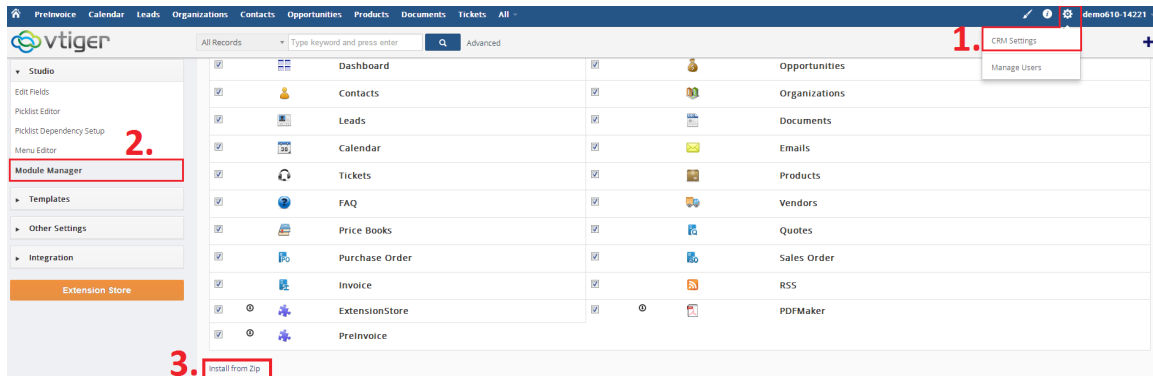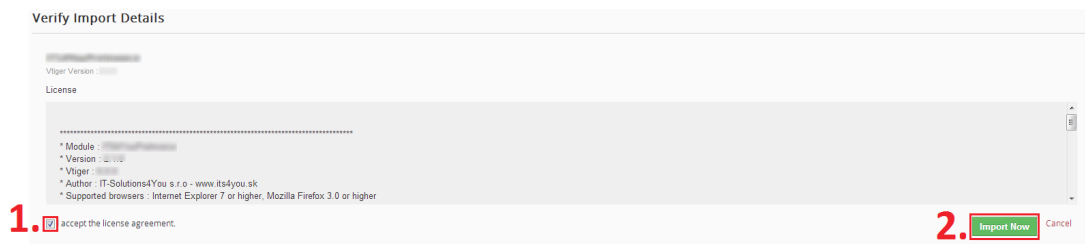

Picture 1.1: Installation of Calculate Fields – Step 1

2. Select the .zip (package) file that you downloaded from our shop. Please check that you accepted the disclaimer and would like to proceed. Click on the **Import** button.
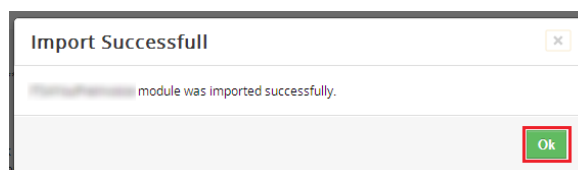

Picture 1.2: Installation of Calculate Fields – Step 2

3. Verify the import details parsed from the .zip (package) file. Please check that you accepted the license agreement and click **Import Now** to proceed **Cancel** or to cancel.

Picture 1.3: Installation of Calculate Fields – Step 3

4. Click on **Ok** button to complete the module import.

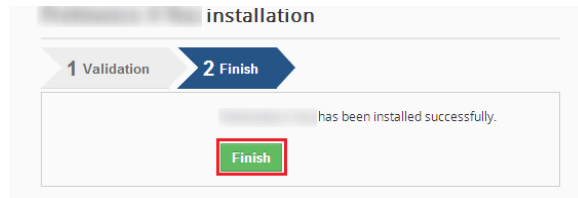*Picture 1.4: Installation of Calculate Fields – Step 4*

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

1. Calculate Fields Validation Step. Please check your Company information and insert license key. Make sure that your server has **Internet access**. Click on **Settings → CRM Setting → Calculate Fields.** Insert your License Key. Click on Validate button. If you want to change your Company information click on Change Company Information button.
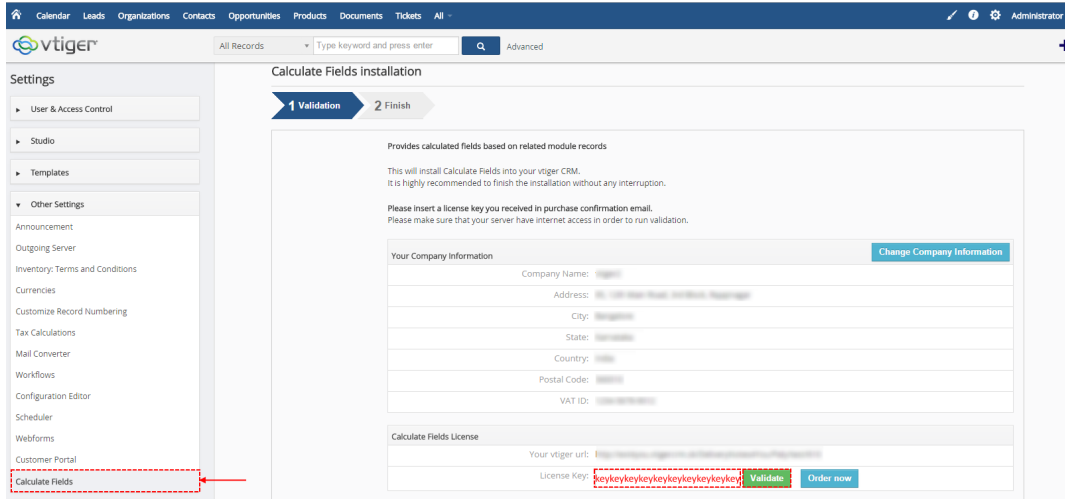

Picture 1.5: Validation of Calculate Fields – Step 1

2. Click on Finish to complete Validation.

Picture 1.6: Validation of Calculate Fields – Step 2

For Upgrade please check 5.3 Upgrade.

If you open Calculate Fields after installation and you will see (Picture 1.7), your Scheduler probably do not work correctly, so please click on Instructions for setup cron job (scheduler) and check how to set Scheduler correctly or check 2.2 Setup of Scheduler.
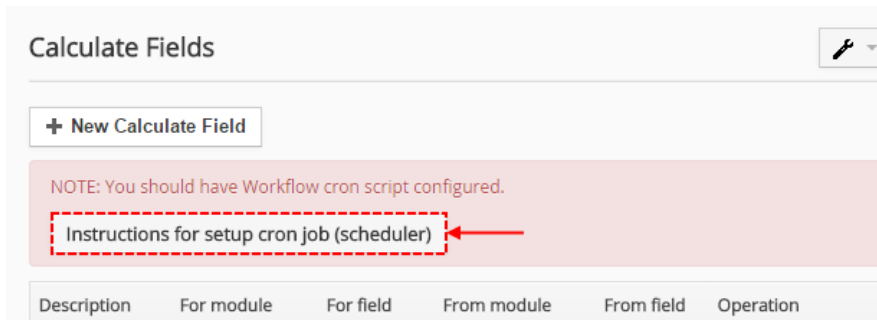
Picture 1.7: Scheduler do not work correctly

2   How to use Calculate Fields

Description of the Calculate Fields

The Calculate Fields module provides calculating values for numbered fields. This calculation for particular fields is based and provided on fields of related modules and defined filters for these modules.

In order to define calculation for field in the target module you have to provide following steps:

1. Define / select the field which value will be calculated in the target module.

2. Define the filter (custom view) for the related module.

3. Define the calculation within Calculate Fields settings.

The only new step from above approach is number 3. The others are the standard vtiger CRM functionalities. Please refer to the online vtiger CRM manual, web pages, forums to obtain more details for example:

https://wiki.vtiger.com/vtiger6/index.php/Configure_fields

https://wiki.vtiger.com/vtiger6/index.php/Creating_Custom_Filters

2.1 Setup calculation of the Calculate Fields

The Calculate Fields settings you can find under **CRM Settings → Other Settings** . In order to setup calculation provide following steps within settings:

1. First at all click on **＋ New Calculate Field** button

Picture 2.1: New callculate Field

2. Select the target module – the target module is the module in which new calculated field is created/located
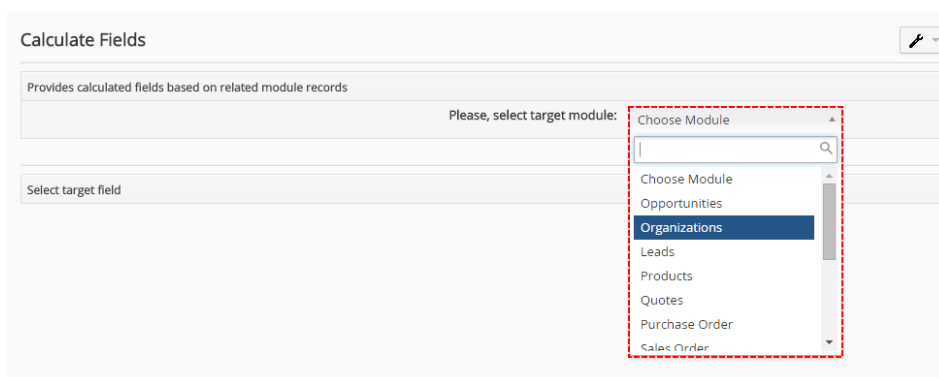
Picture 2.2: Select target module

3. Select the target field – the result of the calculation will be stored/updated in this field (picture ◀ means, that this field is already filled by Calculate Fields)

(picture ▶ means, that this field is used by Calculate Fields)

Picture 2.3: Select target Field

or you can create a new field, so please provide following steps:

- click on [Add Custom Field] button

- select Field Type

Picture 2.4: Create new Field

- choose in which block the new Field will contain in and type required information and click on [Save]

Picture 2.5: Create new Field

▼ Organization Details			
Organization Name	Oragnisation 1	Organization Number	ACC1
Website		Primary Phone	
Ticker Symbol		Fax	
Member Of		Secondary Phone	
Employees	0	Primary Email	
Secondary Email		Ownership	
Industry		Rating	
Type		SIC Code	
Email Opt Out	No	Annual Revenue	0.00
Assigned To	Administrator	Notify Owner	No
Modified Time	11-05-2015 15:57:35	Created Time	10-03-2015 11:33:09
Is Converted From Lead	No	Created By	Administrator
Uhradene FA	254	Grand total of all Invoices	

Picture 2.6: New Field

4. Select related module – you can select only from the group of related modules (visible also within "More Information" tab), you can also add Description and click on **Next**
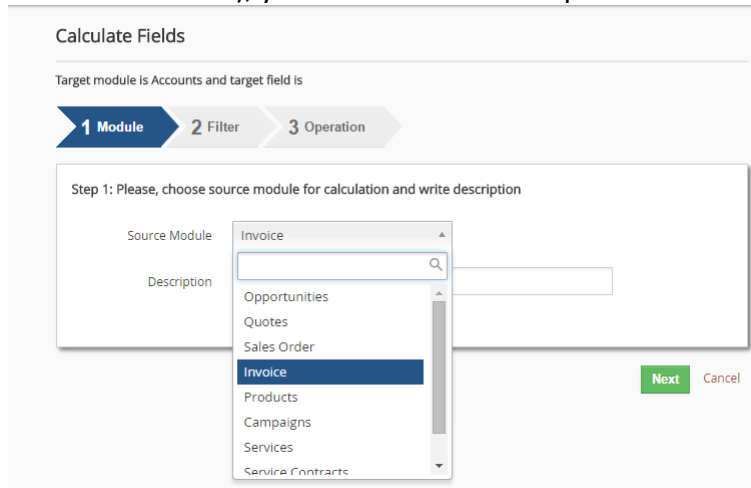
Picture 2.7: Choose Source Module

5. Select related module filter/custom view or you can create new custom view – calculation is done using only group of related records which fit to filter conditions. Continue by **Next**
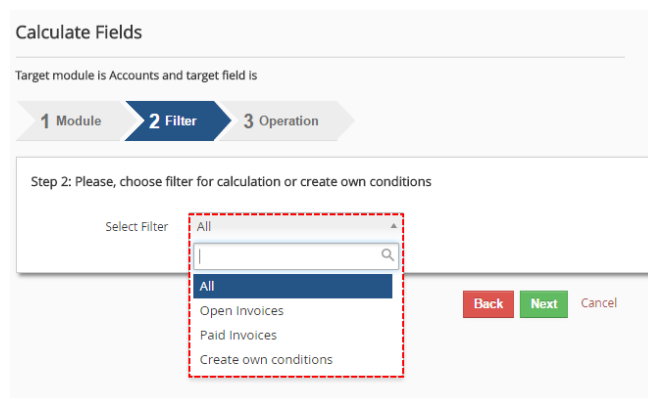
Picture 2.8: Select/create a filter

6. a) Select column - Select column/related field – there should be list of available columns from related module and the list depends on the type of related module. You have to select one column according to your needs, e.g. from invoice you can select from: Adjustment, Sub Total, Total, Discount Amount, S&H Amount.

   b) Select operation – we provided operations like SUM (value1+value2+…+valueN), AVG (SUM/COUNT), MIN (minimal value from all values, i.e. value1 …valueN), MAX (maximum value from all values, value1 …valueN), COUNT (the count of the values, i.e. N)
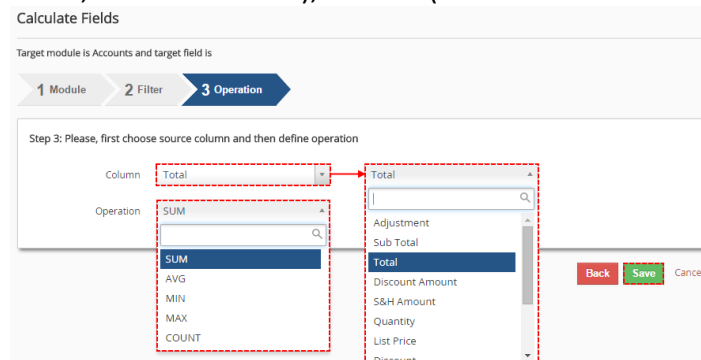
Picture 2.9: Select column and operation

7. Your Calculated Field is created now

Picture 2.10: Your Calculate Fields

8. New column (Grand total of all Invoices) is empty until first start of Calculate Field's Scheduler

Picture 2.11: Calculated Fields

2.2 Setup of Scheduler

As was before mentioned, the calculations provided for calculated fields are done automatically based on scheduler settings and cannot be initiated manually. Please check the scheduler settings, i.e. check whether status for Calculate Fields is "Active". If not please change it, as well as define frequency as shown in the picture below (Picture 2.12) or you can check page: https://wiki.vtiger.com/vtiger6/index.php/Scheduler

Picture 2.12: Scheduler

3 Work area

The Work Area of the Calculate Fields consists of:

- ListView – created Calculate Fields is shown here, edit and delete option, create New Calculate Field and Calculate Fields settings is included too
- EditView – allows the edit existing Calculate Fields

3.1 ListView

The ListView of Calculate Fields consist of created Calculate Fields, edit and delete Calculate Fields options, Create New Calculate Field and Setting of Calculate Fields.

Picture 3.1: Calculate Fields ListView

3.2 EditView

The EditView allows you to edit created Calculate Fields. EditView is shown after clicked on ✎ .

Picture 3.2: EditView of Calculate Fields

EditView is similar like 2.1 Setup calculation of the Calculate Fields steps 4.,5.,6., please check it for more info.

4 Example of usage

This chapter describes few of uncountable set of usage examples in simple way, i.e. how to define field, filter and set up calculation.

4.1 The Annual revenue per organization for current FY

In this example the annual revenue is calculated per organization and result is written to already existing vtiger organization module field "Annual Revenue".

1. Select target module Organizations.
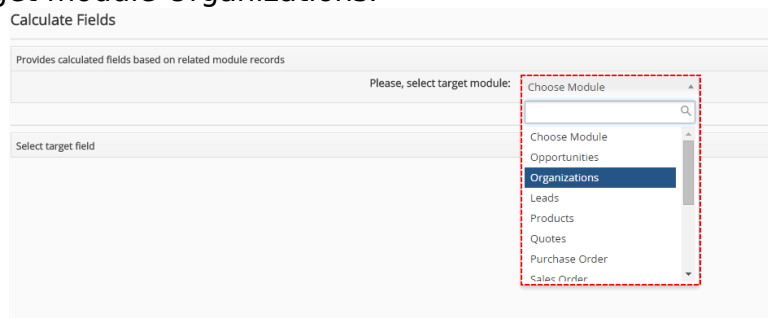
Picture 4.1: Example step 1

2. Select target field "Annual Revenue".
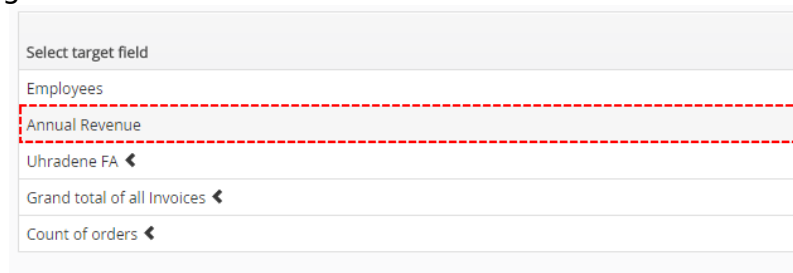
Picture 4.2: Example step 2

3. Select related module "Invoice".
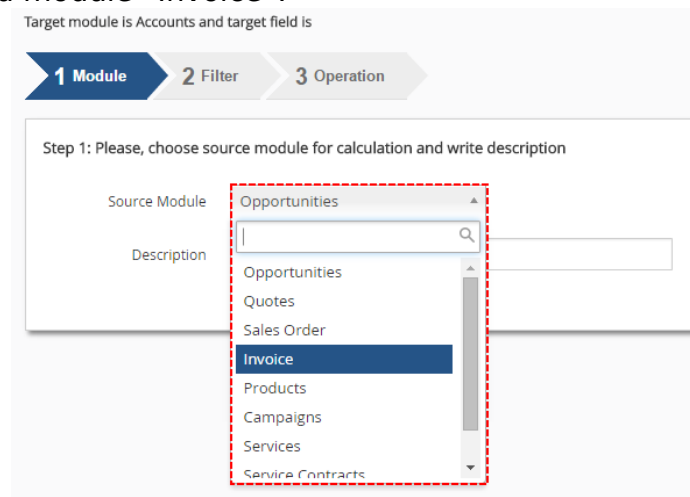
Picture 4.3: Example step 3

4. In order to achieve this we need to create custom view/filter in the related module Invoice, i.e. to define that you would like to see only invoices from Current FY and in addition only Paid invoices as seen below.

Picture 4.4: Example step 4

5. Select operation "SUM".
6. Select column/related field "Total".
7. Click on Save button.

Picture 4.5: Example steps 5, 6, 7

Some examples of possible modifications:
- a) Change the period of interest using standard filter.
- b) Change the advanced filter to see not paid invoices, etc.
- c) Change the operation to see average revenue per invoice or to see the count of the invoices.

4.2 Our Tip for You

When you create a Field that is calculated by Calculate Fields 4 You. Good option to save this Field is to set Field like Read only.

Check following picture to see how to:

- Go to CRM Setting → Profiles and choose Profile you want to change
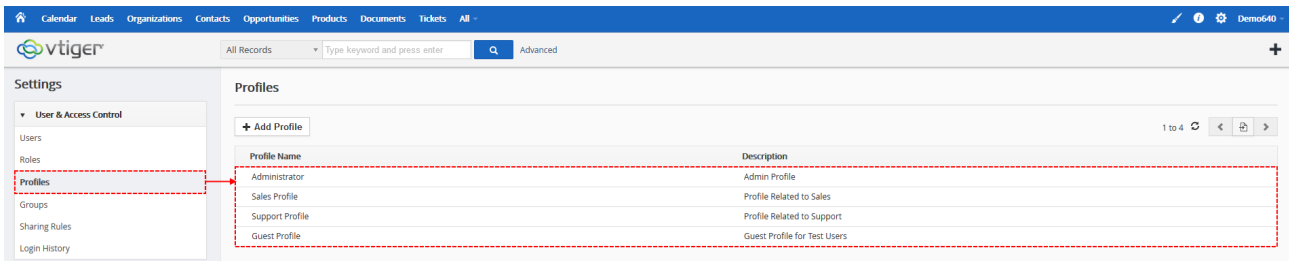
Picture 4.6: Tip

- Now, please click on **Edit** button
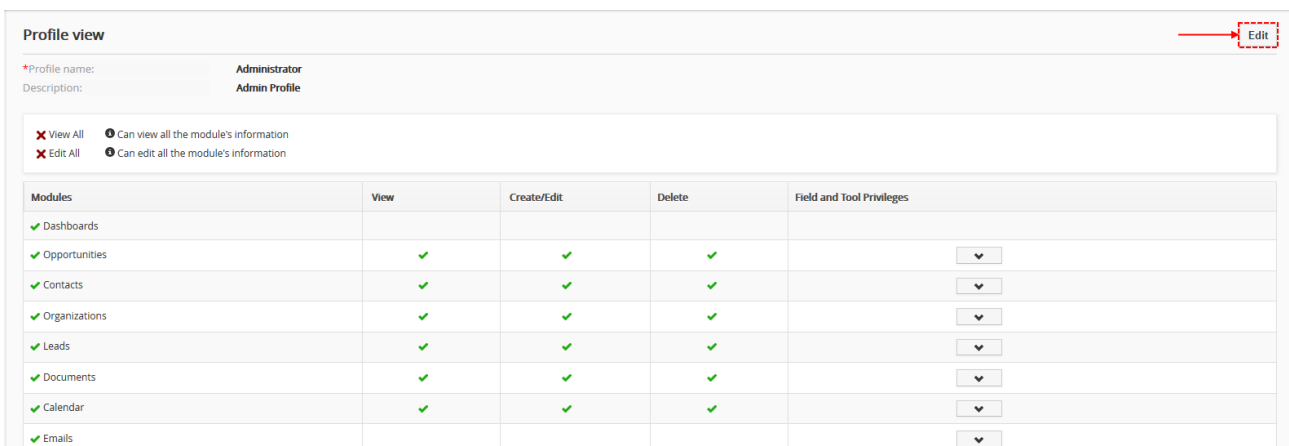
Picture 4.7: Tip

- Find your module and click on ⌄
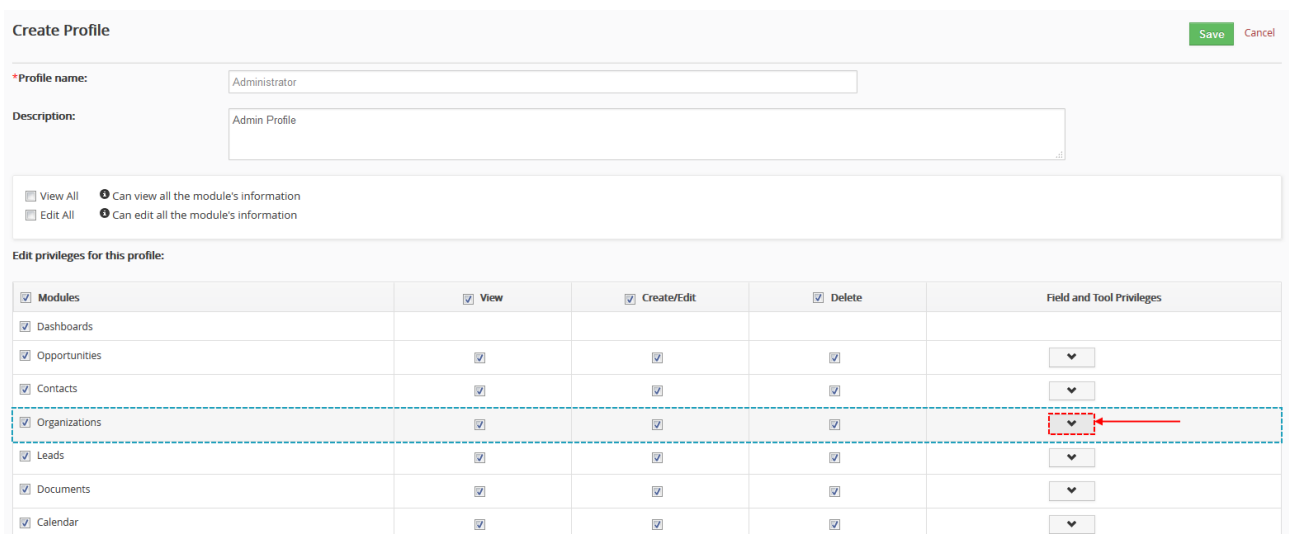
Picture 4.8: Tip

- Find your Field(s), set to Read Only and save it by using [Save]
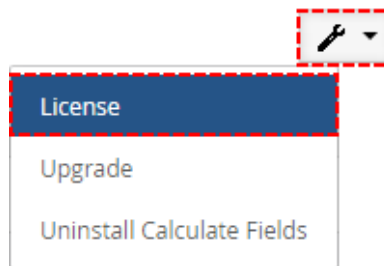

Picture 4.9: Tip

Now, your Field(s) is(are) protected.

5   Settings

5.1 Deactivate license

In case you need to reinstall Calculate Fields you have to deactivate and reactivate license key. To deactivate license key please provide following steps:
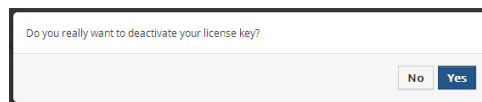
1. Click on ![wrench icon]

2. Click on License

3. Click on [Deactivate license] button

4. Confirm deactivation with button [Yes]

Picture 5.1: Deactivate Calculate Fields – Step 1,2
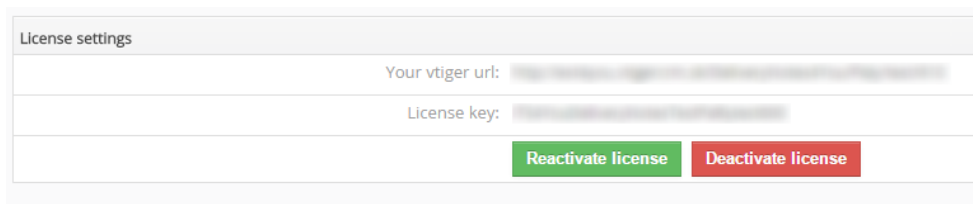
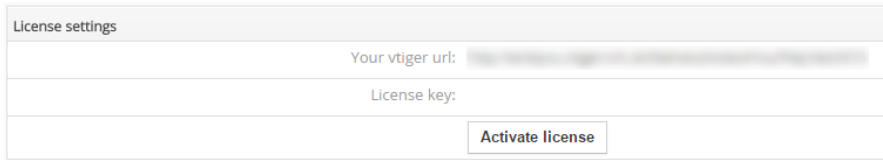*Picture 5.2: Deactivate Calculate Fields – Step 3*

Picture 5.3: Deactivate license of Calculate Fields – Step 4

After deactivation of license Calculate Fields doesn't work at all and Calculate Fields work area is not accessible either.

To reactivate license you have to provide following steps:

1. Click on **Activate license** button
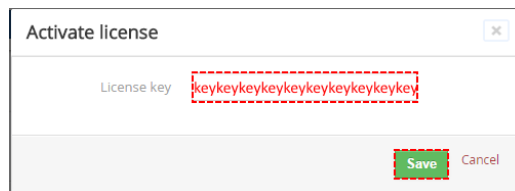2. Insert license key
3. Click on **Save**

Picture 5.4: Activate license of Calculate Fields – Step 1

Picture 5.5: Activate license of Calculate Fields – Step 2,3

5.2 Reactivate license

In case that some problem occurs with license key (moving, copying, migrating, changing Company info) you need to reactivate your license key. To reactivate license key please provide following step:

1. Click on **Reactivate license**
2. Click on **Finish**


Picture 5.6: Reactivate license of Calculate Fields – Step 1


*Picture 5.7: Reactivate license of Calculate Fields – Step 2*

5.3 Upgrade

The upgrade of the Calculate Fields is initiated in the same way as Calculate Fields installation or click on Upgrade link in Settings of Calculate Fields (Picture 5.8). So please refer to above installation part for details how to initiate the import of the module from the file. After upgrade the notification about successful upgrade is shown (Picture 5.10)and click on OK button.
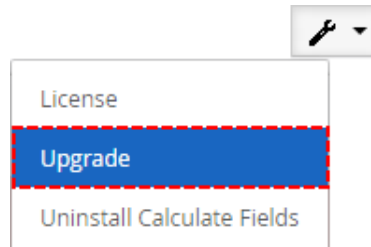
Picture 5.8: Upgrade of Calculate Fields
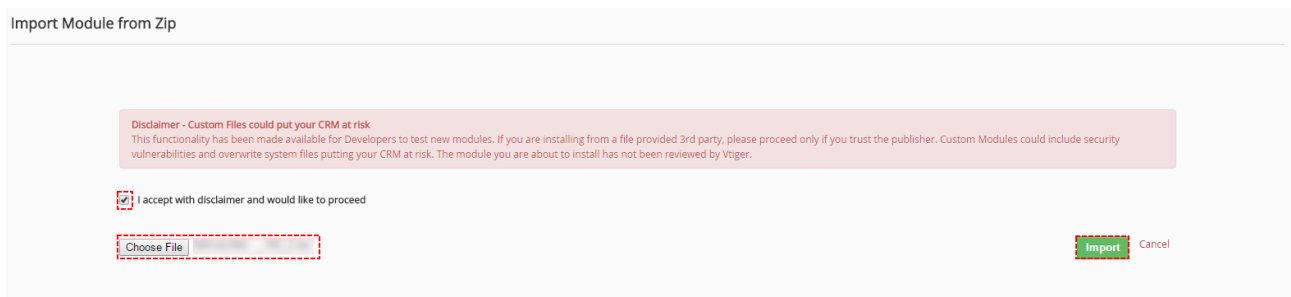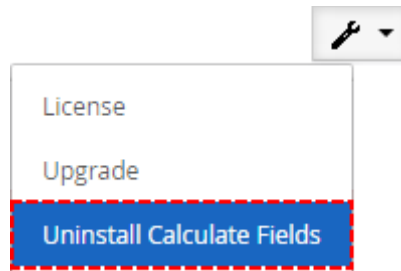

Picture 5.9: Upgrade of Calculate Fields
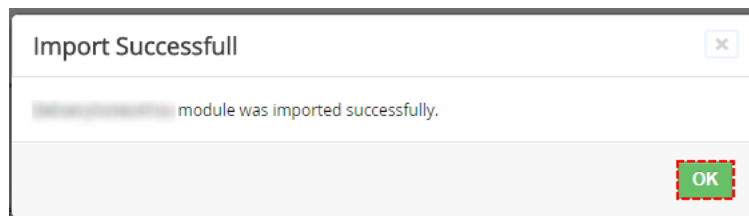
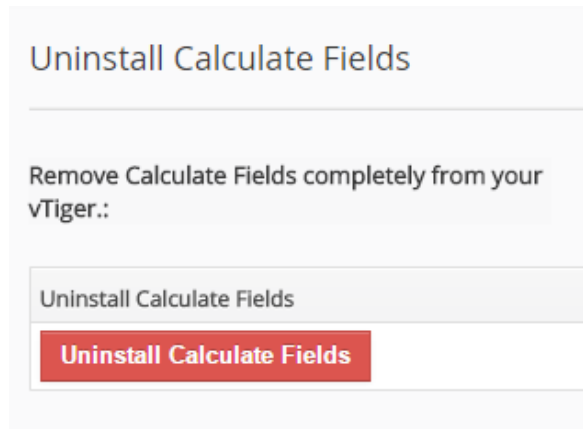*Picture 5.10: Upgrade of Calculate Fields*

5.4 Uninstall

If you want to remove Calculate Fields from your vTiger, please provide following steps:

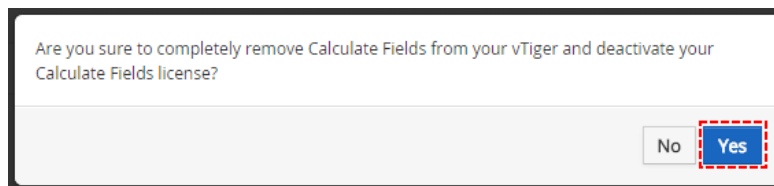- Go to the Calculate Fields and in **Settings** choose option **Uninstall**

Picture 5.11: Uninstall Calculate Fields

- Click on **Uninstall** button

Picture 5.12: Uninstall Calculate Fields

- Click on **Yes** button to finish

Picture 5.13: Uninstall Calculate Fields

Now, Calculate Fields is removed from your vTiger and your license is deactivated. To use Calculate Fields again you need to provide installation and validation steps (see chapter How to install Calculate Fields).

Change log of Calculate Fields

- May 2015: **610.100.2**

Change log of Manual for Calculate Fields

- November 2015:
    - new chapter: 4.2 Our Tip for You
- May 2015: manual is based on Calculate Fields version: **610.100.2**
    - first initiate version for vTiger 6.2