

IT-Solutions4You

MULTI COMPANY 4 YOU for VTIGER CRM 6.x

Introduction

The Multi Company 4 You module 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 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 4 You?

Please try to answer by yourself to following questions to see whether Multi Company 4 You 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 separate numbering of the records for different users?

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

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License agreement

- The Multi Company 4 You is 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 2.xx of Multi Company 4 You.
- This license gives the holder right to install Multi Company 4 You 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 4 You 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 4 You.
- 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 4 You 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 4 You.

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 link for download MultiCompany 4 You and your license key as well.

Private policy

During installation it is necessary to exchange following information:

- vtigerCRM version (e.g. 6.0.0)
- Multi Company 4 You (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 Multi Company 4 You

Please provide following steps in order to install Multi Company 4 You:

1. Install the .zip (package) file of the Multi Company 4 You module via CRM Settings -> Module Manager. Click on the Install From File button.

👚 PDF Maker EMAIL Maker	Cashflow4You	Calendar	Leads Organizations	Contacts Opportunities	Products Do	ocuments Tickets	Campaigns	All -		0 <u></u>	Administrator –
💿vtiger	All Records	 Type ke 	yword and press enter	Q Advanced					CRM Settings		+
Settings	Module M	anageme	nt							lns	tall From File
► User & Access Control	V		Dashboard				à	Opportunities			
Studio Edit Fields	· 4	8	Contacts			V	N	Organizations			
Module Manager]2.]		Leads			V	0	Documents			
Picklist Dependency Setup	V	30	Calendar			V		Emails			
Templates	V	Q	Tickets			V		Products			
► Other Settings	V	2	FAQ			V	<mark>.</mark>	Vendors			

Picture 1.1: Installation of Multi Company – Step 1

2. Select the .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 (package) file. Please check that you accepted the license agreement and click Yes to proceed or No to cancel.

LBL_IMPORT_MODULE_FROM_FILE		
Verify Import Details		
Module Name		
Vtiger Version		
License	* Module : * Version : (2) creatibe license agreement.	
	Vojovno	2. Yes No

Picture 1.3: Installation of Multi Company – Step 3

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

Importing Module	
module was imported successfully.	
	Finish
Picture 1 1: Installation of Multi Company Step 1	

Picture 1.4: Installation of Multi Company – Step 4

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

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

Multi Company installation	
1 Validation 2 Finish	
Welcome to the MultiCompany4you Installation Wizard	
This will install MultiCompany4you into your vtiger CRM. It is highly recommended to finish the installation without any interruption.	
Please insert a license key you received in purchase confirmation email. Please make sure that your server have internet access in order to run validation.	
License key keykeykeykeykeykey Validate Order now	

Picture 1.5: Validation of Multi Company – Step 1

- 2. Click on **Finish** to complete Validation.
- Multi Company installation

	1 Validation	2 Finish	
Multi Company extension has	been installed successfully.		
Distury 16.	Validation of Multi Course	Star 2	

Picture 1.6: Validation of Multi Company – Step 2

2 How to set up Multi Company 4 You

Multi Company 4 You is module 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 4 You it is necessary to define new companies' roles (profiles) and users. So the whole set up comprises definition of:

- roles (profile is necessary) standard vtiger functionality (see chapter 2.1)
- users standard vtiger functionality (see chapter 2.3)
- companies Multi Company 4 You functionality described in chapter 2.4
- custom numbering Multi Company 4 You functionality described in chapter 2.5

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

In order to start Multi Company 4 You tool, please go to CRM settings (1.) and in the section Other Settings click on Multi Company 4 You link (2.).

tiaer	All Records Type keyword and p	ress enter Q Advance	ed	CRM	Settings
liger	Summary			1	
Access Control	2 lisers	21	Workflows	36 Modules	
tes	Settings Shortcuts				
ettings					
erver	Users	Module Manage	er	Picklist Editor	
	Manage users who can access vtiger CRM	Manage module b	ehavior inside vtiger CRM	Customize Picklist values in each module	
tions					
nent					
ferms and	Workflows				
Record Numbering	Create and edit worknows				
rter					
on Editor					
•					
2					
any	List of companies				
$\boldsymbol{\mathcal{A}}$	+ Add Company				
	# Company Name	Email	Phone	Role	Actions
	1 Company 1	c1@its4you.sk	+91 9243602352	Vice President	
	2 Company 2	c2@its4you.sk	222222	Vice President Company2	

Picture 2.1: Start of Multi Company 4 You

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/vtiger6/index.php/Profiles). Definition of roles is standard vtiger CRM functionality so please refer for example to https://wiki.vtiger.com/vtiger6/index.php/Roles or other web manuals.

To create or change Roles please go to CRM settings and in the section User & Acces Control click on Roles link and set Roles according to your needs as you can see in the Picture 2.2.



Picture 2.2: Roles

2.2 Sharing rules

Sharing Rules

We suggest to set sharing rules to private (e.g. Invoice, ...). Go to CRM settings and in the section User & Acces Control click on Sharing Rules link and set Private (Picture 2.3).

Module	Public: Read Only	Public: Read, Create/Edit	Public: Read, Create/Edit, Delete	Private	Advanced Sharing Rules
Task	0	0	0	۲	T
Opportunities	0	0	0	۲	•
Organizations & Contacts	0	0	0	۲	•
Leads	0	0	0	۲	•
Tickets	0	0	0	۲	•
Quotes	0	0	0	۲	•
Purchase Order	0	0	0	۲	•
Sales Order	0	0	0	۲	•
Invoice	0	0	0	۲	•
Campaigns	0	0	0	۲	•
Documents	0	0	0	۲	•
Products	0	0	0	۲	•
Services	0	0	0	۲	•
Service Contracts	0	0	0	۲	•
Project Milestones	0	0	٢	۲	•
Project Tasks	0	0	0	۲	T
Projects	0	0	0	۲	•
5MSNotifier	0	٢	٢	۲	•
Assets	0	0	٢	۲	¥
Comments	0	0	0	۲	•
Vendors	0	٢	0	۲	•

Picture 2.3: How we suggest to set Sharing rules

If you want some module set like public within one company there is option for custom rules. For set using following step:

- 1. Click on 🔹 button for module you want to set custom rule
- 2. Click on Add Custom Rule button
- 3. Here choose who is owner of record
- 4. Here choose who can access to record
- 5. Set Read or Read and Write permission
- 6. Click on Save button

Sharing Rules

Module	Public: Read Only	Public: Read, Create/Edit	Public: Read, Create/Edit, Delete	Private	Advanced Sharing Rules
Task	0	0	٢	٥	1
Opportunities	0	0	0	۲	• _ •
	Picture	e 2.4: Define custom i	rule – Step 1		

Sharing Rules

Module	Public: Read Only	Public: Read, Create/Edit	Public: Read, Create/Edit, Delete	Private	Advanced Sharing Rules
Task	0	۲	۲	0	Ŧ
Opportunities	0	0	0	۲	•
Sharing Rules for Opportunities :				2.	dd Custom Rule
		No Custom Access Rules defined.			

Picture 2.5: Define custom rule – Step 2

	roducts ×
	ouucis
3 , Products of Team S	Selling 💌
4 Can be accessed by Team S	Selling 💌
With Permissions	ł
● Read	d and Write
	6 Save Cancel
0	0

Picture 2.6: Define Custom Role – Step 3,4,5,6

Or for detail information see: https://wiki.vtiger.com/vtiger6/index.php/Sharing_Rules

2.3 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/vtiger6/index.php/Users for details.

To assign User to company please go to CRM settings and in the section User & Acces Control click on Users link. Here you can create or edit users.

The most **important** is set for each user **role** – that mean to which company belong it (Defined in Chapter 2.1).

User Login & Role				
Jser Name *		Admin		
Password *		Primary Email *		
Confirm Password *		Status	Active	¥
First Name		Last Name *		
Default Lead View	Today	Role *	CEO	*
			(I	۹
calendar Settings			CEO	
Reminder Interval	Select an Option 🔹	Starting Day of the week	Vice President Sales Manager	Company
Default Call Duration (Mins)	5	Other Event Duration (Mins)	Sales Person	company
Default Calendar View	Today	Date Format	Vice President Company2 Sales Manager Company2	Company
Calendar Hour Format	12 *	Day starts at	Sales Person Company2	_

Picture 2.7: Create new user and set role

2.4 Definition 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
- 2. In the section Other Settings click on Multi Company 4 You link
- 3. Click on + Add Company button
- 4. In appeared window please specify company details according to your needs
- 5. Save a new company using Save button

©vtiger	All Records * Type keyword and press enter	Q Advanced	1 CRA	Settings +
Settings	Summary		1.	
 User & Access Control Studio 	2 Users	21 Workflows	36 Modules	
 Templates 	Settings Shortcuts			
Other Settings Outgoing Server Currencies Tax Calculations	Users Manage users who can access viger CRM	Module Manager Manage module behavior inside vitger CRM	Picklist Editor Customize Picklist values in each module	
Announcement Inventory: Terms and Conditions Customize Record Numbering Nail Converter	Workflows Create and edit workflows			
Workflows Configuration Editor Scheduler				
Webforms 2. Customer Portal 2.	List of companies			1
	+ Add Company 3.			
	Company Name Email	Phone	Role	Actions
	1 Company 1 c1BRS4	eyou.sk +91.9243602352	Vice President	
	2 Company 2 c2@ited	yeunk 222222	Vice President Company2	
L				

Picture 2.8: Definition of new company – Step 1,2,3

Company Information	
Company Name*	
Street	
City	
Postal Code	
State	
Country	
Phone	
Fax	
Email	
Website	
Bank Name	
Bank Account no.	
IBAN	
SWIFT	
Registration no.	
VAT no.	
Tax ID	
Additional informations	
Role	
Company stamp Choose File No file chosen	CEO Vice President Sales Manager Sales Person Vice President Company? Sales Person Company? Sales Person Company?

Picture 2.9: Definiton of new company – Step 4,5

As you can see on Picture 2.9, you can find in company details also new field "Role". It is mandatory field for correct working of the Multi Company 4 You 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 4 You module.). 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. After selecting of role, all subroles are assigned to company.

In the following Picture 2.10 you can see relationship between Role - User - Companies



Picture 2.10: Relationship between Roles - Users - Companies

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 following picture, the custom numbering will be applied to selected role and all subroles that fall under this role, i.e. will be inherited. Picture shows example where all users/roles belong to "Company 1" will use Custom Numbering settings and only users of Role 2.2 and its all "child" roles will use Custom Numbering settings. Role Company 2, 2.1 etc. will use original vtiger CRM Customize Record Numbering.



Picture 2.11: 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 2.12: Recommended role settings for more companies

2.5 Definition the custom numbering

Within Multi Company 4 You you can define numbering per company and per module according to your needs. To set which module should have custom numbering please check step 3.b) or Picture 2.15.

Additional custom numbering settings consists of the following steps:

1. Select the company Numbering 2. Click on button 3. Select module b) if module is not here click on *button* and add it 4. Define the prefix – here you can combine your text together with fields \$year\$ and \$month\$ 5. Define start sequence – you can use for example 1, 01, 0020 etc. 6. To finish click on Save button List of companies p + Add Company # Company Nar Company 1 c1@its4you.sk +91 9243602352 Vice President 1 c2@its4you.sk 222222 Vice President Company2 2 Company 2 Picture 2.13: Definition of the custom numbering – Step 1

lulti Company		.,	.,	 ່ 2 b) 🗠
Company Details Numbering	2.			5.07
Customize Record Numbering				Update Missing Record Sequence
Customize Record Numbering	Select module:	Contacts	3.	Opuble missing record sequence
	Use Prefix	C\$year\$\$month\$	Choose one	
	Start Sequence*	0002	5 .	
				6. Save Cancel

Picture 2.14: Definition of the custom numbering – Step 2,3,4,5,6 Multi Company

Company Details	Numbering	
Available modules:		
		Potentials
		Contacts
		Accounts
	•	
		Project
		Assets
		Save Cancel

Picture 2.15: Addition of module – Step 3.b)

3 How to use

This chapter is here just to notice that Multi Company 4 You is module 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 but original custom numbering
 - provide steps described in chapter 2 except chapter 2.5 Definition of the custom numbering
- 2. to change already defined custom numbering
 - provide same steps as defined in chapter 2.5, new custom numbering will be set
- 3. to add role for which custom numbering will be not applied
 - please refer to chapter 2.4, Picture 2.11 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 MultiCompany 4 You the PDF Maker was updated to support new module.

In case you are using PDF Maker for a longer time before you start using Multi Company 4 You 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 in the following picture:

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

Properties Other Informations Labels Product block Header / Footer Settings Sharing Company and User Information: Company information City Insert into template 2, Multi Company: City Insert into template Terms and Conditions: Please select City Insert into template	
Company and User Information: Company information City Insert into template 2. Multi Company: City Insert into template Terms and Conditions: Please select Company Name Street Insert into template	
Image: City Insert into template Terms and Conditions: Company Name Street	
Terms and Conditions: Please select Company Name Street City	
City	
Current date: Code Insert into template State	
Barcodes: Phone Insert Barcode into template	
Custom functions: Email Website Loop	
Body Header Footer Stamp Bank Name	
Ozdroj 3 □ 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	
Štýty → Formát → Font SWIFT Registration no. x² Image: State St	
scompany_names scompany_street s scompany_citys 1. 3.	

Picture 4.1: Edit template of PDF Maker

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

5 Deactivate/Reactivate

5.1 Deactivate

In case that some problem occurs with license key or in case you need to reinstall Multi Company 4 You you have to deactivate and reactivate license key. To deactivate license key please provide following steps:

1.	Click on	F			
2.	Click on	Deactivate license	button		
3.	Confirm	deactivation with	button Yes		
List of compan	ies				1
+ Add Company					
# Company Nan	пе	Email	Phone	Role	Actions
1 vtiger		ktosi@kdesi.tam	+91 9243602352	CEO	
2 2 com		email@kdesi.tam	222222	Sales Manager	
Multi Compar	ny > License	Picture 5.1	: Deactivate Multi	Company – Step 1	
Manage your Lic	ense Key:				
LICEISE KEY		License Key:	Reactivate license Deactivate license	ense 2.	
		Picture 5.2	: Deactivate Multi	Company – Step 2	
		Do You realy want to	o deactivate Your license key?	3. No Yes	
		Picture 5.3: Dec	activate license of	Multi Company Step 3	

After deactivation of license MultiCompany 4 You doesn't work at all and MultiCompany 4 You work area is not accessible either as you can see on Picture 5.4.

To reactivate license you have to provide following steps:

1. Click on Activate button 2. Insert licence key 3. Click on Save Multi Company > License Manage your License Key: License Key License Key: Activate Picture 5.4: Activate license of Multi Company – Step 1 Activate keykeykeykeykeykey

Picture 5.5: Activate license of Multi Company – Step 2,3

5.2 Reactivate

To reactivate license key please provide following step:

Click on Reactivate license
 Insert license key
 Click on Save
 Multi Company > License

Manage your License Key:

 Image your License Key:

</

Change log of Multi Company 4 You

• 24th June 2014: **600.01.01**

Change log of Manual for Multi Company 4 You

- 24th June 2014: manual is based on Multi Company 4 You version: **600.01.01**
 - first initiate version for vTiger 6.x