

# ITS **4** You

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## 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

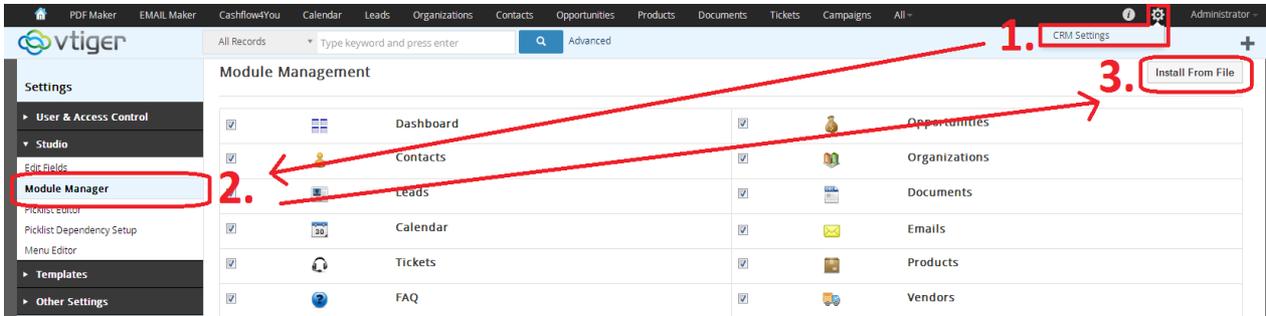
During installation it is necessary to exchange following information:

- 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

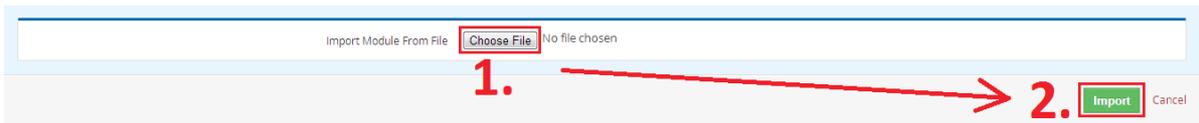
Please provide following steps in order to install Multi Company 4 You:

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.



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.



Picture 1.3: Installation of Multi Company – Step 3

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

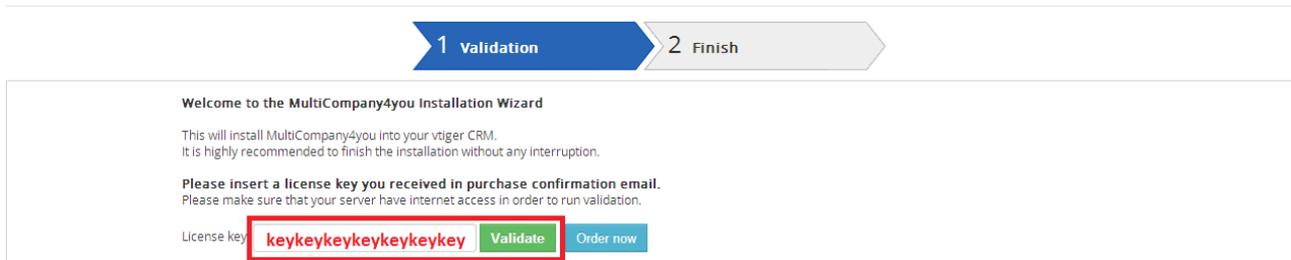


Picture 1.4: Installation of Multi Company – Step 4

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

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

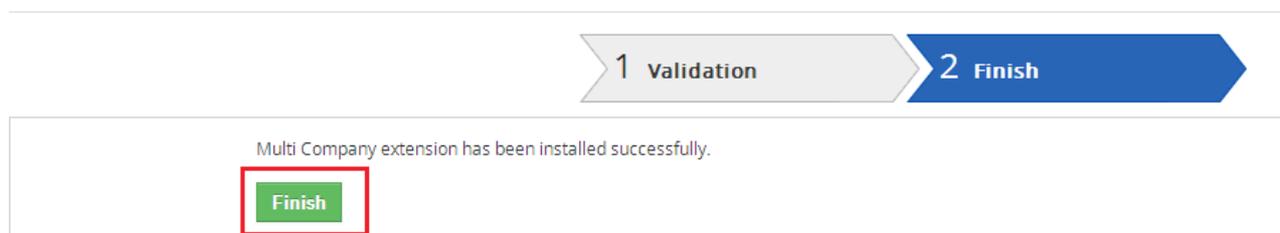
#### Multi Company installation



*Picture 1.5: Validation of Multi Company – Step 1*

2. Click on **Finish** to complete Validation.

#### Multi Company installation



*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.).

The screenshot shows the vtiger CRM settings interface. At the top, there is a navigation bar with various modules like Calendar, Leads, Organizations, etc. The 'CRM Settings' link is highlighted with a red box and labeled '1.'. On the left sidebar, the 'Multi Company' link is highlighted with a red box and labeled '2.'. The main content area shows a summary of settings with 21 Users, 21 Workflows, and 36 Modules. Below this, there are sections for 'Users', 'Module Manager', and 'Picklist Editor'. At the bottom, there is a 'List of companies' table with an '+ Add Company' button. The table contains two entries:

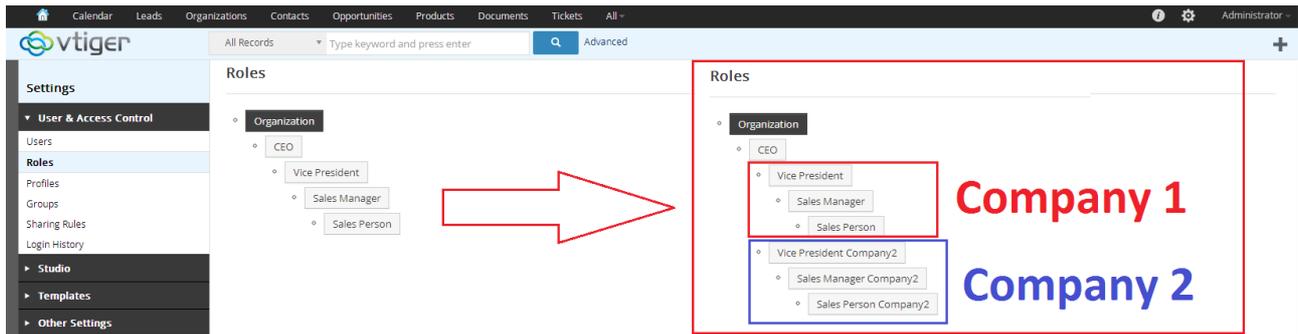
#	Company Name	Email	Phone	Role	Actions
1	Company 1	c1@its4you.sk	+91 9243602352	Vice President	
2	Company 2	c2@its4you.sk	222222	Vice President Company2	

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

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).

Sharing Rules

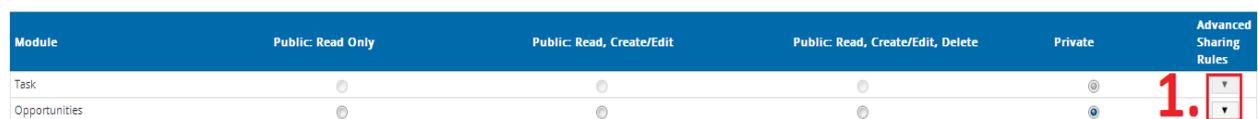
Module	Public: Read Only	Public: Read, Create/Edit	Public: Read, Create/Edit, Delete	Private	Advanced Sharing Rules
Task	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="button" value="v"/>
Opportunities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="button" value="v"/>
Organizations & Contacts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="button" value="v"/>
Leads	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="button" value="v"/>
Tickets	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="button" value="v"/>
Quotes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="button" value="v"/>
Purchase Order	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="button" value="v"/>
Sales Order	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="button" value="v"/>
Invoice	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="button" value="v"/>
Campaigns	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="button" value="v"/>
Documents	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="button" value="v"/>
Products	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="button" value="v"/>
Services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="button" value="v"/>
Service Contracts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="button" value="v"/>
Project Milestones	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="button" value="v"/>
Project Tasks	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="button" value="v"/>
Projects	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="button" value="v"/>
SMSNotifier	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="button" value="v"/>
Assets	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="button" value="v"/>
Comments	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="button" value="v"/>
Vendors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="button" value="v"/>

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  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  button

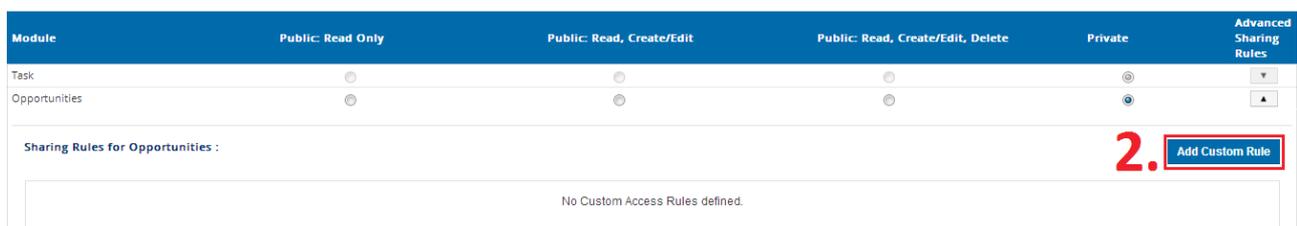
Sharing Rules



Module	Public: Read Only	Public: Read, Create/Edit	Public: Read, Create/Edit, Delete	Private	Advanced Sharing Rules
Task	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Opportunities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	 1.

Picture 2.4: Define custom rule – Step 1

Sharing Rules



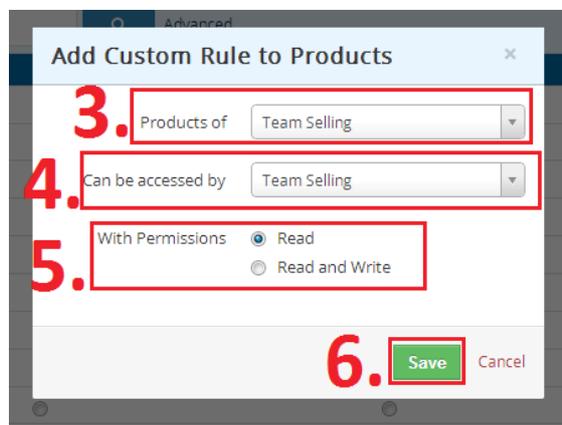
Module	Public: Read Only	Public: Read, Create/Edit	Public: Read, Create/Edit, Delete	Private	Advanced Sharing Rules
Task	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Opportunities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	

Sharing Rules for Opportunities :

No Custom Access Rules defined.

2. 

Picture 2.5: Define custom rule – Step 2



3.

4.

5.  Read  
 Read and Write

6.  Cancel

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

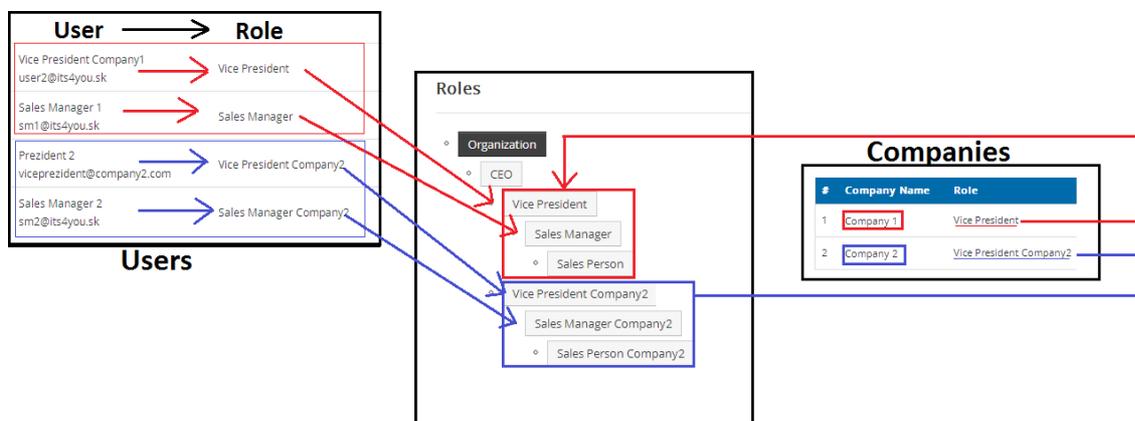
Or for detail information see: [https://wiki.vtiger.com/vtiger6/index.php/Sharing\\_Rules](https://wiki.vtiger.com/vtiger6/index.php/Sharing_Rules)



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

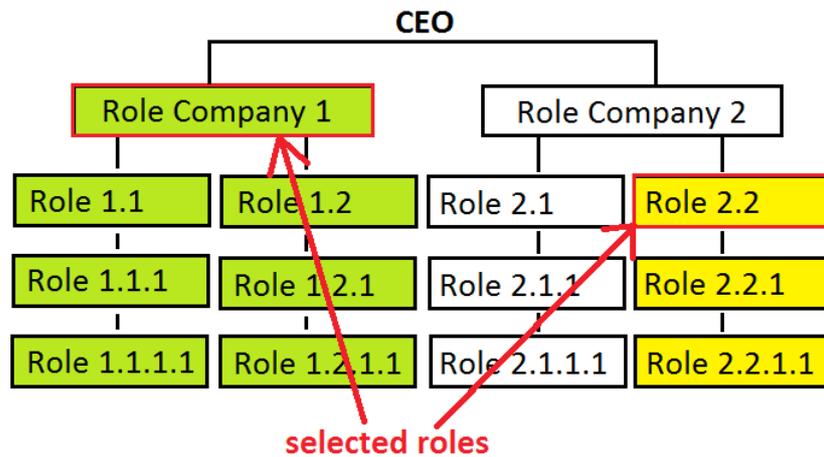
As you can see on Picture 2.9, you can find in company details also new field “Role”. It is mandatory field for correct working of the Multi Company 4 You module (Note: You are allowed to save new company without definition of the “Role”, but please don’t forget to define it before you start real work 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
2. Click on **Numbering** 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 

#	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 2.13: Definition of the custom numbering – Step 1

Multi Company 

Company Details **Numbering** **2.**

**Customize Record Numbering** Update Missing Record Sequence

Select module:  **3.**

Use Prefix:  Choose one... **4.**

Start Sequence\*:  **5.**

**6.**

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

Multi Company

Company Details **Numbering**

**Available modules:**

<input type="checkbox"/>	Potentials
<input checked="" type="checkbox"/>	Contacts
<input checked="" type="checkbox"/>	Accounts
•	
•	
•	
<input type="checkbox"/>	Project
<input type="checkbox"/>	Assets

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

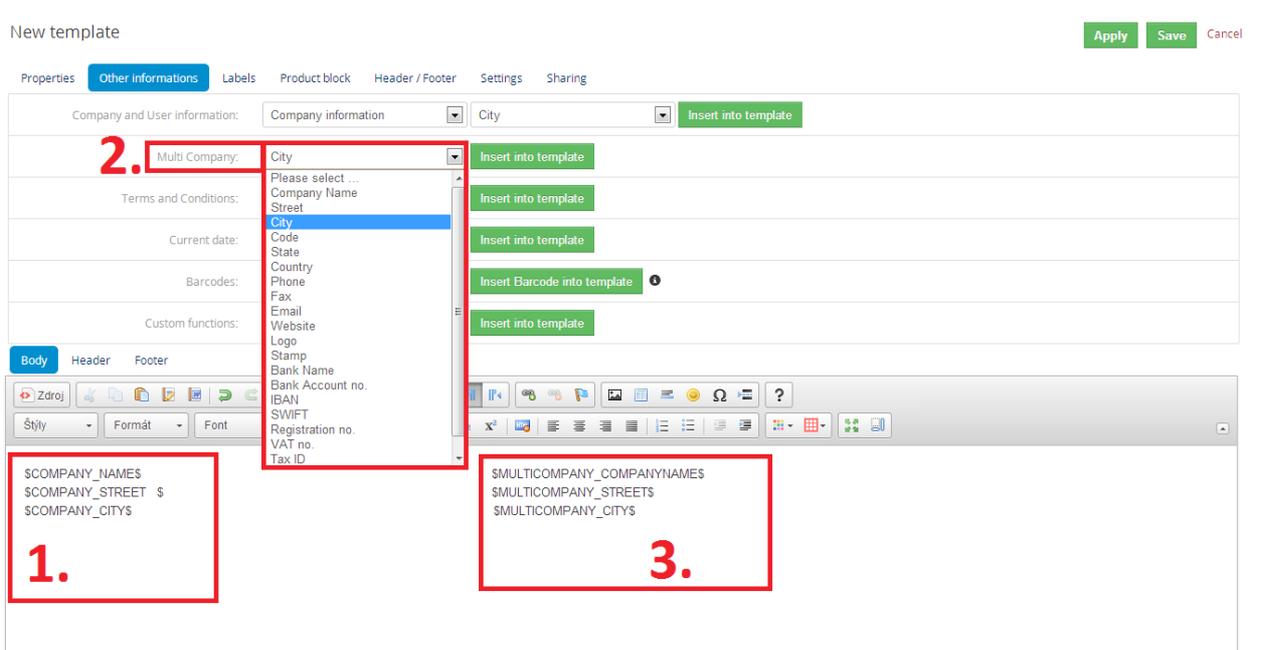
## 4 Additional features

### 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



Picture 4.1: Edit template of PDF Maker

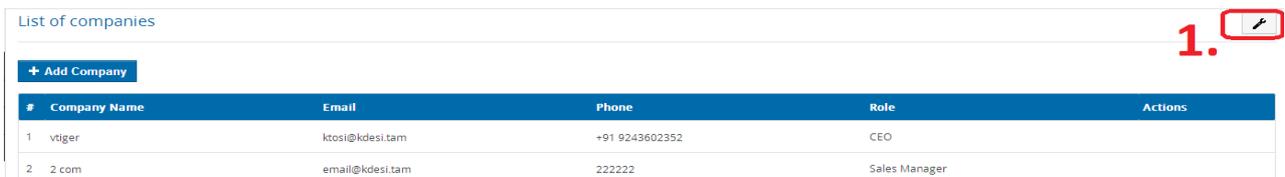
After above adaptation same PDF templates can be used within more companies and final PDF document will always use correct data.

## 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:

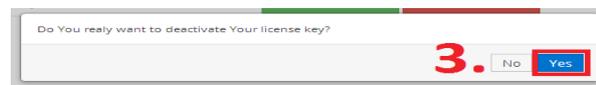
1. Click on 
2. Click on **Deactivate license** button
3. Confirm deactivation with button **Yes**



Picture 5.1: Deactivate Multi Company – Step 1



Picture 5.2: Deactivate Multi Company – Step 2



Picture 5.3: Deactivate license of Multi Company Step 3

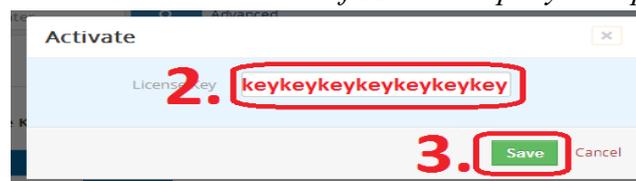
After deactivation of license MultiCompany 4 You doesn't work at all and MultiCompany 4 You work area is not accessible either as you can see on Picture 5.4.

To reactivate license you have to provide following steps:

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



Picture 5.4: Activate license of Multi Company – Step 1



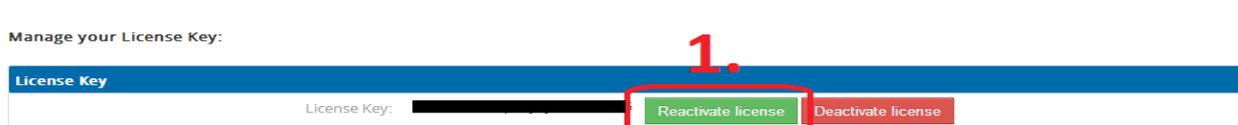
Picture 5.5: Activate license of Multi Company – Step 2,3

## 5.2 Reactivate

To reactivate license key please provide following step:

1. Click on **Reactivate license**
2. Insert license key
3. Click on **Save**

Multi Company > License



Picture 5.6: Reactivate license of Multi Company – Step 1



Picture 5.7: Reactivate license of Multi Company – Step 2,3

## Change log of Multi Company 4 You

- 24<sup>th</sup> June 2014: **600.01.01**

## Change log of Manual for Multi Company 4 You

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