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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



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

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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.

	Standard Modules	Custom Modules
		Import New
ConfigEditor		0 V 1
CronTasks		े 🗹 🗉
Import		0 R I
Integration		0 R I
MailManager		0 R 🗉
Mobile		0 R I
WSAPP		e 🖉 🖬
British English		0 2
DE Deutsch		0 7

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.

Settings > I Manage module b	Alodule Manager > Import ehavior inside vtiger CRM	
Select the Package File		
* File location:	Vliger module is packaged as a zip file.	
		Import Cancel

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.

avior inside vtiger CRM					
Businesscase					
odule Directory modules/Businesscase					
5.4.0					
Module : Businesscase Version : 2.1 Viger : 5.4.0 Author : 1.5-Solutions4You s.r.o - www.its4you.sk Supported browser : Internet Explorer 8 or higher, Mozilla Firefox 5.0 or higher LICENSE The Business Case License will be referred to as "The license" in the remainder of this text.	4 W +				
	avior inside vtiger CRM Businesscase modules/Businesscase 5.4.0 * Module : Businesscase * Module : Businesscase * Vrojer : 5.4.0 * Vrojer : 5.4.0 * Vrojer : 5.4.0 * Usinesscase : Internet Explorer 8 or Higher, Mozilla Firefox 5.0 or Higher * Supported browsers : Internet Explorer 8 or Higher, Mozilla Firefox 5.0 or Higher LICENSE LICENSE LICENSE LICENSE LICENSE Internet Support and License will be referred to as "The license" in the remainder of this text.				

Picture 1.3 Installation of Business Case – step 3

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

Settings > Module Manager > Import Manage module behavior inside vtiger CRM		
Importing Module		
Creating Module Businesscase STARTED Initializing module permissions DONE Updating tabdata file DONE Setting up sharing access options DONE Creating Module Businesscase DONE Added to meru Sales DONE Updating parent_tabdata file STARTED Updating parent_tabdata file DONE SQL: CREATE TABLE 'vitiger_businesscase' (`businesscase_to' af 'businesscase_from' date DEFAULT NULL, 'businesscase_to' date 'businesscase_from' date DEFAULT NULL, 'businesscase_to' date	nt(19) NOT NULL, `businesscase_name` varchar(100) DEFAULT e DEFAULT NULL, `account_id` varchar(100) DEFAULT NULL, `account_id` varchar(100) DEFAULT NULL, `account_id` varchar(100) DEFAULT 'businesscasencomesses varchar(100) DEFAULT NULL, `businesscasencomesses varchar(100) DEFAULT NULL, `account_id` varchar(100) DEFAULT NULL, `businesscasencomesses varchar(100) DEFAULT NULL, `businesscasencomesses varchar(100) DEFAULT NULL, `account_id` varchar(100) DEFAULT NULL, `businesscasencomesses varchar(100) DEFAULT 'businesses varchar(100) DEFAULT 'businesses varchar(100) DEFAULT 'businesses varchar(100) DEFAULT 'businesses varchar(100) DEFAULT	T NULL, `businesscase_no` varchar(100) DEFAULT *, contact_id` varchar(100) DEFAULT NULL, `businesscasestatus` dechecat' decimati25 30 DEFAULT NULL, `chusinest
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	:	:
Adding Link (DETAILVIEWBASIC - Add Vendors) DONE Setting relation with Vendors (ADD,SELECT) DONE Adding Link (DETALVIEWBASIC - Add Faq.) DONE Setting relation with Faq (ADD) DONE Adding Link (DETAILVIEWBASIC - Add Assets) DONE Setting relation with Assets (ADD,SELECT) DONE Setting relation with Assets (ADD,SELECT) DONE Invoking vitib_handler for module_postinstal DONE Intilaizing verserviews port DONE		
•		Finish

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.

installation >> Finish >> 2/2	
Your license key was successfully validated Click on the "Finish" button and You will be redirected to Business Case ListView.	
	Finish



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.



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).

e Tickets	Dashboard	More -
	Sales	Sup
946	Business Ca	se Ser
non	Invoice	Pro
anager	Quotes	bille
anager	Sales Order	Pto
e Din		Pilo
unter		FAG

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.

Search Search Click 4	Search for	In Bus	iness Case numb	er 💌 Se	arch Now			
Busine	ess Case	I J K	LM	N O P	Q	R	2	S T
		1	ilters : All 👻	Create Filter Edit Delete				
Delete Mass Edit								
Business Case number	Business Case Name	Organization	Contact	Business Case Status		Busine	ess Case	Progress
		No		e Found !				_
		No E	Business Cas	e Found !				_

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.

Sea	arch to Advanced Search	S	earch for	In	Business Case num	iber 💌 Search N	low			
A	A B C	D	E F G H	I J	K L M	N O P O	R S T U	VW	XY	
hov. Del	wing Records 1 - 3 of 3)			Filters : Al 💌 🤇	Create Filter Edit Delete				of 1 🥑
hov Del	wing Records 1 - 3 of 3 elete Mass Edit Business Case num	nber	Business Case Name	Organization	Filters : All 💌 (Create Filter Edit Delete Business Case Status	Business Case Progress	e Start Date	End Date	of 1 a
Shov Del	wing Records 1 - 3 of 3 Hete Mass Edit Business Case nur BC005	nber	Business Case Name vTiger in BC	Organization vtiger	Filters : All 💌 (Contact Linda Williams	Create Filter Edit Delete Business Case Status Initiated	Business Case Progress	Start Date	End Date 2013-11-18	of 1 Act edit
Shov Del	Normal Seconds 1 - 3 of 3 Neter Mass Edit Business Case num BC005 BC006	nber	Business Case Name vTiger in BC ListView Colors ITS4You	Organization vtiger demovtiger	Filters : All Contact Linda Williams Patricia Johnson	Create Filter Edit Delete Business Case Status Initiated In progress	Business Case Progress	Start Date 2012-10-11 2012-10-12	End Date 2013-11-18 2013-10-12	Act edit edit

Picture 3.1 ListView

Click on button 🐨 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.

d 1 day ago (01 Nov 2012) By Administra	ou - Editing Business Case Information tor		EditViev
Business Case Information			
Business Case Information	Save	Cancel	Basic info
*Business Case Name	Shopping Center ITS4You	Business Case number	BC002
Organization	IT-Solutions4You s.r.o. 🕞 🖉	Contact	Rastislav Hovee 🛛 🖶 📿
Start Date	2011-09-05	End Date	2013-10-31
Business Case Status	In progress	Business Case Priority	High
Business Case Progress	10 💌	Assigned To	User C Group Administrator
Expectations & Actuals			Expectation
Budget Cost: (€)	300,000	Expected Revenue: (€)	
Expected ROI (%) (%)	115.000		
Description			Description
Description	<h1> The reconst ITS4You_</h1>	ruction of the 2nd floor of the <span style="bi</td><td>ackground-color:#fff100;">Shopping Center	

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)

	More Information			Reca	lculate Edit	Duplicate Delete <		
						·		
V Business Case Information				Basi	c into	Create Business Case re		
Business Case Name	Shopping Center ITS	4You B	usiness Case number	BC002		records:		
Organization	IT-Solutions4You s.r.	D	Contact	Rastislav Hovee		Add Contact AC		
Start Date	2011-09-05		End Date	2013-10-31		Add Service		
Business Case Status	In progress	E	Business Case Priority	High		Add Purchase Order		
Business Case Progress	10		Assigned To	Administrator		Add Sales Order		
Created Time	2012-10-22 07:42:12		Modified Time	2012-11-02 17:22	2:26	Add Product		
						Add Ticket		
V Expectations & Actuals		Exp	ectation	ns & Ad	ctuals	Add Opportunity		
Budget Cost (4	300,000		Actual Cost (€)	116,000	ruun	Add Event		
Expected Revenue (4	0		Actual Revenue (€)	53,760		Add Task		
Expected ROI (%) 115.000		Actual ROI (%)	46.345		Add Service Contract		
Accepted Quotes (%)	Su	m of Sales Orders (€)	53,760		Add Project Test		
						Add Project		
				Decer	in the m	Add Campaign		
Tescription				Descr	iption	Add Invoice		
Descriptio	<h1> <span id="df</td><td>lview_Description"> The reconstru</h1>	uction of the 2nd floor o	f the <span style="bi</td><td>ackground-</td><td>Add Quote</td></tr><tr><td></td><td>color:#111100;">Shop	ping Center ITS4You. <td>an></td> <td></td> <td></td> <td>Add Price Book</td>	an>			Add Price Book
						Add Vendor		
					-	Citer Contractor		
Comments Information				Comr	nents	Add Asset		
Comments Information				Comr	nents	AddAsset		
Comments Information Add Comment Save or C Related modules	997		Relat	Comr ed Mo	ments dules	AddAsad		
Comments Information Add Comment See or C Related modules	Dar		Relat	Sh Comr ed Mo	ments dules	Add Asset		
Comments Information Add Comment Seven or C Related modules Contacts	ber		Relat	Show the second	ments dules	Add Asset		
Comments Information Add Comment Seven or C Related modules Contacts Showing Records 1 - 3 of 3	Bar	a, (c 1 of 1 o) (o	Relat	sh Comr	w: A T	Add Asset		
Comments Information Add Comment Related modules Contacts Showing Records 1 - 3 of 3 Let Name & Ent Name Test Name Test Name A		e) (] of 1) (e	Relat	Sheet Contexts	All Contact	Add Asset		
Comments Information Add Comment Seven or Co Related modules Contacts Showing Records 1 - 3 of 3 Last Name First Name Titl Horse Relation	Organization Name Tr.SolutionsYou as a	e ∈ t of1.e e Email	Relat	She Comr ed Mo Select Contacts	dules Add Contact pred To Action and Action and To Action and Action Action and Action and Action Action and Action Action and Action Ac	Add Asset		
Comments Information Add Comment Add Comment Sowing Records 1 - 3 of 3 Last Have First Have Ratialav Movementer Records 1 - 2 of 3 Last Add Records 1 - 3	p Organization Name IT-Solutions4You s r.o. Hisustebouer	e) (_] of 1) (e) Email Mouerneister@houstebouer.eu	Office Phone	Sheed Moo	Att Contact Att Contact Att Contact Pred To Action Istrator edit (del Horizontact)	Add Asset		
Comments Information Add Comment Add Comment Related modules Contacts Showing Records 1 - 3 of 3 Last Name First Name Tell Robert Rastislav Mauemeister Robert Zogel Andreas	Prganization Name IT-Solutions4You sr.o. Hisustebauer Baumaterial-XXL	e) (c 1 of 1) (e) Email Mouerneister@houslebouer.ou ziegel@bounderiel-od.eu	Relat	Shield Contests Select Contests assistant Assig asdasdisad Admin Admin	Add Contact pred To Action estrator edit (del istrator edit (del istrator edit (del	Add Asset		
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Comments Information Add Comment Add Comment Seven Contects Contects Showing Records 1 - 3 of 3 Last Name First Name Tell Nove Radialay Sowing Records 1 - 2 of 2 Showing Records 1 - 2 of 2	e Organization Name (T-Solutions4You s.r.o. Hisustebauer Baumateriol-XXL	e) (1 of 1) (e) Email Mouerneister@houstebouer.eu ziegel@boumterial-od.eu a) (1 of 1) (e)	Mile Phone +421-51-7732370 +421-55-77323701	Sheet Services	All Contact Add Sorvice Add Sorvice	Add Asset		
Comments Information Add Comment Related modules Contacts Showing Records 1 - 3 of 3 Last Name First Name Tell Nove Ratislav Mauerneister Robert Zogel Andres Showing Records 1 - 2 of 2 Service No	e Organization Name IT-Solutions-You s.r.o. Häuslebauer Baumsterist-XXL	e) c 1 of 1 a (e) Email Mouerneister@houslebouer.eu ziegel@bounaterial-od eu e) c 1 of 1 a (e) Commission Rate	Office Phone +421-51-7732370 +421-55-77323701 +421-56-77323701	Select Services	Att Service Action	Add Asset		
Comments Information Add Comment Add Comment Related modules Contects Showing Records 1 - 3 of 3 Last Name First Name Titl Nove Ratislav Mauerneister Robert Zegel Andreas Showing Records 1 - 2 of 2 Service Na Se		e (t of 1) e Email Mouerneister@houslebouer.cu ziege@boumaterial-od.eu e (t of 1) e Commission Rate 0.000	Office Phone +421-51-7732370 +421-55-77323701 +421-55-77323701 Ho of Unite 8.00	Sheed Moo Select Contacts assistant Assist asdasdaad Admin Admin Select Services Price e55.00	ext i dei	Add Asset		
	e Organization Name IT-Solutions4You s r.o. Houstebouer Baumaterial-XXI. Truction ng hours	e) (1 of 1) (e) Email Mourmeister@houslebouer.eu ziegel@boumterial-od.eu e) (1 of 1) (e) Commission Rate 0.000 0.	Relat •421-51-7732370 •421-51-77323701 •421-55-77323701 •421-55-77323701 •421-55-77323701 •421-55-77323701	Select Contacts Select Contacts Select Contacts Admin Admin Select Services Price Price Price Price	Add Service Action Acti	Add Asset		
Comments Information Add Comments Add Comment Seve or C Related modules Contacts Contacts Showing Records 1 - 3 of 3 Last Name First Name Tit Hove Rastislev Rastislev Rastislev Showing Records 1 - 2 of 2 Service No Servi	Ser	e) ∈ 1 of 1 ⇒ p Email Mouermeister@houslebouer.eu ziegel@bounaterial-od.eu e) ∈ 1 of 1 ⇒ (p Commission Rate 0.000 0.000	Relat Second State Second	Select Services	Att Service Att Se	Add Asset		

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.

d 1 day ago (01 Nov 2012) By Administrato	y		EditViev
Business Case Information			
	Save	Cancel	
Business Case Information			Basic inf
*Business Case Name	Shopping Center ITS4You	Business Case number	BC002
Organization	IT-Solutions4You s.r.o. 🖉	Contact	Rastislav Hovee 🛛 🖶 📿
Start Date	2011-09-05	End Date	2013-10-31
Business Case Status	In progress	Business Case Priority	High 💌
Business Case Progress	10 💌	Assigned To	€ User
Expectations & Actuals			Expectation
Budget Cost: (€)	300,000	Expected Revenue: (€)	
Expected ROI (%) (%)	115.000		
Description			Descriptio
Description	<h1> The reconst ITS4You </h1>	ruction of the 2nd floor of the <span style="ba</td><td>ackground-color:#ffff00;">Shopping Center	

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.

BC002] - Busi	ness Case Infor	mation Updated 1 da	iy ago (02 Nov 2012	2) By Administrator			
Business Case	e Information	More Information			_	Recalculate Edit	Duplicate Delete <
Business Cas	se Information						
							Create Business Case rela records:
	s & Actuals						Add Organization
							Add Invoice
							Add Contact
Description							Add Purchase Order
							Add Service
Comments	Information				Action	links & 🖯	Add Product
					"Add" h	uttone	Add Ticket
Related module	15				Chuu L		Add Document
							Add Opportunity
▼ Organization	15						Add Lead
Showing Records 1	1 - 3 of 3	a) (4, 1	of 1 ()		Select Organizations	Add Organization	Add Event
Organization Nam	ne 💌 🛛 Bill	ing City Website		Phone	Assigned	To Action	Add Service Contract
Baumaterial-XXL	Mic	halovce www.ba	umaterial-xxl.eu	+421-55-773	23701 Administrat	or edit del	Add Project Milestone
Häuslebauer	Koš	ice www.ha	iuslebauer.eu	+421-51-773	211110 Administrat	or edit del	Add Project Task
IT-Solutions4You s.	r.o. Pres	šov www.its	4you.sk/en/	+421-51-773	2370 Administrat	or edit del	Add Project
V Invoice					1.		Add Campaign
Showing Records 1	1 - 1 of 1		e) e 1 of	1.0.0	Select Invoid	e Add Invoice	Add Price Book
Invoice No	Subject	Sales Order	Status	Total	Assigned To	Action	Add Vendor
IN∀6	1st quarter	1st quarter	Paid	€53,760.000	Administrator	edit del	Add FaQ
reating New Inv	oice					— Invo	ice modu
Invoice Info	rmation						
				·····			
				Save Can	cel		
Invoice Info	ormation			2.			
	*Subject	2nd quarter			Sales Order	2nd quarter	🖶 🖉
	Customer No				Invoice No	AUTO GEN ON SAVE	a)
	Contact Name		* 2		Invoice Date	2012-11-04	
		-	-			G/// 48 - 34/	
							BC modu
invoice			4) (4) 1 of	1.0.0 3	Select Invoid	e Add Invoice	
Showing Records	1 - 2 of 2			v .			
Showing Records	1 - 2 of 2 Subject	Sales Order	Status	Total	Assigned To	Action	

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.

business Case Information business Case Information <th>Business Case Information Expectations & Actuals Invoice Voice Voice Voice Voice Search How A B C D E F O H I J K L M N O P O R S T U V W X Y Z A B C D E F O H I J K L M N O P O R S T U V W X Y Z A B C D E F O H I J K L M N O P O R S T U V W X Y Z Add Drockel Add Drockel Add Drockel NV1 Viger invoice No NV2 zoho jmv7841 Showing Records 1.3 of 3 NV4 V10 V10 <th>Business Case Informati</th><th>on More Information</th><th></th><th></th><th>R</th><th>ecalculate Edit</th><th>Duplicate</th><th>Delete</th><th></th></th>	Business Case Information Expectations & Actuals Invoice Voice Voice Voice Voice Search How A B C D E F O H I J K L M N O P O R S T U V W X Y Z A B C D E F O H I J K L M N O P O R S T U V W X Y Z A B C D E F O H I J K L M N O P O R S T U V W X Y Z Add Drockel Add Drockel Add Drockel NV1 Viger invoice No NV2 zoho jmv7841 Showing Records 1.3 of 3 NV4 V10 V10 <th>Business Case Informati</th> <th>on More Information</th> <th></th> <th></th> <th>R</th> <th>ecalculate Edit</th> <th>Duplicate</th> <th>Delete</th> <th></th>	Business Case Informati	on More Information			R	ecalculate Edit	Duplicate	Delete	
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		nvoice No Subje	sales Order	Status	Total	Assigned To	Action	Add Ven	uor	

Picture 4.3 Fill up business case

5 Settings

The Business Case module Settings can be initiated from ListView using button 4 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
 - o 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).

🎇 Man	age module behavior inside vtiger CRM				
	Layout Editor Designing and Modifying the layout in each of the modules	1.4	Field Formulas Add custom equations to custom fields		Tooltip Management Manage the tooltip information from here
	Workflow List Available Workflows		Arrange Relatedlist Arrange sequence of related modules	8	Business Case License Manage your Business Case License Key
8	Upgrade Upgrade Businesscase		Click t	o star	t

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.

Related List	Information Type	Up/Down	Active
Contacts	Basic Information 💌		
Products	Basic Information	e	
Trouble Tickets	More Information	\$	
Documents	More Information 💌	\$	\mathbf{x}
Opportunities	Basic Information	∳ ♦	
Organizations	Basic Information 💌	송 🗣	\mathbf{x}
Organizations	Basic Information 💌	♦ ₹	

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.

			Related List			Information	fype	Up/I	Down	Active
			Contacts			Basic Information	n 💌			
			Services			Basic Informatio	n 💌	ŧ	4	
			Purchase Order		Í	More Informatio	n 💌	-		
			Sales Order			More Informatio				
02] - Busine Itoday (01 Nov 2	ess Case More Inf 1012) By Administrator	formation	/	/	/				Det	tailVi
02] - Busine Itoday (01 Nov 2	ess Case More Inf 1012) By Administrator	formation							Det	tailVie
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02] - Busine Itoday (01 Nov 2 Business Ca	ess Case More Inf 012) By Administrator se Information	formation More Information							Det	tailVie
02] - Busine Itoday (01 Nov 2 Business Ca	ess Case More Inf 1012) By Administrator se Information	formation More Information							Det	tailVie
02] - Busine Itoday (01 Nov 2 Business Ca V Purchase Showing Record	ess Case More Inf 1012) By Administrator se Information	formation More Information		af1.b. (B		50	ect Purch	ase Orde		tailVie
02] - Busine today (01 Nov 2 Business Ca V Purchase Showing Recor Order No	e Order rds 1 - 2 of 2 Subject	formation More Information	e d 1 c Vendor Hame	of1 > (a)	cking Humber	See Total	ect Purch	ase Orde Assigne	Def ar Add	d Purchase Or Action
D2] - Busine today (01 Nov 2 Business Ca Showing Record Order No PO6	ess Case More Inf 1012) By Administrator se Information e Order rds 1 - 2 of 2 Subject Basic reconstruction	formation More Information	e e f o o Vendor Name Mary	of1) (e)	cking Number	Total #50,000.000	ect Purch	ase Orde Assigne Administra	Add a To ator	d Purchase Or Action edit del
D2] - Busine today (01 Nov 2 Business Ca Purchase Showing Recor Order No PO6 PO7	ess Case More Inf 1012) By Administrator as Information e Order rds 1 - 2 of 2 Subject Basic reconstruction Basic reconstruction	formation More Information	a) d 1 a Vendor Hame Mary Mary	of 1 +) (B)	cking Humber	Total 650,000,000 656,000,000	ect Purch	<mark>ase Orde</mark> Assigne Administre	ar Add d To ttor	d Purchase Or Action edit del edit del
D2] - Busine Itoday (01 Nov 2 Business Ca Purchase Showing Recor Order No PO6 PO7	ess Case More Inf 1012) By Administrator se Information e Order rds 1 - 2 of 2 Subject Basic reconstruction Basic reconstruction Basic reconstruction	formation More Information	e) d 1 o Vendor Name Mary Mary	off () (e) Tree	cking Humber	Total 650,000.000 656,000.000	ect Purch	<mark>ase Orde</mark> Assigne Administra Administra	Add d To dtor	d Purchase Or Action edt del
02] - Busint Itoday (01 Nov 2 Business Ca Purchase Showing Recor Order No PO6 PO7 Sales Or	ess Case More Inf 1012) By Administrator se Information e Order rds 1 - 2 of 2 Subject Basic reconstruction Basic reconstruction der	formation More Information	e d T o Vendor Name Mary Mary	off () () Trac	cking Humber	Total eso,000.000 eso,000.000	ect Purch	<mark>ase Orde</mark> Administre Administre	Add d To dtor	d Purchase Or Action edit del edit del
02] - Busini today (01 Nov 2 Bushess Ca Showing Recor Order No PO6 PO7 Sales Or Showing Recor	ess Case More Inf 1012) By Administrator se Information e Order rds 1 - 2 of 2 Subject Basic reconstruction Basic reconstruction der rds 1 - 1 of 1	formation More Information	e d T endor Name Mary Mary	of1 () (e) Training () (f) (f) (f) (f) (f) (f) (f) (f) (f)	cking Humber	50000000 10141 1050,000,000 1056,000,000	ect Purch	ase Orde Assigned Administre Administre ct Sales	Add a To ttor ttor	d Purchase Or Action edit del edit del

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 <u>info@its4you.sk</u> or ask your vtiger support centre.

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

v Invoice							
Showing Re	cords 1 - 2 of 2		e) e 1	of 1 🕑 🕑		Select Invoice	Add Invoice
Invoice No	Subject	Sales Order	Excise Duty	Status	Total	Assigned To	Action
INV6	1 st quarter	vtiger user pasks 88	8 0.000	Paid	€53,761.000	Administrator	edit del
INV10	2nd quarter	2nd quarter	0.000	AutoCreated	€56,000.000	Administrator	edit del
v Invoice			/				
Showing Re	cords 1 - 2 of 2			of1 (i) (ii)		Select Invoice	Add Invoice
Invoice No	Purchase	Order Statu	s Subje	ect Total	As	signed To	Action
INV6	PO_006	Paid	1 st qu	Jarter €53,7	61.000 Ad	ministrator	edit del
155/4.0	PO 012	AutoC	reated 2nd a	uarter 656 0	00.000	minictrator	a dikt dat



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).

 Layout Editor	-	Field Formulas		Tooltip Management
Designing and Modifying the layout in each of the modules	and channe	Add custom equations to custom fields		Manage the tooltip information from here
Workflow List		Arrange Relatedlist		Business Case License
Available Workflows	C.	Arrange sequence of related modules	ter a	Manage your Business Case License Key

Picture 5.7 Initiate upgrade of Business Case module

In the next window please browse the package for upgrade and click on button [Upgrade].

Ma Ma	nage module	behavior inside vi	tiger CRM			
	_		-		•••••	
elect the f	Package Fil	e				
File locati	ion:	[Browse	
		vtiger module is	packaged as a zip file	e.		

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.

-	Settings > Module Manager > Upgrade
R	Manage module behavior inside vtiger CRM
Upgra	de Failure
Canno	t upgrade! Installed Version 540.2.0 matches Package Version

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.

Business Case Information		Click to recalculat	C Recalculate Ed
Business Case Information			
Expectations & Actuals	pectations	Act	uals
Budget Cost (€)	300,000	Actual Cost (€)	116,000
Expected Revenue (€)	450,000	Actual Revenue (€)	53,760
Expected ROL(%)	115.000	Actual ROI (%)	94 621
Expected ((o)		1 Hotalaritor(70)	e near

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 \rightarrow 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 \rightarrow loss; 100 means no profit; values higher than 100 \rightarrow 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).

Related m	odules		Busin	ess C	ase m	odule
Opport	unities	Require using b	ement: quote wa outton [Add Quot	s create	9	
V Quotes		in BC r	nodule (see cha	oter 4.2)		
Showing Rec	ords 1 - 1 of 1		(1) of 1 (1) (1)		Select Quotes	Add Quote
Quote No QUO15	Subject vtiger 11 user packs	Quote Stage Opportun Created	nity Name Organization Na samplevtiger	nme ¥ Total €963.(Assigned To 000 Administrator	Action edit del
Sales 0	rder					
Quote Informa	tion More Information	Information Updated today (08 Nor	/ 2012) By Administrator	Mod	ule Qu	lote
		Use "Genera	ate Sales Order"		Actions	
💎 Quote Info	rmation	if the sales o	rder is saved it		Generate In	woice
	Guote No GUO15	is automatic	ally added into B		Generate S	iales Order
			D			
V Quotes			Busin	ess C	ase mo	oaul
howing Rec	ords 1 - 1 of 1	a	(1 of 1) ()		Select Quotes	Add Quote
uote No	Subject	Quote Stage Opportu	ity Name Organization Na	me Total	Assigned To	Action
0015	vtiger 11 user packs	Accepted	samplevtiger	€963.0	000 Administrator	edit del
Sales 0	rder					
Showing Reco	ords 1 - 1 of 1	@ @ 1	of 1 🕑 🕑	Select S	ales Order Add	Sales Order
Order No	Subject 🔻	Organization Name	Quote Name	Total	Assigned To	Action
6028	vtiger 11 user packs	samplevtiger	vtiger 11 user packs	€963.000	Administrator	edit del
028] vtiger	11 user packs - Sales Or	der Information Updated today (08 Nov 2012) By Administrator			
Sales Order In	formation More Inform	ation	DOIN	ule S	ales	
		Use "Create	Invoice";		Actions	
Sales Orde	er Information Subject vtiger 11	IT the new in	voice is saved it		Creste Invo	xice
	Customer No	is automatic		<u>Y</u>		
Sales 0	rder		Busin	ess C	ase m	odul
Showing Reco	ords 1 - 1 of 1	@ @ 1	of1) ()	Select Se	ales Order Add	Sales Order
Order No	Subject 🔻	Organization Name	Quote Name	Total	Assigned To	Action
6028	vtiger 11 user packs	samplevtiger	vtiger 11 user packs	€963.000	Administrator	edit del
🛡 Inunian						
. Inource			e la cata e e		Select Inunice	Add Invoice
Showing Rec	ords 1 - 1 of 1					
Showing Reco	ords 1 - 1 of 1	() Sales Order	Excise Duty Statue	Total	Assigned To	Action

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.

1	Layout Editor	Cont Cont	Field Formulas	Tooltip M	lanagement
	Designing and Modifying the each of the modules	layout in	Add custom equations to custon fields	Manage there	ne toottip information from
	Workflow List		Arrange Relatedlist	Business	s Case License
	Available Workflows	8	Arrange sequence of related	Manage y	our Business Case
			modules	License K	ey
	Upgrade				
CS.					
	Upgrade Businesscase				4
	Upgrade Businesscase				1
Mo Man	Upgrade Businesscase	siness Case > Bus	siness Case License		1
Mc Man	Upgrade Businesscase odule Manager > Bus age your Business Case Licens License Key	siness Case > Bu: se Key	siness Case License	Houte Description	1
Man	Upgrade Businesscase	siness Case > Bu: te Key BBENCICI (See 4000	siness Case License	Invate	1
Man Man	Upgrade Businesscase	siness Case > Bu: te Key	Siness Case License	tivate Desctivate	1
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E Ma	Upgrade Busnesscase	e Key Business Case > Business Cas	siness Case License	tine Desctivate	1

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 > ⁶ 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.

e			Import New
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ense Key	Activate	ctivate Deactivate	
			[Scroll to To
ish >> 2/2			
	ager > Business Case > ess Case License Key ense Key	ager > Business Case > Business Case License ess Case License Key ense Key Activate Rea	ager > Business Case > Business Case License ess Case License Key ense Key Activate Reactivate Deactivate ish >> 2/2

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.

Comments Information				Show : All
escriptions Templates				
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The reconstruction of	the 2nd floor of th	e Shopping Cent	er ITS4You.	

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.

owing Records 1 -	2 of 2			Filt	ters : All 💌 Cre	ate Filter Edit Delete				List	Vie	W
Delete Mass	Edit											
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BC002	5	Shopping Cente	r ITS4You	IT-Solutions4You su	o. Rastislav Hove	e In progress		10		2011-09-05 2	013-10-31	edit
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Picture 6.6 ListView Colors 4You in BC module