

Document:	My World View Manual
Description:	Administration and User Guide for installing and using My World View. A vtiger 7 extension module combining multiple modules list views on a single page.
Revision:	2



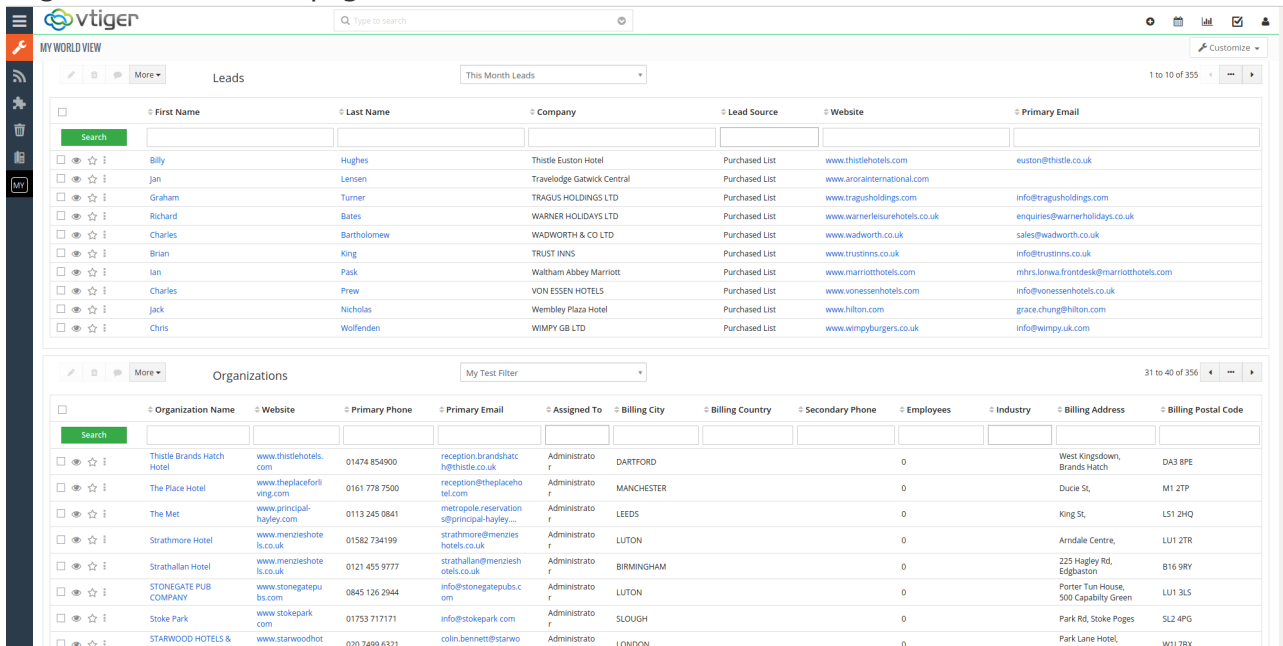
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Introduction

My World View is an Extension module for the Open Source version of vtiger from Libertus Solutions. It allows a user to create their own customised view of the lists of up to 5 separate vtiger modules on one page.



The screenshot shows the 'MY WORLD VIEW' interface in vtiger. It features two main sections: 'Leads' and 'Organizations'. Each section has a search bar, a filter dropdown, and a table of data. The 'Leads' section is filtered by 'This Month Leads' and shows 10 results. The 'Organizations' section is filtered by 'My Test Filter' and shows 10 results.

First Name	Last Name	Company	Lead Source	Website	Primary Email
Billy	Hughes	Thistle Euston Hotel	Purchased List	www.thistlehotels.com	euston@thistle.co.uk
Jan	Lensen	Travelodge Gatwick Central	Purchased List	www.arorainternational.com	
Graham	Turner	TRAGUS HOLDINGS LTD	Purchased List	www.tragus Holdings.com	info@tragusholdings.com
Richard	Bates	WARNER HOLIDAYS LTD	Purchased List	www.warnerleisurehotels.co.uk	enquiries@warnerholidays.co.uk
Charles	Bartholomew	WADWORTH & CO LTD	Purchased List	www.wadworth.co.uk	sales@wadworth.co.uk
Brian	King	TRUST INNS	Purchased List	www.trustinns.co.uk	info@trustinns.com
Ian	Pask	Waltham Abbey Marriott	Purchased List	www.marriotthotels.com	mhrs.lonwla.frontdesk@marriotthotels.com
Charles	Frew	VON ESSEN HOTELS	Purchased List	www.vonessenhotels.com	info@vonessenhotels.co.uk
Jack	Nicholas	Wembley Plaza Hotel	Purchased List	www.hilton.com	grace.chung@hilton.com
Chris	Woffenden	WIMPGY GB LTD	Purchased List	www.wimpyburgers.co.uk	info@wimpy.co.uk

Organization Name	Website	Primary Phone	Primary Email	Assigned To	Billing City	Billing Country	Secondary Phone	Employees	Industry	Billing Address	Billing Postal Code
Thistle Brands Hatch Hotel	www.thistlehotels.com	01474 854900	reception.brandshatch@thistle.co.uk	Administrator	DARTFORD			0		West Kingsdown, Brands Hatch	DA3 8FE
The Place Hotel	www.theplaceforliving.com	0161 778 7500	reception@theplacehotel.com	Administrator	MANCHESTER			0		Ducle 5L	M1 2TP
The Met	www.principal-hayley.com	0113 245 0841	metropole.reservation@principal-hayley.com	Administrator	LEEDS			0		King St,	LS1 2HQ
Strathmore Hotel	www.menzieshotels.co.uk	01582 734199	strathmore@menzieshotels.co.uk	Administrator	LUTON			0		Arndale Centre,	LU1 2TR
Strathallan Hotel	www.menzieshotels.co.uk	0121 455 9777	strathallan@menzieshotels.co.uk	Administrator	BIRMINGHAM			0		225 Hagley Rd, Edgbaston	B16 9BY
STONEGATE PUB COMPANY	www.stonegatepubs.com	0845 126 2944	info@stonegatepubs.com	Administrator	LUTON			0		Porter Run House, 500 Capability Green	LU1 3LS
Stoke Park	www.stokepark.com	01753 717171	info@stokepark.com	Administrator	SLOUGH			0		Park Rd, Stoke Poges	SL2 4PG
STARWOOD HOTELS & RESORTS	www.starwoodhotels.com	020 7499 6321	colin.bennett@starwoodhotels.com	Administrator	LONDON			0		Park Lane Hotel, ...	W11 7BX

Examples of how it might be useful largely depend on a users' role in the business. For example:

- *Technical Support staff might want to view their Trouble Tickets, Assets, Service Contracts and Contacts on a single page. They can select any permitted filter to be the default for each module and they can order the display of each module however they wish.*
- *A Salesperson might want to see their Leads, Opportunities, Quotes, Organisations and Contacts on a single page.*
- *Senior Management may want to view Opportunities, Sales Orders, Invoices, Purchase orders & Trouble Tickets.*

Even non-standard custom entity modules are supported so if, for example your business was selling Energy then you might want to view Energy Contracts, Meters (Commercial), Meters (Domestic) and your Organisations and Contacts.

You can view the same module more than once if you wish – this would typically be where you want to view, for example, Trouble Tickets that are Urgent and with a high Priority (In the top section) and then another list below it showing Tickets which are less severe or urgent.



Administration Guide

This section is primarily intended for the administrators of the vtiger CRM system but other users might find the content interesting or useful.

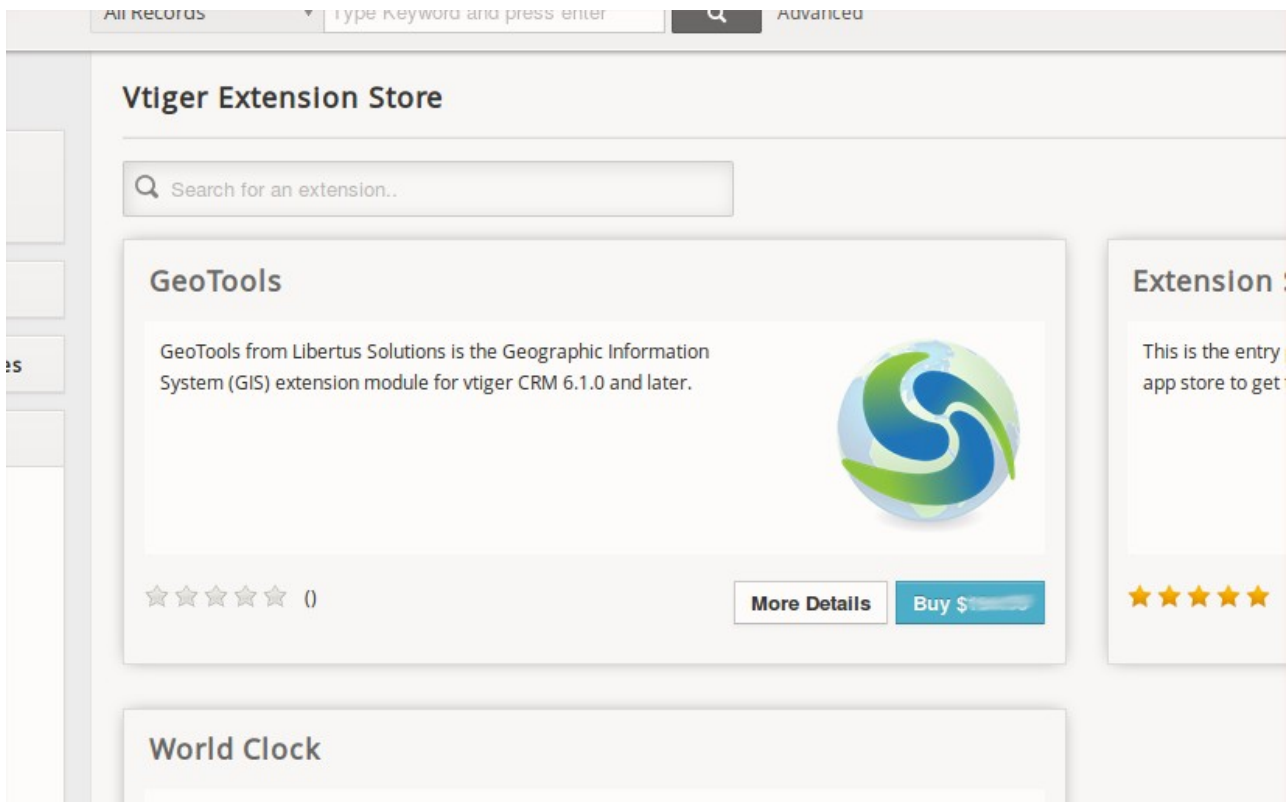
Minimum Requirements

My World View requires a properly installed vtiger 7 Open Source system from a minimum version of 7.2.0.

My World View installation

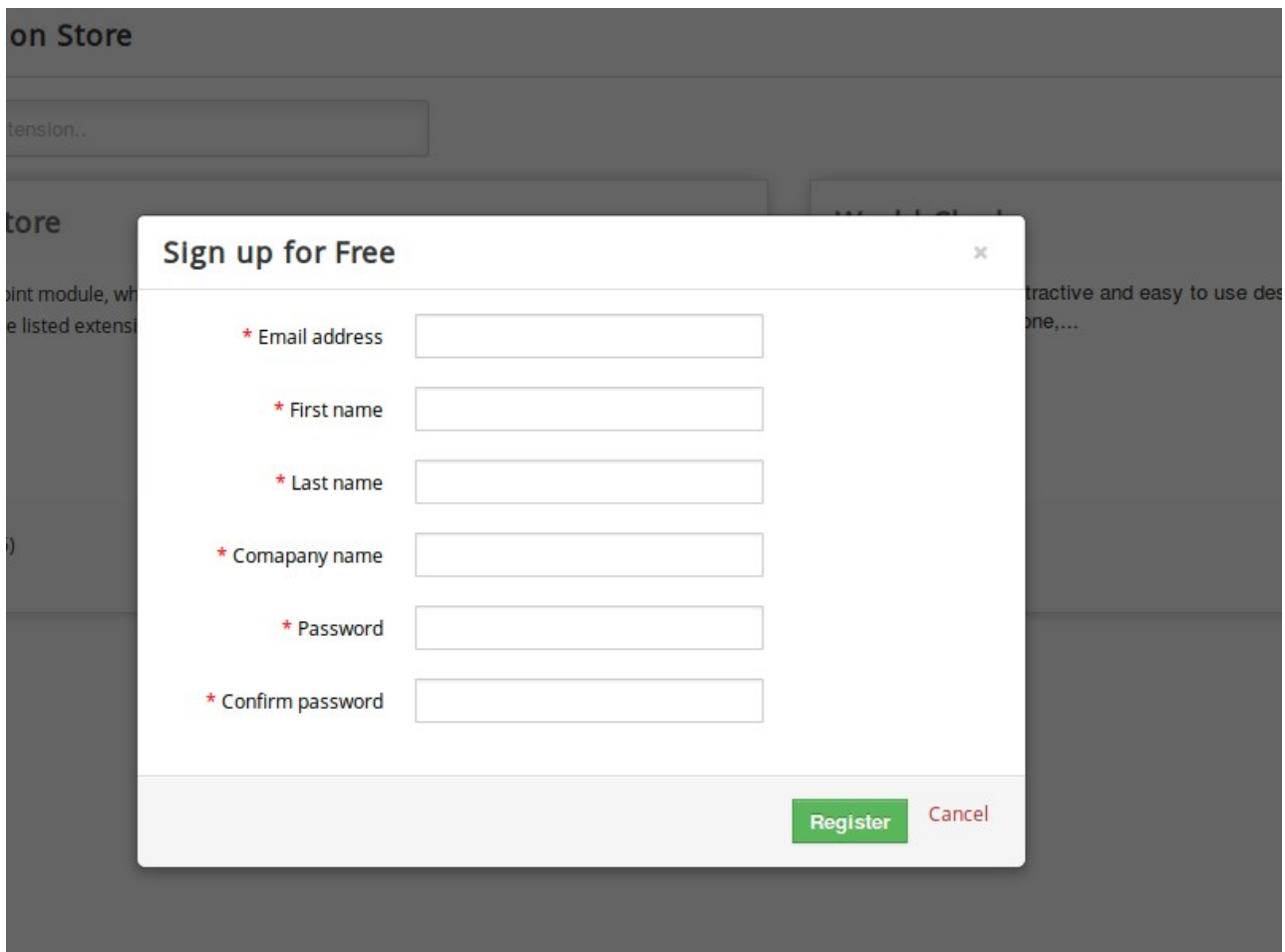
The My World View module is installed via the **Extension Store** which is an application within vtiger itself. This ensures that the version of My World View installed has been approved and tested by the vtiger team. The Extension Store also informs the administrator when updates are available, and enables easy upgrading, for any installed modules.

To install My World View navigate to the CRM Settings area and click the button on the left column called "Extension Store". This will display the various optional extension modules that are currently available in the vtiger Marketplace¹. The extension modules in the Marketplace have been approved and tested by vtiger before being allowed to be installed by end users.



1 <https://marketplace.vtiger.com>

If this is the first time you have visited the Extension Store you will need to register a new user...

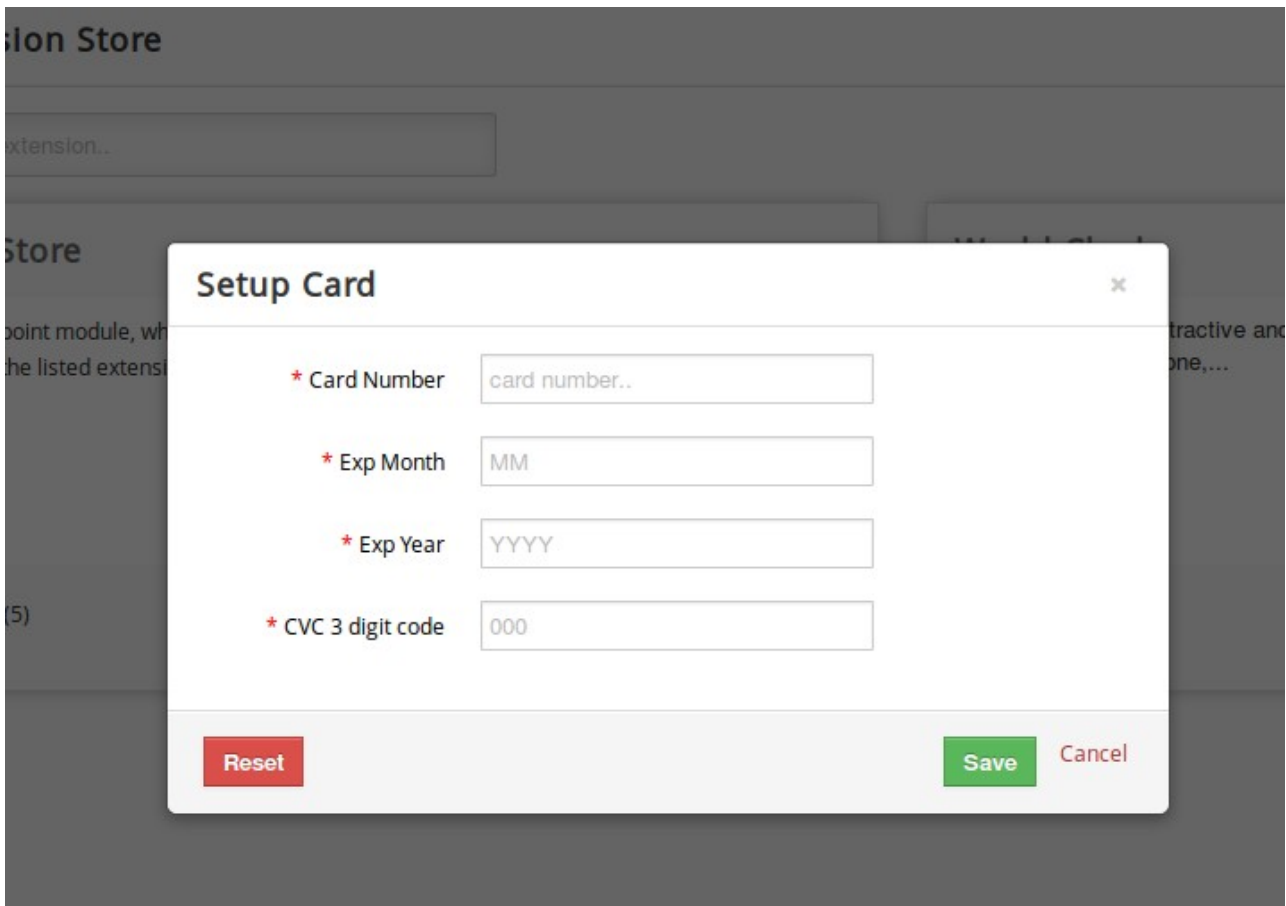


The image shows a screenshot of a web application interface. At the top left, the text "on Store" is visible. Below it, there is a search bar containing the text "tension..". The main content area is titled "tore". A modal window titled "Sign up for Free" is centered on the screen. The modal contains the following fields, each with a red asterisk indicating a required field:

- * Email address
- * First name
- * Last name
- * Comapany name
- * Password
- * Confirm password

At the bottom right of the modal, there are two buttons: a green "Register" button and a red "Cancel" button. The background of the page is dimmed, showing some text like "int module, wh", "e listed extensi", "tractive and easy to use des", and "one,...".

and you may also need to supply a credit card to allow the purchase of any non-free extension modules.



ion Store

extension..

Store

point module, wh

the listed extensi

tractive and

one,...

(5)

Setup Card

* Card Number

* Exp Month

* Exp Year

* CVC 3 digit code

Reset **Save** Cancel

Once you have provided the necessary information you can either browse or search for the My World View module. Once found click on the "More Details" button to view more information about the module. If you wish to install My World View you should pay the requested amount via your credit card and then you will be able to install the module simply by clicking on the green "Install" button.

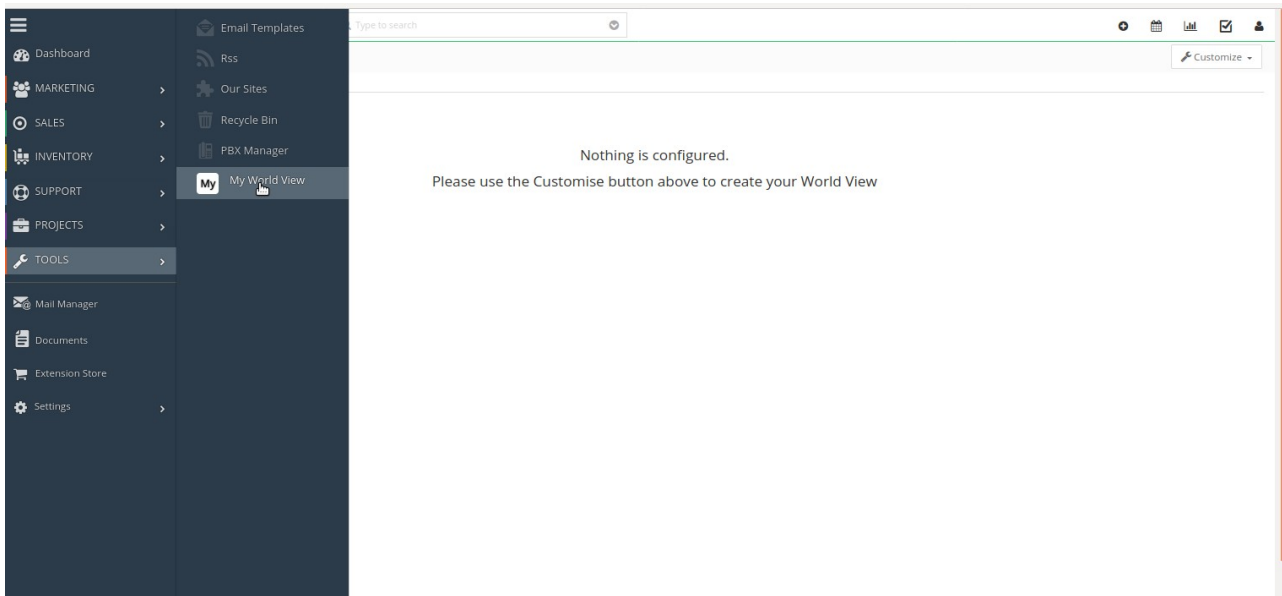


My World View Settings

My World View has no custom settings or administrative configuration requirements.

Configuration

Although there isn't any administrative configuration to do, once installed, the administrator(s) should to familiarise themselves with the way **My World View** is accessible and customisable to vtiger users because it is a little different from other vtiger modules.

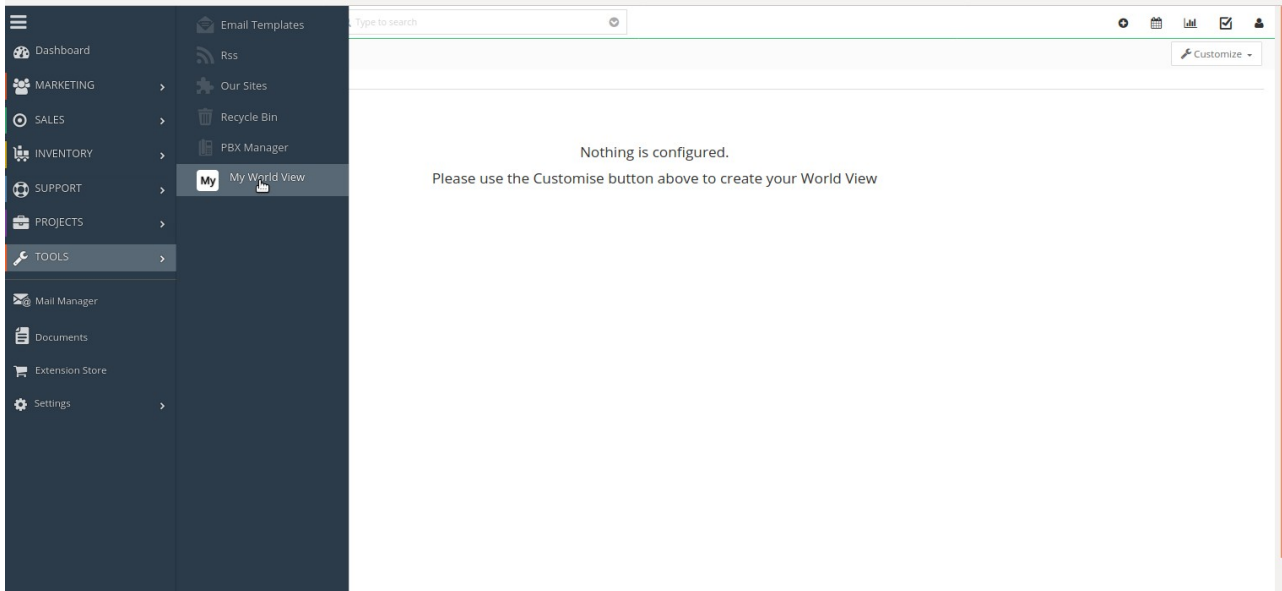


When a user clicks on the “My World View” option in the Tools menu they will see a page with a message informing them they need to create their own World View. ***This is their view only. It is only visible to them and each user must configure and manage their own World View individually.***

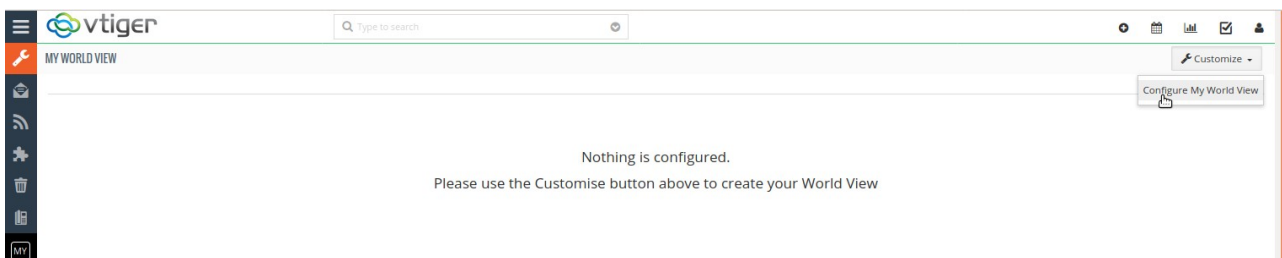
User Guide

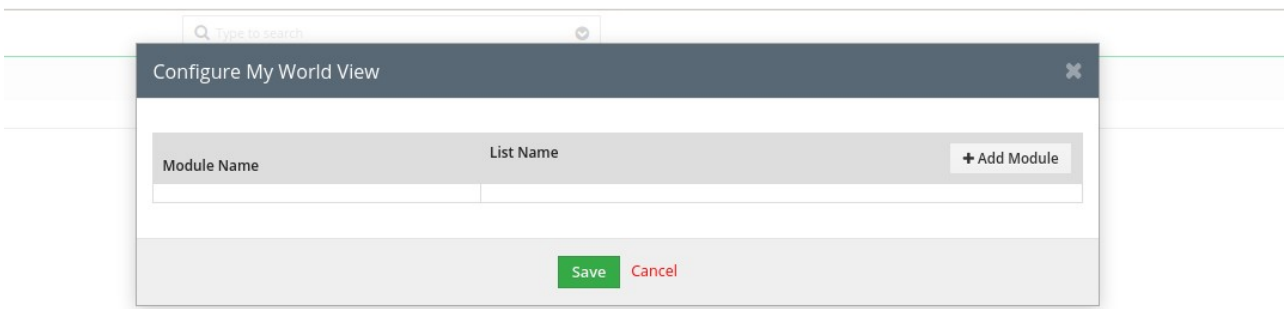
Using My World View

Creating your own My World View is very straightforward.



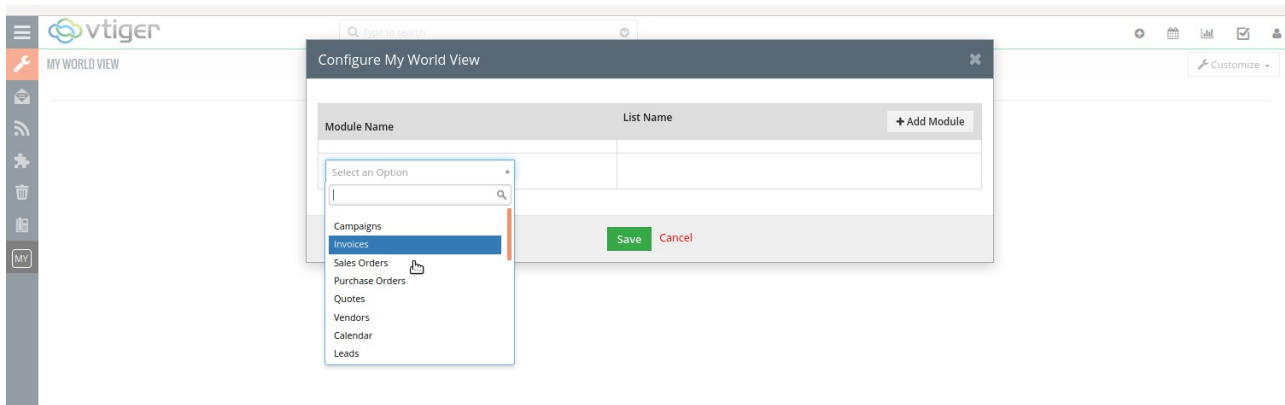
From the Tools menu, click on “My World View”. You should see the page above. Initially every user has nothing configured. It is for you to create and control your own view. To do this, click on the Button which says “Customise” at the top right of the screen, then click on the drop down option which says Configure My World View.



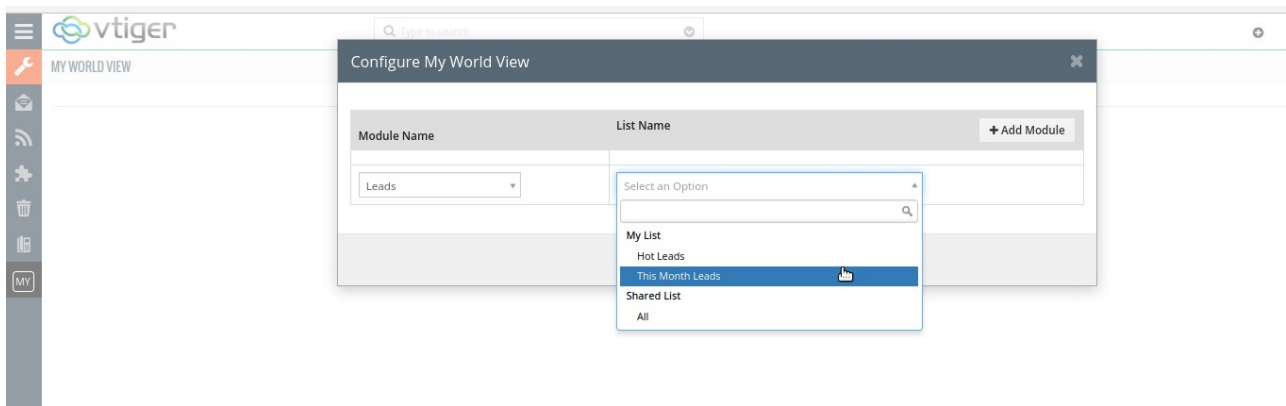


A window appears on the screen with a single action button at the top right "Add Module".

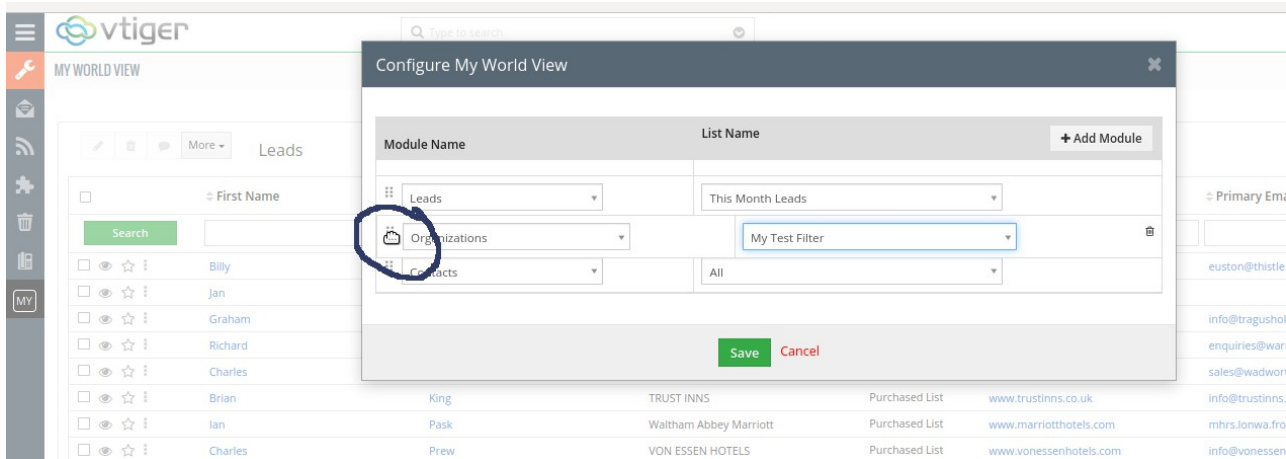
Clicking this button adds a drop down menu in the left column which contains all your permitted modules. Select one you want to use:



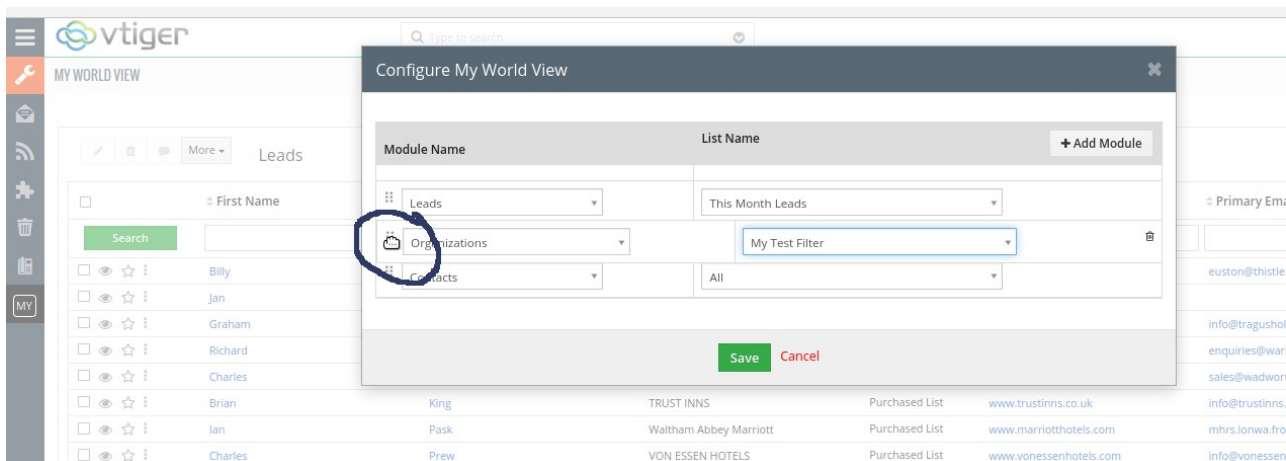
Once a module is selected another drop down module now appears in the right column which contains all your permitted filters for the module selected.



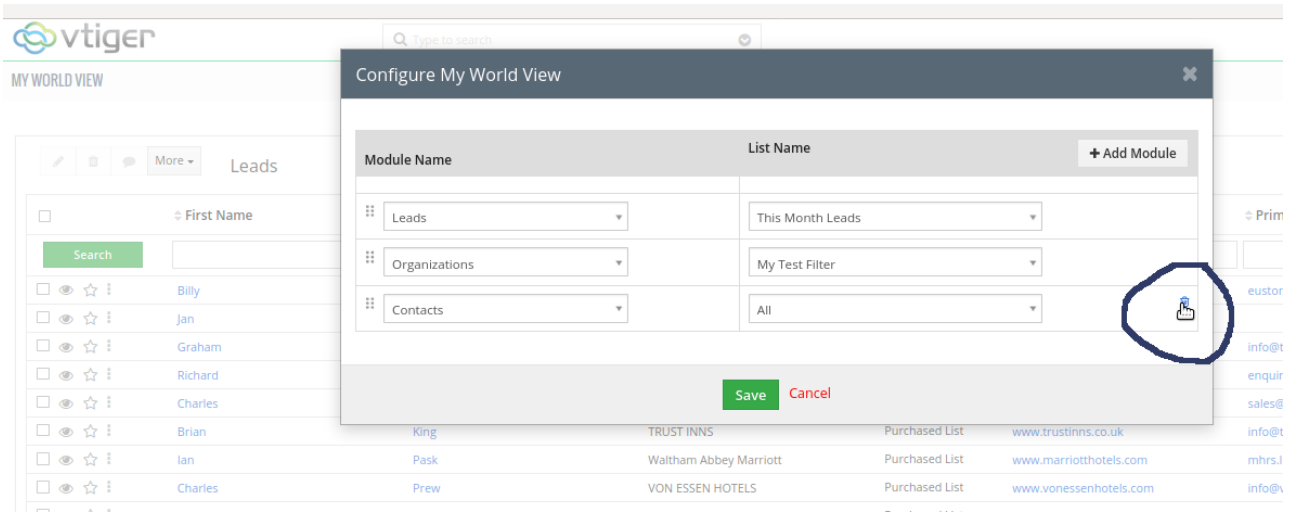
Once you have selected a filter, you can click on the green Save button to store this configuration in the database. You can add multiple modules at the same time if you wish, before clicking on the Save button. You can add up to 5 modules in My World View.



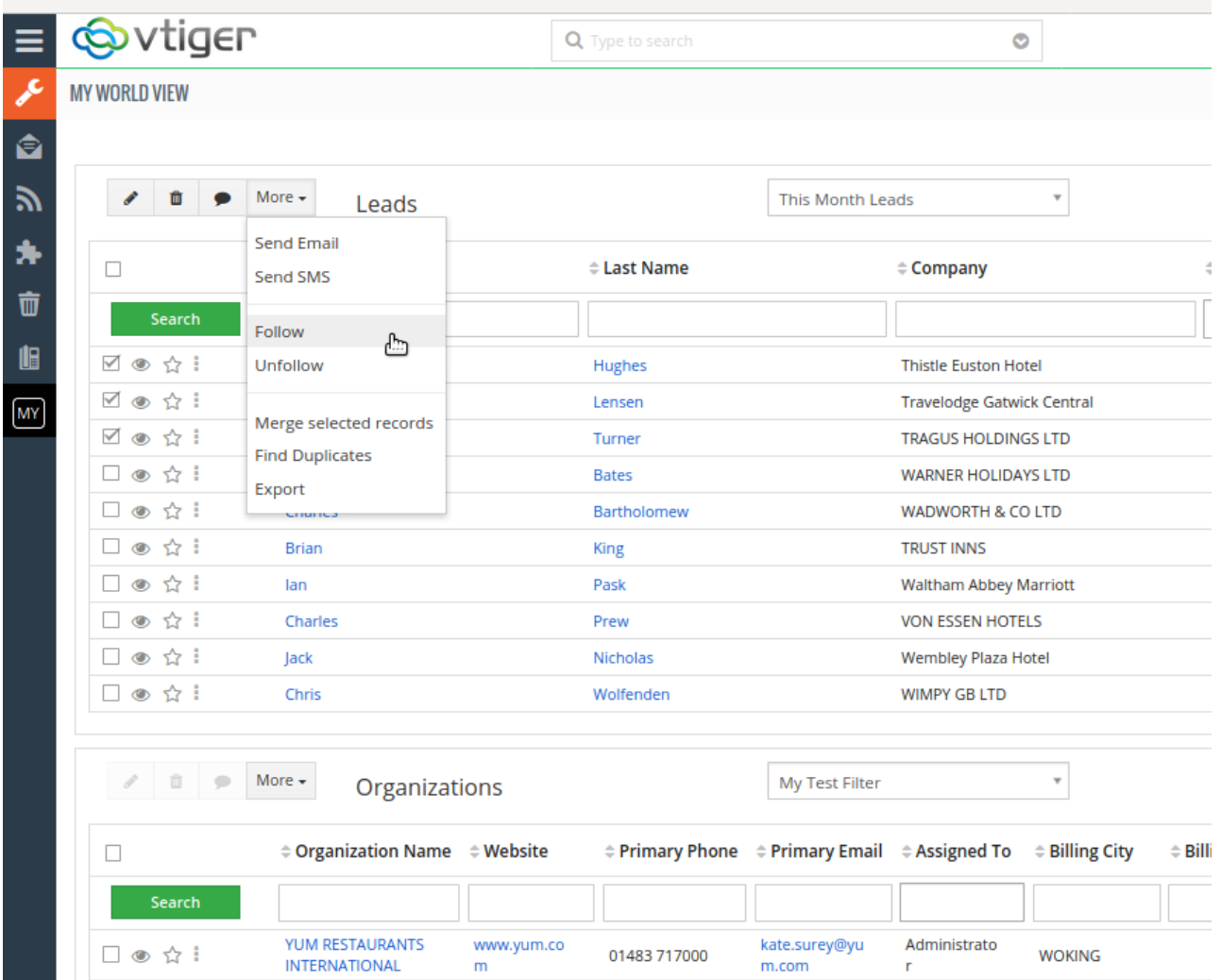
Once you have several modules configured, you can re-order them if you like by using the drag handle on the far left of each row. The order shown in the Configure My World View window, is the same order each list will be shown on the main page.



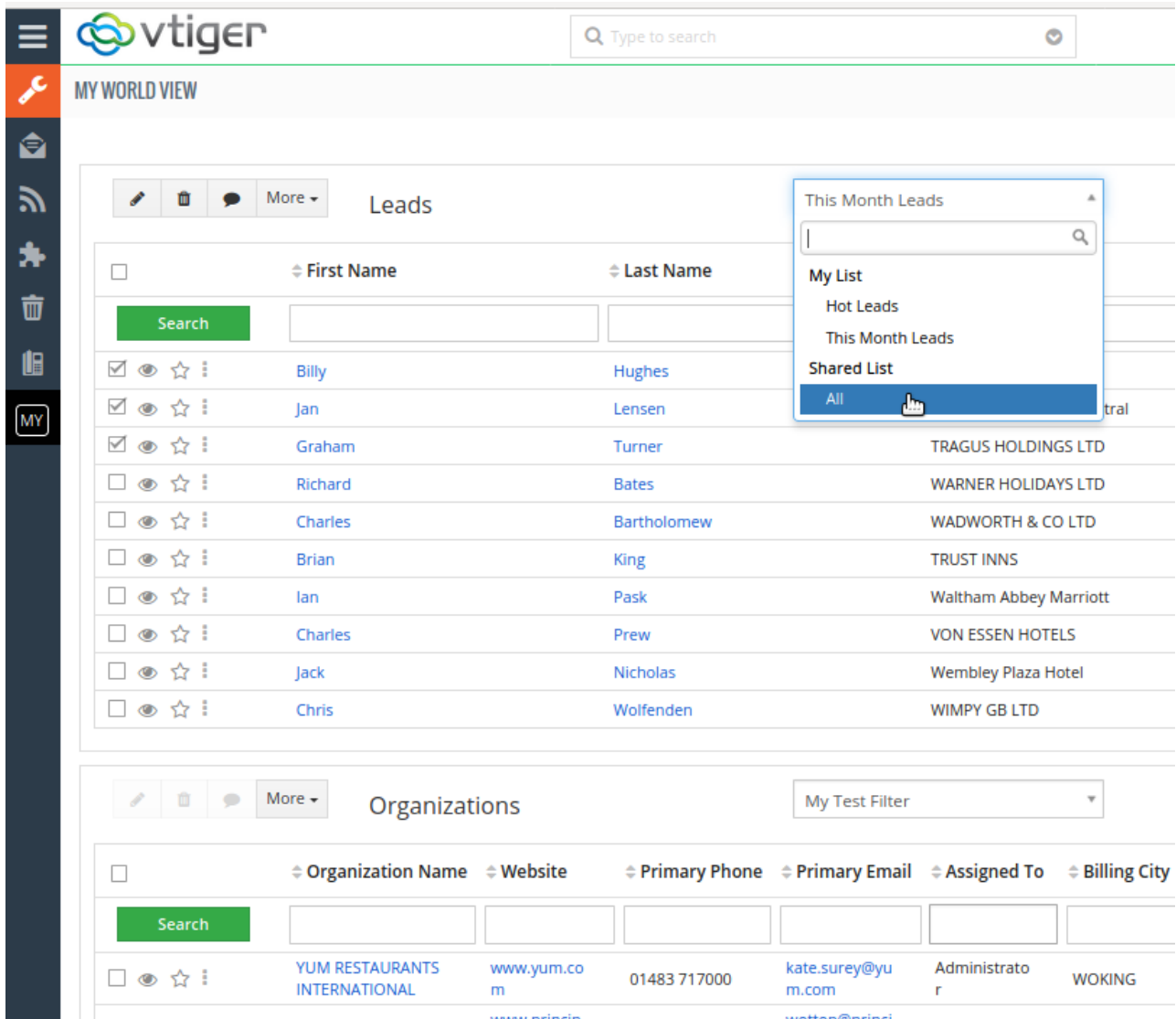
A module can be removed completely by clicking on the Trash Can icon which appears on the far right of each row.



Most of the features supported in a standard vtiger List View are supported for each module within your World View screen.



You can change the filter dynamically simply by using the drop down option above each list.

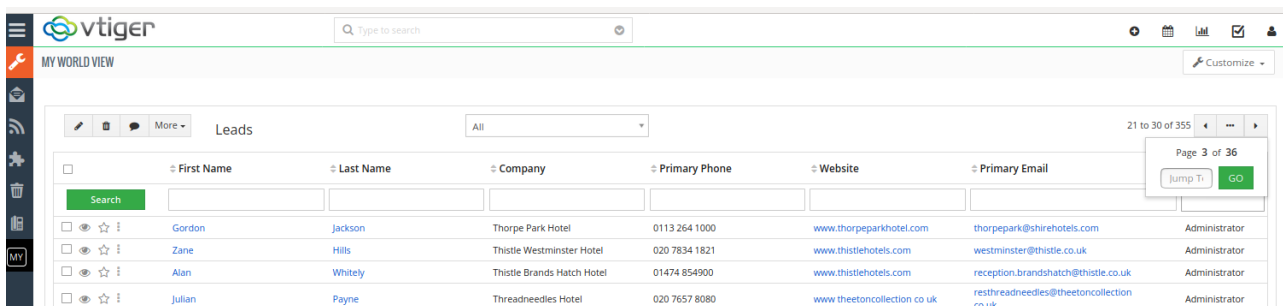


The screenshot shows the vtiger interface with two main sections: 'Leads' and 'Organizations'. The 'Leads' section has a filter dropdown menu open, showing options: 'This Month Leads', 'My List', 'Hot Leads', 'This Month Leads', 'Shared List', and 'All'. The 'Organizations' section has a filter dropdown menu set to 'My Test Filter'.

	First Name	Last Name	
<input type="checkbox"/>			
<input type="checkbox"/>	Billy	Hughes	
<input type="checkbox"/>	Jan	Lensen	
<input type="checkbox"/>	Graham	Turner	TRAGUS HOLDINGS LTD
<input type="checkbox"/>	Richard	Bates	WARNER HOLIDAYS LTD
<input type="checkbox"/>	Charles	Bartholomew	WADWORTH & CO LTD
<input type="checkbox"/>	Brian	King	TRUST INNS
<input type="checkbox"/>	Ian	Pask	Waltham Abbey Marriott
<input type="checkbox"/>	Charles	Prew	VON ESSEN HOTELS
<input type="checkbox"/>	Jack	Nicholas	Wembley Plaza Hotel
<input type="checkbox"/>	Chris	Wolfenden	WIMPY GB LTD

	Organization Name	Website	Primary Phone	Primary Email	Assigned To	Billing City
<input type="checkbox"/>						
<input type="checkbox"/>	YUM RESTAURANTS INTERNATIONAL	www.yum.com	01483 717000	kate.surey@yum.com	Administrator	WOKING

You can also use the standard pagination options to move between selections. Note that My World View displays a maximum of 10 rows per page per module.



The screenshot shows the 'Leads' list with pagination options. The list is filtered to 'All' and shows 21 to 30 of 355 items. The current page is 3 of 36. The pagination controls include 'Jump To' and 'GO' buttons.

	First Name	Last Name	Company	Primary Phone	Website	Primary Email	
<input type="checkbox"/>	Gordon	Jackson	Thorpe Park Hotel	0113 264 1000	www.thorpeparkhotel.com	thorpepark@shirehotels.com	Administrator
<input type="checkbox"/>	Zane	Hills	Thistle Westminster Hotel	020 7834 1821	www.thistlehotels.com	westminster@thistle.co.uk	Administrator
<input type="checkbox"/>	Alan	Whiteley	Thistle Brands Hatch Hotel	01474 854900	www.thistlehotels.com	reception.brands Hatch@thistle.co.uk	Administrator
<input type="checkbox"/>	Julian	Payne	Threadneedles Hotel	020 7657 8080	www.theetoncollection.co.uk	resthreadneedles@theetoncollection.co.uk	Administrator

When you click on a row in a list, or click on a hyperlink within a field on a list, the record will open in ***new tab in your web browser*** so your World View screen stays as it is and specific records you want to view are always displayed in separate browser tabs. This is a bit like using the middle mouse button or right clicking and selecting “Open in new tab”

You can go back to the Configure My World customisation window at any time to re-order or change which modules and filters you want to see in your World View.

Information about My World View

My World View came from an idea after Libertus developed **Vlastic Search**¹ – another extension module for vtiger that provides an extremely fast and comprehensive global search function. As part of that work Libertus created a view which had multiple List View results on a single page. We thought this kind of layout might be a good idea for a stand-alone module.

We do hope you like it.

1 <https://marketplace.vtiger.com/extensions?id=448>