Multi Tenant Features

For

vTiger Open Source

Version 1.0

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OVERVIEW

This document covers Multi-Tenant or SaaS CRM implementation features built using vTiger version 7.x.

GOALS

1. Deliver document for customer to understand overall multitenant architecture.

ABOUT CRMTiger

We are Technology Consulting company with expertise on Enterprise Softwares offering Development, Integration, Business Process Management and Implementation with Training.

With the growing Team of 60+ we have built our expertise in Industry specific solutions. We help Enterprises and Entrepreneurs to stay ahead in their markets by enabling their business with right technology.

Our well defined processes and proactive approach helped us delivering on schedule with best time and cost combination to our clients.

Our team consists professionals with rock solid experience on Analysis, Designing, PHP, CRM, MicroSoft technologies and QA.

We passionately enjoy helping

Startups and MSMEs

to Market leaders and Large Corporates

in making them *Tech Enabled*

OUR ASSOCIATIONS

- ★ Trusted provider in Open Source CRM Market.
- ★ Active member of vTiger and SugarCRM Forum

ACHIEVEMENTS

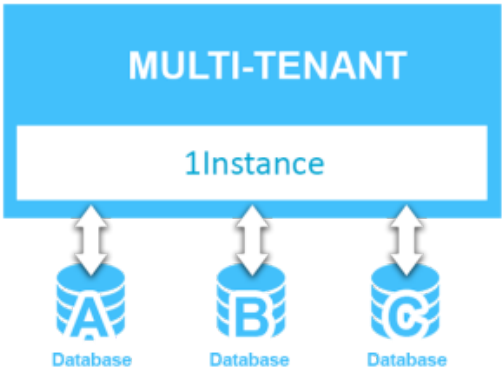
- ★ Successfully completed 50+ Software project
- ★ Best Supplier recognition for CRM Implementation from an American (US) corporate.
- ★ Successfully implementation of Scrum methodology for quality software development

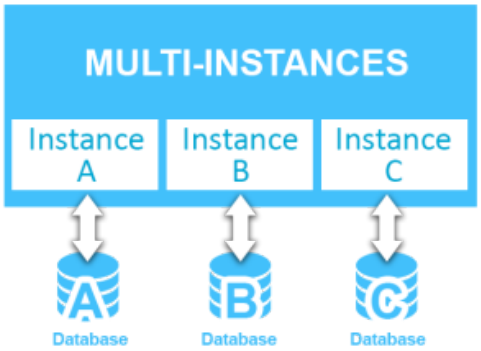
ACRONYMS AND DEFINITIONS

- BRD - **B**usiness **R**equirement **D**ocuments
- SRS - **S**oftware **R**equirements **S**pecifications
- TSD - **T**echnical **S**pecifications **D**ocument
- TBD - **T**o **B**e **D**iscussed
- PMP - **P**roject **M**anagement **P**lan
- WFD - **W**ire**F**rames **D**ocument
- CRUD - **C**reate, **R**ead, **U**pdate and **D**elete

Multitenant Architecture :

CRMTiger offers 2 flavour of multi tenancy. Each one has same features except distribution of application.





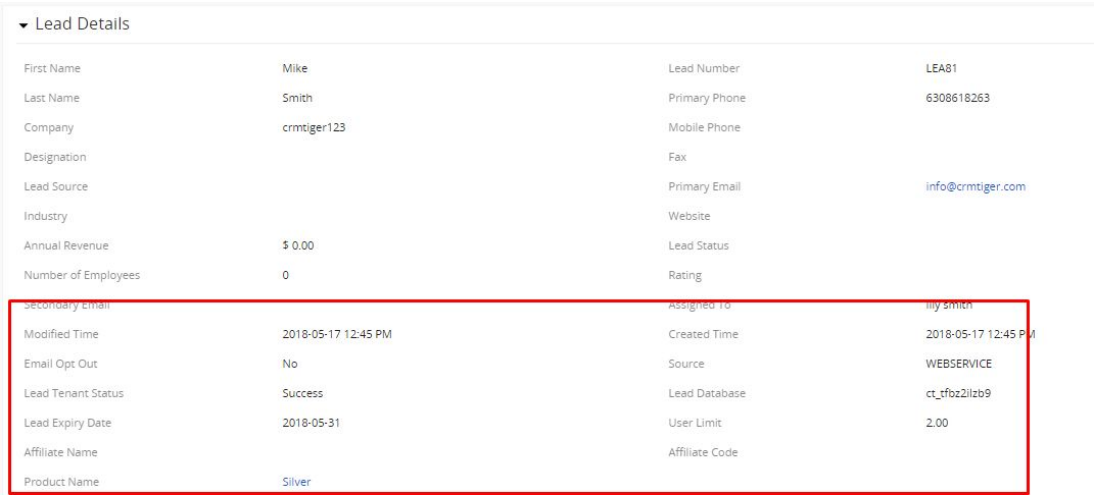
Multi Instance Vs Multi Tenant

	Multi Tenant	Multi Instance
1	Single Application Source Multiple Database	Multiple Application Source Multiple Database
2	Single UI and database for each instance	Separate UI and database for each instance
3	Same extension management for each instance. means if we import extension for one instance available for all instance	Separate extension management for each instance
4	Customization required condition to check as Application source code is same for each tenant	Easy customization in each tenant if each customer has their own requirement

Features :

Master CRM (Super Admin Panel) :

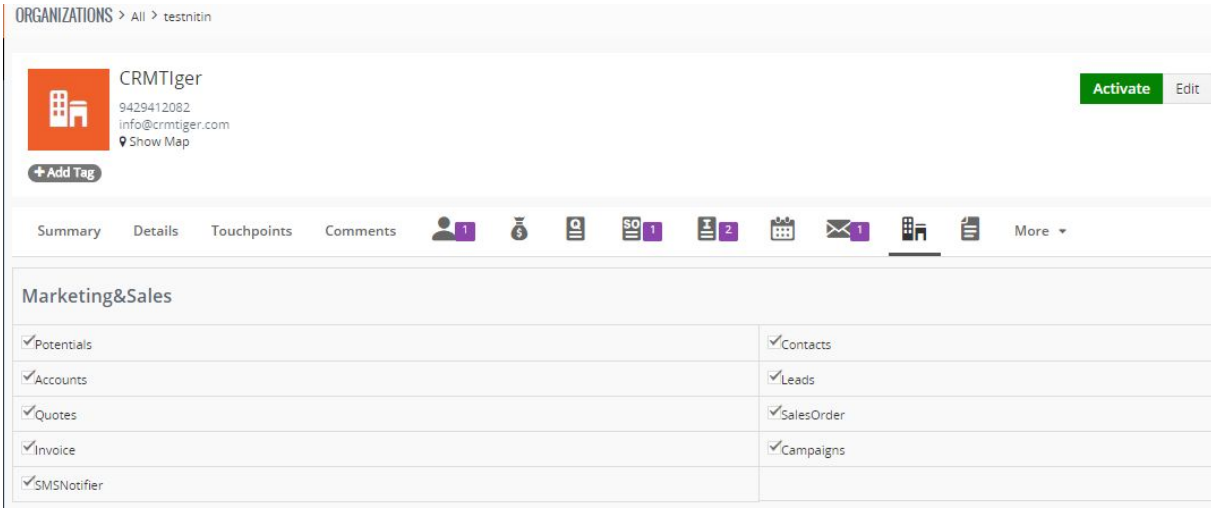
- **Intuitive Dashboard**
  - View latest tenant status
  - View # of tenant, # of user
  - View Paid/UnPaid/Outstanding invoices
- **Subscribers management (Leads)**
  - Create Leads when customer subscribe from marketing website.
  - Auto convert Leads to Organization when customer activate Payment
  - Manage all subscriber in one central location
  - Active/Inactive subscriber
  - Trial expiry management



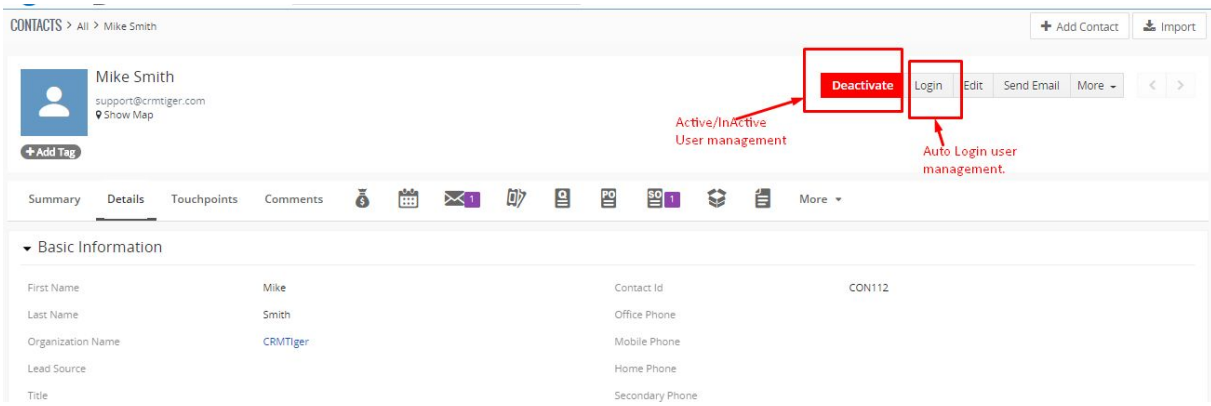
Lead Details

First Name	Mike	Lead Number	LEA81
Last Name	Smith	Primary Phone	6308618263
Company	crmtiger123	Mobile Phone	
Designation		Fax	
Lead Source		Primary Email	info@crmtiger.com
Industry		Website	
Annual Revenue	$ 0.00	Lead Status	
Number of Employees	0	Rating	
Secondary Email		Assigned To	lily smith
Modified Time	2018-05-17 12:45 PM	Created Time	2018-05-17 12:45 PM
Email Opt Out	No	Source	WEBSERVICE
Lead Tenant Status	Success	Lead Database	ct_tfbz2ilzb9
Lead Expiry Date	2018-05-31	User Limit	2.00
Affiliate Name		Affiliate Code	
Product Name	Silver		

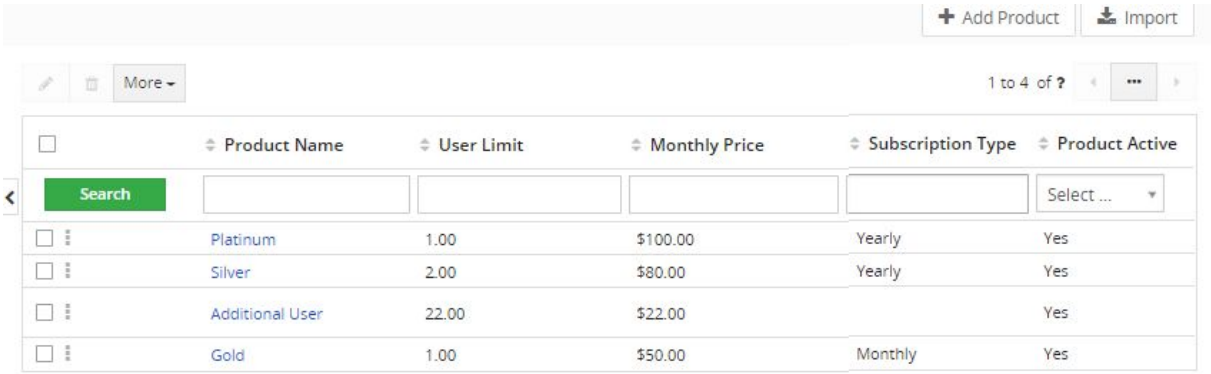
- **Subscribers management(Accounts)**
  - Active/Inactive subscriber
  - Module management for each subscriber
  - 360 degree view
  - Invoicing against each subscriber
  - View users associated with each subscriber
  - Subscriber tenant Expiry management



- **User management (Contact)**
  - Manage users of each tenant from contacts of master CRM
  - Active/Inactive users
  - Auto Login to users tenant from view contact screen



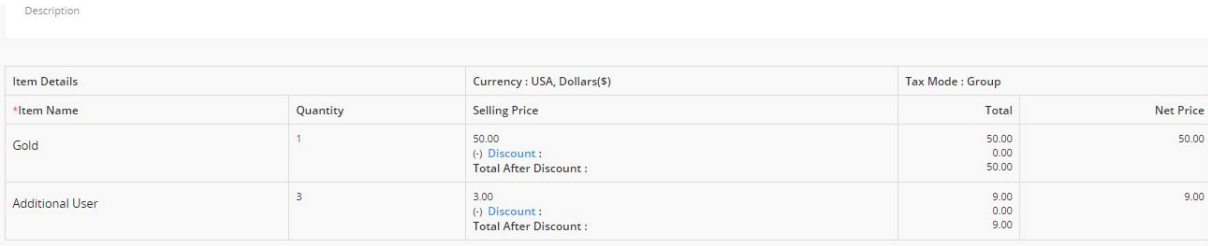
- **Plan management**
  - Define multiple plan for each subscription package
  - Option to define pricing for monthly & yearly subscription
  - Option to define plan for additional user
  - Option to add discount rate for each tenant



- **Invoicing & Billing**

Invoicing management

  - View Paid/Unpaid Invoicing of the customer
  - Auto Recurring invoice on expiry date.
  - Active/Inactive users
  - Auto Login to users tenant from view contact screen

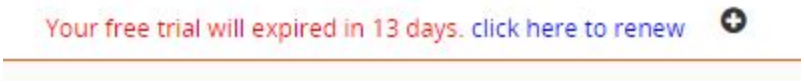


Payment management

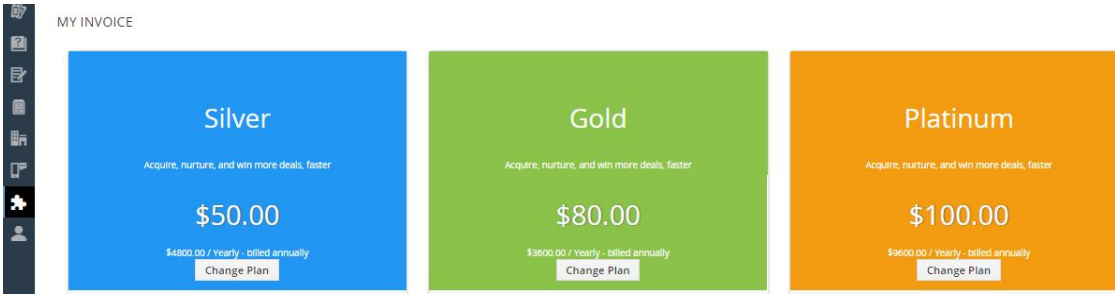
  - Integration with Paypal & Authorize.net payment method
  - Option for custom payment method suggested by customer
  - Payment history of each payment against invoice.

Customer CRM (Tenant CRM) :

- **vTiger Features**
  - All Basic features of vTiger open source
- **Billing & Subscription management**
  - Expiry Notification



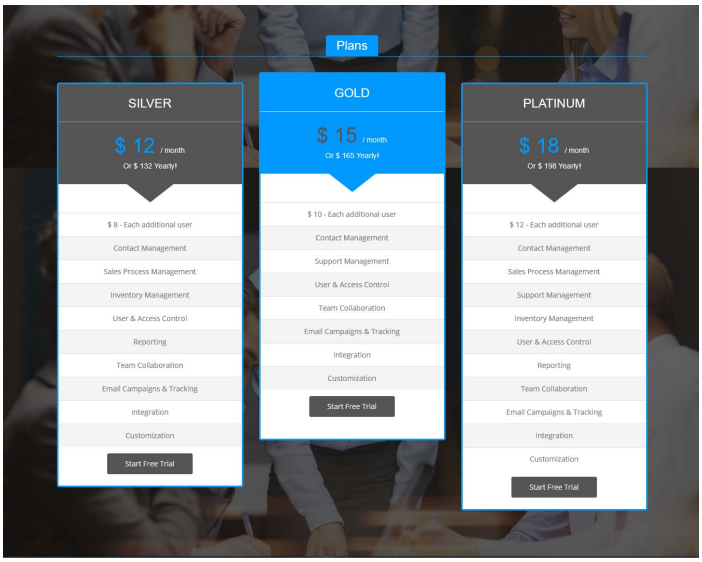
  - Plan selection on active subscription



  - List all customer invoice under my invoice section.
  - Restriction on create additional user than allowed user in plan.

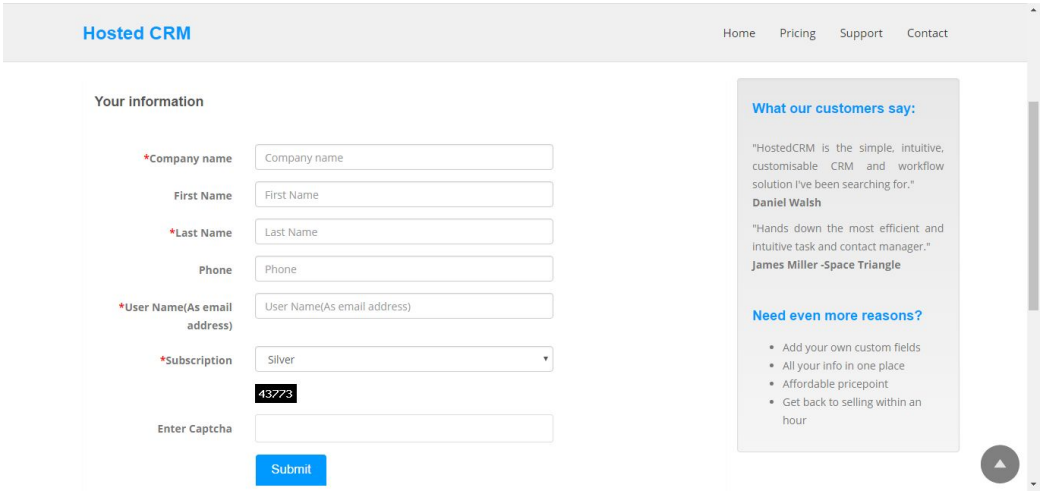
Landing Pages (Marketing website) :

- Content management website with multi language support
- CRM registration Integrated with super admin
- Auto creation of customer's CRM from registration
- Pricing & Plan Integrated with super admin



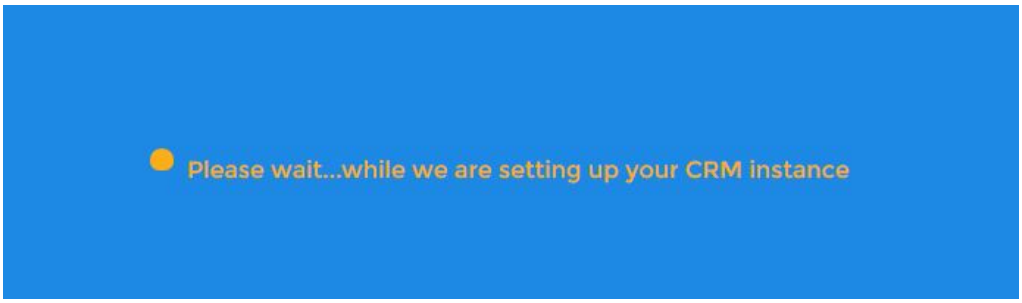
Customer tenant creation flow ?

- Click on Start Free Trial button for any of the Plan
- You will be redirected to a form to fill the details to set up a new Instance of CRM

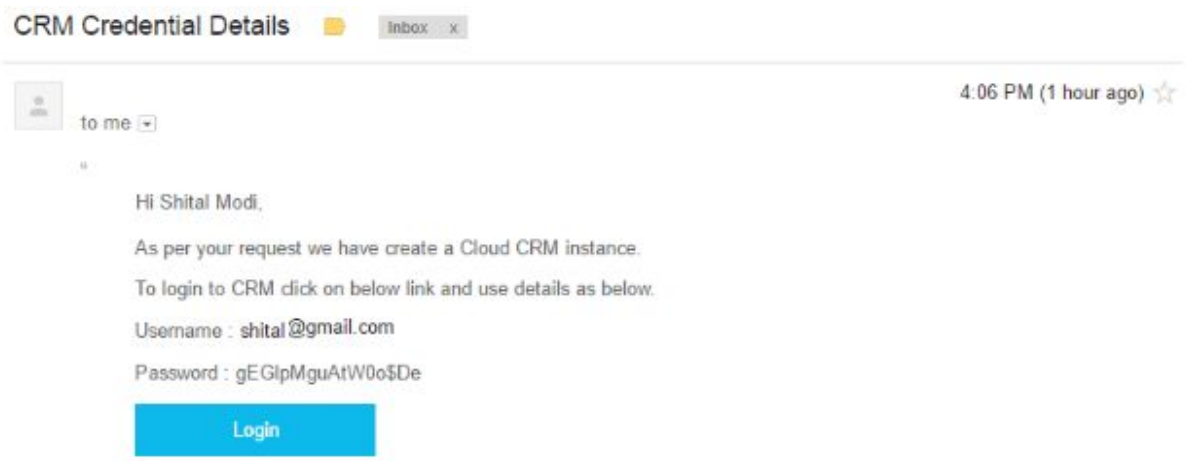


- To avoid and protects websites against bots by generating and grading tests we have added a captcha in form.

- Make sure to insert valid Email address as Credential will be sent to Email address.
- When you redirected to this form a plan get selected in Subscription Dropdown which you can change before submitting form
- After Submitting a form you have to wait for sometime which will be taken for setting up your CRM instance



- Next you will be redirected with auto login to Tenant and a Mail will be sent with Username and Password to your Registered Email address.



List of Supported Extensions :

With multi-tenant extension CRMTiger offers additional extension support in Multi Tenant offering. We offers this extensions with 20% discount price.

Our Developed Extensions :

- vTiger® Email Tracking
- RTL Theme
- vTiger® CRM Record Locking
- Sales Forecasting
- vTiger Import User
- Attach Multiple Files To One Document
- AjaxChat User
- Label Manager
- vTiger – Two Dimensional Widget
- Profile Rating
- Kanban(Pipeline view)