

Business Unit Module

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Introduction

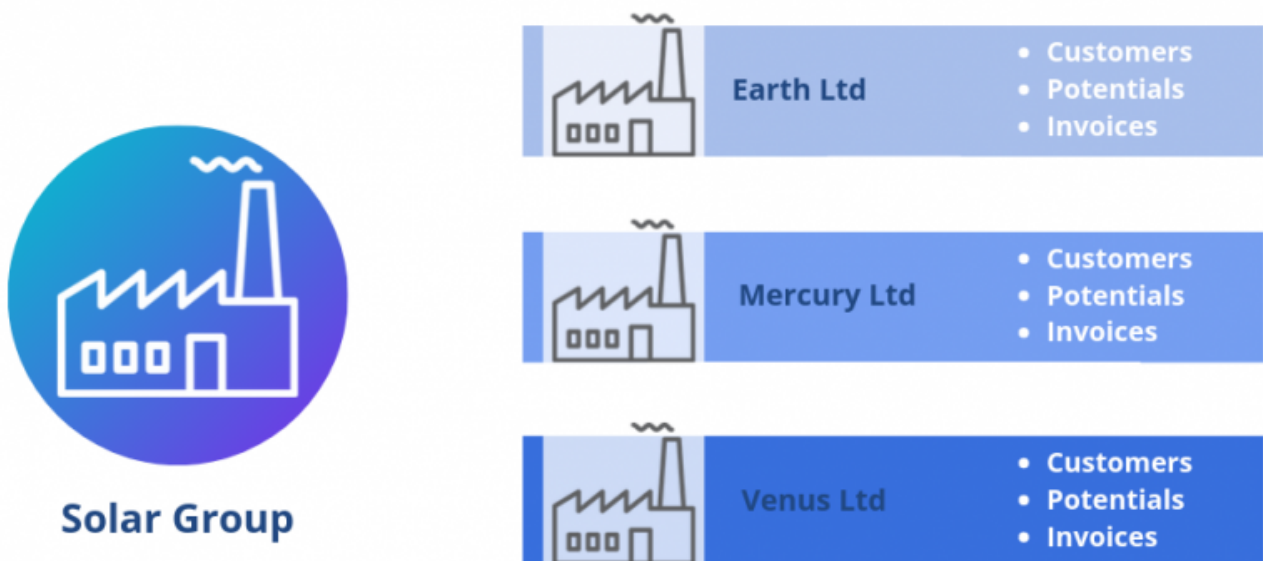
Multi-Company Module is an advanced feature that allows a group of companies to use a single vtenext environment.

The module provided to:

- Have a single customer database for all the companies in the group but with diversified data visibility based on the user and on the belonging on one or more companies in the group;
- Manage diversified progressives for each company in the group (estimates, sales orders, invoices);
- Manage diversified PDFMaker templates for each company in the group.

Default modules: Companies, PDFMaker, Documents, Contacts and Invoices.

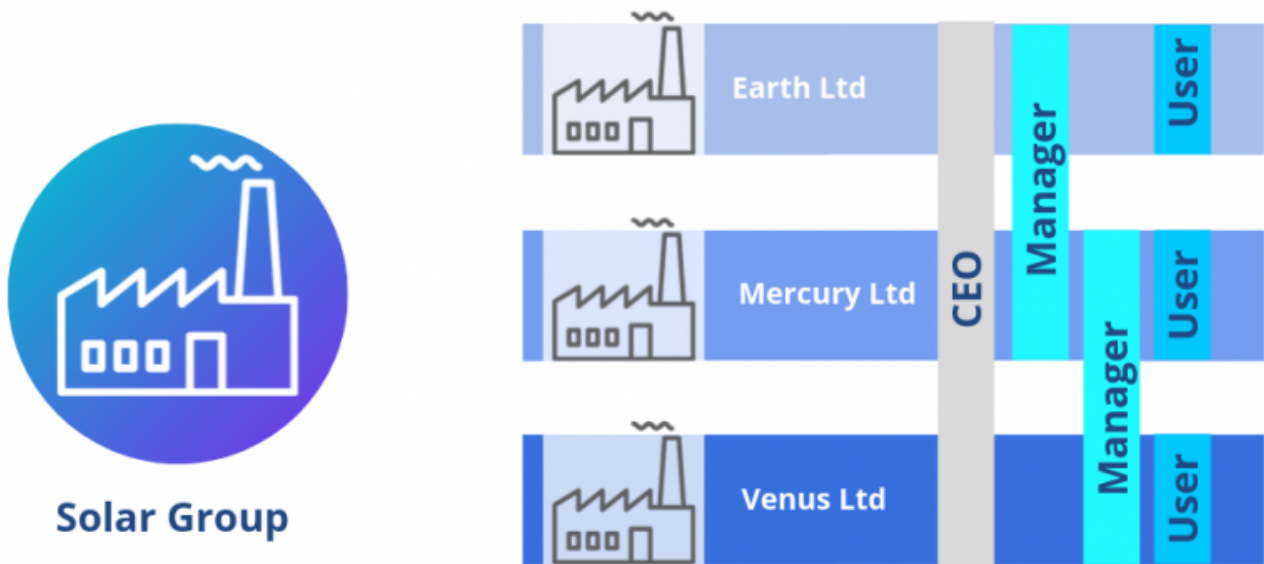
NB: Upon request this feature can be activated also on other vtenext Modules.



In the image above we can see a clear example of how three companies, belonging to the same group/field, can be divided using the module.

Configuration

With an adequate configuration, certain users can manage all modules in a diversified way even at the level of entity numbering.



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Features: a user can be profiled for all or only some **Business Units (BU)**, and will be able to access the related data differently (eg more permissive for managerial profiles and less permissive for the operator profiles).

The data visibility management can be done based on the Business Unit for the modules Companies, Contacts, Products, Opportunities, Sales Orders, Invoices, Purchase Orders, PDF Maker, and other modules (for the modules not previously written the feature will be implemented upon customer request).

As a consequence in every vtenext user we will find a new voice that have to be configured. The admin user will have to choose to which business unit every users belong.

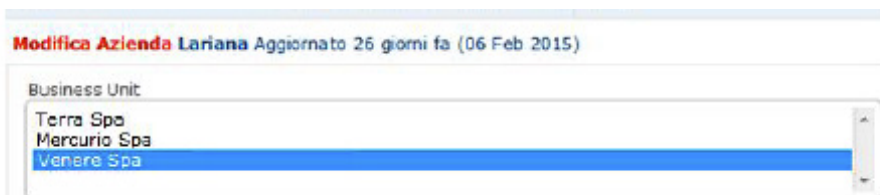
The screen is similar to the following:



With the Multi Company Module there is the possibility to diversify the numbering of the modules, making them completely independent and based on the BU of belonging.



Multi-company function is made explicit with the picklist type field called “Business Unit”, as in the example below:



By reviewing the two previous screens, it is clear that the user **Francesco** is the Group Manager and can access the data of all three companies. The Company **Lariana** is part of the **BU Venere Spa** and therefore is accessible only by the users active on that Business Unit. Lastly, even the functions and modules, such as Company Details (Settings > Company Details) and the PDF Maker, can be adapted to the presence of the Multi-company module.

In the case of PDF Maker, the user finds only the layouts of its Business Unit. In the same layout, the company details of the Business Unit of the user can be reported.