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# **LISTVIEW COLORS FOR VTIGER CRM**

## Introduction

The ListView Colors is extension tool designed for vtiger CRM. The ListView Colors allows in few simple steps change of default ListView to colored ListView. 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 benefits are:

- better efficiency of the ListView
- adaptable to module manager and picklist editor changes
- simple usage
- supported mostly inside all modules

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De	lete Mass Edit	Send Mail Mail	er Export Ser	nd SMS			
	Organization No	Organization Name	Billing City	Website	Phone	Assigned To	Actio
	ACC1	vtiger	Sunnyvale	www.vtiger.com	(638) 077-0099	Administrator	edit   o
	ACC2	t3M Invest A/S	San Mateo	www.t3minvesta/s.com	(010) 395-4821	Administrator	edit
	ACC3	EDFG Group Limited	San Jose	www.edfggrouplimited.com	(740) 618-8412	Administrator	edit
	ACC4	vtigerCRM Inc	San Jose	www.vtigercrminc.com	(805) 511-1191	Administrator	edit
	ACC5	X-CEED INC 99	San Mateo	www.x-ceedinc99.com	(746) 439-1013	Administrator	edit
	ACC6	demovtiger	San Francisco	www.demovtiger.com	(516) 278-3452	Administrator	edit
	ACC7	usable-vtiger	San Mateo	www.usable-vtiger.com	(612) 470-4651	Administrator	edit
	ACC8	gooduivtiger	San Mateo	www.gooduivtiger.com	(178) 517-5046	Administrator	edit
	ACC9	vtigeruser	San Francisco	www.digeruser.com.	(628) 238-3039	Administrator	edit ]
	ACC10	samplevtiger	San Jose	www.samplevtiger.com	(873) 347-6020	Administrator	edit
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## License agreement

- The ListView Colors License will be referred to as "The license" in the remainder of this text.
- This irrevocable, perpetual license covers all versions 1.xx of ListView Colors.
- This license gives the holder right to install ListView Colors 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 ListView Colors 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 ListView Colors.
- The license holder may not re-distribute the library or versions thereof to third party without prior written permission of the copyright holder.
- ListView Colors 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 ListView Colors.

## **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 ListView Colors and your license key as well.

## **Private policy**

During installation it is necessary to exchange following information:

- vtigerCRM version (e.g. 5.4.0)
- ListView Colors version (e.g. 1.3)
- Date and time
- Domain in md5 coding format (e.g. 916b25c201a77a6721003c0030977f3b)
- Action provided by you (INSTALL, REACTIVATE, DEACTIVATE)

## 1 How to install ListView Colors

Please provide following steps in order to install ListView Colors:

It is highly recommended to finish the installation without any interruption. For successful installation we need to exchange information (see "Private policy" for details).

 Install the .zip package of the ListView Colors module via Settings -> Module Manager. Click on the [Import New] button.

	Standard Modules	Custom Modules
		Import New
9	ConfigEditor	<i>े ह</i> ै ।
	CronTasks	0 R I
9	Import	0 R I
9	Integration	् 🗹 🖬
9	MailManager	0 R 🖬
9	Mobile	0 V 1
9	WSAPP	0 🗹 🖬
Ы	British English	0 B
ы	DE Deutsch	0 17

Picture 1.1 Installation of ListView Colors – step 1

2. Select the module zip (package) file that was previously exported or created. Click on the [Import] button.

Settings > I Manage module	Module Manager > Import behavior inside vtiger CRM	
Select the Package File	0	
* File location:	Browse ListViewCol540_1_1.zip · vtiger module is packaged as a zip file.	
		Import _ Cancel

Picture 1.2 Installation of ListView Colors – 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.

Settings > Module Manage module behavior inside	e Manager > Import vtiger CRM	
Verify Import Details		
Module Name	ListViewColors	
Module Directory	modules/ListViewColors	
Req. vtiger version	5.4.0	
License	Module : ListView Colors     Version : 1.3     Version : 5.4.0     Autor : 5.4.0     Supported browsers : Internet Explorer 7 or Higher, Mosilla Firefox 3.0 or Higher     Internet Explorer 7 or Higher, Mosilla Firefox 3.0 or higher     Internet Explorer 7 or Higher, Mosilla Firefox 3.0 or higher     Internet Explorer 7 or Higher, Mosilla Firefox 3.0 or higher     Internet Explorer 7 or Higher, Mosilla Firefox 3.0 or higher     Internet Explorer 7 or Higher, Mosilla Firefox 3.0 or higher     Internet Explorer 7 or Higher, Mosilla Firefox 3.0 or higher     Internet Explorer 7 or Higher, Mosilla Firefox 3.0 or higher     Internet Explorer 7 or Higher, Mosilla Firefox 3.0 or higher     Internet Explorer 7 or Higher, Mosilla Firefox 3.0 or Higher     Internet Explorer 7 or Higher, Mosilla Firefox 3.0 or Higher     Internet Explorer 7 or Higher, Mosilla Firefox 3.0 or Higher     Internet Explorer 7 or Higher, Mosilla Firefox 3.0 or Higher     Internet Explorer 7 or Higher, Mosilla Firefox 3.0 or Higher     Internet Explorer 7 or Higher, Mosilla Firefox 3.0 or Higher     Internet Explorer 7 or Higher, Mosilla Firefox 3.0 or Higher     Internet Explorer 7 or Higher, Mosilla Firefox 3.0 or Higher     Internet Explorer 7 or Higher, Mosilla Firefox 3.0 or Higher     Internet Explorer 7 or Higher, Mosilla Firefox 3.0 or Higher     Internet Explorer 7 or Higher, Mosilla Firefox 4.0 or Higher     Internet Explorer 7 or Higher     Internet Explorer 7 or Higher, Mosilla Firefox 4.0 or Higher     Internet Explorer 7 or Higher     Internet     Internet Expl	•
	I accept the license agreement.	
	Do you want to	proceed with the import? Yes No

Picture 1.3 Installation of ListView Colors – step 3

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

8	Settings > Module Manager > Import Manage module behavior inside vitiger CRM
Import	ting Module
Creatin Updatin Creatin SQL: CI SQL: CI Invoking Invoking	g module adventuolesSTANTED module permissionsDONE glabdata fileDONE glabdata LSVewColorsDONE globade LSVewColorsDONE globade LSVewColorsDONE GRATE TABLE 'vger_lshvewcolors ('tabd' http):DEFAULT NULL, 'feldname' varchar(26) DEFAULT NULL, 'color' varchar(7) DEFAULT '#000000') ENGNE=hnndB DEFAULT CHARSET=utfsDONE REATE TABLE 'vger_lshvewcolors ('tabd' http):DEFAULT NULL, 'feldname' varchar(126) DEFAULT NULL, 'color' varchar(7) DEFAULT '#000000') ENGNE=hnndB DEFAULT CHARSET=utfs DONE REATE TABLE 'vger_lshvewcolors ('tarsion' varchar(10) NOT NULL, 'lcense_ley' varchar(25) NOT NULL, 'lcense' varchar(5) NOT NULL, PRIMAR' KEY ('version') ENGNE=hnndB DEFAULT CHARSET=utfs DONE gvitb, handler for module positistal START gvitb, handler for module positistal DONE
	(Friend)

Picture 1.4 Installation of ListView Colors – step 4

5. After import of the module it is necessary to continue with ListView Colors validation step. Please insert a license key and make sure that your server has internet access. Click on **[Validate]** button.

itView Colors installation
Welcome to the "ListView Colors" Installation Wizard
This will install "ListView Colors" into your vtiger CRM.
It is highly recommended to finish the installation without any interruption.
Please insert a license key you received in purchase confirmation email.
Please make sure that your server has an internet access in order to run validation.
Validate Order now

Picture 1.5 Validation step

6. ListView Colors Download: In order to successfully install ListView Colors it is necessary to overwrite some vtiger core files. Please click on **[Download]** button to download zip file containing necessary files. Unzip the downloaded files.



Picture 1.6 Download installation step

7. Overwriting the vtiger core files: It is necessary to make small changes in few original vtiger core files.

It is highly recommended to backup your original vtiger core files before continue this step.

Two approaches exist for overwriting step depending on your installation of the vtiger:

a) In case you are using original vtiger core files (see the list of the files in the Picture 1.7), please just replace the original vtiger core files by files extracted from our zip file. As you can see in the picture below it is necessary to replace just few files located in directories [vTigerROOT]/include/... and [vTigerROOT]/Smarty/... Please simply copy both directories to your [vTigerROOT] directory and replace original vtiger core files.

\include\ListView\ListViewController.php \include\RelatedListView.php \include\utils\ListViewUtils.php \Smarty\templates\ActivityListView.tpl \Smarty\templates\DocumentsListViewEntries.tpl \Smarty\templates\ListViewEntries.tpl \Smarty\templates\RelatedListDataContents.tpl \Smarty\templates\UnifiedSearchAjax.tpl

Picture 1.7 Zip file content

b) It is also easy to implement changes in case that your corresponding vtiger core files (see Picture 1.7) are not original and were changed due to other your purposes. In that case it is recommended to implement changes file after file manually via any editor. Our changes can be simply found via "ITS4YOU" and "ITS4YOU-END". Please insert these changes into your files including rows containing "ITS4YOU" and "ITS4YOU-END". Next picture shows example of the ListView Colors changes in the vtiger core file.

443	2/143
444	
1111	
445	(foreach_item=entity key=entity_id from=\$LISTENTITY)
446	(*//ITS4YOU MaJu listviewcolors *)
447	(if \$entity_id>0)
448	▲ (*
449	ITSAVOILEND
450	(* //ITS4YOU-END *)
451	<input type="checkbox" NAME="selected_id" id="(\$en</td>
452	{foreach item=data from=\$entity}
453	(\$data)
454	(/foreach)
455	
456	(* // ITS4YOU, MaJu listviewcolors *)
457	
458	O 1134100-END (* //ITS4YOU-END *)
459	(foreachelse)
460	<td style="background-color:#efefef;height:340px" align="cente:</td>

Picture 1.8 Example of the ListView Colors changes in the vtiger core file

8. Please click on [Continue] button to finish ListView Colors installation.



**Picture 1.9 Finish installation** 

# 2 ListView Colors description

In the following sections you can find description how to start and use ListView Colors tool.

#### 2.1 How to start ListView Colors

In order to start ListView Colors tool, please go to CRM settings (1.) and in the section *Other Settings* click on ListView Colors link (2.).



Picture 2.1 Start ListView Colors

#### 2.2 Work Area

The work area of the ListView Colors is simple and user friendly (Picture 2.2). It consists of:

- Settings area main part used for color settings for particular module and corresponding fields
- Buttons area:

0	LISTAIGA CO	ors Manual	is link to	this doci	ument				
0	Reactivate	license	and De	eactivate l	icense	are dealir	ng wit	h licensing	5
gs > L	.istView Colors		i 🖲 🖪	<b>9</b>	+ † Q				
-									
	Settings >	ListView Color	's		Lis	tView Colors Manu	ial Reac	tivate license Dea	activate license
	Settings > Configure speci	ListView Color fic colors for ListViews	S		Lis	tView Colors Manu	ial Reac	tivate license Dea Button	s Area
	Settings > Configure speci	ListView Color fic colors for ListViews and corresponding f	'S ield in order to defir	ne ListView colors	Lis s: Select Mod	tView Colors Manu ule: Contacts	ial Reac	Button:	activate license S Area Call
	Settings > Configure speci Please select module	ListView Color lic colors for ListViews and corresponding f Not Call [donotcall]	'S ield in order to defir	ne ListView colors	tis s: Select Mod	Wiew Colors Manu	sal Reac	tivate license Des Buttons Select a field Do Not C	activate license S Area
	Settings > Configure spect	ListView Color fic colors for ListViews and corresponding f Not Call [donotcall]	'S Teld in order to defin	ne ListView colors	s: Select Mod	Wew Colors Manu	nal Reac	Buttons Buttons Select a field Do Not C	nctivate license SArea cal
	Settings > Configure speci Please select module ye no	ListView Colo lic colors for ListViews and corresponding I Not Call [donotcall] s	'S ield in order to defir	ne ListView color:	s: Select Mod	IView Colors Manu	ial Reac	Select a field Do Not C	cal 💌
	Settings > Configure speci Please select module : ye no	ListView Colo in colors for ListViews and corresponding f Not Call [donotcall] s	'S ield in order to defir	ne ListView colors	Save	(View Colors Manu	Jai Reac	Select a field Do Not C	s Area

Picture 2.2 Work area

#### 2.3 How to set up colors for ListView

Next picture shows how to set up the colors for ListView rows. In order to do it please provide following steps:

- 1. Select the module
- 2. Select the field
- 3. Set up colors for particular values
- 4. Click on [Save] button.

Please refer to next chapters for details about each step.

-				
	Settings > ListView Colors	ListView Colors	Manual Reactivate license Dear	tivate license
	Configure specific colors for ListViews	4	0	
		I.	۷.	
	Please select module and corresponding field in order to define ListView colors:	Select Module: Contacts	Select a field Do Not Ca	
	· · · · · · · · · · · · · · · · · · ·			
	Do Not Call [donotcall]		@×	
	<sup>765</sup> <b>3</b> .	•	9 ×	
	1			
	Save			



#### 2.3.1 Selection of the module

The first step is selection of the module. Please select the module in order to continue ListView Color settings (Picture 2.4).

	Select M	Select Module:		Select a field	
Please select module and corresponding field in order to define ListView colors:	Products	-	none		
Save	Opportunities Contacts Organizations Leads Documents Calendar Trouble Tickets <b>Products</b> FAQ Events Vendors Price Books Quotes Purchase Order Sales Order Invoice Campaigns ServiceS			[Scroll to To	

Picture 2.4 Selection of the module

The ListView Colors tool is supported mostly inside all modules. It is not supported inside few modules where it doesn't make sense (no fields available for module, no picklist values nor checkboxes available for records).

Please note that ListView Colors works correctly for standard modules of vtiger and additional modules written with vtiger standards using standard vtiger core files to display ListView.

If ListView Colors doesn't work with your module, don't hesitate to contact us for further information via <u>info@its4you.sk</u>.

#### 2.3.2 Selection of the field

Next step is selection of the field. As you can see in the picture below, it is possible to select one field which corresponds to picklist or checkbox of the selected module.





Please note that ListView Colors supports all standard and custom fields. It means that if the new picklist, picklist value or checkbox is created than the ListView Colors settings will adapt this change and will allow setting of colors to the new fields.

#### 2.3.3 Setting colors for particular values

Within last step you can simply set up color for each possible picklist (1.) or checkbox (2.) value of the selected field. Click on  $\mathfrak{D}$  icon (3.) in order to set up color. Select the color in pop-up window (4.) according to your needs. The deletion of the color for particular value can be done using icon  $\mathbf{X}$  (5.).



Picture 2.6 Setting colors for particular values

## 3 Additional features

#### 3.1 Deactivate/Reactivate license key

In case that some problem occurs with license key or in case you need to reinstall ListView Colors you have to deactivate and reactivate license key. To deactivate license key please provide following steps:

- 1. Click on [Deactivate license] button in Settings > ListView Colors.
- 2. Insert the license key.
- 3. Confirm deactivation with button [OK].

		to deactivat	e
nodule and corresponding field in order to define ListView colors	Select Mod Organizations	lule: Sele	ect a field
Save			
		[Sc	roll to Top
ngs > ListView Colors ListView Colors Marcolors Marcolors for ListViews	mual 📗 Reactivate li	cense Deactiva	te licens
Please insert a license key you received in purchase confirmation email.	Select Mod Organizations	tule: Sel	ect a field
	nodule and corresponding field in order to define ListView colors           Save           ngs > ListView Colors           ListView Colors           re specific colors to ListViews           Please insert a license key you received in purchase confirmation email.	nodule and corresponding field in order to define ListView colors:       Select Mod         Organizations       Save         ngs > ListView Colors       ListView Colors Manual         Reactitude li       Reactitude li         Please insert a license key you received in purchase confirmation email.       Select Mod         Organizations       Organizations	ListView Colors       Select Module:       Select Module:         Image: Select Module:       Select Module:       Select Module:         Please insert a license key you received in purchase confirmation email.       Select Module:       Select Module:         Please insert a license key you received in purchase confirmation email.       Organizations I in one       Select Module:

Picture 3.1 Deactivate license

After deactivation of license ListView Colors doesn't work at all and ListView Colors work area is not accessible either. When you click on ListView Colors link in the CRM Settings you can see following picture. To reactivate license you have to provide following steps:

- 1. Insert the license key.
- 2. Click on [Validate] button.

ist\	'iew Colors installation
	Welcome to the "ListView Colors" Installation Wizard
	This will install "ListView Colors" into your vtiger CRM.
	It is highly recommended to finish the installation without any interruption.
	Please insert a license key you received in purchase confirmation email.
	Please make sure that your server has an internet access in order to run validation.
1.	
	2. Validate Order now

Picture 3.2 Reactivate license

Note: Button [Reactivate license] is currently not used, but its presence is due to future ListView Colors versions.