

IT-Solutions4You

CREDIT NOTES 4 YOU for VTIGER CRM 6.x

Introduction

What does CREDIT NOTE exactly mean?

A form or letter sent by a seller to a buyer, stating that a certain amount has been credited to the buyer's account. Also called credit memo.

A credit note is issued in various situations to correct a mistake, such as when:

- 1. an invoice amount is overstated,
- 2. correct discount rate is not applied,
- 3. goods spoil within guaranty period,
- 4. they do not meet the buyer's specifications and are returned.

Extension **Credit Notes 4 You** allows you to create Credit Note from Invoice. You can use positive as well as negative prices in this module. And it is compatible with PDF Maker Professional, that means you are able to create PDF file from Credit Note which you have created.

Content

Introduction	1
What does CREDIT NOTE exactly mean?	1
License agreement	3
Terms and conditions	3
Private policy	4
1 How to instal Credit Notes 4 You	5
2 How to Create Credit Note	7
2.1 Create Credit Note from Invoice	7
2.2 Create new Credit Note	8
3 Work area	8
3.1 ListView	8
3.2 Reference	9
4 Additional features	.10
4.1 Support of PDF Maker	.10
4.2 Support of Email Maker	.13
5 Settings	.14
5.1 Deactivate license	.14
5.2 Reactivate license	.15
5.3 Upgrade	.15
Change log of Credit Notes 4 You	.16
Change log of Manual for Credit Notes 4 You	.16

License agreement

- The Credit Notes 4 You will be referred to as "The license" in the remainder of this text.
- This irrevocable, perpetual license covers all versions 2.xx of Credit Notes 4 You.
- This license gives the holder right to install Credit Notes 4 You 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 Credit Notes 4 You 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 Credit Notes 4 You.
- The license holder may not re-distribute the library or versions thereof to third party without prior written permission of the copyright holder.
- Credit Notes 4 You 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 Credit Notes 4 You.

It is strongly required to deactivate the license before moving installation to another server (different url) in order to avoid any license conflicts. After movement and repeated installation you can reactivate your license.

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 info for download and your license key as well.

Private policy

During installation it is necessary to exchange following information:

- vtigerCRM version (e.g. 6.x)
- Credit Notes 4 You version (e.g. 2.xx)
- Date and time
- Domain in md5 coding format (e.g. 916b25c201a77a6721003c0030977f3b)
- Action provided by you (INSTALL, REACTIVATE, DEACTIVATE)

How to instal Credit Notes 4 You 1

Please provide following steps in order to install Credit Notes 4 You:

1. Install the .zip (package) file of the Credit Notes 4 You module via CRM Settings -> Module Manager. Click on the Install From File button.

👚 PDF Maker EMAIL Maker	Cashflow4You	Calendar	Leads Organizations	Contacts Opportunities	Products Docum	ents Tickets	Campaigns	All -	0	Administrator –
💿vtiger	All Records	 Type key 	word and press enter	Q Advanced					CRM Settings	+
Settings	Module M	anageme	nt						3.	Install From File
User & Access Control	V	==	Dashboard			V	å	Opportunities		
Studio Edit Fields	× 4	-	Contacts			V	W	Organizations		
Module Manager	JZ.]		Leads			V		Documents		
Picklist Dependency Setup	V	30	Calendar			v		Emails		
Templates	V	Q	Tickets					Products		
► Other Settings		2	FAQ				8	Vendors		

Picture 1.1: Installation of Credit Notes-Step 1

2. Select the .zip (package) file that you downloaded from our shop. Click on the Import button.

Import Module From File No file chosen		
1	\longrightarrow	2. Import Cancel
Dicture 1.2. Installation of Credit Notes	Stop 2	

Picture 1.2: Installation of Credit Notes – Step 2

3. Verify the import details parsed from the .zip (package) file. Please check that you accepted the license agreement and click Yes to proceed or No to cancel.

LBL_IMPORT_MODULE_FROM_FILE		
Verify Import Details		
Module Name		
Vtiger Version		
Ucense	Module Module Version Constraints	
	Vogiovani i v Miliki ka imatrik	2. Yes No

Picture 1.3: Installation of Credit Notes – Step 3

4. Click on **Finish** button to complete the module import.

Importing Module	
module was imported successfully.	
	Finish
Picture 1 4. Installation	n of Credit Notes _ Step 4

Picture 1.4: Installation of Credit Notes – Step 4

In order to finish installation, please provide following validation steps.

1. Credit Notes 4 You Validation Step. Please insert a license key and make sure that your server has internet access. Click on Validate button.

redit Notes installati	on
	1 Validation 2 Finish
Welcome	to theCredit Notes 4 You Installation Wizard
This will ir It is highly	stall Credit Notes4You into your vtiger CRM. recommended to finish the installation without any interruption.
Please ir Please ma	is ert a license key you received in purchase confirmation email. ke sure that your server have internet access in order to run validation.
License ke	Y keykeykeykeykeyeyey Validate Order now

Picture 1.5: Validation of Credit Notes – Step 1

- 2. Click on **Finish** to complete Validation.
- Credit Notes installation

7	

Picture 1.6: Validation of Credit Notes – Step 2

For Upgrade please check 5.3 Upgrade.

2 How to Create Credit Note

2.1 Create Credit Note from Invoice

The mostly way to create Credit Note, is generate Credit Notes from existing Invoice. To create Credit Note from Invoice you have to provide following steps:

- 1. Go to Invoice List and choose an Invoice (Picture 2.1)
- 2. Click on More -> Generate Credit Note (Picture 2.2)
- 3. In appeared window please specify Credit Note details according to your needs and click on Save button (Picture 2.3)

Action	+ Create Payment + Add Invoice B C D E F G I	H I J K L	M N O	P Q R	S T U V	1 to 20 < 🔁 🕨 🗡 – W X Y Z
-	Subject	Sales Order	Status	Total	Assigned To	
	test rechnung			€35,625.00	Standarduser	:= / #
	rechnung johnny			€285.00	Standarduser	
	example invoce for vde			€7,125.00	Standarduser	
-	Llamda	Llamda	Paid	€88.90	Support Group	
	greek involce			€274.00	Standarduser	
	Test		Approved	€206.63	Standarduser	
	asdsa			€28.50	Standarduser	
-	ergwerger		Cancel	€89,217.50	Support Group	
	Sprzedaz 1		Created	€28.50	Standarduser	
	Prueba	Prueba	Paid	€1,425.00	Standarduser	
	fact1		Paid	€1,710.00	Standarduser	

Picture 2.1: Create Credit Note from Invoice

				Edit More -
				Delete Invoice
V Invoice Details				Duplicate
Subject	Test2	Sales Order	Test2	Export to PDF
Customer No		Invoice No	INV43	
Contact Name		Invoice Date		
Due Date		Purchase Order		
Excise Duty	0	Sales Commission	0	
Organization Name	test org eth3	Status	Paid	
Assigned To	Standarduser	Created Time	06-08-201	4 11:05:26
Modified Time	12-08-2014 15:17:24	Order No		

Picture 2.2: Create Credit Note from Invoice

Creating I	New Credit Note						
							Save Cancel
Credit Note I	Information						
	Credit Note			*Account	Type to search	Q. +	
	Invoice	O Type to search	٩	Valid from			
	Assigned To	Administrator		Status	Select an Option +		
	Copy Billing Address from	Organization Contact Shipping Address		Copy Shipping Address from	Organization Contact Billing Address		
	* Billing Address			Shipping Address			
	Billing Po Box			Shipping Po Box			
	Billing City			Shipping City			
	Billing State			Shipping State			
	Billing Code			Shipping Code			
	Billing Country			Shipping Country			
Terms and Co	onditions						
Description	Terms and Conditions	 Uniess otherwise agreed in writin currency of the invoice, drawn on a 	g by the supplier all involoss are psysble within thiny (30) days bank based in India or by such other method as is agreed in a	of the date of involue, in the Ivance by the Suppler.			
	Description						
Iten Details	s		Euro (E)			Tax Mode Group	
Tools	"Item Name		Quantity	List Price		Total	Net Price
	Type to search 🛛 🖬 O	li li		0 (-) Discount : Tetal After Discoun		0.00 0.00 0.00	0.00
+Add Produ	et +Add Service						
					Items Total		0.00
					(-) Discount		0.00
					(v) Shipping & Handling Charges		0.00
					Pre Tax Total		0.00
					(*)Tax		0.00
					Adjustment widd on Debut		0.00
					Grand Tatal		

Picture 2.3: Create Credit Note from Invoice

2.2 Create new Credit Note

Alternately, you can create new Credit Note by using + Add Record button(Picture 3.1). To create Credit Note of Credit Notes please provide following steps:

- 1. Click on + Add Record button
- 2. In appeared window please specify credit note details according to your needs
- 3. Click on Save button

3 Work area

Work area of Credit Notes 4 You consits of:

- 1. ListView used for common tasks like add new, edit and delete Credit Note, import and export credit notes and access to others tools
- 2. DetailView shows already created Credit Notes in details
- 3. References show references to another Modules

3.1 ListView

The common tasks like add/delete Credit Note, import/export Credit Note or start editing have to be initiated via Credit Notes 4 You ListView. Go to All → MARKETING & SALES → Credit Notes 4 You and Credit Notes 4 You ListView will appear on your screen.

Actions Act	2.	H I	▼ All Credit Notes 4 Yo	u	¢.	R S T U	V	Edit Fields
Edit	Credit Note	Account	All Credit Notes 4 Yo	u	ress	Invoice	Assi	Edit Workflows
	Credit Note	meine	 Create New Filter 	5.		test rechnung	Stand	Edit Picklist Values 3.
Import Export	546354	vos datos ente	iprise sueec:			example invoce for vde	Stand	Upgrade
Find Duplicates	123	vos datos ente	rprise Street	941 Street 941		Testinv HH	Stand	darduser
CN0002	1	PG	tt	4. "		invoice2	Stand	darduser
CN0001	CN1	meine	addres	address			Admi	inistrator

Picture 3.1: Work area of Credit Notes 4 You

The main part of the Credit Note 4 You ListView consists of list of the Credit Note, which gives you information about a Credit Note name, a reference, an amount and related dates. As shown in the picture, above the list of the payments you can find following:

- 1. Actions area contains actions for mass edit, delete, import and export and finding duplicates and access to others tools
- 2. + Add Record button is used to add new Create Note
- 3. Settings area vtiger related tools, License settings and Upgrade
- 4. List of created Credit Notes
- 5. All Credit Notes 4 You filtering
- 6. 🔹 🖹 🔪 navigation bar

3.2 Reference

Every Credit Note, you have created and is assigned to Invoice, you can find in DetailView of Invoice. Go to **Invoice** module, choose your Invoice and click on Credit Notes 4 You link(Picture 3.2).

						Invoice Details
Invoice Details						Updates
	Subject	test rechnung	Sales Order			Activities
Custo	tomer No		Invoice No	INV42		Documents
Conta	act Name		Invoice Date			Assets
D	Due Date		Purchase Order			Cashflow4You
Exc	cise Duty	0	Sales Commission	0		Credit Notes 4 You
Organizatio	on Name	meine	Status			
Assi	signed To	Standarduser	Created Time	03-08-2014 19:42:16		
Assi Modifi	fied Time	5tandarduser 05-08-2014 12:04:12 Picture 3.2: Credit	Notes 4 You in Deta	03-08-2014 19:42:16 ailView of Ii	nvoice	
Assi	signed To fied Time	standarduser 05-08-2014 12:04:12 Picture 3.2: Credit	Notes 4 You in Deta	03-08-2014 19:42:16 ailView of In Er	1VOİCE lit More - F -	٢
Assi	signed To fied Time	standarduser 05-08-2014 12:04-12 Picture 3.2: Credit	Notes 4 You in Deta	03-08-2014 19:42:16 ailView of In Ee	NVOICE lit More • F •	Invoice Details
Assi	signed To	standarduser 05-08-2014 12:04:12 Picture 3.2: Credit	Notes 4 You in Deta	03-08-2014 19:42:16 nilView of In E4 1 to 1	nvoice liti More → F →	Invoice Details Updates
Assi	signed To	standarduser 05-08-2014 12:04:12 Picture 3.2: Credit	Notes 4 You in Deta	03-08-2014 19:42:16 <i>ailView of In</i> Er 1 to 1	nvoice liti More - F -	Invoice Details Updates Activities
Assi Modifi dit Note nr.	signed To	standarduser 05-08-2014 12:04:12 Picture 3.2: Credit	Notes 4 You in Deta	03-08-2014 19:42:16 <i>ailView of In</i> Er 1 to 1	nvoice liit More · / · ·	Invoice Details Updates Activities Documents
Assi Modifi fit Note nr. 306	signed To	standarduser 05-08-2014 12:04:12 Picture 3.2: Credit Credit Note	Created Time Notes 4 You in Deta Assigned To Standarduser	03-08-2014 19:42:16 <i>ailView of In</i> E 1 to 1	nvoice lit More - /	Invoice Details Updates Activities Documents Assets
Assi Modifi lit Note nr. 106	signed To	standarduser 05-08-2014 12:04:12 Picture 3.2: Credit Credit Note Credit Note	Treated Time	03-08-2014 19:42:16 <i>ailView of In</i> E 1 to 1	nvoice lit More - F -	Invoice Details Updates Activities Documents Assets Cashflow4You

Picture 3.3: Credit Note related to Invoice

4 Additional features

4.1 Support of PDF Maker

The PDF Maker is extension tool designed by ITS4You for vtiger CRM. It is powerful and flexible tool which allows users of vtiger CRM to create own pdf templates.

Please note that this will work only with PDF Maker Professional.

Before creating PDF file you need to create template of PDF Maker. To create template please check manual for PDF Maker:

(http://www.its4you.sk/images/pdf_maker/pdf_maker_for_vtiger6_crm.pdf) or please provide following steps:

1. In vtiger CRM menu (Picture 4.1), please go to All -> Tools and click on PDF Maker

Opportunities Produc	ts Documents	All 🗸	
MARKETING &	SUPPORT	INVENTORY	Tools
SALES	Tickets	Assets	PDF Maker
Cashflow4You	FAQ	Products	EMAIL Maker
Credit Notes 4 You	Projects	Services	Email Templates
Campaigns	Service Contracts	Price Books	Mail Manager
Leads		Vendors	Calendar
Contacts		Rurshasa Ordan	Documents
Organizations		rarenase order	Charline Service
Opportunities			SMSNother
Quotes			Recycle Bin
Invoice			
Sales Order			
ANALYTICS			
Reports			
			Customize Main Menu
			Add / Manage Modules

Picture 4.1: Create template – Step 1

2. The screenshot below (Picture 4.2) shows PDF Maker ListView. You can click + Add template to add new template.

Acti	ions –	+ Add template	PDF Maker Manual		
#	Select	Template name		Module	Description
1		Probando un ticket (de	fault)	Tickets	Plantilla ticket

Picture 4.2: Create template – Step 2

3. In the EditView (Picture 4.3), go to Properties tab and define the template name and the description.

2	*Template name:	Credit Note		Description:
ΞĂ	*Module:	CreditNotes4You		Billing City Insert into template
	Related modules:	Select Module		Credit Note Information Credit Note Information Reset into template
	Related blocks:	Please select	•	Created Time Modified Time Credit Note nr.
	ListView block:	Please select	*	Account E Invoice
Source	Footer	C / 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1))	Status Record ID Created Time (Due Date & Time) Modified Time (Due Date & Time)
Styles • Fo	rou_BILL_CITY\$	<u>Size</u> <u>B</u> <u>7</u>		Billing Address Billing Po Box Billing Cty

Picture 4.3: Create template – Step 3,4,5,6,7 **4.** Choose the module from the list (i.e. CreditNotes4You).

- 5. Choose one of the all available fields from the selected module (i.e. Billing City) and click on Insert into template button
- 6. Repeat the steps 5. and 6. to finish your pdf template according to your needs
- 7. Finally click on the Save button

todule: Cre	ote ditNotes4You								Edit Duplic	cate Delete	
Templa	te informations										
		Template name	Credit Note								
		Description									
		Module	CreditNotes4You								
		Status	Active								
		Set as default	for DetailView 🗙	for ListView 🗙							
PDF Ter	nplate										-
Header											
	CREDIT	Note: \$C	REDITNC	TES4Y	OU_CRED	ITNOTE	S4YOU_I	VO\$			
	CREDIT	Note: \$C	REDITNC	TES4Y(ITNOTE %G_Subtotal%	S4YOU_I	NO\$ %G_LBL_NET_PRICE% without TAX	%G_Tax% (%)	%G_Tax% (\$CURRENCYCODE\$)	%M_Total%
	Pes #PRODUCTBLOC,START4	Note: \$C	REDITNC	TES4YC	DU_CRED	ITNOTE %G_Subtotal%	S4YOU_I	NO\$ %G_LBL_NET_PRICE% without TAX	%G_Tax% (%)	%G_Tax% (\$CURRENCYCODE\$)	%M_Total%
	Pos #PRODUCTBLOC_START# \$PRODUCTPOSITION\$	Note: \$C	REDITNC Rty%	TES4YC	SPRODUCTUISTPRICES	ITNOTE %G_Subtotal% SPRODUCTTOTALS	S4YOU_I %G_Discount%	NO\$ NG_LBL_NET_PRICEN WITHOUT TAX SPRODUCTSTOTALAFTERDISCOUNTS	%G_Tex% (%) SPRODUCTVATPERCENTS	%G_Tax% (\$CURRENCYCODE\$) \$PRODUCTVATSUM\$	%M_Total%
	Pos #PRODUCTBLOC_STARTA \$PRODUCTPOSITIONS #PRODUCTPOSITIONS	Note: \$C	REDITNC Rty%	TES4Y(SPRODUCTLISTPRICES	SPRODUCTTOTALS	SAYOU_I	NO\$ %G_LBL_NET_PRICE% without TAX \$PRODUCTSTOTALAFTERDSCOUNTS	%G_Tax% (%) SPRODUCTVATPERCENTS	%G_Tax% (SCURRENCYCODES) SPRODUCTVATSUMS	%M_Total% \$PRODUCTTOTALSUMS
Body	Pos #PRODUCTBLOC_START# \$PRODUCTBLOC_START# #PRODUCTBLOC_END# Subtoctals	Note: \$C	REDITNC Rty%	TES4YC	SPRODUCTUSTPRICES	ITNOTE %G_Subtotal% SPRODUCTTOTALS	S4YOU_I	NO\$ NG_LBL.NET_PRICEN without TAX SPRODUCTSTOTALAFTERDISCOUNTS STOTALWITHOUTVATS	%G_Tax% (%) SPRODUCTVATPERCENTS	%G_Tax% (\$CURRENCYCODE\$) \$PRODUCTVATSUMS \$VAT\$	SPRODUCTTOTALSUMS SSUBTOTALS
Body	Pes #PRODUCTELOC_START \$PRODUCTELOC_START \$PRODUCTELOC_END# Subtotals HG_Dacount%	Note: \$C	REDITNC Rty%	TES4YC Text SPRODUCTNAMES	DU_CRED	ITNOTE %G_Subtotal% \$PRODUCTTOTALS	S4YOU_I %G_Discount%	NO\$ NG_LBU,NET_PRICEN without TAX SPRODUCTSTOTALATERDSCOUNTS STOTALNITHOUTNATS	%G_Tax% (%) SPRODUCTVATPERCENTS	%G_Tax% (\$CURRENCYCODE\$) \$PRODUCTVATSUMS \$VAT5	MM_Total% SPRODUCTTOTALSUMS SSUBTOTALS STOTALDISCOUNTS
Body	Pes #PRODUCTBLOC_START SPRODUCTBLOC_START SPRODUCTBLOC_START Subtocals NG_Descourt% Total with TAX	Note: \$C %G_ \$PRODUCTQUANTITYS	REDITNC Rty# sproductuskgeunits	TES4YC Text sproductinames	DU_CRED	SPRODUCTTOTALS	SAYOU_I %G_Discount%	NO\$ NG_IBU,NET_PRICES without TAX SPRODUCTSTOTALATTERDISCOUNTS STOTALMITHOUTIVATS	%G_Tax% (%)	SG_TaxS (SCURRENCYCODES) SPRODUCTVATSUMS SVATS	SPRODUCTTOTALSUMS SPRODUCTTOTALSUMS SSUBTOTALS STOTALDISCOUNTS STOTALUNTHVATS
Body	Pes #PRODUCTBLOC_STARTI SPRODUCTBLOC_STARTI SPRODUCTBLOC_STARTI SUBSCALE SUBSCALE VAC_DESCOURT\$ Total with TAX VAC_LB_SHPPING_AND_	Note: \$C	REDITNC R5%	Text sproductnames	SPRODUCTUSTPRICES	SPRODUCTTOTALS	SAYOU_I %G_Discount%	NO\$ NG_IBU,NET_PRICE without TAX SPRODUCTSTOTALATERDISCOUITS STOTALMITHOUTIVATS	%G_Tas% (%)	SG_TaxS (SCURRENCYCODES) SPRODUCTVATSUMS SVATS	SPRODUCTTOTALSUMS SPRODUCTTOTALSUMS SSUBTOTALS STOTALDISCOUNTS STOTALWITHATS SSHTAXAMOUNTS
Body	Pres PRODUCTELIC_START SPRODUCTELIC_START SPRODUCTEDIC_ENDE Subtoals NG_Discount% Total with TAX NG_LB_SHIPPING_AND_ NG_LB_TAX_FOR_SHIPPI	Note: \$C	REDITNC Rty#	TES4Y(Text \$PRODUCTIVAILES	SPRODUCTUSTPRICES	ITNOTE %G_Subtotal% SPRODUCTTOTALS	SAYOU_I %G_Discount%	NO\$ KGLIBL.NET_PRICEN without TAX \$PRODUCTSTOTALAFTERDISCOUNTS \$TOTALWETHOUTHARS	%G_Tax% (%)	%G_Tax% (\$CURRENCYCODES) \$PRODUCTVATSUMS \$VATS	SPRODUCTTOTALSUMS SPRODUCTTOTALSUMS SSUBTOTALS STOTALDISCOUNTS STOTALWITHVATS SSHTAXAMOUNTS SSHTAXATOTALS
Body	CREDIT	Note: \$C	REDITNC 9795 \$PRODUCTUSAGEUNITS	TES4Y(Text \$PRODUCTIVAILES	SPRODUCTUSTPRICES	ITNOTE %G.Subtotal% SPRODUCTIOTALS	SAYOU_I SG_DiscountS	NO\$ NGLIBL.NET.PRICEN without TAX SPRODUCTSTOTALATERDISCOUNTS STOTALNITHOUTUATS	%G_Tax% (%)	SG_TAXS (SCURRENCYCODES) SPRODUCTVATSUMS SVATS	SPRODUCTTOTALSUMS SPRODUCTTOTALSUMS SUBTOTALS STOTALDISCOUNTS STOTALUNICHATS SHTAXTOTALS SHTAXTOTALS SADJUSTIKENTS SADJUSTIKENTS

Picture 4.4: PDF Maker template for Credit Notes 4 You

In the following pictures you can see how to generate PDF file in the ListView or DetailView using PDF Maker:

ListView

- 1. Select record(s)
- 2. Click on Actions button and select "PDF Export"
- 3. Select the PDF template(s)
- 4. Select the language
- 5. Click on Export to pdf button
- 6. Dialog box will appear on the screen depending on your web browser. The PDF file is generated



Picture 4.5: Create PDF file from ListView – Step 1,2



Picture 4.6: Create PDF file from ListView – Step 3,4,5

DetailView

- 1. Select the PDF template(s)
- 2. Select the language
- 3. Click on 🖾 Export link
- 4. Dialog box will appear on the screen depending on your web browser. The PDF file is generated

Records List	CN1	
Recently Modified	▼ Credit Note Information	
	Credit Note	CN1
Credit Note	Account	meine
	Valid from	
US English	Created Time	09-07-2014 14:09:11
Export	Status	
Send Email	▼ Address	
Edit and Export	Billing Address	address
Save into Documents	Billing Po Box	
► Tag Cloud	Billing City	
	Billing State	
	Billing Code	
	Billing Country	

Picture 4.7: Create PDF file from DetailView – Step 1,2,3

4.2 Support of Email Maker

The Email Maker is extension tool designed for the vtiger CRM. Using EMAIL Maker you can create email templates with predefined information and send them from all the modules. There are available all the fields from source and related modules, the fields related to recipients, the company information and many more. The intention was to provide powerful and flexible tool which allows users of vtiger CRM to create own email templates. Using the email templates you can send mass emails from ListViews (e.g. Invoices, Quotes, Products, etc.) and finally save lot of your time. Sending is running in background. You are informed about sending process by small popup window.

PDF Maker EMAIL Maker	Cashflow	iYou Credit Notes 4 You Calendar	Leads Organizations Contact	s Opportunities Products Documents All		🕽 🔅 Administrator –
🕲 vtiger	All Records	 Type keyword and press enter 	Q Advanced			+
Records List	Actions ~	+ Add template + Add theme				1 -
► Settings	# Select	t Template name	Module	Description	Status	Action
► Tools	1	template1	Invoice	test template	Active	Edit Duplicate
	2	Test Orga	Invoice		Active	Edit Duplicate
	3 🛄	asdsdddsds			Active	Edit Duplicate
	4 📖	Invoice	Invoice		Active	Edit Duplicate
	5 🕅	Quote	Quotes		Active	Edit Duplicate
	6 📖	Account info	Organizations		Active	Edit Duplicate
	7	Test matus	Organizations		Active	Edit Duplicate
	8 🔳	Credit Note	Credit Notes 4 You		Active	Edit Duplicate
			EI	MAIL Maker Basic 600.1.13 :: IT-Solutions4You		

Picture 4.8: Email Maker

You can send Email from DetailView of Sales Order.



Picture 4.9: Sending Email from DetailView of Sales Order Notice: If POP-up window do not show, please allow POP-up window in your browser.

Full funtionality of Email Maker you can fink on following link:

http://www.its4you.sk/images/stories/email-maker/Email_Maker_for_vtiger_CRM_6.pdf

Settings 5

5.1 Deactivate license

In case you need to reinstall Credit Notes 4 You you have to deactivate and reactivate license key. To deactivate license key please provide following steps:

1. Click on 🧨 2. Click on Licence 3. Click on Deactivate license button Yes 4. Confirm deactivation with button + Add R 1 to 4 < 🔁 🄰 🗡 🕶 Actions -The All Credit Notes 4 You Edit Fields J K L M N O вс Module Se Edit Workflo Credit Credit N 546354 vos datos enterprise Licens CN0003 123 vos datos enterprise Street 941 Street 941 Testiny HH CN0002 PG invoice2 Picture 5.1: Deactivate Credit Notes – Step 1,2 License settings Manage all settings related to your license e Deactivate license 3 Re Picture 5.2: Deactivate Credit Notes – Step 3 LBL_DEACTIVATE_QUESTION Picture 5.3: Deactivate license of Credit Notes – Step 4

After deactivation of license Credit Notes 4 You doesn't work at all and Credit Notes 4 You work area is not accessible either as you can see on Picture 5.4.

To reactivate license you have to provide following steps:

- 1. Click on Activate button
- 2. Insert licence key



Picture 6.5: Activate license of Credit Notes-Step 2,3

5.2 Reactivate license

In case that some problem occurs with license key (moving, copying, migrating) you need to reactivate your license key. To reactivate license key please provide following step:

1.	Click on	Reactivate license				
2.	Insert lic	ense key				
3.	Click on	Save				
L	icense settii	ngs				
N	lanage all setti	ings related to your lic	cense:	1		
	License setting	5		_ _		
		Li	icense key:	Reactivate license	Deactivate license	

Picture 6.6: Reactivate license of Credit Notes – Step 1

Rea	ctivate lic	ense			×
	License	ey keykey	keykeyke	ykeykey	
≥ K				3. 💷	ve Cancel

Picture 6.7: Reactivate license of Credit Notes – Step 2,3

5.3 Upgrade

The upgrade of the Credit Notes 4 You is initiated in the same way as Credit Notes 4 You installation. So please refer to above installation part for details how to initiate the import of the module from the file. As can be seen on the below picture you will be notified that the Credit Notes 4 You module already exists. The upgrade will start immediately when the checkbox "I would like to update now." is checked. After upgrade the notification about successful upgrade is shown.

Import Module From File		
	Import Module From File Choose File CreditNotes600_1_0.2ip	
	import	Iancel
Import Module From File		
Verify Import Details		
Module Name	CreditNotes4You Exists	
Vtiger Version	6.0.0	
License		-
	I would like to update now 💽 😋	ıcel
Update Module From File		
Updating Module		
CreditNotes4You module was updated succes	sfully.	
	Fi	nish

Picture 5.5: Upgrade Credit Notes 4 You

Change log of Credit Notes 4 You 4th August 2014: 600.1.0

Change log of Manual for Credit Notes 4 You

- 14th August 2014: manual is based on Credit Notes 4 You version: **600.1.0**
 - first initiate version for vTiger 6.x