ITS4You
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

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)

# 1 How to instal Credit Notes 4 You

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.
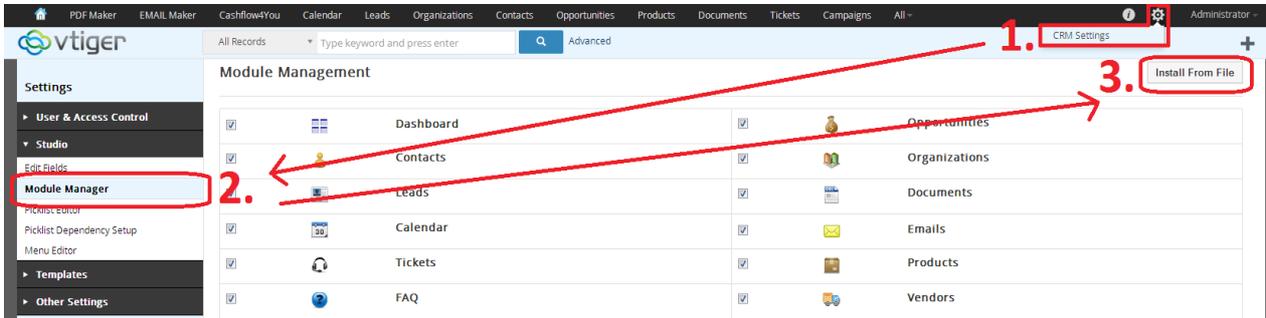
Picture 1.1: Installation of Credit Notes– Step 1

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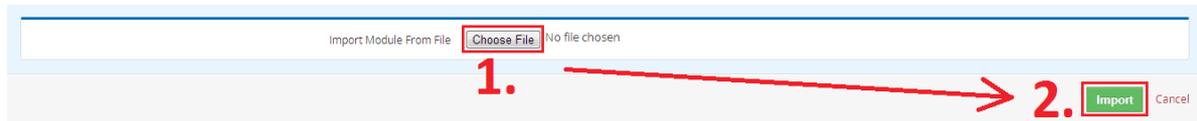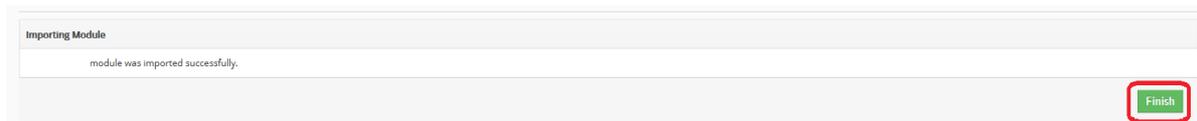

Picture 1.2: Installation of Credit Notes – Step 2

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.

Picture 1.3: Installation of Credit Notes – Step 3

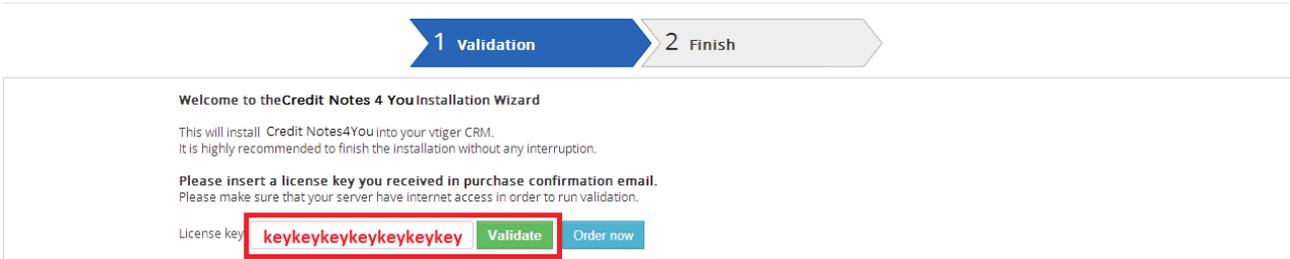4. Click on **Finish** button to complete the module import.

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.
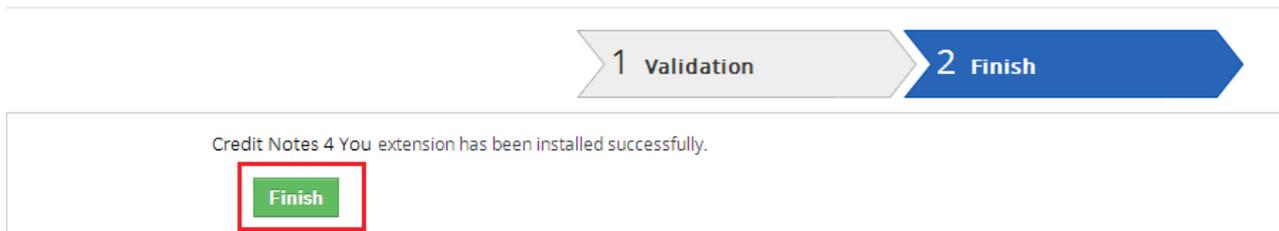

Picture 1.5: Validation of Credit Notes – Step 1

2. Click on **Finish** to complete Validation.

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 andn 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)

Picture 2.1: Create Credit Note from Invoice

Picture 2.2: Create Credit Note from Invoice

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.
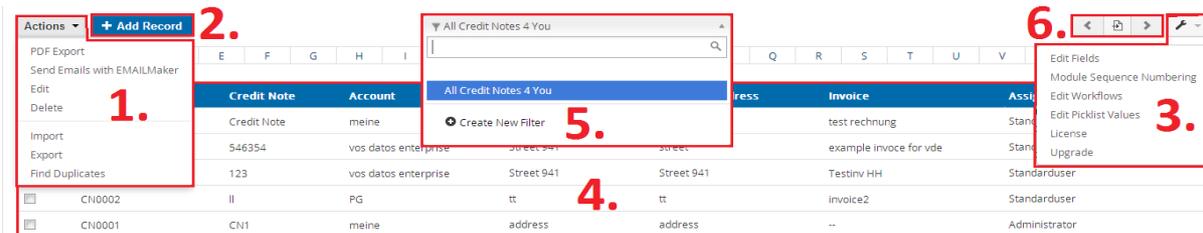

Picture 3.1: Work area of Credit Notes 4 You

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).
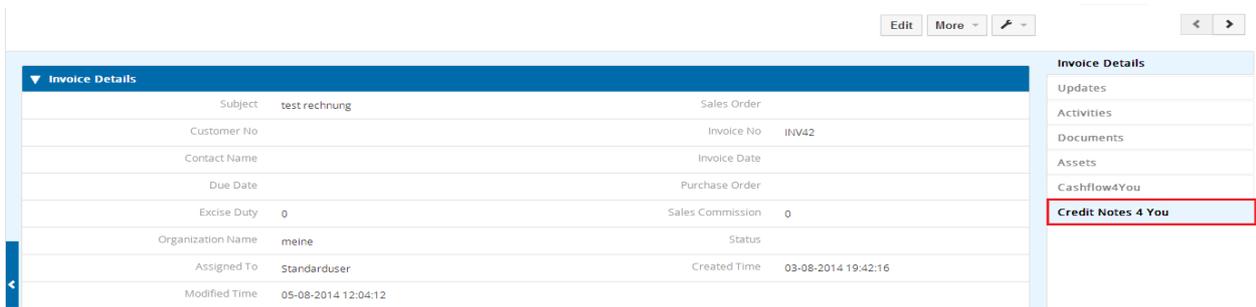
Picture 3.2: Credit Notes 4 You in DetailView of Invoice
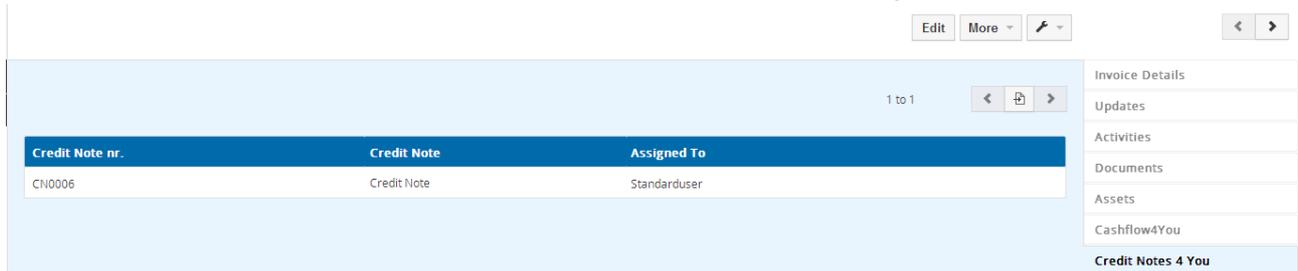
Picture 3.3: Credit Note related to Invoice

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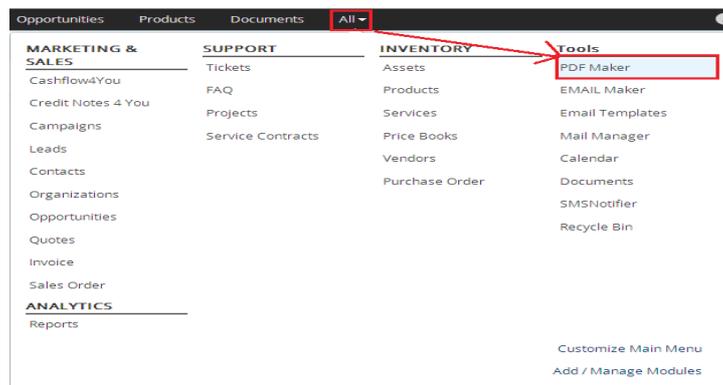
Please note that this will work only with PDF Maker Professional.

Before creating PDF file you need to create template of PDF Maker. To create template please check manual for PDF Maker:
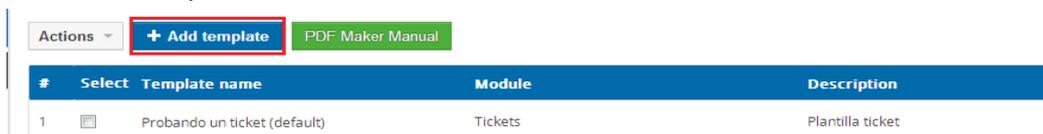(http://www.its4you.sk/images/pdf_maker/pdf_maker_for_vtiger6_crm.pdf)
or please provide following steps:

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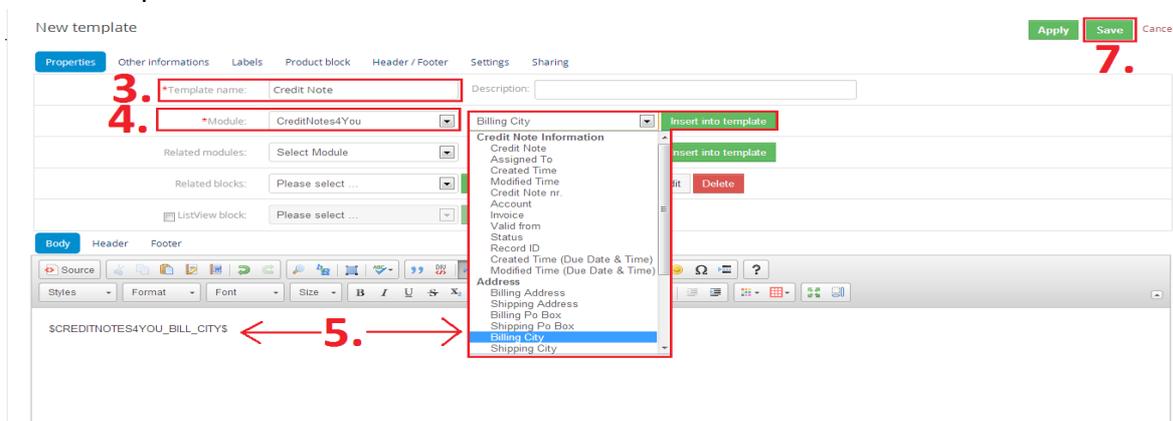

Picture 4.1: Create template – Step 1

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

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.

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

*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

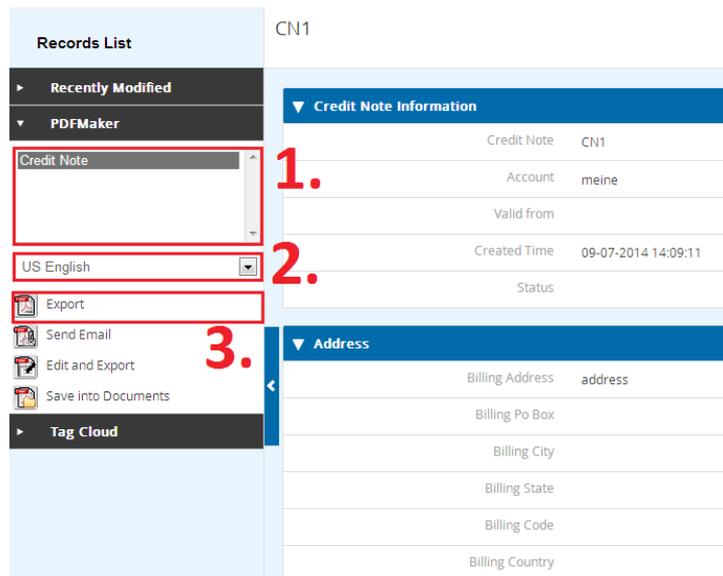6. Dialog box will appear on the screen depending on your web browser. The PDF file is generated
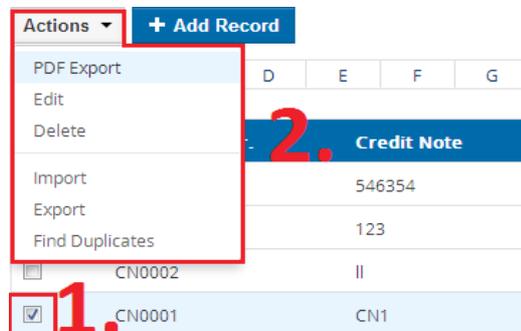
Picture 4.5: Create PDF file from ListView – Step 1,2
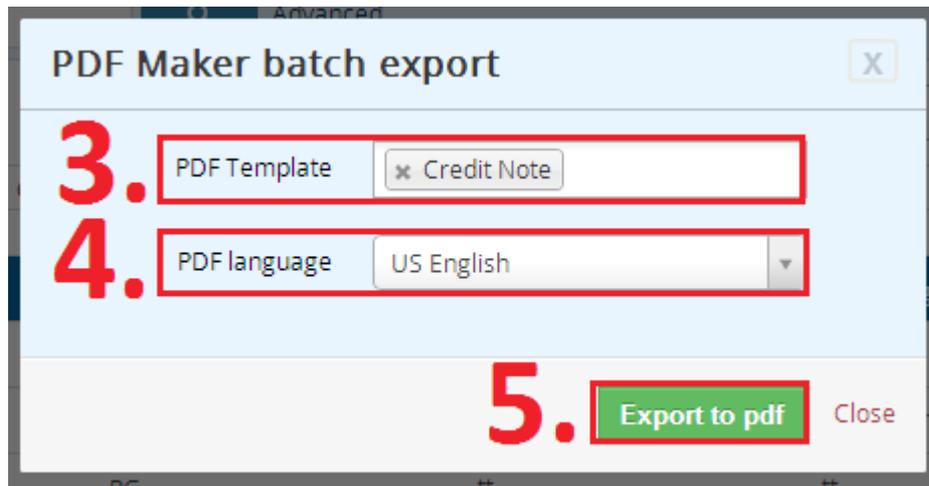
Picture 4.6: Create PDF file from ListView – Step 3,4,5

DetailView

1. Select the PDF template(s)

2. Select the language

3. Click on link

4. Dialog box will appear on the screen depending on your web browser. The PDF file is generated

*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.
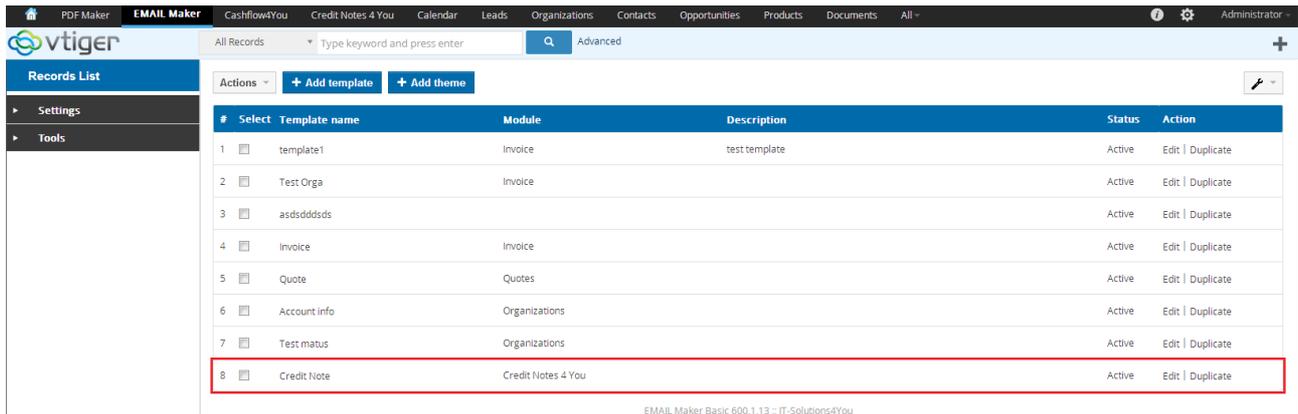
Picture 4.8: Email Maker

You can send Email from DetailView of Sales Order.
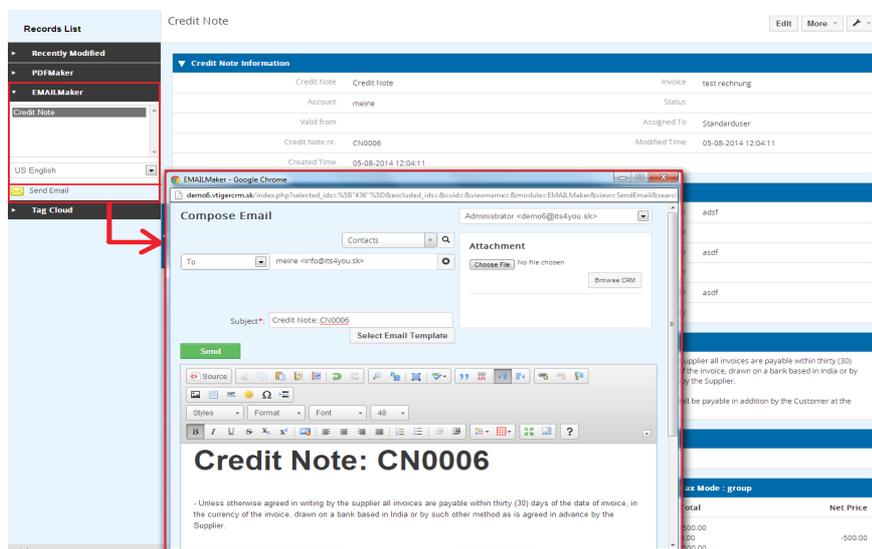
Picture 4.9: Sending Email from DetailView of Sales Order

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:

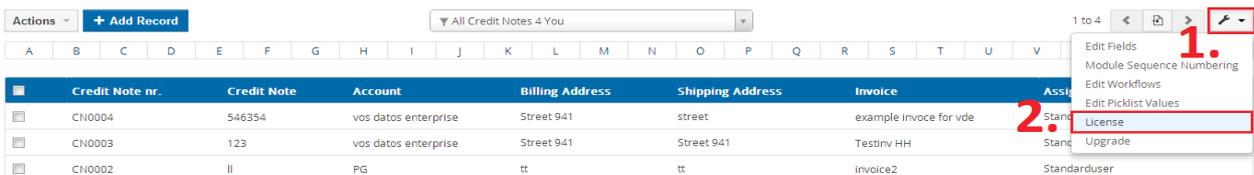http://www.its4you.sk/images/stories/email-maker/Email_Maker_for_vtiger_CRM_6.pdf

5   Settings

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 [wrench icon]

2. Click on Licence

3. Click on [Deactivate license] button

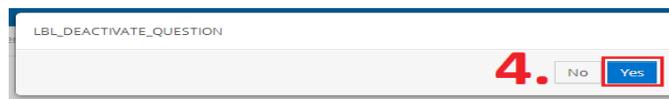4. Confirm deactivation with button [Yes]

Picture 5.1: Deactivate Credit Notes – Step 1,2

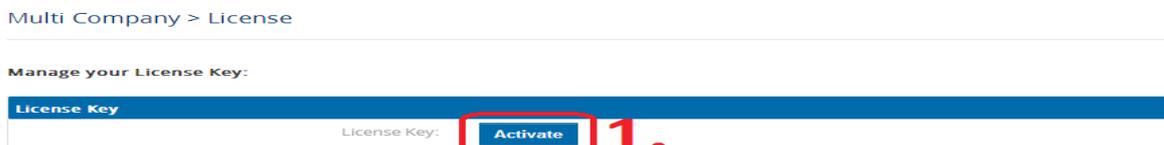*Picture 5.2: Deactivate Credit Notes – Step 3*

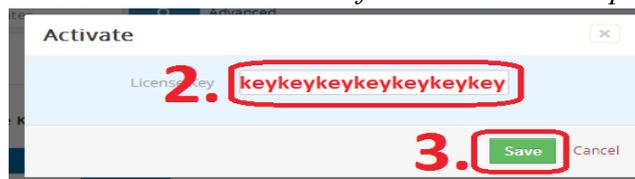*Picture 5.3: Deactivate license of Credit Notes – Step 4*

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

3. Click on [Save]

Picture 5.4: Activate license of Credit Notes – Step 1

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:
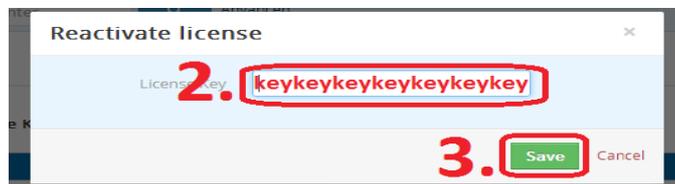
1. Click on **Reactivate license**

2. Insert license key

3. Click on **Save**

Picture 6.6: Reactivate license of Credit Notes – Step 1

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.
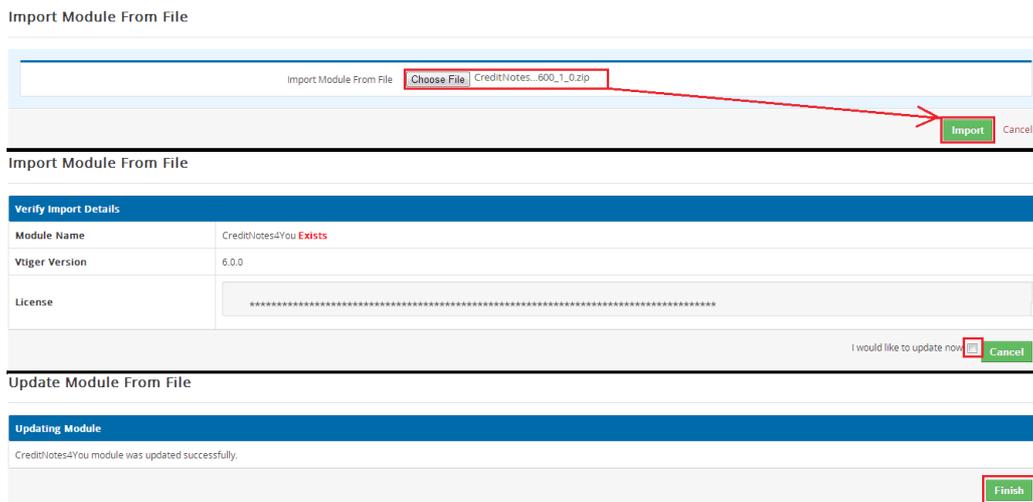
Picture 5.5: Upgrade Credit Notes 4 You

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