

# **IT-Solutions4You**

# DELIVERY NOTES 4 YOU for VTIGER CRM 6.x

#### Introduction

Delivery Notes 4 You allows you:

- Create Delivery Note
- Invoice products, services from Delivered product(s), service(s)

Ac	tions - + Add Delivery	Note		▼ All Delivery Notes		×		1 to 20 🗯 🐇 🕹 🖌 -
	A B C D	E F	G H I	J K L	M N C	P Q	R S T U	V W X Y Z
	Delivery Note No	Organisation	Contact Name	Status	Delivery Date	Sales Order	Invoice	Assigned To
								Search
	DN152	Orga1		Delivered	29-01-2015	Manual added test 2		Administrator
	DN151	Orga1		Ready to Deliver	29-01-2015	Manual added test 2	-	Administrator
	DN149	Orga1		Canceled	28-01-2015	Manual added test 2		Administrator
	DN150	Orga1		Ready to Deliver	31-01-2015		-	Administrator
	DN140	Orga1		Invoiced	25-01-2015		AutoStatus test 3	Administrator

# **Delivery Notes 4 You**

				Delivery Note Deta
Delivery Note Information				Updates
Delivery Note N	0 DN151	Status	Ready to Deliver	Documents
Organisatio	Orga1	Contact Name		
Delivery Da	te 29-01-2015	Туре	Sale	
Sales Ord	er Manual added test 2	Carrier		
Invoi	ce	Tracking No		
Assigned To Administrator		Created Time	29-01-2015 00:53:43	
Modified Tin	1e 29-01-2015 00:53:43			
Address Information				
Stre	et OrgaShipAddr1	PO Box	5	
Z	IP 08001	City	OrgaShipCity1	

Cancel

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#### License agreement

- The Delivery Notes 4 You License will be referred to as "The license" in the remainder of this text.
- This irrevocable, perpetual license covers all versions 2.xx of Delivery Notes 4 You.
- This license gives the holder right to install Delivery 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 Delivery 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 Delivery 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.
- Delivery 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 Delivery 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:

- vTiger CRM version (e.g. 6.x)
- Delivery 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 install Delivery Notes 4 You

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

1. Install the .zip (package) file of the Delivery Notes 4 you module via **CRM Settings -> Module Manager**. Click on the **Install from Zip**.

Studio	s • Type key	word and press enter Q Advanced			1.	CRM Settings
Studio V	88					
Fields		Dashboard	2	6	Opportunities	Manage Users
	۵.	Contacts	2	<u>10</u>	Organizations	
list Editor		Leads	2	873 <b>6</b> .	Documents	
nu Editor 2.	38	Calendar	2		Emails	
dule Manager	Q	Tickets	V	<b>1</b>	Products	
Templates	3	FAQ	2		Vendors	
Other Settings	æ	Price Books		R	Quotes	
Integration	Po	Purchase Order	V	80	Sales Order	
Extension Store	匙	Invoice	2	<b>N</b>	RSS	
V	© 🌲	ExtensionStore	v 0		PDFMaker	
V	© 🌲	Preinvoice				

Picture 1.1: Installation of Delivery Notes 4 You – Step 1

2. Select the .zip (package) file that you downloaded from our shop. Please check that you accepted the disclaimer and would like to proceed. Click on the Import button.

Import Module	e from Zip	
	Disclaimer - Custom Files could put your CRM at risk This functionality has been made available for Developers to test new modules. If you are installing from a file provided 3rd party, please proceed only if you trust the publisher. Custom Modules coul vulnerabilities and overwrite system files putting your CRM at risk. The module you are about to install has not been reviewed by Voger.	d include security
2.	I accept with disclaimer and would like to proceed	
<b>1.</b> [	Choose File	3. Import Cancel

Picture 1.2: Installation of Delivery Notes 4 You – Step 2

3. Verify the import details parsed from the .zip (package) file. Please check that you accepted the license agreement and click Import Now to proceed Cancel or to cancel.

Verify Import Details	
Viger Version : License	
* Module : * Varian : * Viagr * Autor: TFSoldione/You s.r.a - Here & Advau ak * Autor: TFSoldione/You s.r.a - Here & Marilla Europe, 2.0 or biology * Generated Researce : Learner European European Marilla European A	Î
Gyperce defined a method is defined in the ingles, method is defined in the ingles     Gyperce defined a method is defined in the ingles, method is defined in the ingles	2. Import Now Cancel

Picture 1.3: Installation of Delivery Notes 4 You – Step 3

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

Import Successfull	×
module was imported successfully.	
	Ok

*Picture 1.4: Installation of Delivery Notes 4 You – Step 4* 

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

 Delivery Notes 4 You Validation Step. Please check your Company information and insert license key. Make sure that your server has Internet access. Click on Validate button. If you want to change your Company information click on Change Company Information button.

Delivery Note inst	allation	
1 Validation	2 Finish	
	Welcome to the Delivery Note Installation Wizard	
	This will install Delivery Note into your vtiger CRM. It is highly recommended to finish the installation withou	t any interruption.
	Please check your Company information. Please insert a license key you received in purchase confl Please make sure that your server has an internet access	rmalion email. In order to run validation.
	Your Company Information	Change Company Information
	Company Name:	w
	Address:	1. UP Har Rul 10 Bolt Rainings
	City:	ngen
	State:	
	Country:	
	Postal Code:	823
	VAT ID:	0.0100
	Lisense settings	
	Vour vtiger url:	To Tentes, open in a Televisionethic Reventini
	License key:	keykeykeykeykeykeykeykeykeykeykey
		Validate Order now

Picture 1.5: Validation of Delivery Notes 4 You – Step 1

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

Colleges of the	installation
1 Validation	2 Finish
	has been installed successfully.
	Finish

Picture 1.6: Validation of Delivery Notes 4 You – Step 2

For Upgrade please check 5.4 Upgrade.

After successful installation, you are able to see Delivery Notes into your vTiger (Picture 1.7).



Picture 1.7: Start Delivery Notes 4 You

# 2 How to use Delivery Note

#### 2.1 Creating Delivery Note from Sales Order

If in your business first you create Sales Order and then you will delivery products this option to create Delivery Note is suitable for You. After that you can invoice this products. To use it please provide following steps:

1. Create or open your Sales Order and in ITS4YouDeliveryNotes click on Actions • button and choose Create Delivery Note

Sales Order	List	< s	alesOrderfirst			Edit More 👻 🗡 👻
Recently Mod	dified					
<ul> <li>ITS4YouDeliv</li> </ul>	ervilotes		<ul> <li>Sales Order Details</li> </ul>			
	a grades		Subject	SalesOrderfirst	Opportunity Name	
Prod2 Prod1	Available		Customer No		Sales Order Number	\$033
	Actions -		Quote Name		Purchase Order	
Create	Delivery Note		Contact Name		Due Date	
			Carrier		Pending	
Show D	elivery Overview		Status	Created	Sales Commission	0
·			Excise Duty	0	Organization Name	Orga1
▶ Tag Cloud			Assigned To	Administrator	Created Time	30-01-2015 14:08:54
			Modified Time	30-01-2015 14:11:47		

Picture 2.1: Creating Delivery Note from Sales Order

2. Now, please set quantities of products to be delivered (You can choose all or part of products)



Picture 2.2: Creating Delivery Note from Sales Order

3. Your Delivery Note was created



Picture 2.3: Creating Delivery Note from Sales Order

4. If it is necessary, you are able to create a second (next) Delivery Note (steps: 1,2) for the same Sales Order

Sales Order Lis	st	< s	alesOrd	lerfirst		
Recently Modifi	ed					
<ul> <li>ITS4YouDeliver</li> </ul>	vNotes		▼ Sales	Order Details		
Brod2	Available			9	Subject	SalesOrderfirst
Prod1	Available			Custor	ner No	
	Actions -			Quote	Name	
Create De	elivery Note			Contact	Name	
Add to De	livery Note				Carrier	
Deliver pr	oducts				Status	Created
Show Deli	very Overview			Excis	e Duty	0
	-			Assig	ned To	Administrator
Tag Cloud				Modifie	d Time	30-01-2015 14:26:14
	Set quantiti Add to existing Product Name	es to be Delivery N Available	e delive	157		X A
	Prod2	10000.000	2.000	2.000	D	elete
	Prod1	1000.000	1.000	1.000	D	elete
				Add to Delivery N	ote	Cancel

5. Also you can add products to existing Delivery Note

Picture 2.4: Creating Delivery Note from Sales Order

6. After the products were added into Delivery Note, you are able to deliver products (change status to Delivered) directly from Sales Order as you can see on Picture 2.5 as well as from Delivery Note that is in status Ready to Deliver (Picture 2.6)

<ul> <li>Recently Mo</li> </ul>	dified			
Recently Mu	Junea	_	Color Order Details	
<ul> <li>ITS4YouDeli</li> </ul>	veryNotes			
Prod2	Available		Subject	SalesOrdeninsc
Prod1	Available		Customer No	
	Actions -		Quote Name	
Creat	e Delivery Note		Contact Name	
Add to	o Delivery Note		Carrier	
Delive	er products		Status	Created
Show I	Delivery Overview		Excise Duty	0
			Assigned To	Administrator
▶ Tag Cloud			Modified Time	30-01-2015 14:26:1
			<b>*</b>	
	To b	Product Name	d Delivery Notes X	
	To b	Product Name	d Delivery Notes X	
	To b	Product Name DN157 Prod2	Ready to deliver	

Picture 2.5: Deliver products from Sales Order

ON157 Created Ready to Dail	iver Delivered Invoiced	Deliver products	Cancel Delivery Note Edit More *
Delivery Note Information			
Delivery Note No	DN157	Status	Ready to Deliver
Organisation	Orga1	Contact Name	
Delivery Date	30-01-2015	Туре	Sale
Sales Order	SalesOrderfirst	Carrier	
Invoice		Tracking No	
Assigned To	Administrator	Created Time	30-01-2015 14:24:48
Modified Time	30-01-2015 14:24:48		
	Deliver prod	ucts	
	Prod2	10.000	

Picture 2.6: Deliver products from Delivery Note

 To invoice all delivered products you have also two options. You can invoice products from Sales Order (Picture 2.7) or you are able to invoice products from Delivery Note (Picture 2.8)

	Sales Order List		< Sale	esOrderfirst			
	Recently Modified						
			*	Sales Order Details			
	IIS4YouDeliveryNote		Subject	SalesOrderfi	st		
	Prod2 Prod1	Available		Customer No			
	Actions -			Quote Name			
	Create Delivery	Note		Contact Name			
	Add to Delivery I	Note		Carrier			
	Deliver products			Status	Created		
	Invoice products			Excise Duty	0		
	Show Delivery C	Overview		Assigned To	Administrato	r	
				Modified Time	02-02-2015 1	1:02:59	
		To be i	nvoiced	Delivery Notes X			
			oduct Name	Dolivorad			
		2 Di	157				
		Pro	102 od 1	6.000			
				0.000			
				Create Invoice Cancel			
		L			l i		
creating New Invoice							Save Cancel
Invoice Details							
* Subject	SalesOrderfirst				Sales Order	SalesOrderfirst	Q
Customer No				Co	ontact Name	O Type to search	Q
Invoice Date					Due Date		
Invoice Date Purchase Order	<b>1</b>				Due Date Excise Duty	0.000	
Invoice Date Purchase Order Sales Commission	0.000			* Organi:	Due Date Excise Duty zation Name	0.000 Orga1	٩
invoice Date Purchase Order Sales Commission Status	0.000 v			* Organi:	Due Date Excise Duty zation Name Assigned To	0.000 Orga1 Administrator v	٩
Invoice Date Purchase Order Sales Commission Status Address Details	0.000 Select an Option			• Organia •	Due Date Excise Duty zation Name Assigned To	0 000     Orga1     Administrator     *	٩

Picture 2.7: Invoice delivered products from Sales Order

DN157		Invoice products	Cancel Delivery Note	Edit More - 🖌 -	< >
Created Ready to Del	iver Delivered Invoiced				
- Delivery Note Information					Delivery Note Details
Delivery Note Information     Delivery Note No.	DM157	Status	Dolivered		Updates
Organisation	Ormal	Contact Name	Delivered		Documents
Delivery Date	30-01-2015	Type	Sale		
Sales Order	SalesOrderfirst	Carrier			
Invoice		Tracking No			
Assigned To	Administrator	Created Time	30-01-2015 14:24:48		
Modified Time	30-01-2015 15:33:33				
Graating New Invoice					Carrol
creating new invoice					save
Invoice Details					
* Su	bject DN157		Sales Order	SalesOrderfirst	Q
Custom	er No		Contact Name	• Type to search	Q
Involce	Date		Due Date		=
Purchase 0	Drder		Excise Duty		
Sales Commi	Sales Commission		* Organization Name	O Orga1	Q
S	Status Select an Option		* Assigned To Administrator		v
Address Details					
	Organization			Organization	

Picture 2.8: Invoice delivered products from Delivery Note

#### 2.2 Creating Delivery Note from Invoice

You are able also create Delivery Note from Invoice. To create it please see next steps:

1. Open or create Invoice, click on Actions - button and choose Create Delivery Note

Invoice List	<	InvoiceFirst				Edit More - 🖌 -	<	
Recently Modified							Invoice Details	
ITS4YouDelivervNotes		<ul> <li>Invoice Details</li> </ul>					Updates	
Prod1 Available Prod2 Available		Address Details						
Actions -		▼ Terms & Conditions						
Create Delivery Note			Terms & Con	Unless otherwise agreed in writing by th invoice, in the currency of the invoice, dra advance by the Supplier.     All prices are not inclusive of VAT which	he supplier all invoices are payable within thirt awn on a bank based in India or by such other shall be payable in addition by the Customer a	ty (30) days of the date of method as is agreed in at the applicable rate.	Delivery Notes	
lag cloud		<ul> <li>Description Details</li> </ul>						
		Description	1					
		Item Details		Currency : Euro(€)	Tax Mode : group			
		*Item Name	Quantity	List Price	Total	Net Price		
		Prod1	14	15'000	210'000	210'000		

Picture 2.9: Creating Delivery Note from Invoice

2. Fill how many products will be delivered and click on Create Delivery Note button

Set quantiti	es to be	delivere	d	X
Product Name	Available	To deliver	Quantity	Action
Prod1	986.000	14.000	14.000	Delete
Prod2	9994.000	6.000	6.000	Delete
	_	Crea	te Delivery Note	Cancel

Picture 2.10: Creating Delivery Note from Invoice

3. Your Delivery Note was created



Picture 2.11: Creating Delivery Note from Invoice

#### 2.3 Creating Delivery Note

The last option is creating Delivery Note first. Please provide following steps:

1. Go to the ListView of Delivery Notes and click on + Add Delivery Note button

Contacts	Opportunities I	Products Docume	nts Tickets	Delivery Notes	All -				/ 0	🗘 🌣 Administrator -
All Records	▼ Type key	word and press enter	٩	Advanced						+
Actions	+ Add Deliven	y Note	c u	▼ All De	livery Notes	M N O	• •	C T	1 to 20 C	< 🖹 🗲 🗡 🗸
A	всо	E F	чн	I J	K L	MNO	P Q K	5 1	0 0 0	λ Υ Δ
	Delivery Note No	Organisation	Contac	t Name St	atus	Delivery Date	Sales Order	Invoice	Assigned To	
										Search
	DN160	Orga1		Rea	ady to Deliver	02-02-2015		InvoiceFirst	Administrator	
	DN159	Orga1		Rea	ady to Deliver	02-02-2015	SalesOrderfirst		Administrator	
	DN157	Orga1		De	livered	30-01-2015	SalesOrderfirst		Administrator	

Picture 2.12: Creating Delivery Note

2. Fill information (Required are Organization and Item) and click on Save button

elivery Note b	nformation					
chirch finder in	* Organisation	O Orga1	Q +	Contact Name	• Type to search	۹ +
	Delivery Date			Туре	Select an Option *	
	Sales Order	O Type to search	Q	Carrier	Select an Option 🔹	
	Invoice Type to search Q			Tracking No		
	Assigned To	Administrator				
dress Inform	ation					
	Copy Shipping Address from	<ul> <li>Organization</li> <li>Contact</li> </ul>				
	Street	OrgaShipAddr1	1	PO Box	5	
	ZIP	08001		City	OrgaShipCity1	
	Country	OrgaShipCountry1		State	OrgaShipState1	
scription Info	ormation					
	Description					
rms & Condit	tions					
	Terms & Conditions	- Unless otherwise agreed in writing by th in advance by the Supplier.	e supplier all invoices are payable within	thirty (30) days of the date of invoice, in the currency of th	e invoice, drawn on a bank based in India	or by such other method as is agre
em Details						
ols	*Item Name			Quantity	ý	
	Prod1	<b>E</b> 0		3		
	de Add Camina					

Picture 2.13: Creating Delivery Note

3. Now, you can deliver products. To deliver, please click on Deliver products button

D	N161 Created Ready to Deliver	Delivered Invoiced	Deliver prod	ucts Cancel Delivery Note Edit More -	< >
					Delivery Note Details
	Delivery Note Information				updates
	Delivery Note No	DN161	Status	Ready to Deliver	Documents
	Organisation	Orga1	Contact Name		
	Delivery Date		Туре		
	Sales Order		Carrier		
	Invoice		Tracking No		
	Assigned To	Administrator	Created Time	02-02-2015 12:29:46	
	Modified Time	02-02-2015 12:29:46			

Picture 2.14: Deliver products from Delivery Note

4. Fill how many products will be delivered and click on **Save** button



Picture 2.15: Deliver products from Delivery Notes

5. Now, you are able to invoice delivered products. Please click on **Invoice products** button

Co	ntacts Opportunities Products	s Documents Tickets Delivery Notes All	<b> </b> ≁		🖌 🥡 🍄 Administrator -
All Re	cords   Type keyword and	press enter Q Advanced			+
¢ [	DN161		Invoice products	Cancel Delivery Note Edit More -	< <b>&gt;</b>
	Created Ready to Deli	iver Delivered Invoiced			
					Delivery Note Details
	<ul> <li>Delivery Note Information</li> </ul>				Updates
	Delivery Note No	DN161	Status	Delivered	Documents
	Organisation	Orga1	Contact Name		
	Delivery Date		Туре		
	Sales Order		Carrier		
	Invoice		Tracking No		
	Assigned To	Administrator	Created Time	02-02-2015 12:29:46	
	Modified Time	02-02-2015 12:35:49			

Picture 2.16: Invoice products from Delivery Note

6. Fill info you want and click on **Save** button

cts Opportunities Products Documents	Tickets Invoice All ~		🖌 🕑 🌣 Administrator
Records • Type keyword and press enter	<b>Q</b> Advanced		+
Creating New Invoice			Save Cancel
Invoice Details			
* Subject	DN161	Sales Order	C Type to search Q
Customer No		Contact Name	O Type to search Q
Invoice Date		Due Date	
Purchase Order		Excise Duty	
Sales Commission		* Organization Name	Orga1 Q
Status	Select an Option *	* Assigned To	Administrator *
Address Details			
Copy Billing Address from	Organization     Contact     Shipping Address	Copy Shipping Address from	Organization     Contact     Billing Address
	a annua		a ar

Picture 2.17: Invoice products

**Note:** To create delivery note, deliver product or invoice products you can also use Delivery Note OverView. To more information about Delivery OverView please check chapter 3.4 Delivery Notes block.

# 3 Work area

The Work Area of the Delivery Notes 4 You consists of:

- ListView used for common tasks like add, delete, duplicate Delivery Notes, import and export Delivery Notes and access to others tools
- DetailView- shows already created Delivery Notes in details
- EditView allows the preparation of the new Delivery Notes or editing existing
- Delivery Notes block contains of Delivery Notes Action block and Delivery Overview

#### 3.1 ListView

The common tasks like add/delete/duplicate Delivery Notes, import/export Delivery Notes or start editing have to be initiated via Delivery Notes 4 You ListView. Go to **All -> INVENTORY** and click on **Delivery Notes** link and Delivery Note 4 You ListView will appear on your screen.

									Edit Heids
				1	(				Module Sequence Numbering
	Edit						٩		Edit Workflows
	Delete								Edit Picklist Values
🕆 Calendar Leads Organizations	Import	s Pr	roducts Documents	Tickets Delive	All Delivery Notes Default matus				License
	Export	keywo	ord and press enter	Q Advanc	Delivered products				Upgrade
	Find Duplicat	es			O Create New Filter				Uninstall
Delivery Notes List	Actions ~	+ Add Delivery	Note		▼ All Delivery Notes		v		1 to 20 🗢 < 🗄 🗲 🗡 -
► Recently Modified	A B	C D	E F C	5 H I	J K L	M N O	P Q	R S T U	V W X Y Z
	De De	elivery Note No	Organisation	Contact Name	Status	Delivery Date	Sales Order	Invoice	Assigned To
									Search
	E DI	1152	Orga1	-	Delivered	29-01-2015	Manual added test 2		Administrator
	E DN	1151	Orga1		Ready to Deliver	29-01-2015	Manual added test 2		Administrator
	Di Di	1149	Orga1		Canceled	28-01-2015	Manual added test 2	-	Administrator
	DN	1150	Orga1		Ready to Deliver	31-01-2015			Administrator 📰 🖍 🏦

Picture 3.1: Delivery Notes 4 You ListView

The main part of the Delivery Notes 4 You ListView consists of the list of the Delivery Notes, which gives you information about a Delivery Notes name, number and other information. In the list you can also select one or more Delivery Notes and consequently delete or export the selected group of Delivery Notes.

ListView of Delivery Notes 4 You consists of:

- Actions contains actions for edit, deletion, import or export of the Delivery Notes and find Duplicates
- + Add Delivery Note is used to add new Delivery Notes
- Search to search Delivery notes based on field
- All Delivery Notes - to use filtering or create new filter
- • P > next/previous page of Delivery Notes
- Image: allow you to set standard vTiger settings, Preferences, License setting, Upgrade and Uninstall
- 🔳 🖉 🟛 to show Complete Details, Edit or Delete Delivery Notes

#### 3.2 DetailView

From ListView you can directly open any Delivery Note in DetailView. The DetailView consists of:

• Information about status of Delivery Note

0	Created
0	Ready to Deliver
0	Delivered
0	Invoiced

- Delivery Note details part
- Group of action buttons
  - Deliver products deliver products from Delivery Notes (in status Ready to Deliver)
  - Invoice products create Invoice from Delivered products (in status Delivered)
  - Cancel Delivery Note cancel Delivery Note
  - Edit switch to EditView and start editing
  - More duplicate or delete Delivery Note
  - allow you to set Delivery Notes 4 You
  - next/previous Delivery Note
- References part most important is reference to Documents
- PDF Maker and Email Maker area allows to create PDF or send mail with PDF please see (Additional features)

					Edit Field	ls	
					Module 9	Sequence Numbering	
					Edit Wor	kflows	
					Edit Pickl	list Values	
					License		
					Upgrade		
					Uninstall		
DN152	Deliv	rer products Invoice products	Cancel Deliver	/Note Edit More 👻	1 -		< >
Created Ready to Deli	iver Delivered Invoiced			Delete Delivery Note			
				Duplicate		Delivery Note Dr	taile
<ul> <li>Delivery Note Information</li> </ul>						Undates	
Delivery Note No	DN152	Status	Delivered			Documents	
Organisation	Orga1	Contact Name				o o comento	
Delivery Date	29-01-2015	Туре	Sale				
Sales Order	Manual added test 2	Carrier					
Invoice		Tracking No					
Assigned To	Administrator	Created Time	29-01-2015 00:53	50			
Modified Time	29-01-2015 12:43:40						
▼ Address Information							
Street	OrgaShipAddr1	PO Box	5				
ZIP	08001	City	OrgaShipCity1				
Country	OrgaShipCountry1	State	OrgaShipState1				
<ul> <li>Description Information</li> </ul>							
Descriptio	n						
▼ Terms & Conditions	Tarma & Candiliana						
	Terms & Conditions						
Item Details							
*Item Name				Quantity			
Prod1				1			

*Picture 3.2: DetailView* 

## 3.3 EditView

The EditView allows you to edit Delivery Notes that are not in Delivered or Invoiced status.

elivery Note Information						
	* Organisation	Orga1	Q +	Contact Nar	Type to search	Q +
	Delivery Date	29-01-2015		Ту	sale v	
	Sales Order	Manual added test 2	Q	Carri	er Select an Option 🔹	
	Invoice	• Type to search	Q	Tracking I	10	
	Assigned To	Administrator *				
ress Information						
Copy Sh	ipping Address from	Organization Contact				
	Street	OrgaShipAddr1		PO B	DX 5	
	ZIP	08001		C	ty OrgaShipCity1	
	Country	OrgaShipCountry1		Sta	te OrgaShipState1	
scription Information						
	Description					
ms & Conditions						
	Terms & Conditions	- Unless otherwise agreed in writing by the advance by the Supplier.	supplier all invoices are payable with	in thirty (30) days of the date of invoice, in the currency of th	e invoice, drawn on a bank based in Ir	ndia or by such other method as is agreed in
m Details						
ls *Item	Name			Quar	tity	
Prod1				2 Noter Maxin	ough stock sum value is	
				//		
Add Product + Add Service						

Picture 3.3: EditView of Delivery Notes 4 You

#### 3.4 Delivery Notes block

The Delivery Notes block in modules Invoice and Sales Order contains of two parts: Delivery Notes Actions block and Delivery Overview where you can find information about (delivered, ready to deliver, ordered, ready to invoice, invoiced) products and also options to create Delivery Note, Add to Delivery Note, Deliver products and Invoice products.

🖌 Calendar Leads Organiz	ations	Contacts	Opportunities	Products	Documents	Tickets	Sales Order	All -
💿 vtiger <sup>.</sup>	All	Records	▼ Type ke	eyword and p	oress enter	٩	Advanced	
Sales Order List	<	testfor	delivery					
Recently Modified								
<ul> <li>ITS4YouDelivervNotes</li> </ul>		▼ Sal	es Order Details					
				Subject	testfordelivery			
Prod2 Not available			Cus	tomer No				
Actions -			Qu	ote Name				
Create Delivery Note			Cont	act Name				
Add to Delivery Note				Carrier				
Deliver products				Carrier				
Invoice products				Status	Created			
			E	xcise Duty	0			
Snow Delivery Overview	1		As	signed To	Administrator			
			Moc	lified Time	29-01-2015 15:27:	47		

Picture 3.4: Delivery Notes block

After click on Actions button you will see Delivery Notes Action block. On Picture 3.4 you can find option what you can do with the products.

When you click on Show Delivery Overview button you can see status of products (Picture 3.5).

C	Delivery Overview							X
	Product Name	Available	Ordered	Ready to deliver	Delivered	Ready to Invoice	Invoiced	
F	Prod2	-712.000	12.000	1.000	5.000	2.000	3.000	
		Create Delivery Note	Add to Delivery Note	Deliver products		Invoice products		
								Cancel

Picture 3.5: Delivery Overview detail

#### Here you have options to:

- Create Delivery Note
   to create new Delivery Note
- Add to Delivery Note
   to add into existing Delivery Note
- Deliver products
   to deliver products that are ready to deliver
- Invoice products
   to invoice delivered products

# 4 Additional feature

#### 4.1 Create Invoice from Delivery Note

How to create Invoice is described in chapter about using Delivery Note (How to use Delivery Note)

#### 4.2 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.

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/en/images/extensions/PDFMaker/manual/pdf\_maker\_for\_vtiger6\_crm.pdf

#### 4.3 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 ListView (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 pop-up window.

Full functionality of Email Maker you can find on following link:

http://www.its4you.sk/en/images/extensions/EmailMaker/manual/Email\_Maker\_for\_vtiger\_C RM\_6.pdf

#### 4.4 Outgoing Products

After installation of Delivery Notes 4 You, the Outgoing Products will be install automatically. This module reflects products that are in some Delivery Note but there are not delivered yet. You will have overview of products you need deliver. This module you can find if you click on **All** and in category **INVENTORY** you can see **Outgoing Products** (Picture 4.1)

Documents Tickets	Outgoing Products All -		
MARKETING & SALES	SUPPORT	INVENTORY	Tools
Campaigns	Tickets	Outgoing Products	Our Sites
Leads	FAQ	Delivery Notes	RSS
Contacts	Projects	Assets	Email Templates
Organizations	Service Contracts	Products	PBXManager
Opportunities		Services	Mail Manager
Quotes		Price Books	Calendar
Invoice		Vendors	Documents
Sales Order		Purchase Order	SMSNotifier
			Recycle Bin
ANALYTICS			
Reports			
			Customize Main Menu
			Add / Manage Modules

Picture 4.1: Outgoing Products

Now, you can see all products that are not delivered yet. The ListView is devided into two areas. When you click into first part you will be redirected to product and when you click into second area you will be redirected to Delivery Note that is assigned to chosen products and you can deliver product like on the Picture 2.6 or Picture 2.14.

						1 to 7 🕽	< ₽ >
Product	Quantity	Delivery Note No.		Delivery Date	Organization		
							Search
Prod1	2.000	 DN151		29-01-2015	 Orga1		
Prod1	10.000	DN160		02-02-2015	Orga1		
Prod2 I. area	1.000	DN153 II. are	а		Orga1		
Prod2	2.000	DN156		29-01-2015	Orga1		
Prod2	1.000	DN159		02-02-2015	Orga1		
Prod2	4.000	DN160		02-02-2015	Orga1		

Picture 4.2: ListView of Outgoing Products

# **5** Settings

#### 5.1 Preferences

In case you want enable/disable using Services in Delivery Notes modules. Please provide following steps:

- 1. Click on 🧨
- 2. Click on Preferences
- 3. Click on Edit
- 4. Enable or disable Services in Delivery Notes and click on Save



Picture 5.1: Enable/disable Services in Delivery Notes

Preferences	Edit
Customize the business process	
Inventory preferences	
	Services enabled: Yes

Picture 5.2: Enable/disable Services in Delivery Notes



Picture 5.3: Enable/disable Services in Delivery Notes

#### 5.2 Deactivate license

In case you need to reinstall Delivery 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 License
- 3. Click on Deactivate license button
- 4. Confirm deactivation with button Yes



Picture 5.4: Deactivate Delivery Notes 4 You – Step 1,2

License settings	
Your vtiger url:	
License key:	
	Reactivate license Deactivate license

Picture 5.5: Deactivate Delivery Notes 4 You – Step 3

Do you really v	vant to deactivate you	ur license key?		
			No	Yes

Picture 5.6: Deactivate license of Delivery Notes 4 You – Step 4

After deactivation of license Delivery Notes 4 You doesn't work at all and Delivery 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 license button
- 2. Insert license key
- 3. Click on Save

License settings	
Your vtiger url:	
License key:	
	Activate license

Picture 5.7: Activate license of Delivery Notes 4 You – Step 1

Activate license	×
License key	keykeykeykeykeykeykeykeykeykey
	Save Cancel

Picture 5.8: Activate license of Delivery Notes 4 You – Step 2,3

#### 5.3 Reactivate license

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

1. Click on Reactivate license

т.	CIICK OII	Reactivate license				
2.	Click on	Finish				
	Delivery Note Rea	ctivate license				
	1 Reactivate license	a ficense 2 Finish				
	Welcome to the Delivery Notes 4 You reactivate licens Your URL installation has been changed. To activate th		Witand license please confirm the following form,			
	Your Company Information		Change Company Information			
		Company Name:	107 E			
		Address:	<ol> <li>Or Handback, Schlins, Nagarage</li> </ol>			
		City:				
		State:	11.100			
		Country:				
		Postal Code:				
		VAT ID:				
		License settings				
		Your vtiger url:	No. 1970 A. AND			
		License key:				
			Reactivate license			

Picture 5.9: Reactivate license of Delivery Notes 4 You – Step 1

Delivery Note React	ivate license
1 Reactivate license	2 Finish
	Delivery Notes 4 You has been reactivate license successfully.
	Finish

Picture 5.10: Reactivate license of Delivery Notes 4 You – Step 2

#### 5.4 Upgrade

The upgrade of the Delivery Notes 4 You is little different like Installation. **One difference** between Install and Upgrade is unzip step.

First at all you need to unzip .zip file of Delivery Notes 4 You and then install each module (2) separately. How to install you can find in chapter (How to install Delivery Notes 4 You). So please refer to above installation part for details how to initiate the import of the module from the file. After upgrade the notification about successful upgrade is shown (Picture 5.13)and click on or button.

😚 Calendar Leads Organizations Contac	cts Opportunities Products Documents	Tickets Delivery Notes All -				🖌 🕖 🌣 Administrator -
🕲 vtiger	All Records	d press enter Q Advanced				+
Delivery Notes List	Actions - Add Delivery Note		🔻 All Delivery Notes	v	1 t	01 ℃ < Ҽ > ⊁・
<ul> <li>Recently Modified</li> </ul>	A B C D	E F G H I	J K L M	N O P Q R S	T U V W	/ Edit Fields
	Delivery Note No	Organisation Contact Name	e Status I	Delivery Date Sales Order	Invoice Assign	Edit Workflows
						Edit Picklist Values
		Oragnisation 1	Delivered	-	Admir	Ns License
			Delivery Notes 610.100.2	2 :: IT-Solutions4You		Upgrade Uninstall

Picture 5.11: Upgrade of Delivery Notes 4 You

ort Module	from Zip	
	Disdaimer - Custom Files could put your CRM at risk This functionality has been made available for Developers to test new modules. If you are installing from a file provided 3rd party, please proceed only if you trust the publisher. Custom Modules could include vulnerabilities and overwrite system files putting your CRM at risk. The module you are about to install has not been reviewed by Vüger.	e security
	I accept with disclaimer and would like to proceed	

Picture 5.12: Upgrade of Delivery Notes 4 You



Picture 5.13: Upgrade of Delivery Notes 4 You

#### 5.5 Uninstall

If you want to remove Delivery Notes 4 You from your vTiger, please provide following steps:

• Go to the ListView of Delivery Notes 4 You and in Settings choose option Uninstall



Picture 5.14: Uninstall Delivery Notes 4 You

•	Click on <sup>Uninstall</sup> butte	on
		Uninstall Delivery Notes
		Remove Delivery Note completely from your vTiger.
		Uninstall Delivery Notes Uninstall
	Pic	ture 5.15: Uninstall Delivery Notes 4 You
•	Click on Yes button to	) finish

Are you sure to completely re	nove Delivery No	ote 4 You from you	ir vTiger and deactivate
Derivery Note 4 You license?			
			No

Picture 5.16: Uninstall Delivery Notes 4 You

Now, Delivery Notes 4 You is removed from your vTiger and your license is deactivated. To use Delivery Notes 4 You again you need to provide installation and validation steps (see chapter How to install Delivery Notes 4 You).

# Change log of Delivery Notes 4 You

- September 2016: 610.100.9
  - option to deliver services
  - prices are taken from Sales Order
  - SubProducts issue fixed
  - Delivery Notes related list in Invoice fixed
  - minor improvements and bug fixes
- May 2015 July 2016: 610.100.3 610.100.8
  - option to merge the same products
  - minnor improvements and bug fixes
- April 2015: 610.100.2

# Change log of Manual for Delivery Notes 4 You

- September 2016: manual is based on Delivery Notes 4 You version: 610.100.9
  - new chapter: 5.1 Preferences
- April 2015: manual is based on Delivery Notes 4 You version: 610.100.2
  - first initiate version for vTiger 6.1