

ITS 4 You

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)

Delivery Note No	Organisation	Contact Name	Status	Delivery Date	Sales Order	Invoice	Assigned To
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

DN151
[Deliver products](#)
[Cancel Delivery Note](#)
[Edit](#)
[More](#)

Created **Ready to Deliver** Delivered Invoiced

Delivery Note Information	
Delivery Note No	DN151
Organisation	Orga1
Delivery Date	29-01-2015
Sales Order	Manual added test 2
Invoice	
Assigned To	Administrator
Modified Time	29-01-2015 00:53:43
Status	Ready to Deliver
Contact Name	
Type	Sale
Carrier	
Tracking No	
Created Time	29-01-2015 00:53:43

Address Information	
Street	OrgaShipAddr1
PO Box	5
ZIP	08001
City	OrgaShipCity1

Delivery Note Details

Updates

Documents

Product Name	Available	Ordered	Ready to deliver	Delivered	Ready to Invoice	Invoiced
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](#)

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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

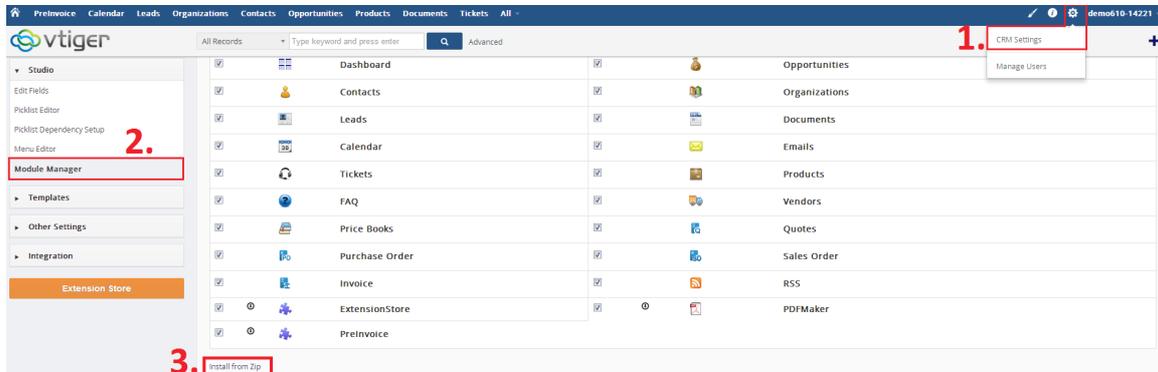
During installation it is necessary to exchange following information:

- 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**.



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.



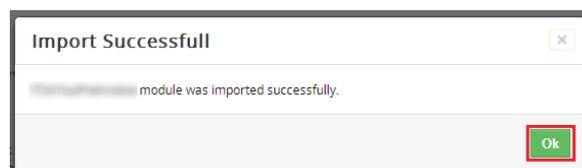
Picture 1.2: Installation of Delivery Notes 4 You – Step 2

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.



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

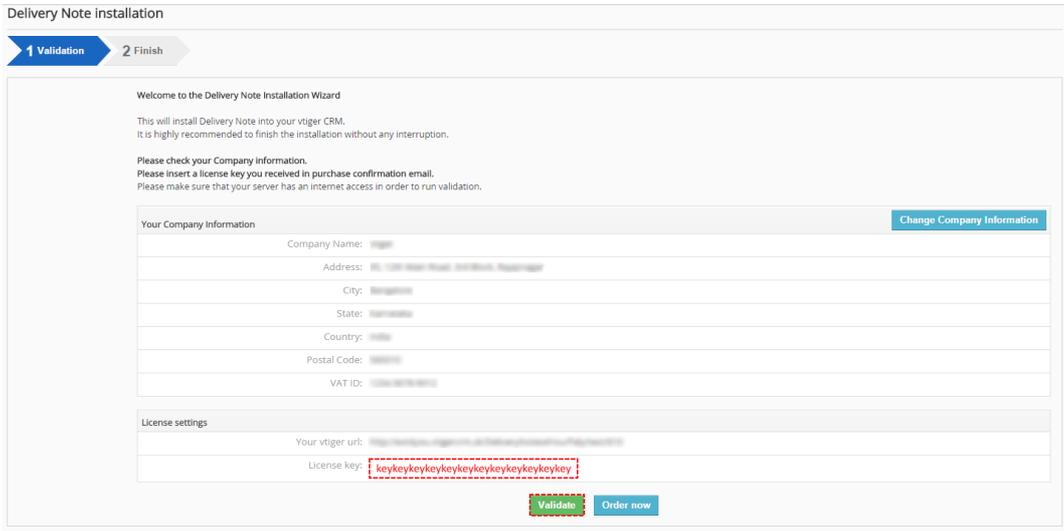
4. Click on **Ok** button to complete the module import.



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

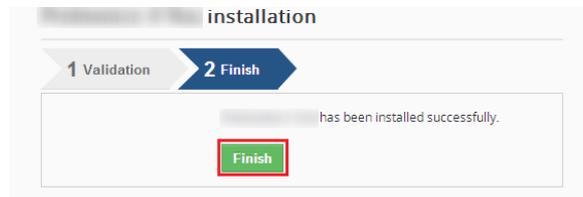
In order to finish installation, please provide following validation steps:

1. 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.



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

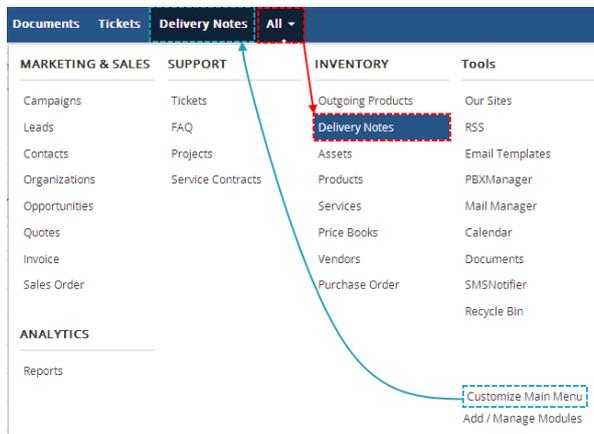
2. Click on **Finish** to complete Validation.



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).



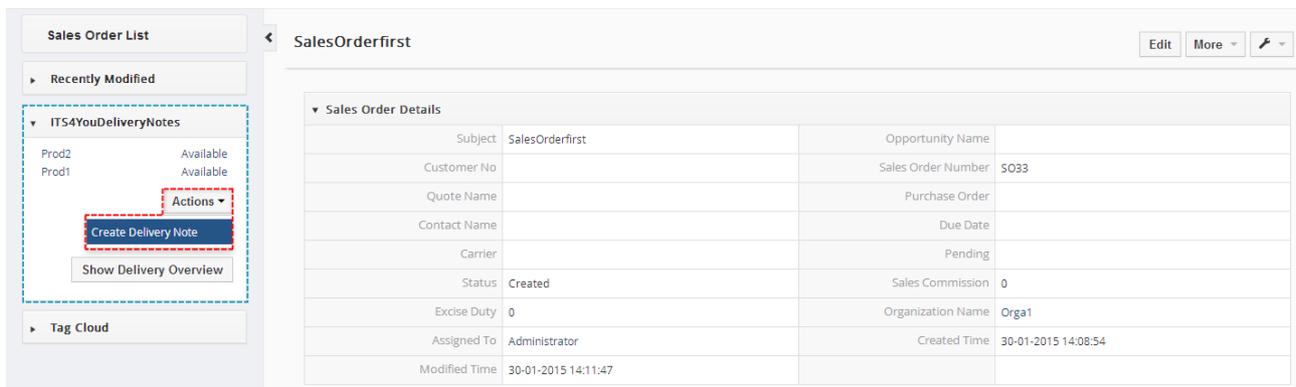
Picture 1.7: Start Delivery Notes 4 You

2 How to use Delivery Note

2.1 Creating Delivery Note from Sales Order

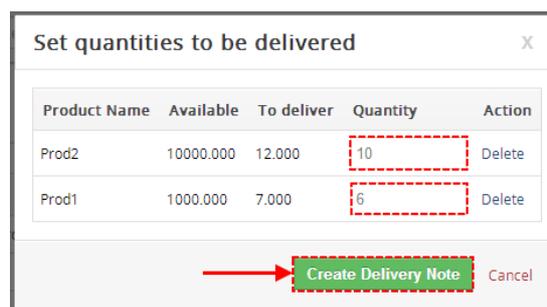
If in your business first you create Sales Order and then you will delivery products this option to create Delivery Note is suitable for You. After that you can invoice this products. To use it please provide following steps:

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



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)



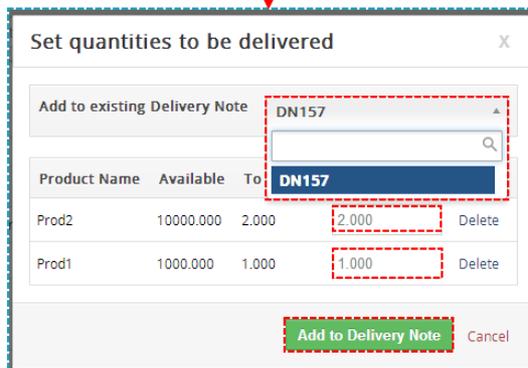
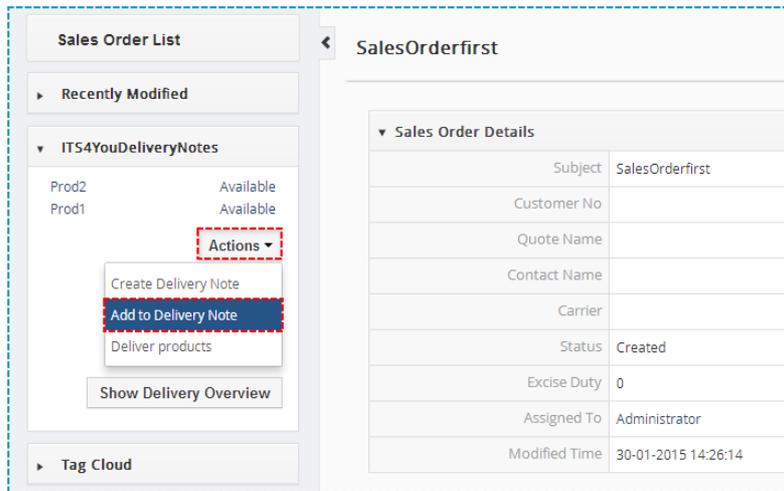
Picture 2.2: Creating Delivery Note from Sales Order

3. Your Delivery Note was created



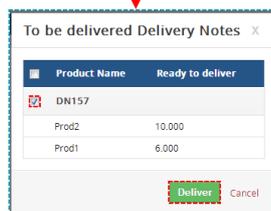
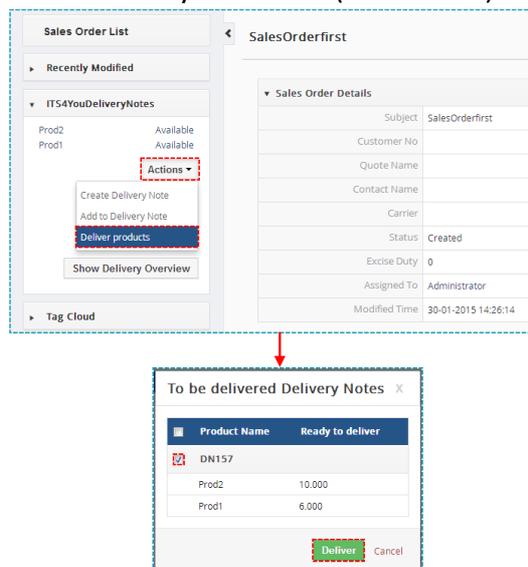
Picture 2.3: Creating Delivery Note from Sales Order

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



Picture 2.5: Deliver products from Sales Order

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)

Picture 2.7: Invoice delivered products from Sales Order

DN157 Invoice products Cancel Delivery Note Edit More

Created Ready to Deliver **Delivered** Invoiced

Delivery Note Information	
Delivery Note No	DN157
Organisation	Orga1
Delivery Date	30-01-2015
Sales Order	SalesOrderfirst
Invoice	
Assigned To	Administrator
Modified Time	30-01-2015 15:33:33

Delivery Note Details

Updates

Documents



Creating New Invoice Save Cancel

Invoice Details	
* Subject	DN157
Customer No	
Invoice Date	
Purchase Order	
Sales Commission	
Status	Select an Option
Sales Order	SalesOrderfirst
Contact Name	Type to search
Due Date	
Excise Duty	
* Organization Name	Orga1
* Assigned To	Administrator

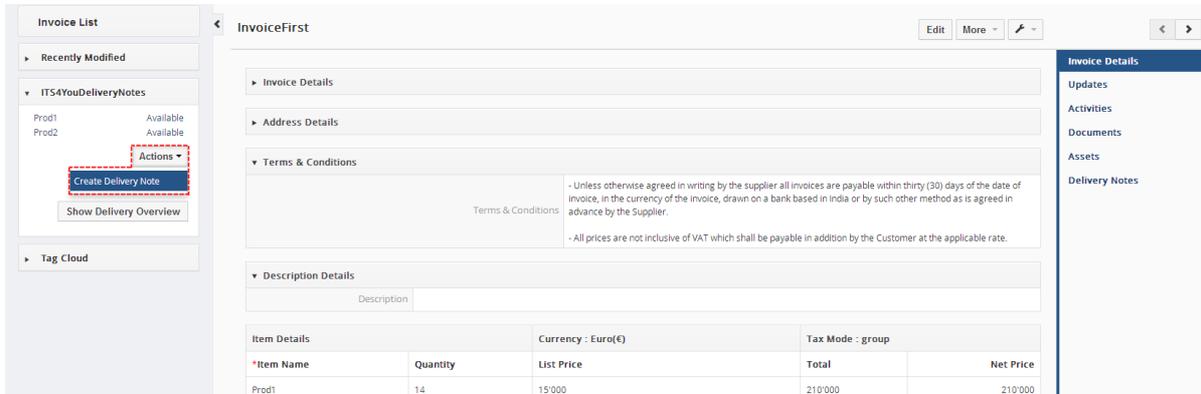
Address Details	
Organization	Organization

Picture 2.8: Invoice delivered products from Delivery Note

2.2 Creating Delivery Note from Invoice

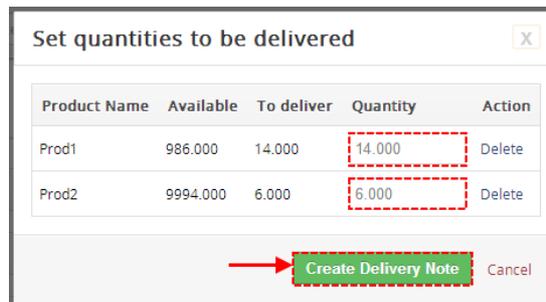
You are able also create Delivery Note from Invoice. To create it please see next steps:

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



Picture 2.9: Creating Delivery Note from Invoice

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



Picture 2.10: Creating Delivery Note from Invoice

3. Your Delivery Note was created

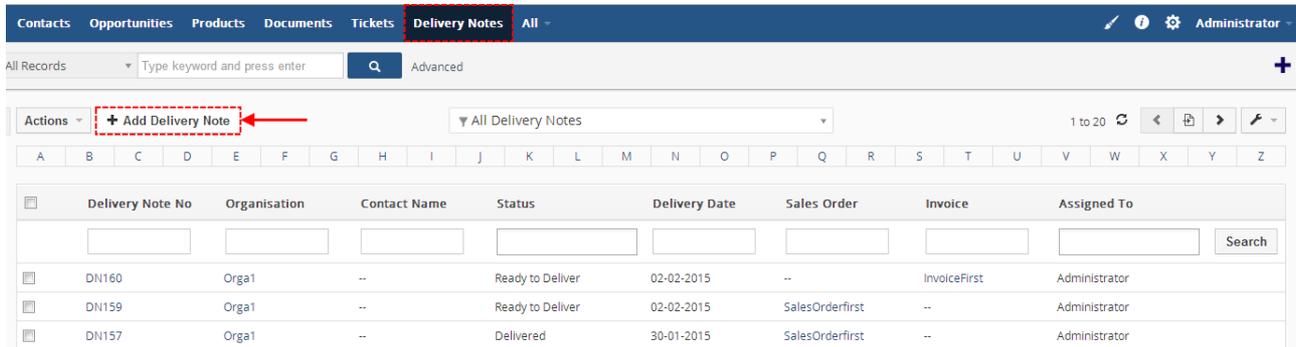


Picture 2.11: Creating Delivery Note from Invoice

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

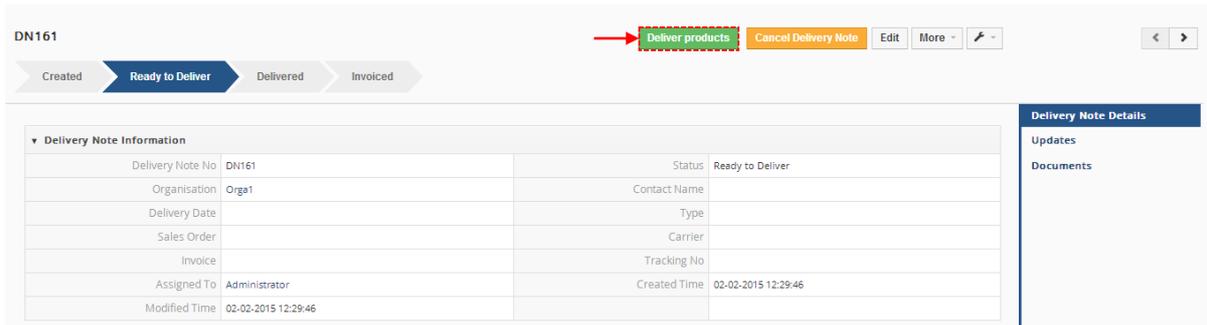


Picture 2.12: Creating Delivery Note

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

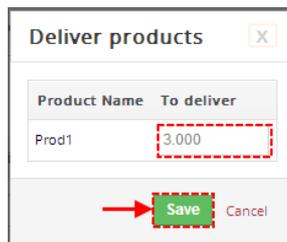
Picture 2.13: Creating Delivery Note

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



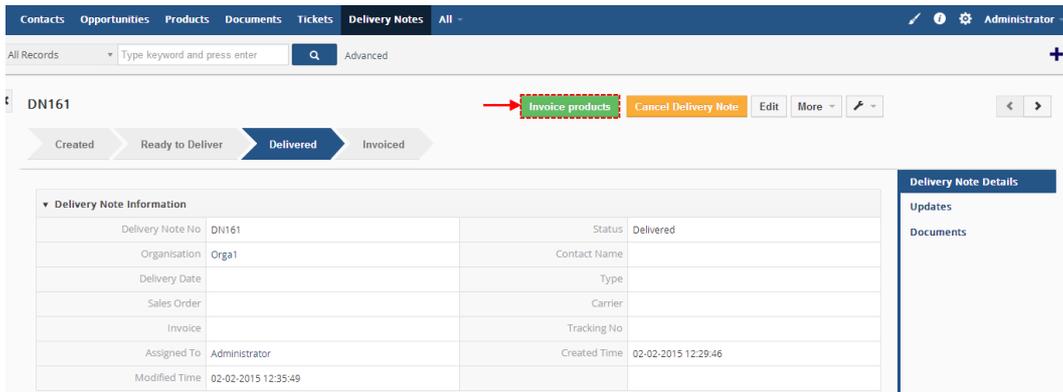
Picture 2.14: Deliver products from Delivery Note

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



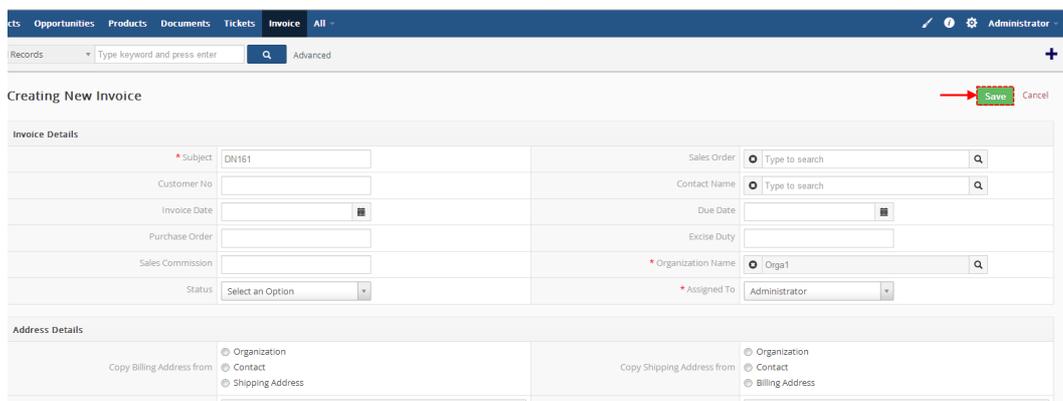
Picture 2.15: Deliver products from Delivery Notes

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



Picture 2.16: Invoice products from Delivery Note

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



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.

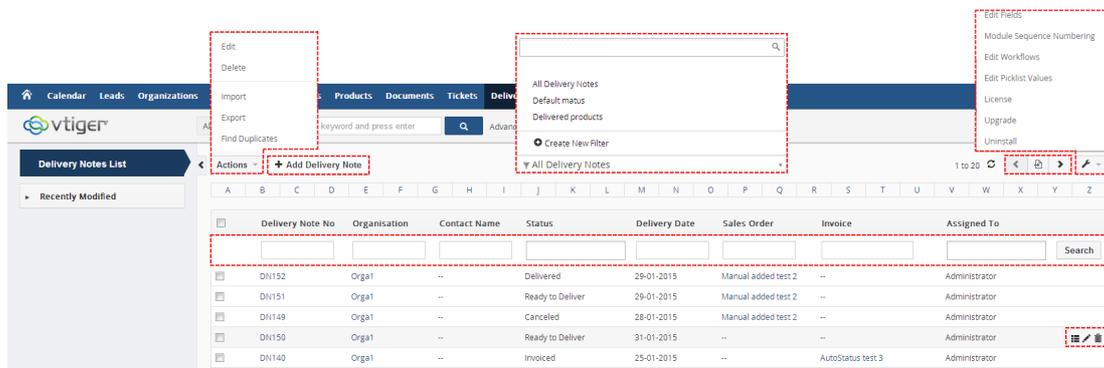
3 Work area

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.



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.

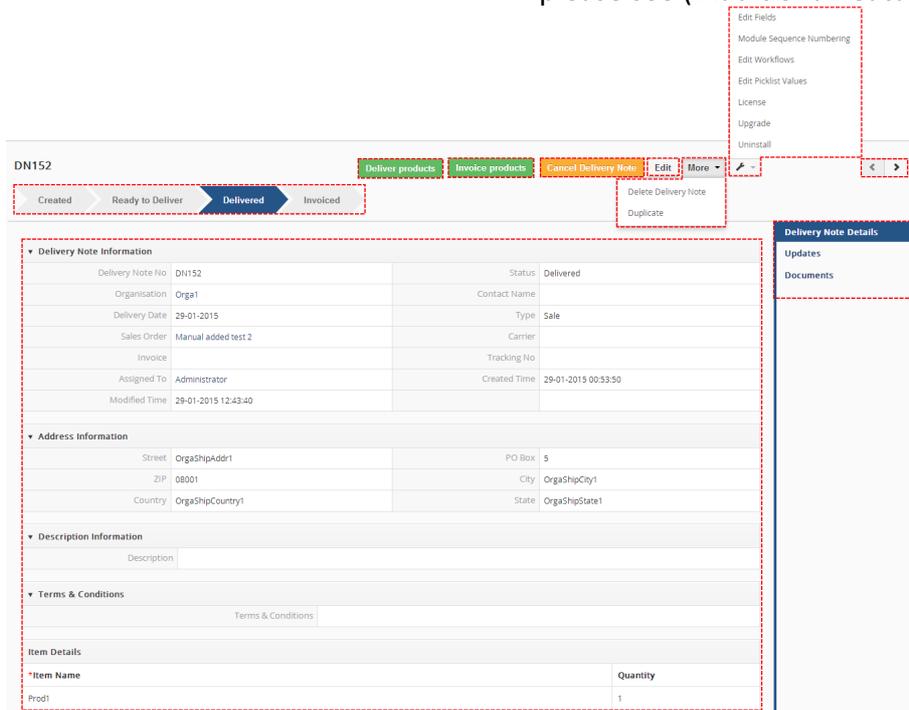
ListView of Delivery Notes 4 You consists of:

- **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
- **< >** – next/previous page of Delivery Notes
- **⚙** – 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
 - Created
 - Ready to Deliver
 - Delivered
 - 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)



Picture 3.2: DetailView

3.3 EditView

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

Editing Delivery Note - DN151 Save Cancel

Delivery Note Information

* Organisation	Orga1	Contact Name	Type to search
Delivery Date	29-01-2015	Type	Sale
Sales Order	Manual added test 2	Carrier	Select an Option
Invoice	Type to search	Tracking No	
Assigned To	Administrator		

Address Information

Copy Shipping Address from	Organization		
Street	OrgaShipAddr1	PO Box	5
ZIP	08001	City	OrgaShipCity1
Country	OrgaShipCountry1	State	OrgaShipState1

Description Information

Description

Terms & Conditions

Terms & Conditions: - Unless otherwise agreed in writing by the supplier all invoices are payable within thirty (30) days of the date of invoice, in the currency of the invoice, drawn on a bank based in India or by such other method as is agreed in advance by the Supplier.

Item Details

Tools	*Item Name	Quantity
	Prod1	2

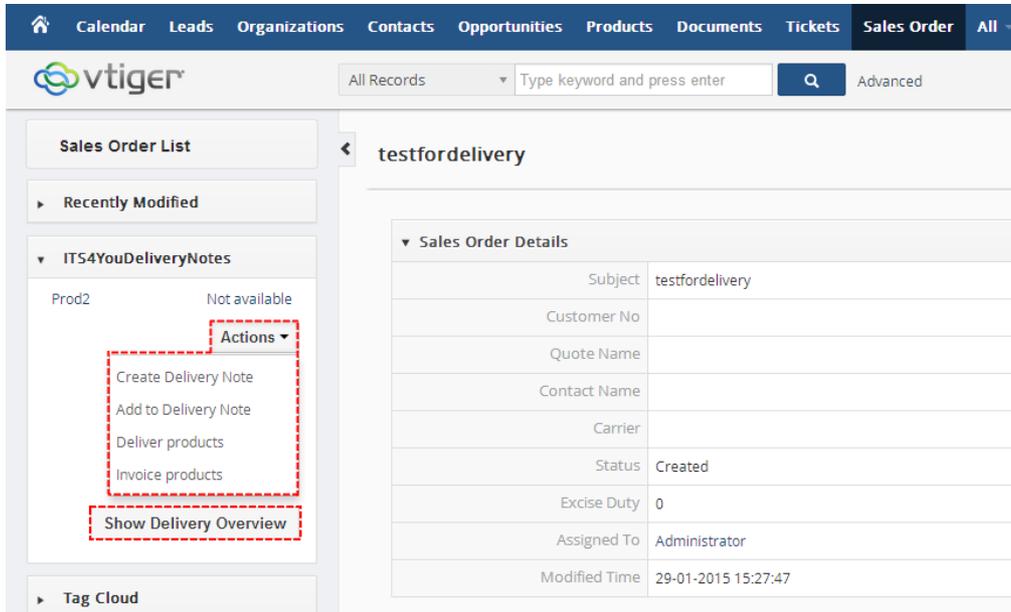
+ Add Product + Add Service

Save Cancel

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.



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).

Product Name	Available	Ordered	Ready to deliver	Delivered	Ready to Invoice	Invoiced
Prod2	-712.000	12.000	1.000	5.000	2.000	3.000

Buttons: 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

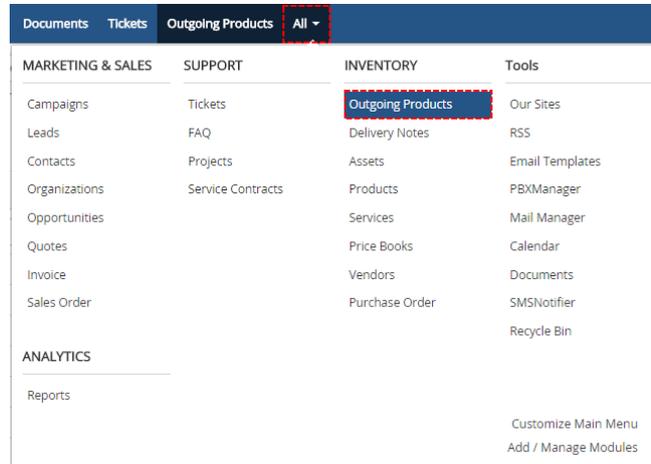
The Email Maker is extension tool designed for the vTiger CRM. Using EMAIL Maker you can create email templates with predefined information and send them from all the modules. There are available all the fields from source and related modules, the fields related to recipients, the company information 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_CRM_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)



Picture 4.1: Outgoing Products

Now, you can see all products that are not delivered yet. The ListView is divided 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.

The screenshot shows a table with columns: Product, Quantity, Delivery Note No., Delivery Date, and Organization. The table contains six rows of data. Two areas are highlighted with red dashed boxes: 'I. area' covers the first two columns (Product and Quantity) of the first three rows, and 'II. area' covers the last three columns (Delivery Note No., Delivery Date, and Organization) of the same three rows. A search bar is visible at the top right of the table.

Product	Quantity	Delivery Note No.	Delivery Date	Organization
Prod1	2.000	DN151	29-01-2015	Orga1
Prod1	10.000	DN160	02-02-2015	Orga1
Prod2	1.000	DN153	--	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

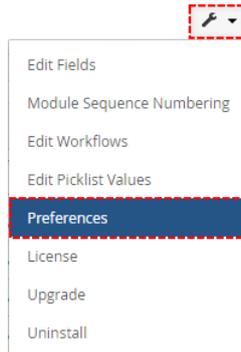
Picture 4.2: ListView of Outgoing Products

5 Settings

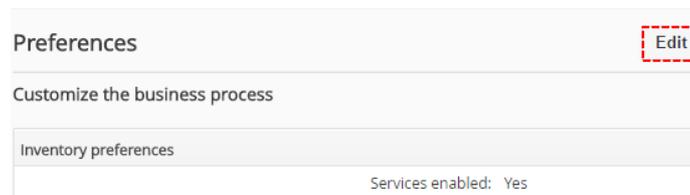
5.1 Preferences

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 
4. Enable or disable Services in Delivery Notes and click on 



Picture 5.1: Enable/disable Services in Delivery Notes



Picture 5.2: Enable/disable Services in Delivery Notes

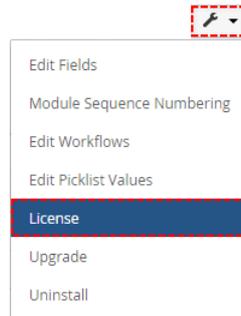


Picture 5.3: Enable/disable Services in Delivery Notes

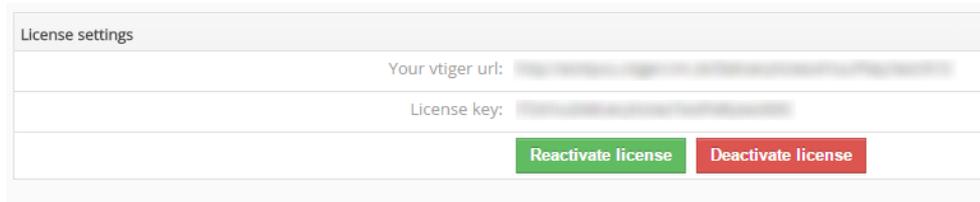
5.2 Deactivate license

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:

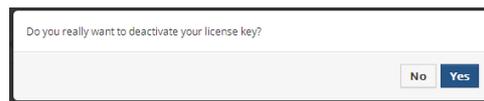
1. Click on 
2. Click on License
3. Click on **Deactivate license** button
4. Confirm deactivation with button **Yes**



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



Picture 5.5: Deactivate Delivery Notes 4 You – Step 3

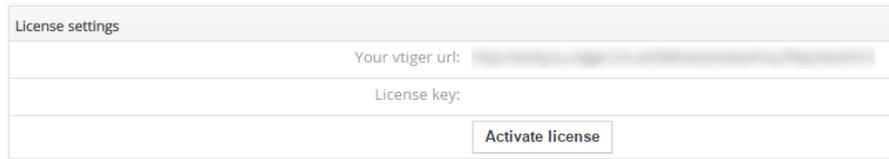


Picture 5.6: Deactivate license of Delivery Notes 4 You – Step 4

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**



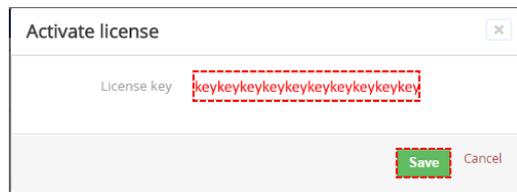
License settings

Your vtiger url:

License key:

Activate license

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



Activate license

License key:

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**
2. Click on **Finish**

Delivery Note Reactivate license

1 Reactivate license 2 Finish

Welcome to the Delivery Notes 4 You reactivate license Wizard
Your URL installation has been changed. To activate the license please confirm the following form.

Your Company Information [Change Company Information](#)

Company Name:

Address:

City:

State:

Country:

Postal Code:

VAT ID:

License settings

Your vtiger url:

License key:

Reactivate License

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

Delivery Note Reactivate license

1 Reactivate license 2 Finish

Delivery Notes 4 You has been reactivate license successfully.

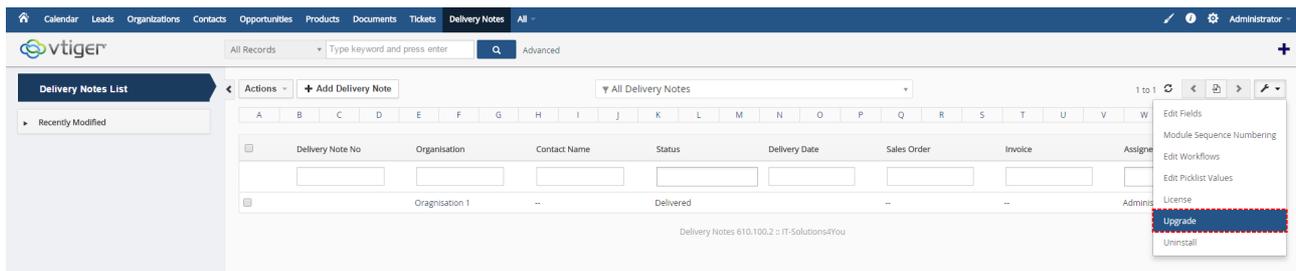
Finish

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

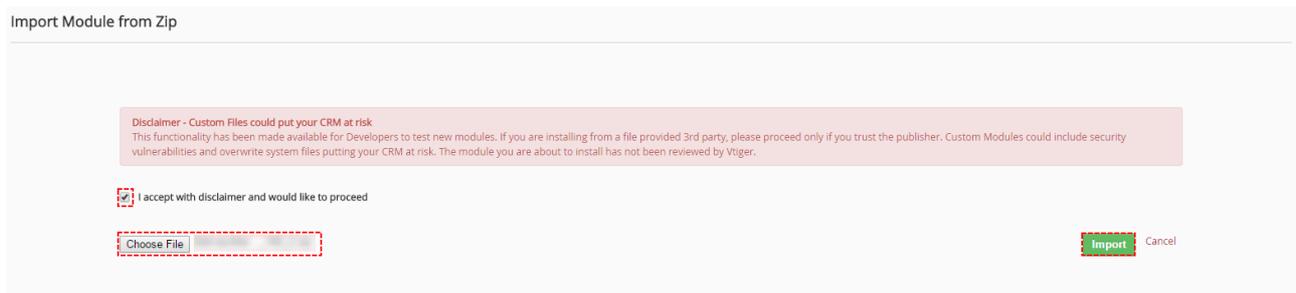
5.4 Upgrade

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

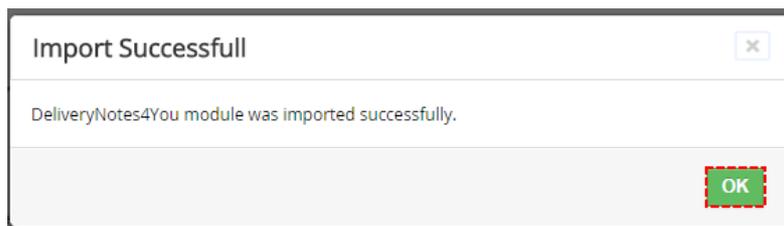
First at all you need to unzip .zip file of Delivery Notes 4 You and then install each module (2) separately. How to install you can find in chapter (How to install Delivery Notes 4 You). So please refer to above installation part for details how to initiate the import of the module from the file. After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



Picture 5.11: Upgrade of Delivery Notes 4 You



Picture 5.12: Upgrade of Delivery Notes 4 You

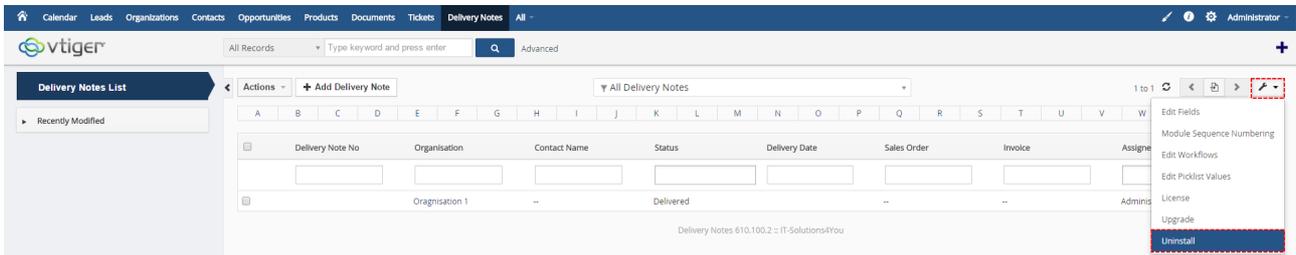


Picture 5.13: Upgrade of Delivery Notes 4 You

5.5 Uninstall

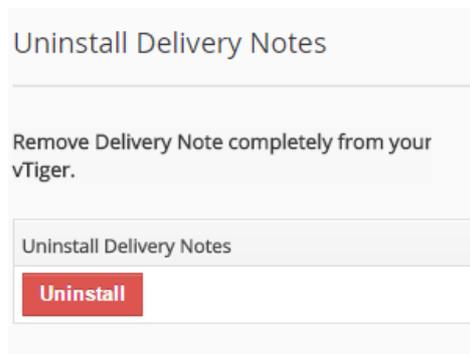
If you want to remove Delivery Notes 4 You from your vTiger, please provide following steps:

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



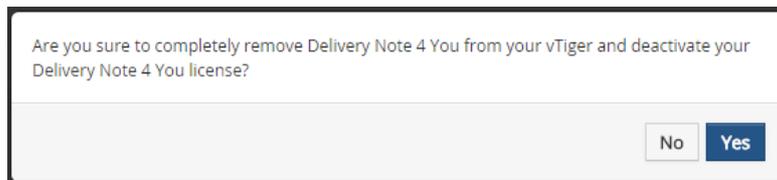
Picture 5.14: Uninstall Delivery Notes 4 You

- Click on **Uninstall** button



Picture 5.15: Uninstall Delivery Notes 4 You

- Click on **Yes** button to finish



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