ITS4You
IT-Solutions4You

DESCRIPTIONS 4 YOU for VTIGER CRM 6.x

Introduction

The Descriptions 4 You is vTiger extensions which allows you to create well formatted descriptions for records. The new descriptions are created in CK Editor so you can use adding tables and images to make your description attractive. The new descriptions can be stored separately, it means you can have additional description to original one or you can simply replace original descriptions by new Descriptions 4 You. The Descriptions 4 You allows you to create description for particular module as well as global description templates, so you can create one global template and use it everywhere in vtiger CRM and save time with additional description formatting.

Descriptions 4 You benefits:

- supported mostly for all modules
- additional description to original description
- supports images, tables and other text formatting
- easy using Descriptions 4 You templates Picklist
- useable for Terms & Conditions Fields
- useable for Custom Textarea Fileds

Content

License agreement

- The Descriptions 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 Descriptions 4 You.
- This license gives the holder right to install Descriptions 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 Descriptions 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 Descriptions 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.
- Descriptions 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 Descriptions 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)
- Descriptions 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)
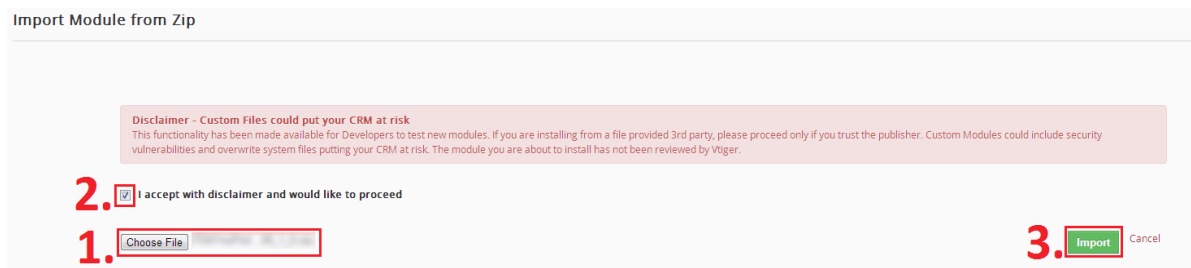
1 How to install Descriptions 4 You

Please provide following steps in order to install Descriptions 4 You:

1. Install the .zip (package) file of the EMAIL Maker module via **CRM Settings -> Module Manager**. Click on the **Install from Zip** .
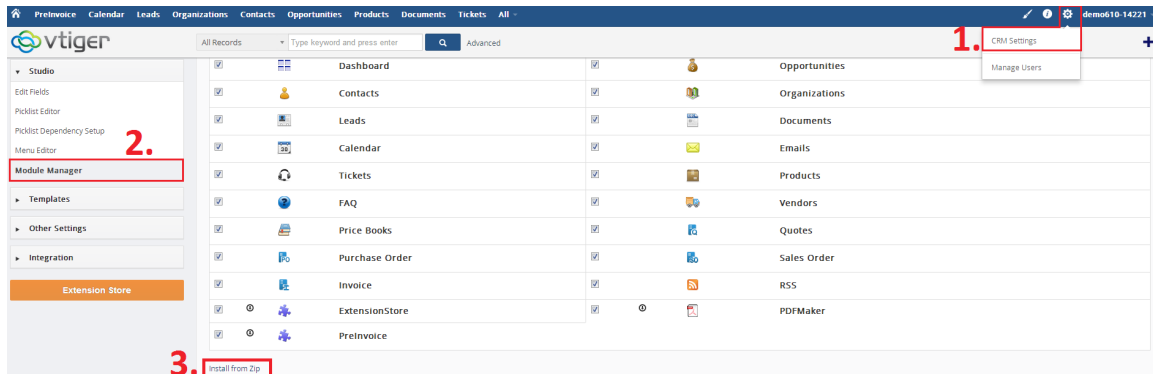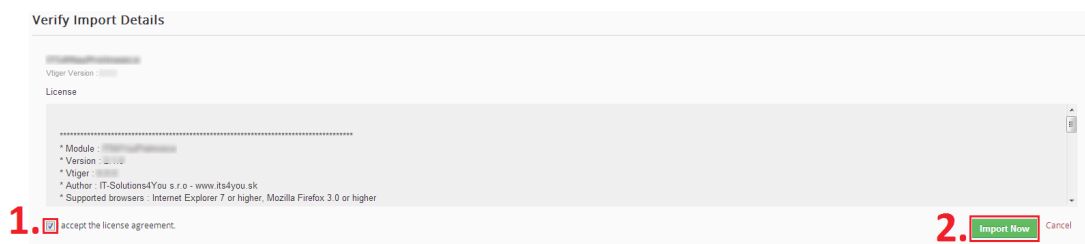

Picture 1.1: Installation of Descriptions 4 You – Step 1

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.
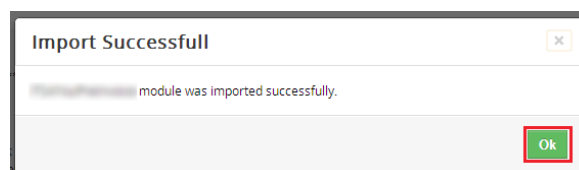

Picture 1.2: Installation of Descriptions 4 You – Step 2

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.

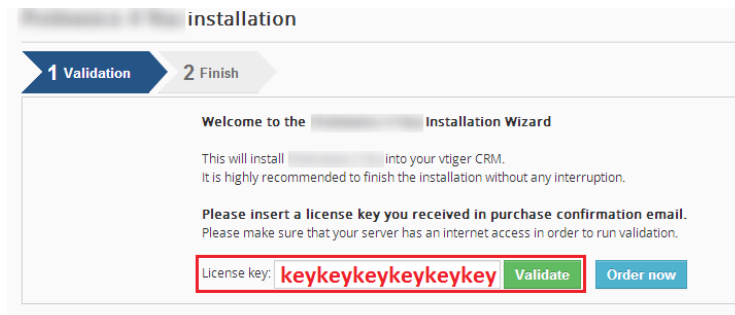*Picture 1.3: Installation of Descriptions 4 You – Step 3*

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

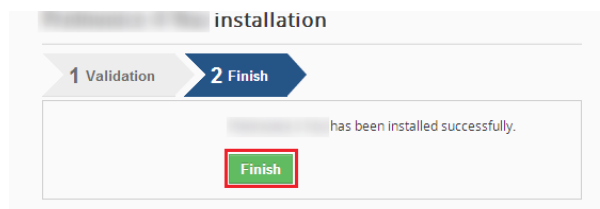*Picture 1.4: Installation of Descriptions 4 You – Step 4*

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

1. Descriptions 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 Descriptions 4 You – Step 1

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

Picture 1.6: Validation of Descriptions 4 You – Step 2

For Upgrade please check 5.4 Upgrade.

2   How to create Descriptions 4 You

In order to start the Descriptions 4 You tool please provide following steps:
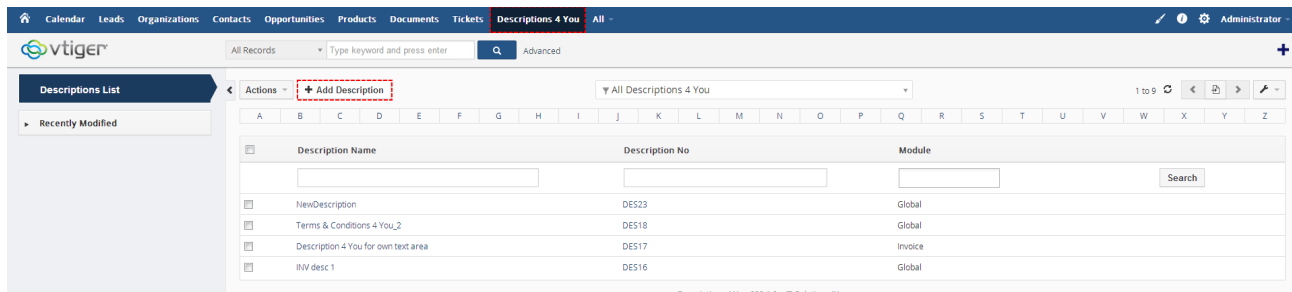
- In vtiger CRM menu (Picture 2.1), please go to **All -> Tools** and click on **Descriptions 4 You**. As shown in the picture you can place short link directly into vtiger Main Menu using **Customize Main Menu** link.
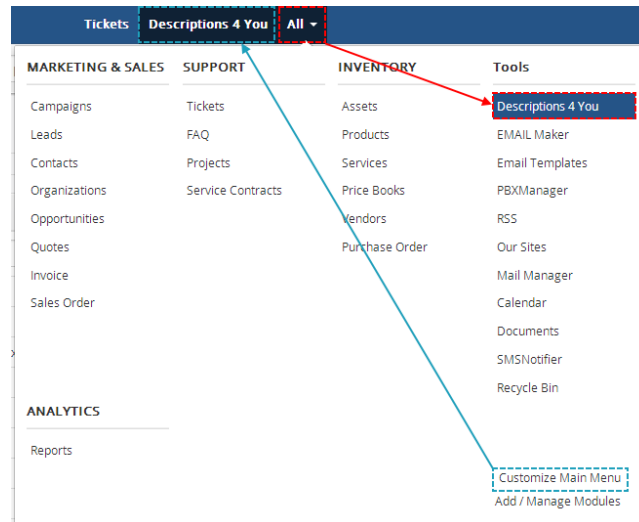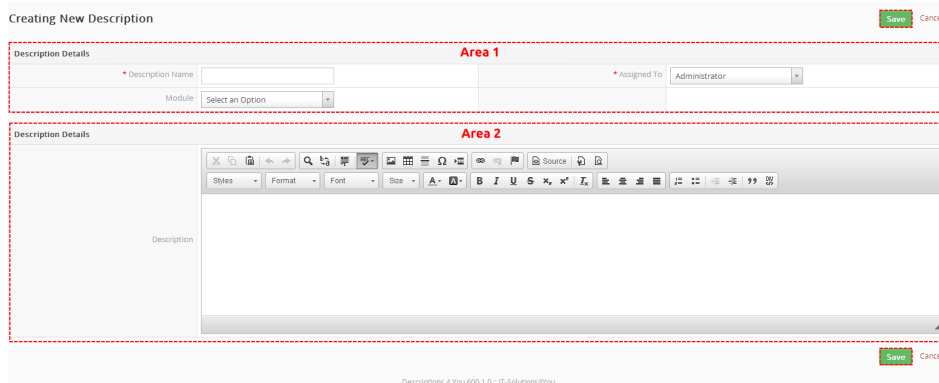

Picture 2.1: Start Descriptions 4 You

Creating Description

To create Description please click on **+ Add Description** in ListView of Descriptions 4 You.

Picture 2.2: Creating Description

Now, you can see EditView of Descriptions 4 You.

Picture 2.3: EditView of Descriptions 4 You

Creating is devided into two areas:

First area is for current information of your Description.

Picture 2.4: EditView – first area

Name	Description
* Description Name	Name of your Description
* Assigned To	Set to whose is Description assigned to
Module	For which module you can use your Description. To add/delete allowed module please see chapter 5.3 Integration. Global is for all allowed modules.

The second area is CKEditor that is mainly used for inserting/editing your own text, tables, images etc. and to make some design adjustment of the Description like font change, color, format, size, background color of the text etc. This editing can be initiated via many toolbars located in the above part of Editing area.

Picture 2.5: EditView – second area

Finally, please click on Save button.

Now, you are able to add/replace your description into allowed modules. For adding or replacing your old description please check chapter 3.4 Using Descriptions 4 You Picklist.

3 Work area

The Work Area of the Descriptions 4 You consists of:

- ListView – used for common tasks like add, delete, duplicate Description, import and export Descriptions and access to others tools
- DetailView – shows already created Description in details
- EditView – allows the preparation of the new Description or editing existing Descriptions
- Descriptions 4 You Picklist – is used to add/replace Description

3.1 ListView

The common tasks like add/delete/duplicate Description, import/export Descriptions or start editing have to be initiated via Descriptions 4 You ListView. Go to **All -> Tools** and click on **Descriptions 4 You** link and Descriptions 4 You ListView will appear on your screen.
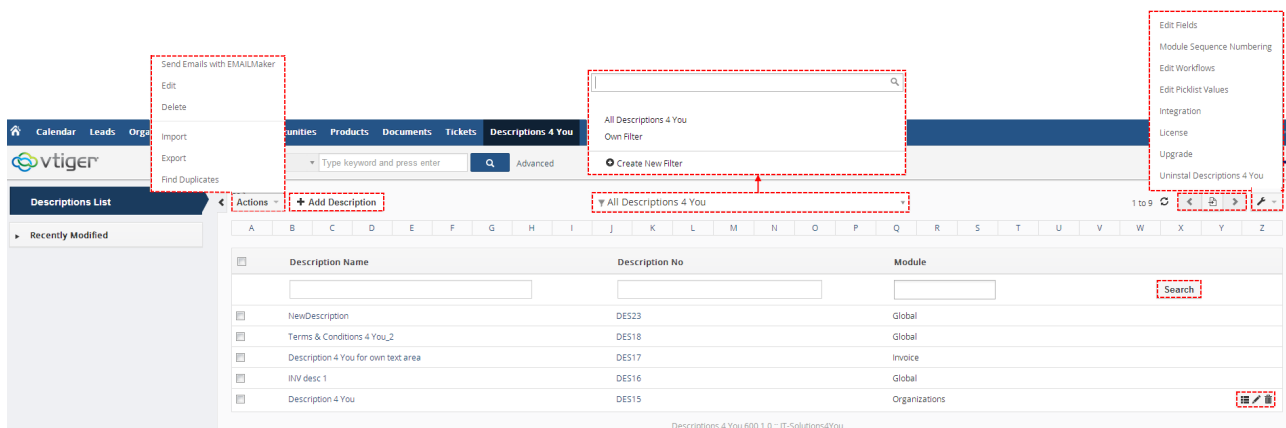
Picture 3.1: Descriptions 4 You ListView

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

ListView of Descriptions 4 You consists of:

- **Actions** contains actions for deletion, import or export of the Descriptions and find Duplicates
- **+ Add Description** – is used to add new Description
- **Search** – to search Description based on Name, Number or Module
- **▼ All Descriptions 4 You** – to use filtering or create new filter
- **< ⊡ >** – next/previous page of Descriptions
- **🔧 ▼** – allow you to set Integration, License settings, Upgrade and Uninstal Descriptions
- **▤ ✎ 🗑** – to show Complete Details, Edit or Delete Description

3.2 DetailView

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

- Description Details
    - Description Name
    - Assigned To
    - Module
    - Description No.
    - Created Time
    - Modified Time
- Description – show your Description in Details
- Group of buttons
    - Edit – switch to EditView and start editing
    - More ▾ – duplicate or delete Description
    - ✕ ▾ – allow you to set Descriptions 4 You

Picture 3.2: DetailView

3.3 EditView

The EditView shown in the picture below is divided into two areas:

- Description Details area – is used for type Description Name, Assigned to and choose modules that are allowed

- Editing area – is mainly used for inserting/editing your own text, tables, images etc. and to make some design adjustment of the Description like font change, color, format, size, background color of the text etc. This editing can be initiated via many toolbars located in the above part of Editing area.
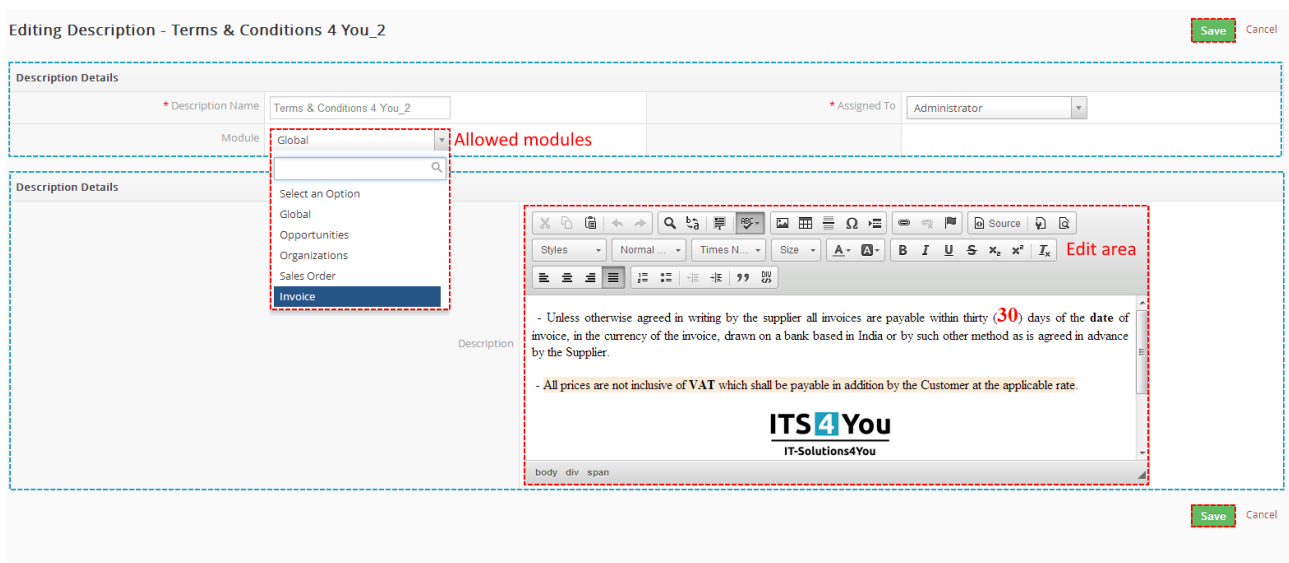
Picture 3.3: EditView of Descriptions 4 You

3.4 Using Descriptions 4 You Picklist

After installation Descriptions 4 You, you are able to see Descriptions 4 You Picklist in allowed modules that provides for you to replace or add Description in the textareas.
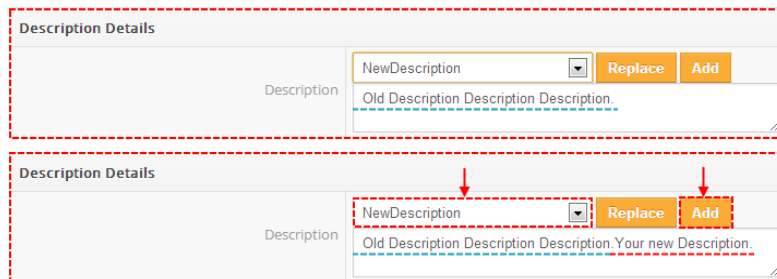

Picture 3.4: Descriptions 4 You block

Consists of:

- Available Descriptions for module

- **Replace** – is used to replace all old text by your Description (old description will be deleted)
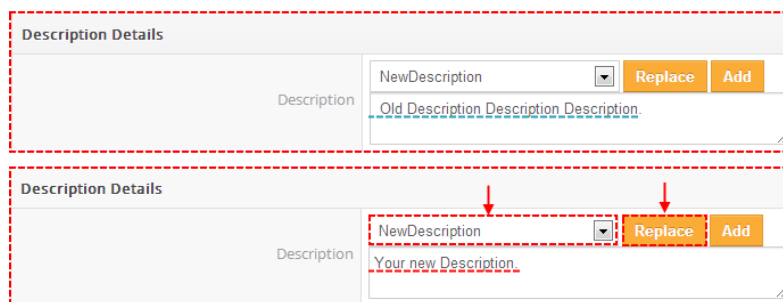
Picture 3.5: Replace Description

- **Add** – is used to add new Description after old text (old description won't be deleted)

Picture 3.6: Add Description

After adding or replacing Description you can correct it manually. We recommend to correct it after adding and replacing, not before (please check chapter Known issues)

4 Additional feature

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.

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

Picture 4.1: Support of PDF Maker

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.

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

Picture 4.2: Support of EMAIL Maker

4.3 Support of Custom Textarea Fields
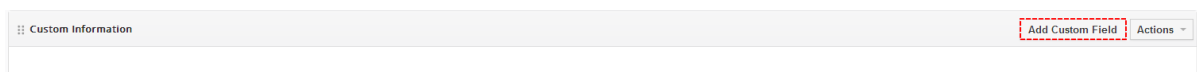
You can add your description or text into your own Custom Fileds for all modules, that are "Text area" type. To create own Textare Fields please provide following steps (if you have created your Custom Textarea Field, you can skip steps 1-3):

1. Click on in module you want to edit and choose **Edit Fields**
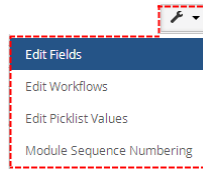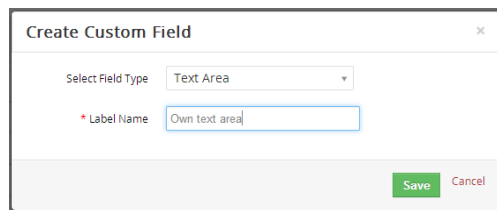
Picture 4.3: Custom Fields – step 1

2. Next, click on Add Custom Field button

Picture 4.4: Custom Fields – step 2

3. Choose **Text area** and type name of your Field. Click on Save and your Field will be created

Picture 4.5: Custom Fields – step 3

4. Now you can use Custom Field in EditView and add your own Description template (chapter 3.4 Using Descriptions 4 You Picklist)

*Picture 4.6: Custom Fields – step 4*

5. Your description in DetailView

*Picture 4.7: Custom Fields – step 5*

5   Settings

5.1 Deactivate license

In case you need to reinstal Descriptions 4 You you have to deactivate and reactivate license key. To deactivate license key please provide following steps:
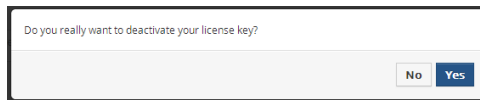
1. Click on ![wrench icon]

2. Click on Licence

3. Click on [Deactivate license] button

4. Confirm deactivation with button [Yes]
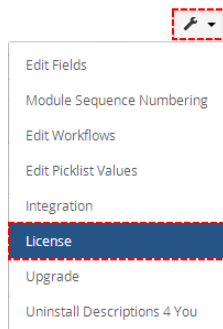
Picture 5.1: Deactivate Descriptions 4 You – Step 1,2
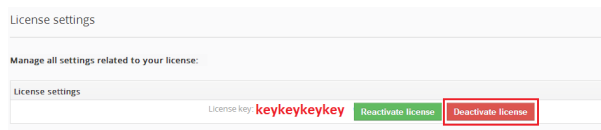
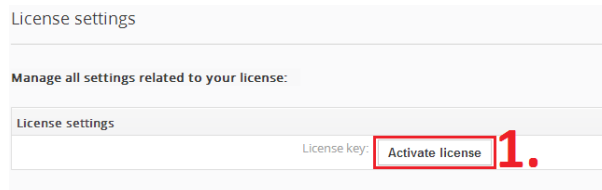*Picture 5.2: Deactivate Description 4 You – Step 3*

Picture 5.3: Deactivate license of Descriptions 4 You – Step 4

After deactivation of license Descriptions 4 You doesn't work at all and Descriptions 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 licence key

3. Click on **Save**

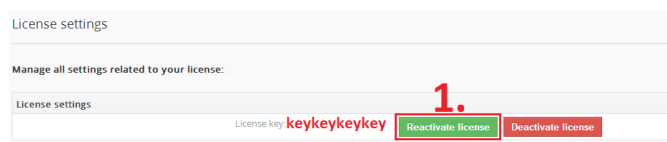*Picture 5.4: Activate license of Descriptions 4 You – Step 1*

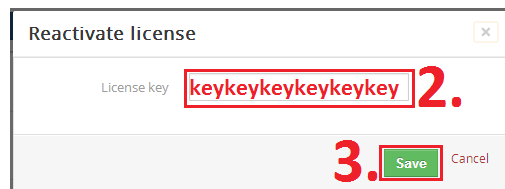*Picture 5.5: Activate license of Descriptions 4 You – Step 2,3*

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 5.6: Reactivate license of Descriptions 4 You – Step 1

Picture 5.7: Reactivate license of Descriptions 4 You – Step 2,3

5.3 Integration

The Descriptions 4 You is available for many modules. Within setting Integration you can customize the visibility of the Descriptions 4 You Picklist (chapter 3.4 Using Descriptions 4 You Picklist) for particular module. Please use checkboxes to make Descriptions 4 You visible/invisible for particular module according to your needs.
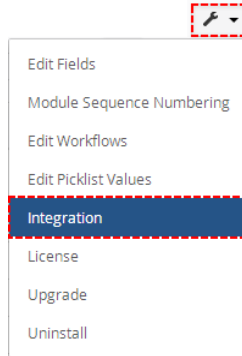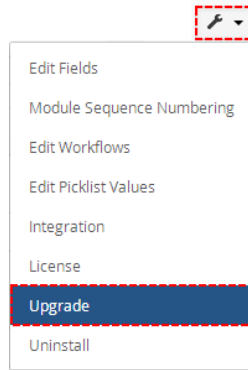

Picture 5.8: Integration of Descriptions 4 You

Picture 5.9: Integration of Descriptions 4 You
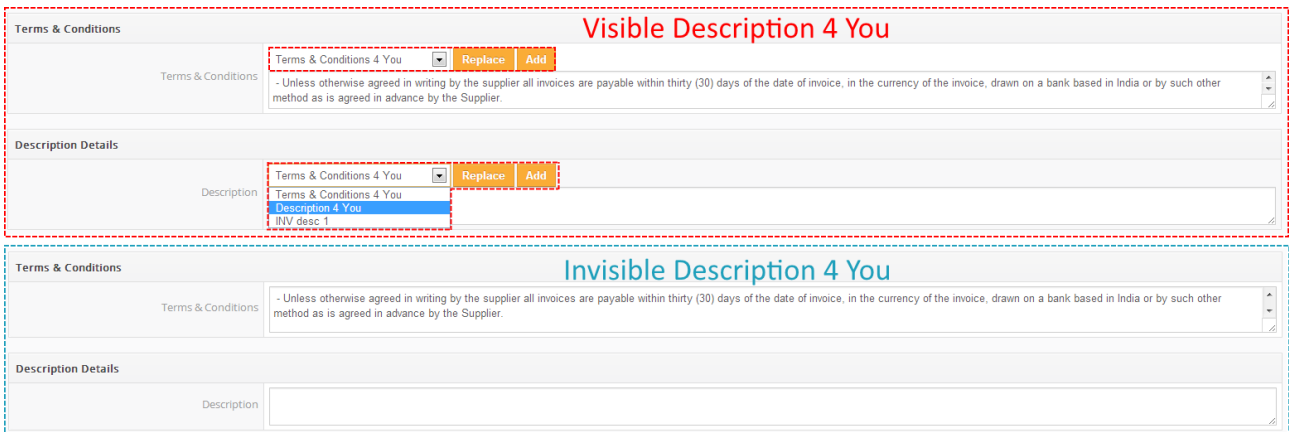
Picture 5.10: Visible and Invisible Descriptions 4 You for Invoice module

5.4 Upgrade

The upgrade of the Description 4 You is initiated in the same way as Descriptions 4 You instalation. So please refer to above instalation part for details how to initiate the import module from zip (Picture 1.1). As can be seen on the below picture you will be notified that the Descriptions 4 You module already exists. The upgrade will start immediately when you click on **Update Now** button. After upgrade the notification about successful upgrade is shown and click on **Ok** button.
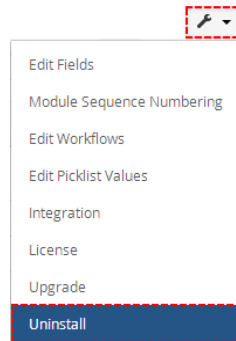

Picture 5.11: Upgrade Descriptions 4 You

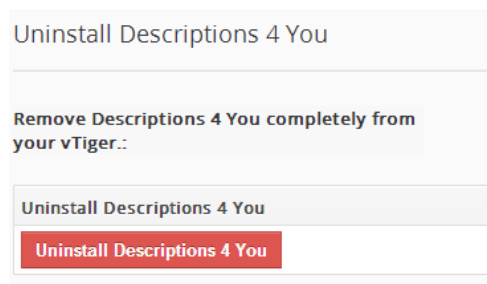*Picture 5.12: Upgrade Descriptions 4 You*

5.5 Uninstall

There is option to remove Descriptions 4 You form your vTiger. To uninstall please provide following steps:

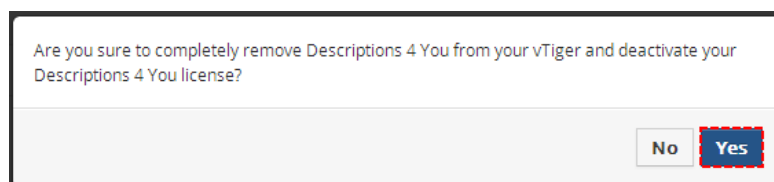- Go to the listView of Descriptions 4 You and choose option **Uninstall Descriptions 4 You**

Picture 5.13: Uninstall – step 1

- Click on Uninstall Descriptions 4 You button

Picture 5.14: Uninstall – step 2

- Confirm uninstall with Yes button

Picture 5.15: Uninstall – step 3

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

6   Known issues

6.1 HTML "shown"

When you use in your Description tables, images etc. and to make some design adjustment of the Description like font change, color, format, size, background color of the text etc. **Only** in the Editview, your Description is shown like HTML code, in DetailView or PDF Maker it is displayed correctly. It is solvable problem, but it requests vTiger source code changes.
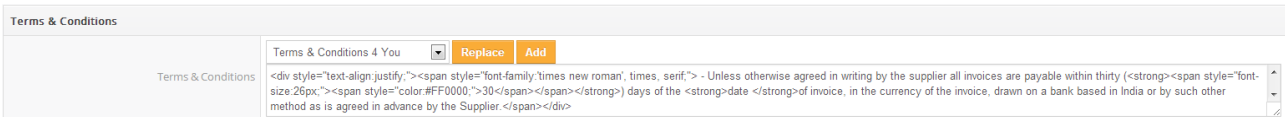
Picture 6.1: HTML code in EditView
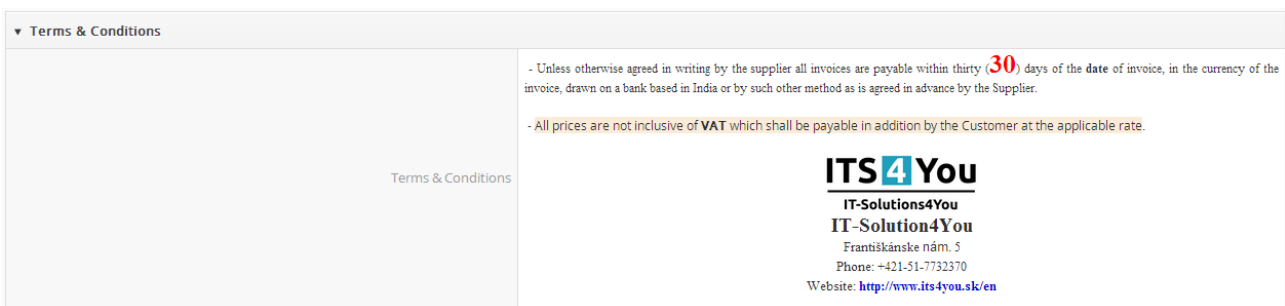
Picture 6.2: Correctly shown in DetailView

6.2 Add/replace and manually modify of Description

We recommend first add or replace your Description and then modify Textarea manually (chapter 3.4 Using Descriptions 4 You Picklist). If you first modify and the use adding and replacing, it does not have to work correctly.

Change log of Descriptions 4 You

- November 2014: **600.1.0**

Change log of Manual for Descriptions 4 You

- November 2014: manual is based on Descriptions 4 You version: **600.1.0**

  - first initiate version for vTiger 6.1