

Dynamic Fields 4 You for VTIGER CRM 6.x

Introduction

Extension **Dynamic Fields 4 You** is great tool to make your form more user-friendly.

Dynamic Fields 4 You allows you to modify your form - fields in form – based on conditions like you wish.

Benefits of **Dynamic Fields 4 You**:

- support of standard and custom Modules (Calendar module,Events,To Do-not supported yet)
- support of all fields (fields with uitype 10 is not supported completely-in progress to solve it)
- unlimited count of **Dynamic Fields**
- option to create conditions like you wish and need – of course unlimited too
- compatible with **vtiger 6.x.x** also **vtiger 6.4.0**

What's new?

Until version 600.2.0 the main new features are:

- option to able or disable Pop-up window (Picture 2.2)
- option to create Follow-up conditions (3.4 Follows-up Dynamic Fields)

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Dynamic Fields

4

You

The image shows two screenshots of an 'Invoice Details' form. The top screenshot shows a form with fields for Subject, Customer No, Due Date, Purchase Order, Sales Commission, Status (dropdown), Sales Order, Contact Name, Excise Duty, Organization Name, and Assigned To. Red dashed boxes highlight the Status dropdown and the Excise Duty/Organization Name/Assigned To section. A blue double-headed arrow connects two boxes labeled 'Conditions' and 'Dynamic Fields' positioned between the two screenshots. Red arrows point from the Status dropdown in the top screenshot to the 'Conditions' box, and from the Excise Duty/Organization Name/Assigned To section to the 'Dynamic Fields' box. The bottom screenshot shows the same form with the Status dropdown set to 'Paid' and the Excise Duty/Organization Name/Assigned To section highlighted with a red dashed box. A red arrow points from the 'Dynamic Fields' box to this section. The ITS 4 You logo and 'IT-Solutions4You' text are at the bottom right.

License agreement

- The Dynamics Fields 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 Dynamics Fields.
- This license gives the holder right to install Dynamics Fields 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 Dynamics Fields 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 Dynamics Fields 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.
- Dynamics Fields 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 Dynamics Fields 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

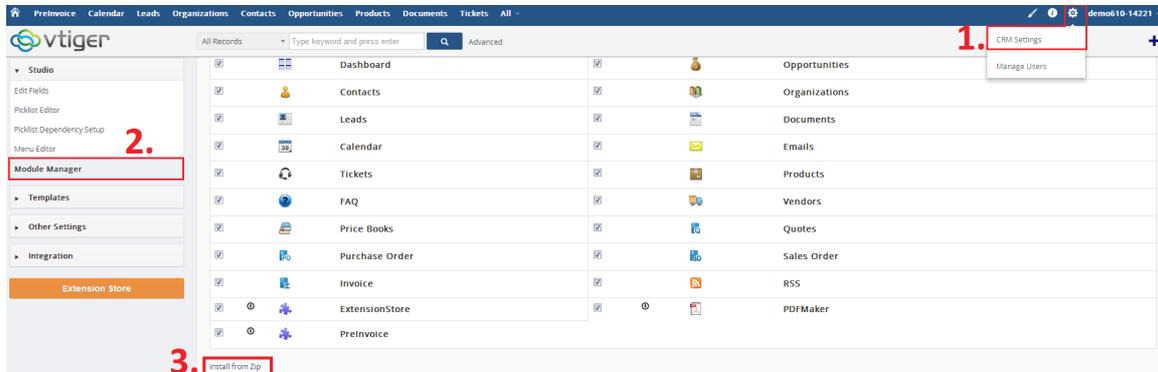
During installation it is necessary to exchange following information:

- vTiger CRM version (e.g. 6.x)
- Dynamics Fields 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 Dynamic Fields 4 You

Please provide following steps in order to install Dynamics Fields 4 You:

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



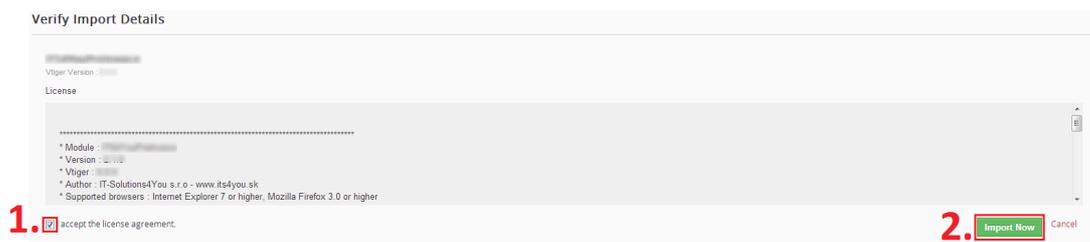
Picture 1.1: Installation of Dynamic Fields 4 You – Step 1

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.



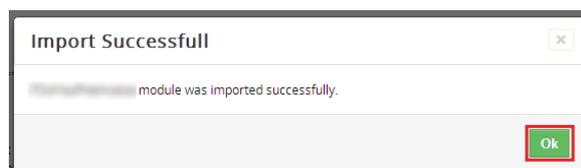
Picture 1.2: Installation of Dynamic Fields 4 You – Step 2

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 Dynamic Fields 4 You – Step 3

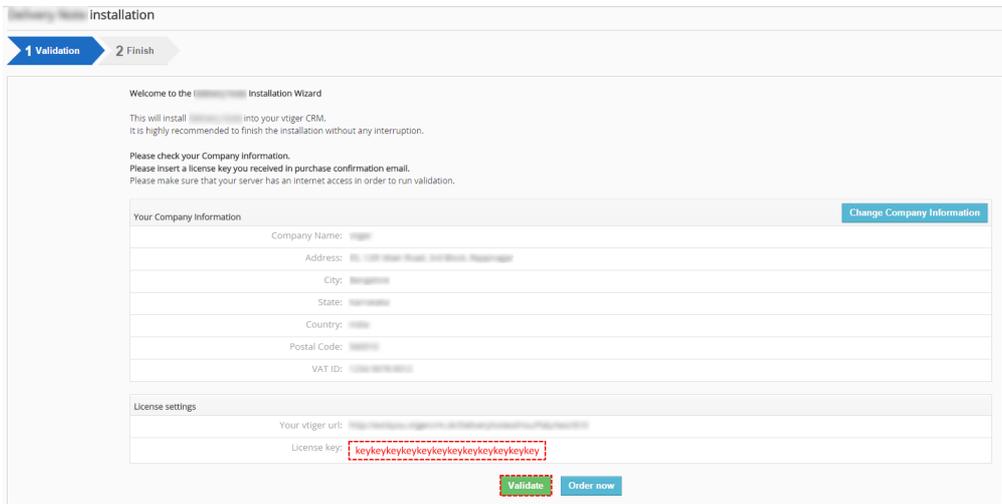
4. Click on **Ok** button to complete the module import.



Picture 1.4: Installation of Dynamic Fields 4 You – Step 4

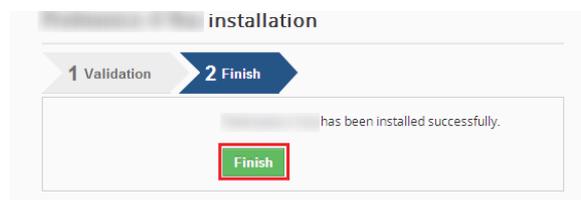
In order to finish installation, please provide following validation steps:

1. Dynamic Fields 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 Dynamic Fields 4 You – Step 1

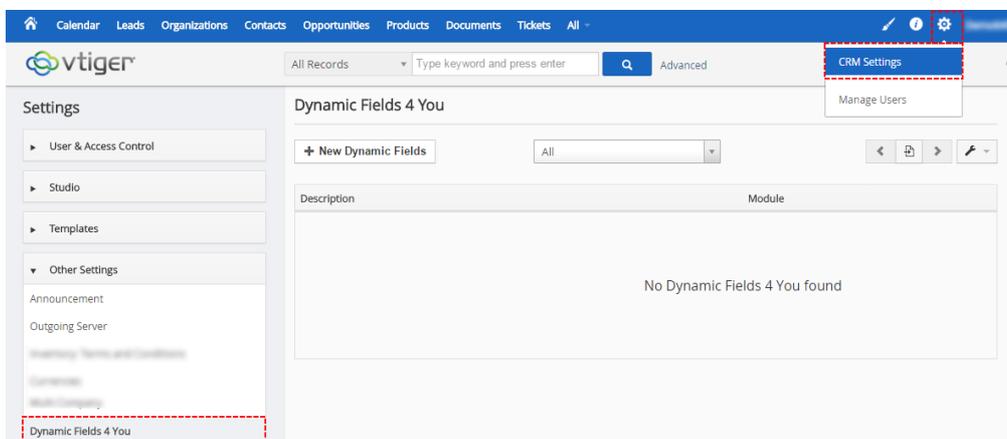
2. Click on **Finish** to complete Validation.



Picture 1.6: Validation of Dynamic Fields 4 You – Step 2

For Upgrade please check 5.3 Upgrade.

After successful installation, you are able to see Dynamic Fields into your vtiger CRM Settings (Picture 1.7).

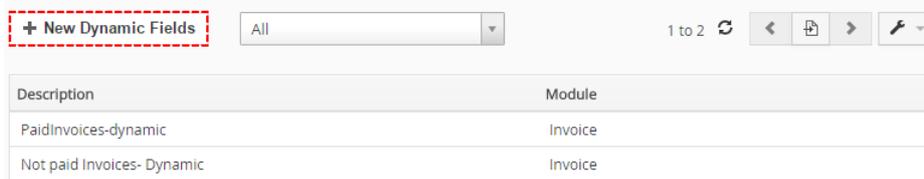


Picture 1.7: Start Dynamic Fields 4 You

2 How to create Dynamic Fields 4 You

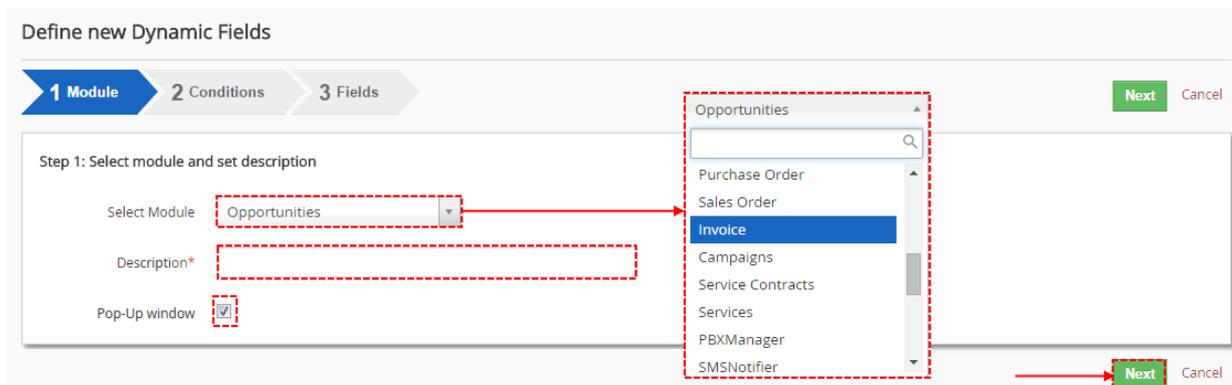
Create a new Dynamic Fields is very simple and user-friendly.

- The first step is click on **+ New Dynamic Fields** button



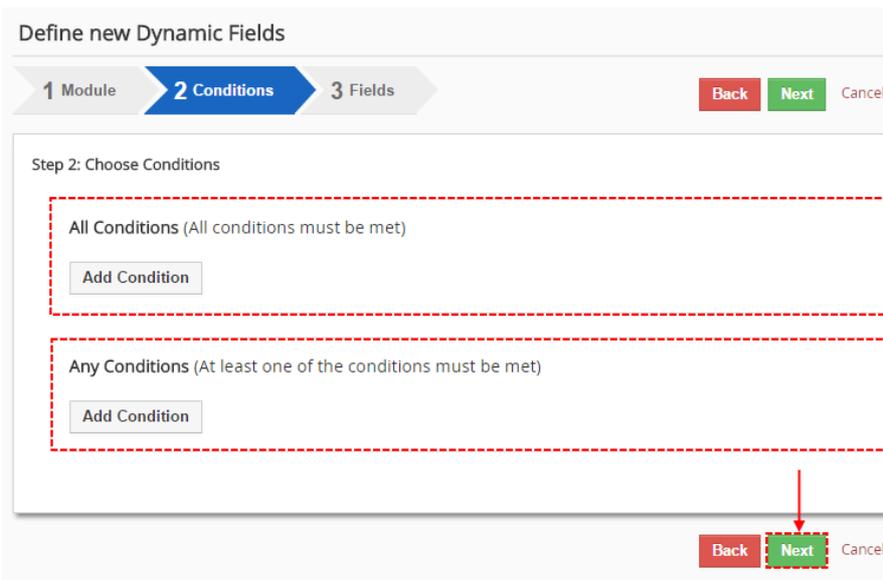
Picture 2.1: How to create Dynamic Fields – step 1

- Choose module and fill Description (Name of Dynamic Fields to have overview about your created Dynamic Fields), choose if you want Pop-up window and click on **Next** button



Picture 2.2: How to create Dynamic Fields – step 2

- Here you are able to create a conditions when Dynamic Fields should be initiated. You are able to choose if **All** Conditions or **Any** Conditions must be met.



Picture 2.3: How to create Dynamic Fields – step 3

- Finally, you will see option to set Fields. Here you can see 5 options to set your Fields:
 - **Select option** – this option **do not make** any change (default option)
 - **Show** – this option show Fields if the condition(s) is(are) true
 - **Hide** – this option hide Fields if the condition(s) is(are) true
 - **Read only** – this option lock Fields for read only (limited on input boxes)
 - **Mandatory** – make this fields Mandatory/required

You are also able to set this value for each Field separately or for each block at once. Default option is Select option (do not any change).

Define new Dynamic Fields Click here to finish →

1 Module 2 Conditions 3 Fields Back Finish

Set for a Block at once

Invoice Details	Set: Select option	Set			Show	Mandatory
Subject	Select option	<input checked="" type="checkbox"/>		Sales Order	Select option	<input type="checkbox"/>
Customer No	Select option	<input type="checkbox"/>		Invoice No	Select option	<input type="checkbox"/>
Contact Name	Select option	<input checked="" type="checkbox"/>	Set Field required	Invoice Date	Show	<input checked="" type="checkbox"/>
Due Date	Read only	<input type="checkbox"/>		Purchase Order	Select option	<input type="checkbox"/>
Adjustment	Select option	<input type="checkbox"/>		Excise Duty	Select option	<input type="checkbox"/>
Sub Total	Show	<input type="checkbox"/>		Sales Commission	Select option	<input type="checkbox"/>
Total	Hide	<input type="checkbox"/>		Tax Type	Select option	<input type="checkbox"/>
	Read only	<input type="checkbox"/>		Discount Amount	Select option	<input type="checkbox"/>
Discount Percent	Select option	<input type="checkbox"/>		Organization Name	Select option	<input type="checkbox"/>
S&H Amount	Select option	<input type="checkbox"/>		Assigned To	Select option	<input type="checkbox"/>
Status	Select option	<input type="checkbox"/>		Modified Time	Select option	<input type="checkbox"/>
Created Time	Select option	<input type="checkbox"/>		Conversion Rate	Select option	<input type="checkbox"/>
Currency	Select option	<input type="checkbox"/>		Pre Tax Total	Select option	<input type="checkbox"/>
Last Modified By	Select option	<input type="checkbox"/>		Balance	Select option	<input type="checkbox"/>
Received	Select option	<input type="checkbox"/>				

Picture 2.4: How to create Dynamic Fields – step 4

Please check Examples and Tips chapter to some Examples and our Tips of Dynamic Fields.

Until 600.1.6 there is option to create Follow-up Dynamic Fields and here you are able to set each field or each block by one. Read more: 3.4 Follow-up Dynamic Fields

Note:

**We are really sorry but there is one limitation of Dynamic Fields 4 You.
When you edit a Field, which is in condition, in DetailView – changes of Dynamic Fields
will not be applied.**

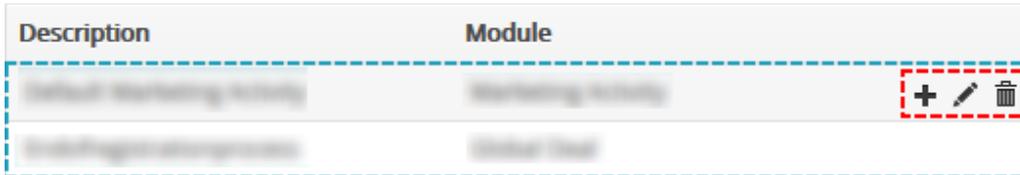
More info you can find here

3 Work area

The Work Area of the Dynamics Fields 4 You consists of:

- List of created Dynamic Fields
-  – New Dynamic Fields button
-  – Settings part – used for License setting, Upgrade and Uninstall

3.1 List of created Dynamic Fields



Description	Module
Invoice dynamic fields	Invoice
Not paid Invoices- Dynamic	Invoice

Picture 3.1: List of created Dynamic Fields

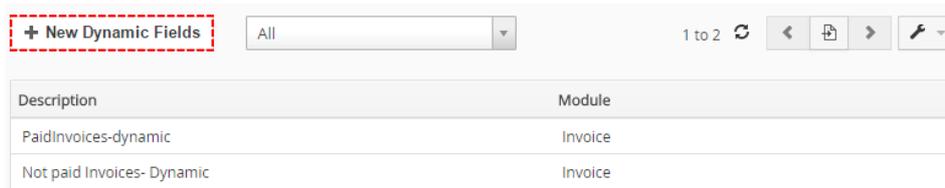
Here you can see created Dynamic Fields.

Description of Fields, related module and options to add, edit and delete Dynamic Fields.

From release 600.1.6 is new functionality available. Read more about Follows-up options.

3.2 New Dynamic Fields button

There is option to add new Dynamic Fields. How to create new Dynamic Fields is described in chapter How to create Dynamic Fields 4 You.



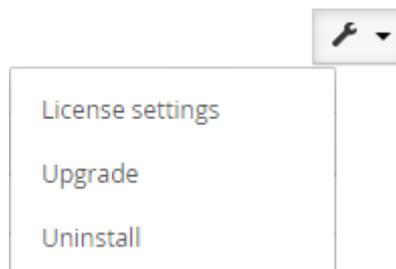
Description	Module
PaidInvoices-dynamic	Invoice
Not paid Invoices- Dynamic	Invoice

Picture 3.2: New Dynamic Fields button

3.3 Settings part

Setting part contains of:

- License setting
- Upgrade
- Uninstall



Picture 3.3: Settings part of Dynamic Fields

4 Examples and Tips

Limitation

First we need to show you one Limitation of Dynamic Fields.

Please do not change Fields in DetailView. Changes created by Dynamic Fields **will not be applied**.

Example:

In Invoice module, you will set condition:

All Conditions (All conditions must be met)

Status is Paid

Add Condition

Picture 4.1: Limitation

Field **Invoice Date** is show and Mandatory.

Invoice Date Show

Picture 4.2: Limitation

If you apply change of Status in EditView of Invoice. Everything works.

Invoice Details **EditView of Invoice**

Subject Inv2 Customer No Due Date Purchase Order Sales Commission 0.000 Status Created

Sales Order Type to search Contact Name Test1 Excise Duty 0.000 Organization Name OrganizationContact1 Assigned To Demo640 Administrator

Invoice Details

Subject Inv2 Customer No Invoice Date 02-11-2015 Purchase Order Sales Commission 0.000 Status Paid

Sales Order Type to search Contact Name Test1 Excise Duty 0.000 Organization Name OrganizationContact1 Assigned To Demo640 Administrator

Picture 4.3: Limitation

Now, if you try to change Status in DetailView, Invoice date will not be shown.

Invoice Details **DetailView of Invoice**

Subject Inv2 Customer No Contact Name Test1 Due Date Excise Duty 0 Organization Name OrganizationContact1 Assigned To Demo640 Administrator Modified Time 02-11-2015 4:09 PM

Sales Order Invoice No INV2 Purchase Order Sales Commission 0 Status Created Created Time 26-10-2015 4:47 PM

Invoice Details

Subject Inv2 Customer No Contact Name Test1 Due Date Excise Duty 0 Organization Name OrganizationContact1 Assigned To Demo640 Administrator Modified Time 02-11-2015 4:09 PM

Sales Order Invoice No INV2 Purchase Order Sales Commission 0 Status Paid Created Time 26-10-2015 4:47 PM

Picture 4.4: Limitation

Tips

Now, we would like to show some examples/tips for you.

Reverse option

When you set some conditions to show/hide/... fields, very good option for you is set reverse conditions.

Ex.: Invoice date – shown and Mandatory when Status of Invoice is paid

You are able to set Invoice date like shown and Mandatory when status of Invoice is Paid. But it is only one part of your job. Set please also reverse option. Reverse option may be like this:

Invoice date is hidden when Status of Invoice **is not** paid.

Option to protect important Invoices/Quotes/...

Do you have Invoice where total amount is more than 100.000 € and Status is paid?

Do you want to protect it against overwrite?

Set condition: Status is paid and total is greater then 100.000. Set all fields or fields you want to read only and your Invoice is in safety.

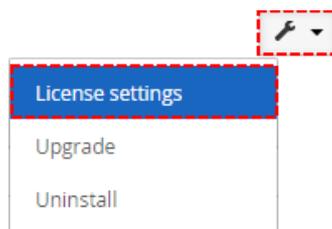
Hide select box Status to protect against overwrite.

5 Settings

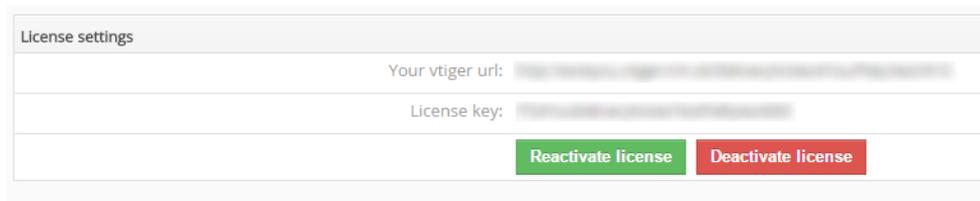
5.1 Deactivate license

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

1. Click on 
2. Click on 
3. Click on  button
4. Confirm deactivation with button 



Picture 5.1: Deactivate Dynamics Fields 4 You – Step 1,2



Picture 5.2: Deactivate Dynamics Fields 4 You – Step 3

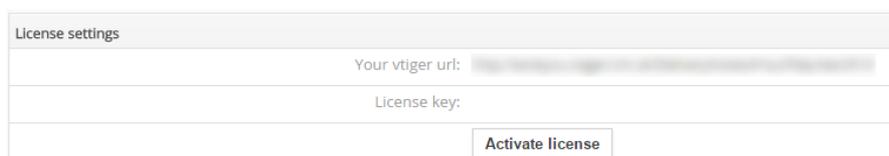


Picture 5.3: Deactivate license of Dynamics Fields 4 You – Step 4

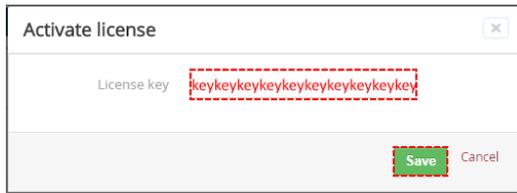
After deactivation of license Dynamics Fields 4 You doesn't work at all and Dynamics Fields 4 You work area is not accessible either as you can see on Picture 5.4.

To reactivate license you have to provide following steps:

1. Click on  button
2. Insert license key
3. Click on 



Picture 5.4: Activate license of Dynamics Fields 4 You – Step 1

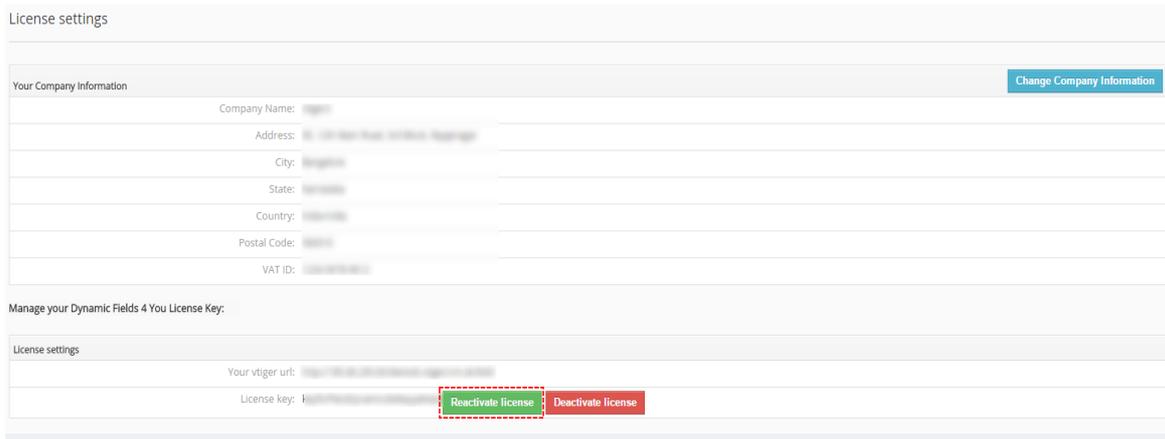


Picture 5.5: Activate license of Dynamics Fields 4 You – Step 2,3

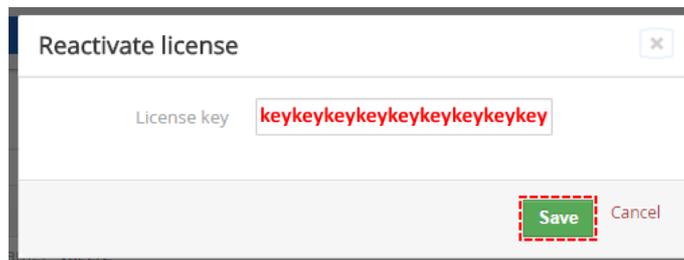
5.2 Reactivate license

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 **Save**



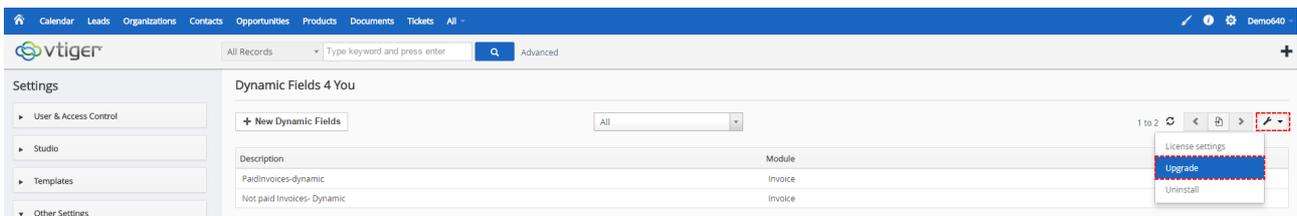
Picture 5.6: Reactivate license of Dynamics Fields 4 You – Step 1



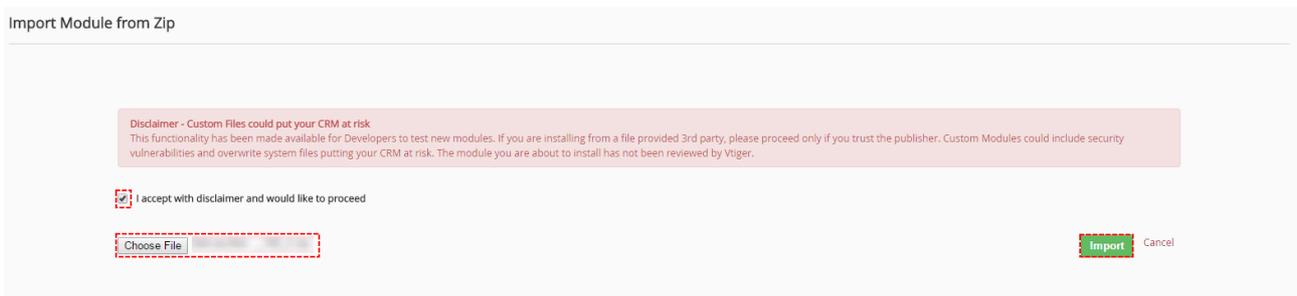
Picture 5.7: Reactivate license of Dynamics Fields 4 You – Step 2

5.3 Upgrade

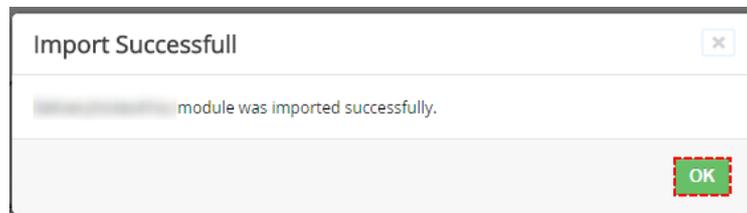
The upgrade of the Dynamic Fields 4 You is initiated in the same way as Dynamic Fields installation (How to install Dynamic Fields 4 You) or click on Upgrade link in ListView of Dynamic Fields (Picture 5.8). So please refer to above installation part for details how to initiate the import of the module from the file. After upgrade the notification about successful upgrade is shown (Picture 5.10)and click on **OK** button.



Picture 5.8: Upgrade of Dynamic Fields 4 You



Picture 5.9: Upgrade of Dynamic Fields 4 You

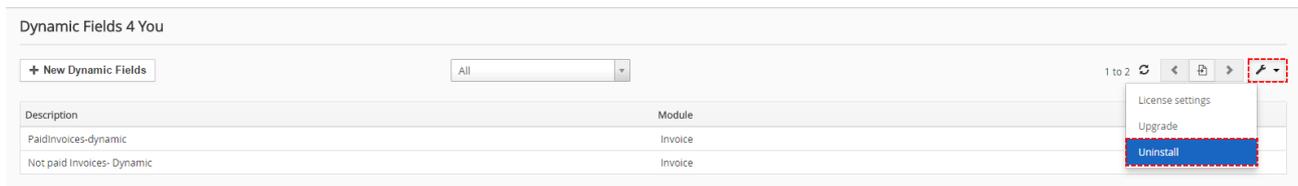


Picture 5.10: Upgrade of Dynamic Fields 4 You

5.4 Uninstall

If you want to remove Dynamic Fields 4 You from your vtiger please provide following steps:

1. In work area of Dynamic Fields please click on  button and choose **Uninstall** option



Picture 5.11: Uninstall of Dynamic Fields 4 You – step 1

2. Click on **Uninstall** button



Picture 5.12: Uninstall of Dynamic Fields 4 You – step 2

3. Confirm uninstall by **Yes** button



Picture 5.13: Uninstall of Dynamic Fields 4 You – step 3

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

Change log of Dynamics Fields 4 You

- March 2016: **600.2.0**
 - new functionality: Follows-up Dynamic Fields, Able/Disable Pop-up window
- November 2015: **620.1.0 – 600.1.5**

Change log of Manual for Dynamics Fields 4 You

- March 2016: manual is based on Dynamic Fields 4 You version: **600.2.0**
 - new chapter: 3.4 Follows-up Dynamic Fields
 - changes: How to create Dynamic Fields 4 You, 3.1 List of created Dynamic Fields
- November 2015: manual is based on Dynamics Fields 4 You version: **600.1.4**
 - first initiate version for vtiger 6.4