

# IT-Solutions4You

# PREINVOICE 4 YOU for VTIGER CRM 6.x

### Introduction

#### PreInvoice – Pro-forma Invoice – Preliminary Invoice

An abridged or estimated invoice sent by a seller to a buyer in advance of a shipment or delivery of goods. It notes the kind and quantity of goods, their value, and other important information such as weight and transportation charges. Pro forma invoices are commonly used as preliminary invoices with a quotation, or for customs purposes in importation. Proforma invoices are not recorded as an accounts receivable by the seller nor are they recorded as an accounts payable by the buyer.

Extension **PreInvoice 4 You** allows you to create PreInvoice from Quotes and Sales Order without risk that buyer does not pay Invoice and you will have to cancel Invoice. Also it is good way to create records of payment's deposits and then create real Invoice. **PreInvoice 4 You** is compatible with PDF Maker Professional, that means you are able to create PDF file from PreInvoice which you have created.

# Content

Introduction	
PreInvoice – Pro-forma Invoice – Preliminary Invoice	1
License agreement	3
Terms and conditions	3
Private policy	3
1 How to install PreInvoice 4 You	4
2 How to Create PreInvoice	6
2.1 Create PreInvoice from Sales Order	6
2.2 Create PreInvoice from Quotes	7
2.3 Create new PreInvoice	8
3 Work area	9
3.1 ListView	9
3.2 DetailView	9
3.3 Reference	.11
4 Additional features	.12
4.1 Create Invoice from PreInvoice	.12
4.2 Create Invoice from Relation	.12
4.3 Support of PDF Maker	.12
4.2 Support of Email Maker	.15
4.5 Support of CashFlow4You	.16
5 Settings	.17
5.1 Deactivate license	.17
5.2 Reactivate license	.18
5.3 Upgrade	.18
Change log of PreInvoice 4 You	.19
Change log of Manual for PreInvoice 4 You	.19

#### License agreement

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

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

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

😂 vtiger	All Records	<ul> <li>Type k</li> </ul>	eyword and press enter Q Advanced					CRM Settings	
Studio		==	Dashboard	V		5	Opportunities	Manage Users	
dit Fields		۵.	Contacts	V		00	Organizations		
icklist Editor			Leads	V		676. Ø ()	Documents		
Icklist Dependency Setup Itenu Editor <b>2.</b>	V	30	Calendar	V			Emails		
Module Manager		0	Tickets	1			Products		
Templates	V	2	FAQ	V			Vendors		
Other Settings		æ	Price Books	1		8	Quotes		
Integration		10	Purchase Order	V		5	Sales Order		
Extension Store		<b>B</b>	Invoice	<b>V</b>		2	RSS		
	v 0	4	ExtensionStore	V	0		PDFMaker		
	<b>v</b> •	4	Preinvoice						

Picture 1.1: Installation of PreInvoice-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 could include vulnerabilities and overwrite system files putting your CRM at risk. The module you are about to install has not been reviewed by Vitger.	e security
2.	I accept with disclaimer and would like to proceed	
1.	Choose File ITS4YouPrel00_1_0 zip	Import

Picture 1.2: Installation of PreInvoice – 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 PreInvoice – Step 3

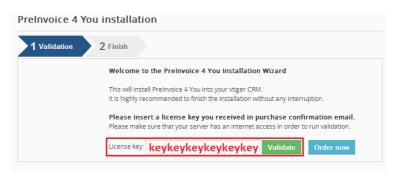
4. Click on ok button to complete the module import.

Import Successfull	×
ITS4YouPreInvoice module was imported successfully.	
	Ok

Picture 1.4: Installation of PreInvoice – Step 4

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

1. PreInvoice 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 PreInvoice – Step 1

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

Prelnvoice 4	/ou installation
1 Validation	2 Finish
	Preinvoice 4 You has been installed successfully.
	Finish

Picture 1.6: Validation of PreInvoice – Step 2

For Upgrade please check 5.3 Upgrade.

### 2 How to Create PreInvoice

#### 2.1 Create Prelnvoice from Sales Order

The mostly way to create PreInvoice, is generate PreInvoice from existing Sales Order. To create PreInvoice from Sales Order you have to provide following steps:

- 1. Go to Sales Order List and choose a Sales Order (Picture 2.1)
- 2. Click on More and now you have 2 option (Picture 2.2):
  - Create PreInvoice if you do not need products from Sales Order in PreInvoice

(e.g. Percentage PreInvoice of Sales Order, ... )

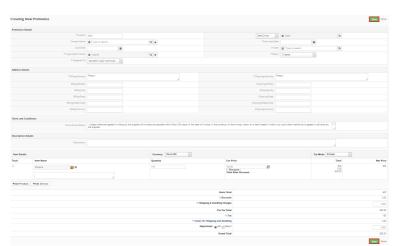
- Create PreInvoice with Products if you want to make PreInvoice with products and services from Sales Order
- 3. In appeared window please specify PreInvoice details according to your needs and click on Save button (Picture 2.3)

Actions ~	+ Add Sales Order	₹ All Sale	s Order	¥	1 to 3 🕽	< 🗄 > 🗡 -
A	B C D E F	G H I J	K L M N O	P Q R S	T U V W X	Y Z
	Subject	Organization Name	Quote Name	Total	Assigned To	
						Search
	503	Acc10		€2,946.40	demo610-14221 Administrator	≡⁄î
	502	Acc10		€1,104.90	demo610-14221 Administrator	
	501	Acc10		€787.40	demo610-14221 Administrator	

Picture 2.1: Create PreInvoice from Sales Order

03				Edit More -	< <b>&gt;</b>
				Delete Sales Order	Sales Order Details
<ul> <li>Sales Order Details</li> </ul>		Duplicate	Updates		
Subject	S03	Opportunity Name		Create Preinvoice	Activities
Customer No		Sales Order Number	SO3	Create Preinvoice with Products	Documents
Quote Name		Purchase Order		Export to PDF	Invoice
Contact Name		Due Date		Send Email with PDF	Preinvoice
Carrier		Pending		Create Invoice	
Status	Created	Sales Commission	0		
Excise Duty	0	Organization Name	Acc10		
Assigned To	demo610-14221 Administrator	Created Time	21-08-2014 15:43:5	3	
Modified Time	21-08-2014 15:43:53				

Picture 2.2: Create PreInvoice from Sales Order



Picture 2.3: Create PreInvoice with products from Sales Order

### 2.2 Create Prelnvoice from Quotes

Next option to create PreInvoice is from existing Quotes. To create PreInvoice from Quote you have to provide following steps:

- 1. Go to Quotes List and choose a Quote (Picture 2.4)
- 2. Click on **More** and now you have 2 options (Picture 2.5):
  - Create PreInvoice if you do not need products from Quote in PreInvoice

(e.g. Percentage PreInvoice from Quote, ... )

- **Create PreInvoice with Products** if you want to make PreInvoice with products and services from Quote
- 3. In appeared window please specify PreInvoicedetails according to your needs and click on Save button (Picture 2.6)

Actions ~	+ Add Quote		▼ All Quotes		v	1 to 3 C <	> /·
A	B C D E	F G H I	J K L M	A N O P	Q R S T	U V W X	Y Z
	Subject	Quote Stage	Opportunity Name	Organization Name	Total	Assigned To	
							Search
	Quote_3	Created	-	meine	€2,730.50	demo610-14221 Administrator	
	Quote_2	Created	-	meine	€2,501.90	demo610-14221 Administrator	
	Quote_1	Created		meine	€273.06	demo610-14221 Administrator	

Picture 2.4: Create PreInvoice from Quote

Quote_2				Edit More 👻 🗲	Ŧ	< >
				Delete Quote		Quote Details
▼ Quote Details		Duplicate		Updates		
Subject	Quote_2	Opportunity Name		Generate Preinvoice		Sales Order
Quote Number	QUO1	Quote Stage	Created	Generate PreInvoice with Products		Activities
Valid Until		Contact Name		Generate Invoice from Preinvoice		Documents
Carrier		Shipping		Export to PDF		Preinvoice
Inventory Manager		Organization Name	meine	Send Email with PDF		
Assigned To	demo610-14221 Administrator	Created Time	25-08-2014 10:35	Generate Invoice		
Modified Time	25-08-2014 10:37:26			Generate Sales Order		

Picture 2.5: Create PreInvoice from Quote

Creating New Prelovoice	
verse vers	Bave
Analysiska Batalak	
*Subject Quee, 2 Quee, 2	٩
Constant law for Type In search Q + Performance Gare	
Due Date Involte C Type to east	٩
*Organization Name (a) tables (b) (c) (c) (c) (c) (c) (c) (c) (c) (c) (c	
* Autopred To demolto-4221 Administration 1	
Méders Details	
+Bitsg Adress Ory +Shaping Adress Ory	
Bitry (10 Bas	
Bing Cry Physics Cry	
Billing Stee	
Billing Real Code Shipping Real Code	
Bing County Disping County	
Nonlytice Status	
tem Gezite Carrency Ture (6 -	
Teels Them Name Quantity Ust Price 71	ul Ne
E Pennin ■ 0 14 12 3 mmetri 1 3 aurenti Tod Alter Societt 1 70	100 00 00
4848 Poubut 480 Innie	
Rem Suid	
E bitcourt	
HDalpping & Handling Charges	
Pro Tas Sant	
() Tax     () Tax     () Tax     () Taxs for Shipping and Handling	
Officer for Shopping and Marillag     Algorithm (Galactic Control of Con	
at the second seco	

Picture 2.6: Create PreInvoice with products from Quote

### 2.3 Create new Prelnvoice

Alternately, you can create new PreInvoice by using + Add PreInvoice button(Picture 3.1).

To create PreInvoice please provide following steps:

- 1. Click on + Add PreInvoice button
- 2. In appeared window please specify PreInvoice details according to your needs
- 3. Click on Save button

### 3 Work area

Work area of PreInvoice 4 You consits of:

- 1. ListView used for common tasks like add new, edit and delete PreInvoice, import and export PreInvoice and access to others tools
- 2. DetailView shows already created PreInvoice in details
- 3. References show references to another Modules

### 3.1 ListView

The common tasks like add/delete PreInvoice, import/export PreInvoice or start editing have to be initiated via PreInvoice 4 You ListView. Go to All  $\rightarrow$  MARKETING & SALES  $\rightarrow$  PreInvoice and PreInvoice 4 You ListView will appear on your screen.

ctions - + Add PreInvoi	ce <b>2</b> .			▼ All PreInvoice	*				0. < 🗄 > /
Create Invoice from PreInvoice	D E	F G H	1		٩	R	S T U	V W	Edit Fields
reate Involce from Relation end Emails with EMAILMaker	Subject	Organization Name	Relati	All Preinvoice		Fotal	Status	Assigned	Module Sequence Number
DF Export				Paid Preinvoices					Edit Picklist Values
dit 📕 🛛	Quote_2	meine	Quote_	O Create New Filter		\$46.1	Created	demo610-1	License
elete	Quote_1	meine	Quote_1		 (	53.5	Created	demo610-1	Upgrade
port	Quote_1	meine	Quote_2		 5	546.1	Created	demo610-1	4221 Administrator
port	502	Acc10	502	4.	 6	53.5	Created	demo610-1	4221 Administrator
nd Duplicates	SO3	Acc10	503		 1	27	Created	demo610-1	4221 Administrator
111110000	SO3	Acc10	503		 1	27	Created	demo610-1	4221 Administrator
PINV0004	503	Acc10	503		 1	25.4	Created	demo610-1	4221 Administrator

Picture 3.1: Work area of PreInvoice 4 You

The main part of the PreInvoice 4 You ListView consists of list of the PreInvoice, which gives you information about a PreInvoice name, a reference, an amount and related dates. As shown in the picture, above the list of the payments you can find following:

- 1. Actions area contains actions for mass edit, delete, import and export, finding duplicates. For options of PDF Export, Send Emails with EMAIL Maker please see (Additional features), create invoice from Preinvoice (4.1 Create Invoice from PreInvoice), create invoice from Relation (4.2 Create Invoice from Relation).
- 2. + Add PreInvoice button is used to add new PreInvoice
- 3. Settings area vtiger related tools, License settings and Upgrade
- 4. List of created PreInvoices
- 5. **All Preinvoice** filtering
- 6. < 🖻 🕨 navigation bar

### 3.2 DetailView

From ListView you can dircetly open any PreInvoice in DetailView. The DetailView consists of:

- PreInvoice details part
- Group of action buttons
  - Edit switch to EditView and start editing

- More allows to delete, duplicate, create Invoice, export to PDF and send Email with PDF (for support of PDF Maker and Email Maker please see Additional features)
- **I** vtiger related tools, license setting and upgrade of PreInvoice 4 You
- • navigation buttons (previous/next PreInvoice)
- 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)

Yrelnvoice List	Quote_1			switch to EditView	Duplicate E Create Invoice E Export to PDF L Send Email with PDF U	
AILMaker	* Prelovoice Details		Prelnvoice d			PreInvoice Details Documents
Invoice	· · · · · · · · · · · · · · · · · · ·	Subject Quote_1	Freinvoice u	Relation Quete_1		
TVOIDe A		Preinvoice No PINV0009		Contact Name		1 12
		Preinvoice Date		Due Date		
		Invoice		Organization Name meine		references
English		Status Created		Assigned To demo610-14221 Administrator		
Send Email		Created Time 25-08-2014 10:39:12		Modified Time 25-08-2014 13:03:03		
	<ul> <li>Address Details</li> </ul>					
Maker		Billing Address City		Shipping Address City		
nvolce		Billing PO Box		Shipping PO Box		
		Billing City		Shipping City		
		Billing State		Shipping State		
English	Bi	lling Postal Code		Shipping Postal Code		
Export		Billing Country		Shipping Country		
Send Email	• Terms and Conditions					
Edit and Export Save into Documents			Terms & Conditions India or by such other method as is ag	r the supplier all invoices are payable within thirty (30) days of the date of invoice. In the curreed in advance by the Supplier. It is advance by the Supplier. It is hall be payable in addition by the Customer at the applicable rate.	rrency of the invoice, drawn on a bank based in	
	• Description Details	Description				
support of PDF Maker	Item Details	Quantity	Currency : Euro(6)	Tax Mode : group Total	Net Price	
and Email Maker	Potatois	Quantity	List Price	50.00	S0.00	
	Politos		(·) Discount : Total After Discount :	50.00 50.00	50.00	
				Items Total	50.00	
				(·) Discount	0.00	
				(+) Shipping & Handling Charges	0.00	
				Pre Tax Total	50.00	
				(+) Tax	13.50	
				(+) Taxes For Shipping and Handling		
				Adjustment	0.00	
				Kujustinent	0.00	

Picture 3.2: DetailView of PreInvoice

### 3.3 Reference

Every Prelnvoice, you have created and is assigned to Sales Order or Quotes you can find in DetailView of Sales Order or Quotes.

1. To show PreInvoice assigned to Sales Order please go to **Sales Order** module, choose your Sales Order and click on **PreInvoice** link(Picture 3.3).

)3			Edit More - 🗡 -	< >
				Sales Order Details
<ul> <li>Sales Order Details</li> </ul>				Updates
Subject	503	Opportunity Name		Activities
Customer No		Sales Order Number	503	Documents
Quote Name		Purchase Order		Invoice
Contact Name		Due Date		Preinvoice
Carrier		Pending		
Status	Created	Sales Commission	0	
Excise Duty	0	Organization Name	Acc10	
Assigned To	demo610-14221 Administrator	Created Time	21-08-2014 15:43:53	
Modified Time	21-08-2014 15:43:53			

Picture 3.3: PreInvoice in DetailView of Sales Order

03								Edit More -	< <b>&gt;</b>
								1 to 5 🖸 4 🏝 >	Sales Order Details Updates Activities
Subject	Relation	Preinvoice No	Prelnvoice Date	Due Date	Invoice	Total	Organization Name	Status	Documents
SO3	SO3	PINV0001				317.5	Acc10	Created	Invoice
SO3	SO3	PINV0002				101.6	Acc10	Created	Preinvoice
SO3	SO3	PINV0004				25.4	Acc10	Created	
503	SO3	PINV0005				127	Acc10	Created	

Picture 3.4: PreInvoices related to Sales Order

2. To show PreInvoice assigned to Quotes please go to **Quotes** module, choose your Quote and click on PreInvoice link(Picture 3.5).

ote_2			Edit More -	< >
				Quote Details
Quote Details				Updates
Subject	Quote_2	Opportunity Name		Sales Order
Quote Number	QU01	Quote Stage	Created	Activities
Valid Until		Contact Name		Documents
Carrier		Shipping		Preinvoice
Inventory Manager		Organization Name	meine	
Assigned To	demo610-14221 Administrator	Created Time	25-08-2014 10:35:45	
Modified Time	25-08-2014 10:37:26			

Picture 3.5: PreInvoice in DetailView of Quote

Quote_2								Edit More - 🖌 -	< >
								1 to 2 🖸 🔇 🔁 🗲	Quote Details Updates Sales Order
Subject	Relation	Prelnvoice No	Prelnvoice Date	Due Date	Invoice	Total	Organization Name	Status	Activities
Quote_1	Quote_2	PINV0008				546.1	meine	Created	Documents
Quote_2	Quote_2	PINV0010				546.1	meine	Created	Preinvoice

Picture 3.6: PreInvoices related to Quote

# 4 Additional features

### 4.1 Create Invoice from PreInvoice

In the DetailView of PreInvoice you are able to create Invoice. To create Invoice you need to choose one or more Preinvoice(s). Please note that organization must be the same. Click on Actions - button and then **Create Invoice from PreInvoice.** In appeared window please specify PreInvoice details according to your needs and click on Save button.

Action	ns 🔹 🕂 Add Preinv	oice		▼ All Pr	einvoice			•		1 to 20 🖸 < 🗄 🕨 🗡
Creat	e Invoice from PreInvoice	D E	F G H	I J	K L	MN	O P Q	R S	T U	V W X Y Z
	e Invoice from Relation Emails with EMAILMaker	ject	Organization Name	Relation	Preinvoice Date	Due Date	Invoice	Total	Status	Assigned To
PDF E	export									Search
Edit			Acc10	SO1				127	Paid	demo610-14221 Administrator
Delet	e	- SO test matus 2	Acc10	SO test matus 2			INV - SO test matus 2	317.5	Invoiced	demo610-14221 Administrator
Impor	rt	- SO test matus 2	Acc10	SO test matus 2				158.76	Paid	demo610-14221 Administrator
Expor	t	from SO test matus	Acc10	SO test matus			INV from SO test matus	127	Paid	demo610-14221 Administrator
Find C	Duplicates	from SO test matus	Acc10	SO test matus			INV from SO test matus	635	Invoiced	demo610-14221 Administrator
-		envoicepeto	Acc10					635	Created	demo610-14221 Administrator
	PINV0015 C	ista PrelNV	trnavska 13				INV z Cista PrelNV	1993.9	Invoiced	demo610-14221 Administrator
V	PINV0014 pi	reinvolce zo SO6	Acc10	S06				635	Created	demo610-14221 Administrator
	PINV0013 PI	reinvoice 2 for SO4	Acc10	SO4				381	Created	demo610-14221 Administrator
<b>V</b>	PINV0012 PI	reinvoice1 from SO4	Acc10	SO4			INV from SO4	381	Invoiced	demo610-14221 Administrator
<b>V</b>	PINV0001 S	03	Acc10	S03				317.5	Created	demo610-14221 Administrator
	PINV0002 S	03	Acc10	SO3				101.6	Created	demo610-14221 Administrator
	PINV0009 Q	uote_1	meine	Quote_1				63.5	Created	demo610-14221 Administrator
	PINV0010 Q	uote_2	meine	Quote_2				546.1	Created	demo610-14221 Administrator
	PINV0011 Q	uote_2	meine	Quote_2				273.06	Created	demo610-14221 Administrator
	PINV0008 Q	uote_1	meine	Quote_2				546.1	Created	demo610-14221 Administrator
7	PINV0007 S	02	Acc10	SO2				63.5	Created	demo610-14221 Administrator
	PINV0006 S	03	Acc10	S03				127	Created	demo610-14221 Administrator
	PINV0005 S	03	Acc10	SO3				127	Created	demo610-14221 Administrator
1	PINV0004 S	03	Acc10	SO3				25.4	Created	demo610-14221 Administrator

Picture 4.1: Create Invoice from PreInvoice

In the created Invoice will be (all) product(s) and service(s) from Preinvoice(s) included.

### 4.2 Create Invoice from Relation

You are able to create Invoice from Relation. To create Invoice please choose one or more Preinvoice(s). Click on Actions - button and then **Create Invoice from Relation.** In appeared window please specify PreInvoice details according to your needs and click on Save button.

In the created Invoice will be (all) product(s) and service(s) assigned to Relation(s) included.

### 4.3 Support of PDF Maker

The PDF Maker is extension tool designed by ITS4You for vtiger CRM. It is powerful and flexible tool which allows users of vtiger CRM to create own pdf templates.

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

Before creating PDF file you need to create template of PDF Maker. To create template please check manual for PDF Maker:

(http://www.its4you.sk/images/pdf\_maker/pdf\_maker\_for\_vtiger6\_crm.pdf)

or please provide following steps:

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

🕏 vtiger	All Rec	tords	<ul> <li>Type keys</li> </ul>	MARKETING & SALES	SUPPORT	INVENTORY	Tools
Preinvoice List	< Ac	tions -	+ Add Preinvo	Preinvoice Campaigns	Tickets FAO	Assets Products	PDF Maker EMAIL Maker
Recently Modified		A B	C C	Leads	Projects	Services	Email Templates
		P	reinvoice No	Contacts Organizations	Service Contracts	Price Books Vendors	PBXManager RSS
				Opportunities		Purchase Order	Our Sites
		P	INV0003	Quotes			Mail Manager Calendar
			INV0002	Sales Order			Documents
			1140001				SMSNotifier Recycle Bin
				ANALYTICS			,
				Reports			
							Customize Main Menu Add / Manage Modules

*Picture 4.2: Create template – Step 1* 

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

			+ Add template PDF Maker Manual	+ Add templa	tions –	Act
	Description	Module	Template name	Template nam	Select	#
voice	Template for Invoice	Invoice	Invoice	Invoice		1
alesOrder	Template for SalesOrde	Sales Order	SalesOrder	SalesOrder		2
Sa	Template for	Sales Order		SalesOrder		2

*Picture 4.3: Create template – Step 2* 

3. In the EditView (Picture 4.3), go to Properties tab and define the template name and the description.

New template				Apply Save Cancel
Properties Other informations Labels Proc	duct block Header / Footer Settin	gs Sharing		1.
<b>5 *</b> Template name:	Pre Invoice	Description:		
4. *Module:	ITS4YouPreInvoice	Prelnvoice No	Insert into template	
Related modules:	Select Module	Address Details Billing Address Shipping Address Billing City	Insert into template	
Related blocks:	Please select	Shipping City Billing State	Edit Delete	
ListView block:	Please select	PreInvoice Details Subject Relation		
Body Header Footer		Contact Name Prelnvoice Date		
📀 Source 🔏 🐚 🖍 📘 🖉 🖉 🔎	bg   其   ॐ⊷ 🤧 🐰 🕅 🕅		2	
Styles + Format + Font + S	Size - B I U S X <sub>2</sub> X <sup>2</sup>	Status Assigned To Created Time	■ <b>** </b> ■• <b>*</b> 3	
\$ITS4YOUPREINVOICE_PREINVOICE_NO\$	<b>—5.</b> —→	Modified Time  Prelivoice No Invoice Record ID	•	

Picture 4.4: Create template – Step 3,4,5,6,7

- 4. Choose the module from the list (i.e. ITS4YouPreInvoice).
- 5. Choose one of the all available fields from the selected module (i.e. PreInvoice No) and Insert into template click on button
- 6. Repeat the steps 5. and 6. to finish your pdf template according to your needs
- 7. Finally click on the Save button

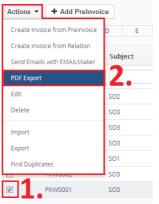
e Invoice dule: ITS4YouPreInvoice									Edit Duplicate	D
Template informations										
	Template name	Pre Invoice								
	Description									
	Module	ITS4YouPre	Involce							
	Status	Active								
	Set as default	for DetailVie	ew 🗙 for ListView 🗙							
PDF Template										
Header										
	Pre	Invo	oice no: \$l	TS4YOUF	REINVO	ICE_PREI	VOIC	E_NO\$		
		Pos	NG.	Qty%	Text	NG_LBL_LIST_PRICEN	%G_Subtotal%	%G_Discount%	%M_Total%	
	#PRODUCTE	BLOC_START#	OC_START#							
	SPRODUC	TPOSITIONS	SPRODUCTQUANTITYS	SPRODUCTUSAGEUNITS	SPRODUCTNAMES	SPRODUCTLISTPRICES	SPRODUCTTOTALS	SPRODUCTDISCOUNTS	SPRODUCTSTOTALAFTERDISCO	UNTS
	#PRODUCTE	SLOC_END#								
	%G_LBL_NET	PRICE% without	ut TAX						STOTALWITHOUT	IVATS
Body	%G_Discour	196							\$TOTALDISCO	UNTS
/	Total witho	ut TAX							\$TOTALAFTERDISCO	UNTS

Picture 4.5: PDF Maker template for PreInvoice 4 You

In the following pictures you can see how to generate PDF file in the ListView or DetailView using PDF Maker:

#### ListView

- 1. Select record(s)
- 2. Click on Actions button and select "PDF Export"
- 3. Select the PDF template(s)
- 4. Select the language
- 5. Click on Export to pdf button
- 6. Dialog box will appear on the screen depending on your web browser. The PDF file is generated



Picture 4.6: Create PDF file from ListView – Step 1,2

PDF N	Naker batch export X	
3.	PDF Template  x Pre Invoice	P
4.	PDF language US En 🔻	te
	5. Export to pdf Close	l

Picture 4.7: Create PDF file from ListView – Step 3,4,5

#### DetailView

- 1. Select the PDF template(s)
- 2. Select the language
- 3. Click on 🚺 Export link
- 4. Dialog box will appear on the screen depending on your web browser. The PDF file is generated

Prelnvoice List	502	
► Recently Modified		
► EMAILMaker	PreInvoice Details	
	Subject	SO2
▼ PDFMaker	Preinvoice No	PINV0007
Pre Invoice	PreInvoice Date	
1.	Invoice	
-	Status	Created
US English 💽 🔰	Created Time	22-08-2014 16:02:15
Export 2		
	<ul> <li>Address Details</li> </ul>	
Send Email	Billing Address	Presov
😭 Edit and Export	Billing PO Box	
Save into Documents	Billing City	
	Billing State	
<ul> <li>Tag Cloud</li> </ul>	Billing Postal Code	
	Billing Country	

Picture 4.8: Create PDF file from DetailView – Step 1,2,3

### 4.2 Support of Email Maker

The Email Maker is extension tool designed for the vtiger CRM. Using EMAIL Maker you can create email templates with predefined information and send them from all the modules. There are available all the fields from source and related modules, the fields related to recipients, the company information and many more. The intention was to provide powerful and flexible tool which allows users of vtiger CRM to create own email templates. Using the email templates you can send mass emails from ListViews (e.g. Invoices, Quotes, Products, etc.) and finally save lot of your time. Sending is running in background. You are informed about sending process by small popup window.

R Preinvoice Calendar Leads	Organizati	ons Contacts	Opportunities	Products Do	ocuments Tic	kets EMAIL Make	All -		🖌 🕧 🛱 demo610-1
🕲 vtiger	All F	ecords	• Type keyword a	nd press enter	۹,	Advanced			
Records List	•	Actions ~	+ Add template	+ Add them	ne				1 -
▶ Settings		# Select	Template name			Module	Description	Status	Action
▶ Tools		1 🗹	Pre Invoice			Preinvoice		Active	Edit   Duplicate

Picture 4.9: Email Maker

You are able to send Email from DetailView of PreInvoice.

¢vtig∈r	AJI	Records	enter Q Advance	zd							
Preinvoice List	<	503							Edit More - 🖌 -		< >
Recently Modified										Preinvoice Details	
EMAILMaker		Preinvoice Details								Documents	
Pre Invoice	~	Subject	503			Relation St	03				
		Prelnvoice No	PINV0001			Contact Name					
			V	rendors • Q	ttachment						
JS English					Choose File No file chose	20	Browse CRM				
Send Email	_										
Send Email											
PDFMaker		Subject*		Select Email Template							
		Send									
Tag Cloud											
	1	💿 Source 🔏 🐚 🖍 😥 🗷 🗢	0 4n 11 12 19	07 <b>1 1 1 1 1</b>	E2 III = 0 0	, <b></b>					
		Styles - Format - Font					1 2				
						-	ov 1	-			
		Pre Invoice no: PIN	V0001								
		- Unless otherwise agreed in writing by the s	oplier all invoices are payable w	ithin thirty (30) days of the date o	if invoice, in the currenc	cy of the invoice, drawn	on a bank based in				
		India or by such other method as is agreed in							date of invoice, in the		
		- All prices are not inclusive of VAT which sh	all be payable in addition by the	Customer at the applicable rate.					) by the Supplier.		
									rate.		
		Pos Quantity Ter	t List Price	G_LBL_SUB_TO	250.00	Discount 0.00	Net Price				
		Total	60.00	1	200.00	0.00	250.00				
		Discount					0.00				

Picture 4.10: Sending Email from DetailView of PreInvoice

Notice: If POP-up window do not show, please allow POP-up window in your browser.

Full funtionality of Email Maker you can fink on following link:

http://www.its4you.sk/images/stories/email-maker/Email\_Maker\_for\_vtiger\_CRM\_6.pdf

### 4.5 Support of CashFlow4You

The Cashflow4You module is designed for vtiger CRM 6.x. The Cashflow4You module helps you to register your incoming or outgoing payments and associate that payment with other entities in the vtiger CRM Open Source. The extension allows you to track incoming payments that we will receive from customers or will have to make in the future. So it is easy to create a Report or Custom view on payments forecast for incoming or outgoing payment made by our company. It enables you to define payments for some categories like (goods, services, ...).

• Payme	ents		
Grand T	otal	1,270.00€	
Received	04-09-2014	100.00€	List of related payments wi
Paid	10-09-2014	150.00€	status, date and amount
Waiting	11-09-2014	200.00€	
Total arr	nount	150.00 €	sum of all payments
Balance		1,120.00€	value of new (remaining) payment(s)
	Create Payment	]	payment(s)
	$\hat{\mathbf{h}}$	_	
cli	ick here to cre	ate	
I	new payment		
	Picture 4.11	: Pavmer	nt block of Cashflow4You

For more information about CashFlow4You please check:

http://www.its4you.sk/images/cashflow4you/Cashflow4You.pdf

# **5** Settings

### 5.1 Deactivate license

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

- 1. Click on 🧨
- 2. Click on Licence
- 3. Click on Deactivate license button
- 4. Confirm deactivation with button Yes

Actions	+ Add Preinvo	ice		Ŧ	All Preinvoice		v		1 to 3	S < 8 > /·
A	B C	D E	F G H	1	J K L M	N O P	Q R	S T U	V W	Edit Fields
	Preinvoice No	Subject	Organization Name	Relation	Preinvoice Date Due Di	ate Invoice	Total	Status	Assigned	Module Sequence Numbering Edit Workflows
										Edit Picklist Values
	PINV0003	SO1	Acc10	SO1			127	Created	dem_610-1	License
	PINV0002	S03	Acc10	503			101.6	Created	demo610-1	Upgrade
	PINV0001	503	Acc10	SO3			317.5	Created	demo610-14	221 Administrator

Picture 5.1: Deactivate PreInvoice – Step 1,2

License settir	ıgs	
Manage all setti	ngs related to your license:	
License settings		
	License key: keykeykeykey Reactivate license Deactivate license	
Pict	ure 5.2: Deactivate PreInvoice – Step	3
Pict	ture 5.2: Deactivate PreInvoice – Step	Ĵ
Pict	ture 5.2: Deactivate PreInvoice – Step	Ĵ
Pict	ture 5.2: Deactivate PreInvoice – Step	ź
Pict	·	ź
Pict	·	Ĵ

Picture 5.3: Deactivate license of PreInvoice – Step 4

After deactivation of license PreInvoice 4 You doesn't work at all and PreInvoice 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

License settings	
Manage all settings related to your license:	
License settings	
	License key: Activate license

Picture 5.4: Activate license of PreInvoice – Step 1

Activate license	
License key	keykeykeykeykey 2.
	3. Save Can

Picture 5.5: Activate license of PreInvoice-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

ive			
License settings			
Manage all settings related to your license:			
License settings		1.	
	License key: keykeykeykey	Reactivate license	Deactivate license

Picture 5.6: Reactivate license of PreInvoice – Step 1

Reactivate licens	se ×
License key	keykeykeykeykey 2.
	3. Save Cancel

Picture 5.7: Reactivate license of PreInvoice – Step 2,3

### 5.3 Upgrade

The upgrade of the PreInvoice 4 You is initiated in the same way as PreInvoice 4 You installation. So please refer to above installation 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 PreInvoice 4 You module already exists. The upgrade will start immediately when you click on the Update Now button. After upgrade the notification about successful upgrade is shown and click on Ok button.

Verify Import Details			
ITS4YouPreInvoice Exists Vtiger Version : 6.0.0			
License			
* Module : ITS4YouPrelevoice * Version : 2.1 0 * Volge : 6 Solutions4You s.r.o - www.its4you.sk * Author : IT-Solutions4You s.r.o - www.its4you.sk * Supported browsers : Internet Explorer 7 or higher, Mozilla Firefox 3.1			1. Update Now Carcel
	Update Successfull	×	
	ITS4YouPreInvoice module was updated successfully		
		2. 💿	

Picture 5.8: Upgrade PreInvoice 4 You

## Change log of Prelnvoice 4 You

- December 2014: 600.1.1
  - bug fixes
- September 2014: 600.1.0

### Change log of Manual for Prelnvoice 4 You

- September 2014: manual is based on PreInvoice 4 You version: 600.1.0
  - first initiate version for vTiger 6.1