

IMPROVEMENTS 4YOU FOR VTIGER CRM

Introduction

The Improvements 4You is extension tool designed for vtiger CRM. The intention was to provide powerful tool which allows users of vtiger CRM to work more effectively, save their time and improve usage of vtiger CRM. The Improvements 4You is set of independent tools designed for vtiger CMR. Our current version of Improvements 4You consists of:

- action links in DetailView of the modules Sales Order, Purchase Order and Opportunities these links allow creating new vtiger records based on viewed record
- Products/Services Ajax Search this tool real-time searching in the database of your products and services and helps to create new quote, sales order, purchase order, invoice or other inventory records in easier way and shorten time

What's new?

Here is the list of the new features and improvements provided within versions 1.4. available for vtiger CRM version 5.4.0:

- the creation of the Quote directly from Opportunity detail
- the creation of the Event directly from Opportunity detail
- the creation of the To Do record directly from Opportunity detail
- Products/Services Ajax Search allows searching products and services in inventory modules (e.g. Quotes, Sales Order, Purchase Order, Invoice)

Who needs Improvements 4You?

The target group of Improvements 4You users are people daily working with inventory modules. In addition it is expected that people would like to create new purchase / sales orders, quotes, invoices, events or to do records based on already existing records with smaller effort. Using Improvements 4You and just few clicks you can provide same actions as before but within less time.

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License agreement

- The Improvements 4You License will be referred to as "The license" in the remainder of this text.
- This irrevocable, perpetual license covers all versions 1.xx of Improvements 4You.
- This license gives the holder right to install Improvements 4You 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 Improvements 4You 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 Improvements 4You.
- The license holder may not re-distribute the library or versions thereof to third party without prior written permission of the copyright holder.
- Improvements 4You 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 Improvements 4You.

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 link for download Improvements 4You and your license key as well.

Private policy

During installation it is necessary to exchange following information:

- vtigerCRM version (e.g. 5.4.0)
- Improvements 4You version (e.g. 540.1.3)
- Date and time
- Domain in md5 coding format (e.g. 916b25c201a77a6721003c0030977f3b)
- Action provided by you (INSTALL, REACTIVATE, DEACTIVATE)

1 How to install Improvements 4You

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

It is highly recommended to finish the installation without any interruption. For successful installation we need to exchange following information (see previous chapter for details):

vtigerCRM version (e.g. 5.4.0)
Improvements 4You version (e.g. 540.1.3)
Date and time
Domain in md5 coding format (e.g. 916b25c201a77a6721003c0030977f3b)
Action provided by you (INSTALL, REACTIVATE, DEACTIVATE)

1. Install the .zip package of the Improvements 4You module via Settings -> Module Manager. Select the *Custom Modules tab* and click on the Import New button.

đ	Manage module behavior inside vtiger CRM	
	Standard Modules	Custom Modules
		Import New
3	ConfigEditor	a 🖬 🖬
8	CronTasks	0 R 🗉
8	Import	a 🖉 🖬 🖬
8	Integration	a 🖉 🖬 🖬
3	MailManager	ê 🗹 🖬
3	Mobile	0 R 🗉
5	PDFMaker	8 R I 🔦
5	WSAPP	a 🗹 🖬
abl	British English	0 Ø
ab	DE Deutsch	0 🗹

Picture 1.1 Installation of Improvements 4You – step 1

2. Select the module zip (package) file that was previously exported or created. Click on the Import button.

Manage n	nodule behavior inside vliger CRM
Select the Packa	ige File
* File location:	H:\ITS4You\Improvements4You_540_1_3.zip Browse
	Lawrent Connect

Picture 1.2 Installation of Improvements 4You – step 2

3. Verify the import details parsed from the zip file. Please check that you accepted the license agreement and click Yes to proceed or No to cancel.

/erify Import Details	
Module Name	Improvements4You
Module Directory	modules/Improvements4You
Req. vtiger version	5.4.0
License	* Module : Improvements4You * Version : 1.3 * Vtiger : 5.4.0 * Author : IT-Solutions4You s.r.o - www.its4you.sk * Supported browsers : Internet Explorer 7 or higher, Mozilla Firefox 3.0 or higher * LICENSE LICENSE * LICENSE

Picture 1.3 Installation of Improvements 4You – step 3

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

1. Improvements 4You Validation Step. Please insert a license key and make sure that your server has internet access. Click on <u>Validate</u>.

Imp	provements 4You installation >> Validation >> 1/2
	Welcome to the Improvements 4You Installation Wizard
	This will install Improvements 4You into your vtiger CRM.
	It is highly recommended to finish the installation without any interruption.
	Please insert the license key you received in purchase confirmation email. Please make sure that your server has an internet access in order to run validation.
	Validate Order now

Picture 1.4 Validation step 1

2. If Improvements 4You is installed successfully you will see following screen. Click on **Finish** button.



The Product/Service Ajax Search tool requires overwriting of the some vtiger core files. This proceeding will be initiated when you enable it in the settings (please see chapter 3). The following picture describes necessary steps:

- 1. Please click on **Download** button to download zip file containing necessary files.
- 2. Save and unzip the downloaded files.
- 3. Two approaches exist for overwriting step depending on your installation of the vtiger:
 - a) In case you are using original vtiger core files or vtiger core files updated due to other our ITS4You products (see the list of the files in the Picture 1.6), please just replace the original vtiger core files by files extracted from our zip file. As you can see in the picture below it is necessary to replace just few files located in directories [vTigerROOT]/Smarty/..., [vTigerROOT]/modules/.... and [vTigerROOT]/include/... Please simply copy these directories to your [vTigerROOT] directory and replace original vtiger core files.
 - b) It is also easy to implement changes in case that your corresponding vtiger core files are not original and were changed due to other your purposes. In that case it is recommended to implement changes file after file manually via any editor. Please find detail description in chapter 5.1
- 4. After update of the vtiger core files click on button **Continue**

Allows you to	o search products and services in inventory modules by using autocomplete.
	It is necessary to overwrite some vtiger core files. If You have a clean installation (no customisations in vtiger code), simply download attached zip file, unzip it and copy the extracted files to Your vtiger directory. In other case unzip the files and compare file after file the unzipped and original vtiger files. Our changes are enclosed with "// ITS4YOU" tags. Find our added parts of code and copy it to proper place of Your vtiger files. After that in ord to finish installation click on button "Continue".
	Opening torewrite.zip Vou have chosen to open: Orewrite.zip Which is a: WinZip File (22,8 KB) from: http://ext4you.vtigercm.sk What should Firefox do with this file? © gpen with WinZip (default) © Save File Do this gutomatically for files like this from now on.
	3. \torewrite\Smarty\templates\Inventory\InventoryEditView.tpl \torewrite\Smarty\templates\Inventory\InventoryCreateView.tpl \torewrite\modules\Services\Services.js \torewrite\include\js\Inventory.js

Picture 1.6 Products / Services Ajax Search enabling process

2 Improvements 4You usage

After successful installation and enable Improvements 4You in the settings you can find Improvements 4You action blocks in the DetailView of the modules Sales Order, Purchase Order and Opportunities as seen in the picture below. Tool Improvements 4You provides following action items:

- Create Purchase Order
 Allows you to create Purchase Order from Sales Order DetailView.
- Create Multiple Purchase Orders Allows you to create multiple Purchase Orders (per Vendor) from Sales Order DetailView. For each Vendor separate purchase order is created.
- Create Sales Order
 Allows you to create Sales Order from Purchase Order detail.
- Create Quote
 Allows you to create Quote from Opportunity detail.
- Create Event
 Allows you to create Event from Opportunity detail.
- Create To Do
 Allows you to create To Do from Opportunity detail.

Sales Order DetailView Purch

Purchase Order DetailView

Opportunities DetailView



Picture 2.1 Improvements 4You action items

In addition the Products / Services Ajax Search is introduced within Improvements 4You for inventory modules i.e. Quotes, Sales Order, Purchase Order and Invoice. This tool is described in the chapter 2.5.

2.1 Create Purchase Order

This simply creates purchase order from already existing sales order. All products are copied from sales order to one purchase order regardless of vendors of products. In order to create purchase order, just click on link Create Purchase Order in the DetailView of sales order. You will be redirected to module purchase order and window "Creating New Purchase Order". Please continue with editing of the new purchase order according to your needs and finally save it using button Save.

Note: As a vendor for new purchase order the vendor of the first product from sales order is selected. You can change it if necessary.

Sales Order Information	More	Information			Edit	Duplicate Delete
🔝 Sales Order Information			Click	to creat	000	Actions
	Subject	One Vendor Sales Order	Opportunity Name	iu create	e one	Create Invoice
Cur	tomer No		purchase	e order w	ith all	
Qui	ote Name		Purcha	ducte/cor	vices	Convert SalesOrder
Conta	act Name		Due Date	2013-01-21	VICES	Create Purchase Order
	Carrier	FedEx	Pending			Create Multiple Durchas
	Status	Created	Sales Commission		Edit	
Ex	cise Duty		Organization Name	vtiger		DDFM V.
Asi	signed To	Rastislav Itsfouryou	Created Time	2013-01-23 17:28:47		POFMaker
						Contraction of the second s
Modi	ified Time	2013-01-23 17 28 42				SalesOrder
Mod New Purchase Order	ified Time	2013-01-23 17 28 42	Save Cancel			SalesOrder
Mod New Purchase Order Purchase Order Information Purchase Order Information	ified Time	2013-01-23 17 28 42	Saul Cancel	PurchaseOrder No	AUTO GEN ON SAV	ShesOrder /6
Med New Purchase Order Purchase Order Information Purchase Order Information	ified Time	2013-01-23 17 26 0 One Vender Sales Onder Patricia	Save Cancel	PurchaseOrder No Requisition No	AUTO GEN ON SAV	Subscructer 7E
Med New Purchase Order	ified Time	2013-01-23 17 26 0 One Vender Sales Order Patricia	Save Cancel	PurchaseOrder No Requisition No Contact Name	AUTO GEN ON SAN	E
Med New Purchase Order Purchase Order Information Purchase Order Information ~via Tracka	ified Time	2013-01-23 17 26 0 One Vender Sales Onder Patricia 2013-01-23 00yyrem-d8	Save Cancel	ParchaseOrder No Requestion Ne Contact Name Carrier	AUTO GEN ON SAV	EsterOtter
Med New Purchase Order Information Purchase Order Information Purchase Order Information Nut	ified Time Subject ndor Name ing Number Due Date ommission	2013-01-23 17 28 42 One Vinder Sales Order Patricia	Seve Cancel	PurchaseOrder No PerchaseOrder No Requestion Ne Contact Name Carrier Excise Duty	AUTO GEN ON SAV	re ne ne ne ne ne ne ne ne ne ne ne ne ne

Picture 2.2 Create purchase order

2.2 Create Multiple Purchase Orders

The purpose of the S Create Multiple Purchase Orders link is also to create purchase order. In opposite to previous chapter the link S Create Multiple Purchase Orders is used for creation of the purchase orders based on information about vendor of the product. It means it creates as much as necessary purchase orders per vendor from one sales order. After click on link S Create Multiple Purchase Orders you are asked whether you really would like to create multiple purchase orders. Please click on button OK. The created purchase orders you can find in more information tab of the original sales order or in the ListView of the purchase order module (Picture 2.3).

						and an entering an	
Sales Urder Information More In	formation				Edit	Duplicate Del	ete <
					A	ctions	
Sales Order Information						Create Imnice	
Subject	Multiple Vendor example	Opport	inity Name			STARTE DIMES	
Customer No		Sal		ick to croa	to	Convert SalesOrder	
Quote Name		Purc	hase Order	ick to crea		iem (
Contact Name		purchase c	rders	per Vend	or	Create Purchase C	<u>)rder</u>
Carrier	FedEx		Pending	1		Create Multiple Pu	rchase Ord
Status	Created	Sales C	ommission		- L.		
Excise Duty		Organiz:	tion Name vt	iger		DEMakor	
Assigned To	Rastislav Itsfouryou	Cr	eated Time 20	013-01-23 17 49:06		-Dr maker	
Modified Time	2013-01-23 13:58:30					SalesOrder	
				Are you sure?			
Drder Sales Order M D33] Multiple Vendor example - Sale ated today (23 Jan 2013) By Rastislav Itsfouryou Sales Order Information More	S Order More Information	tion tab	ving Records 1 - 2 -	Are you sure? OK Cancel	D E Purchan	seOrder No 💌 S N O P Q R Create Filter Edit De	iearch Now S T T
Sales Order Information Sales Order Information Purchase Order	s Order More Information	tion tab	ing Records 1 - 2 - Into Mass Edi PurchaseOrder	Are you sure? OK Cancel of POF Leport No Subject	In Purchas	Create Filter Edit Dr	icarch Now S T elete
Conter Sales Order Market Sales Order Information More Purchase Order Showing Records 1 - 2 of 2	Information	tion tab	ving Records 1 - 2 - lete Mass Edit PurchaseOrder 1 P013	Are you sure? OK Cancel of Filters : All POF Leput No Subject Multiple Vendor example	In Purchas	SeOrder No S NO P Q R Create Fitter Edit Dr Tracking Humber 1	Carch Now S T elete Fotal A 2149.00 R
Order Order of the state D33] Multiple Vendor example - Sale ated today (23 Jan 2013) By Rastislav Itsfouryou Sales Order Information More Purchase Order Showing Records 1 - 2 of 2 Order No Subject	Information	Vendor Name	ving Records 1 - 2 : foro Maxa Tali PurchaseOrder I P013 P014	Are you sure? OK Cancel of 2 Filters : All 1 POF Expansion No Subject Multiple Vendor example Multiple Vendor example	In Purchas L M N Vendor Name Patricia Jennifer	seOrder No S NOPOR Create Fitter Edit De Tracking Number	icarch Now S T elete Total A 2149.00 R 2216.00 R
Order Order of the second	Information	Vendor Name Patricia	ving Records 1 - 2 : foto Maxe Edit PurchaseOrder I P013 P014 fetio Maxe Edit	Are you sure? OK Cancet of 2 Filters : All i POr Expant No Subject Multiple Vendor example Multiple Vendor example Multiple Vendor example	Vendor Name Patricia Jennifer	SeOrder No S Create Filter Edit De Tracking Number	Cearch Now S T elete Total A 2149.00 R 2216.00 R

Picture 2.3 Create Multiple Purchase Order

2.3 Create Sales Order

Based on customer requests we also developed the opposite tool to previous one which is <u>Create Sales Order</u>. It allows creating sales order from the DetailView of purchase order. In order to create sales order, just click on link <u>Create Sales Order</u> in the DetailView of purchase order. You will be redirected to module sales order and window "Creating New Sales Order". Please continue with editing of the new sales order according to your needs and finally save it using button <u>Save</u>.

urchase Order Information	ore Information				Ed	it Duplicate Delete 🔍
			Clic	k to create	one	
Purchase Order Information			oold	o ordor wit	th all	Actions
Subject	Purchase order for vtiger		PurchaseOrder No.	POIG	in all	Convert Burgham Order
Vendor Name	Mary		Requisition	oducts/serv	lices .	Convert FurchaseOrder
Tracking Number			Contact Name	-		Create Sales Order
Due Date	2013-01-23		Carrier	FedE		
Sales Commission			Entrise Duty			PDFMaker
Status	Created	-	Assigned To	Rastislav Itsfouryou		PurchaseOrder
Created Time	2013-01-23 18:15:49		Modified Time	2013-01-23 18:15:49		
ng New Sales Order						
ig New Sales Order			Save			
g New Sales Order Sales Order Information Sales Order Information	ject Purchase order for vti	ger	Save Cancel	Opportunity Name		₩ 2
g New Sales Order Sales Order Information Sales Order Information "Sut	ject Purchase order for vi	Bei.	Save Cancel	Opportunity Name SalesOrder No	AUTO GEN (N SAVE
g New Sales Order Sales Order Information Sales Order Information "Sub Custome Ouder N	ject Purchase order for vi No	ger	Save Cancel	Opportunity Name SalesOrder No Purchase Order	AUTO GEN (N SAVE
g New Sales Order Sales Order Information Sales Order Information "Sut Custome Quete N Contact N	ject Purchase order for vi No	ger ₩ 2 ₩ 2	Save Cancel	Opportunity Name SalesOrder No Purchase Order Due Date	AUTO GEN 0 2013-01-24 000-000-000	NI SAVE
g New Sales Order Sales Order Information Sales Order Information Sales Order Information Custome Cust	ject Purchase order for via No	ger 	Save Cancel	Opportunity Name SalesOrder No Purchase Order Due Date Pending	AUTO GEN 0 2013-01-24 6999-mm-daj	N SAVE
g New Sales Order Sales Order Information Sales Order Information "Sut Custome Oute N Contact N	ject Purchase order for via No mre mier FedEx • vitus Created •	ger 	Save Cancel	Opportunity Name SalesOrder No Purchase Order Due Date Pending Sales Commission	AUTO GEN 0 2013-01-24 0939-mm-88	N SAVE

Picture 2.4 Create Sales Order

2.4 Create from the DetailView of the opportunity

Create Quote, Create Event and Create To Do are action links introduced within DetailView of the module Opportunities. These links are used to starting creation new quote, event of to do record directly from the DetailView of any opportunity. As seen in the picture below, the new records are automatically related to viewed opportunity (red lines).



Picture 2.5 Create from the DetailView of the opportunity

2.5 Products/Services Ajax Search

The Products / Services Ajax Search is improvement used within inventory modules i.e. Quotes, Sales Order, Purchase Order and Invoice and its behavior is same for all inventory modules. Using this improvement you can simply real-time find the item name (product or service) without products' or services' pop-up windows. It means that you can avoid using these pop-up windows, which leads to improve your work and decreases the necessary work time. Below picture (Picture 2.6) describes basic features of the Products / Services Ajax Search:

- 1. The Products / Services Ajax Search starts when at least two characters are written. It searches within any item name word, any part of the word and is not case sensitive.
- 2. More characters increase the precision of the search.
- 3. The Products / Services Ajax Search searches for items in the products and services at the same time and shows the results within one picklist.
- 4. In order to select item you can use mouse as well as arrow keys $\uparrow\downarrow$.

Note: The parallel searching removes the necessity to distinguish what you are going to add (product or service). It also helps to avoid annoying creation of 'only services based' inventory records in the supported modules (not necessary to add separate service item line, move it up and delete empty product item line).

3 Settings

Within this chapter following settings are described:

- Improvements 4You CRM settings
- Improvements 4You module manager items

In the part "Other Settings" in the CRM Settings you can find link related to 🖗 Improvements 4You.

šv tiger	Search	• Q	Rastislav Itsfouryou 🤱 🗿
D POF Maker EMAIL Maker Dunmens Case Involc	e Calendar Leads Organizations	Contacts Opportunities Products More	- Guick Create.
Settings 🚽 🧭 🕲 💆 😰 😉	1 1 m		
Other Settings			
Currencies Manage riternational currencies and exchange rates	Tax Calculations Tax Calculations Manage taxes and the corresponding tax rates	Proxy Server Configure provides to access RSS feeds through internet	Continue Server Configure Outgoing Mail Server details
Announcements Manage conpany wise announcements	Backup Server Specify database backup server details	Default Module View Set Default Default View for All Modules	Inventory: Terms & Conditions Specify Terms and Conditions for quetes, orders, and invoices
Customize Record Numbering Module Entity Number customization	Mail Converter Contigure mailbox for scanning	Workflows Create agreat workflows for stager	Configuration Editor
MudTracker Select modules for tracking	Webforms Alows you to manage Webforms	Scheduler Allows you to Configure Cron Task	Customer Portal Allows you to Configure Customer
ListView Colors Defre colors of rows in ListView depending on publish and checkbox values	Alows you to create PurchaseOrder from SalesOrder Detail.		

Picture 3.1 Improvements 4You CRM settings link

After click on link \bigcirc Improvements 4You you are redirected into Improvements 4You settings (Picture 3.2). It allows you to enable or disable each particular tool of the Improvements 4You. In order to enable/disable particular tool please click on checkboxes on the right side \bowtie .

	4You	
Improvements 4You		
Purchase Orders from Sales Order	Allows you to create Purchase Order from Sales Order detail.	
Multiple Purchase Orders from Sales Order	Allows you to create multiple Purchase Orders (per Vendor) from Sales Order detail.	
Sales Order from Purchase Order	Allows you to create Sales Order from Purchase Order detail.	
Products/Services Ajax Search	Allows you to search products and services in inventory modules (e.g. Quotes, Sales Order, Purchase Order, Invoice).	ATT 🗹
Quote from Opportunity	Allows you to create Quote from Opportunity detail.	
Event from Opportunity	Allows you to create Event from Opportunity detail.	
To Do from Opportunity	Allows you to create To Do from Opportunity detail	

Picture 3.2 Improvements 4You settings

In order to initiate Improvements 4You module manager please click on CRM Settings -> Module Manger -> Custom Modules and button 4 related to Improvements 4You (Picture 3.3).

s vtiger CRM		
	Standard Modules	Custom Modules
ing Access		Import New
are module sharing	Businesscase	2 🗹 🗉 🔦
s custom sharing	ConfigEditor	ð 🗹 🗈
	CronTasks	ê 🗹 🛨
L	Descriptions4you	2 R 🕁 🕫
	EMAILMaker	2 🗹 🗹 🔨
lule Manager 🔶	🖉 Import	ç 🗹 🗗
age module behavior	Improvements4 You	ê 🗹 🗈 🍕
e vtiger CRM	Integration	2 R 🖸
	ListViewColors	3 10 1
	MailManager	
	Mobile	
	PDFMaker	
e viiger	Crum	Cruit C Integration B ListView/Colors B MaliManager Mobile B POFMaker

Picture 3.3 Module manager items

Improvements 4You module manager contains following items:

- See License settings manage your Improvements 4You License key
- Upgrade allows to upgrade Improvements 4You

Please refer to following chapters for details.

3.1 Upgrade of the Improvements 4You

The upgrade of Improvements 4You can be started using Supprade link in the module manager. Please browse the package using button Browse... and click on button Upgrade.

Setting Manage mo	s > Module Manager > Upgrade dule behavior inside vtiger CRM	
Select the Packag	e File	
* File location:	vtiger module is packaged as a zip file.	Browse
		Upgrade Cancel

Picture 3.4 Upgrade of Improvements 4You

The upgrade continues with following window. Please verify the upgrade details parsed from the zip file. Please check that you accepted the license agreement and click <u>Yes</u> to proceed or <u>No</u> to cancel.

verify Upgrade Details					
Module Name	Improvements4You				
Module Directory	modules/Improvements4You				
/ersion	540.1.3 [Installed Version 540.1.2]				
Req. vtiger version	5.4.0				
icense	<pre>* Module : Improvements4You * Version : 1.3 * Vtiger : 5.4.0 * Author : IT-Solutions4You s.r.o - www.its4you.sk * Supported browsers : Internet Explorer 7 or higher, Mozilla Firefox 3.0 or higher LICENSE The Improvements4You License will be referred to as "The license" in the remainder of this text. This invasionable experiment. </pre>				

Picture 3.5 Upgrade of Improvements 4You – step 2

Click on **Finish** to complete the module upgrade.

Picture 3.6 Finish upgrade

In case that installed version of Improvements 4You matches package version, upgrade will be not provided and following information will appear on the screen.

S 72	Settings > Module Manager > Upgrade	
Upgrad	de Failure	
Cannot	t upgrade! Installed Version 540.1.3 matches Package Version	
		Finish

Picture 3.7 Upgrade failure

3.2 Deactivate/Reactivate license key

In case that some problem occurs with license key or in case you need to reinstall Improvements 4You you have to deactivate and reactivate license key. To deactivate license key please provide following steps:

- 1. Click on Deactivate button.
- 2. Confirm deactivation using _____ button in next window.
- 3. You are informed about successful deactivation of the license. Just click on .

	License key	keykeykeykeykeykey	Reactivate Deactiv	ate 1
				[Scroll to Top]
- Mod	ule Manager >	Improvements4You	> License settings	
Manage	e all settings related to	your license		
		, as we had a set is refer the a line and a li	Concentration of the International Concentration	
	Are you	a sure to deactivate the license k	ey? eactivate Deactiv	late
	Are you		ey? eactivate Deactiv	(Scroll to Top)
	2	OK Cancel	eey? eactivate Deactiv	(Scroll to Top)
	2	Cancel	ey? eactivate Deactiv	[Scroll to Top]
Mod	ule Manager >	Improvements4You >	ey? eactivate Deactiv	[Scroll to Top]
Mod Manage	ule Manager >	Improvements4You >	ey? eactivate Deactiv	(Scroll to Top)
Modi Manage	Liter Are you 2 ule Manager > e all settings related to	Cancel	exclusion Deactive License settings	[Scroll to Top]

Picture 3.8 Deactivate license

After deactivation of the license the Improvements 4You block is not visible and you are not able to use it.

To reactivate license you have to provide following steps (see picture next page):

- 1. Insert the license key and click on button Activate if you are reactivating license after previous deactivation, or click on button Reactivate if you are reactivating license after previous migration of the server.
- 2. If license key is correct you will be informed about successful re/activation. Just click on button.

Mana	ge all settings related to yo	ur license		
	License key		Activate Reactivate 1	
				[Scroll to Top
Mo	dule Manager > Ir	nprovements4You > L	icense settings	
Mon Mana	dule Manager > Ir	nprovements4You > L ur license	icense settings	
Mo Mana	dule Manager > In ge all settings related to yo	nprovements4You > L ur license	icense settings	
Mon Mana	dule Manager > In ge all settings related to yo Lie License key I	nprovements4You > L ur license nas been (re)activated successful	icense settings IV. ctivate Deactivate	
Mon Mana	dule Manager > In ge all settings related to yo	nprovements4You > L ur license nas been (re)activated successful	icense settings IV. ctivate Deactivate	IScroli to Tor

Picture 3.9 Re/Activate license

4 FAQs

Q: With which version of vtiger CRM is Improvements 4You compatible?

ITS4You: The Improvements 4You is compatible with vtiger CRM 540.

Q: How can I upgrade Improvements 4You to latest version?

ITS4You: Please follow the instructions described in the chapter 3.1.

Q: If we purchase the product now, then we will receive the updates too?

ITS4You: Yes, our customers can download the latest version of Improvements 4You for current version of vtiger CRM from our downloading page for free. We inform our customers about new version of Improvements 4You per Email and vtiger forum.

5 Appendix

5.1 Manual update of vtiger core files

As was described earlier in this manual usage of the Improvements 4You tool "Products/Services Ajax Search" requires rewrite / update some vtiger core files. Here is the list of the files:

```
[vtigerRootDir]/Smarty/templates/Inventory/InventoryEditView.tpl
[vtigerRootDir]/Smarty/templates/Inventory/InventoryCreateView.tpl
[vtigerRootDir]/modules/Services/Services.js
[vtigerRootDir]/include/js/Inventory.js
```

In case that you already use customized above files, you have to provide manual update of these files. Our changes can be simply found via "ITS4YOU" and "ITS4YOU-END". Please insert these changes into your files including rows containing "ITS4YOU" and "ITS4YOU-END". Next picture shows required changes for all files.

InventoryEditView.tpl

Find following code:

<script type="text/javascript" src="modules/com_vtiger_workflow/resources/jquery-1.2.6.js"></script> <script type="text/javascript"> jQuery.noConflict(); </script> and replace it with new code: {* ITS4YOU MaJu *} {* <script type="text/javascript" src="modules/com_vtiger_workflow/resources/jquery-1.2.6.js"></script> script type="text/javascript"> jQuery.noConflict(); </script type="text/javascript"> jQuery.noConflict(); </script type="text/javascript">

</script> *}

<script type='text/javascript' src='modules/Improvements4You/ProductsAjaxSearch.js'></script>
{* //ITS4YOU-END *}

See also following picture.

InventoryCreateView.tpl

Find following code:

<script type="text/javascript" src="modules/com_vtiger_workflow/resources/jquery-1.2.6.js"></script><script type="text/javascript">

jQuery.noConflict();

</script>

and replace it with new code:

{* //ITS4YOU MaJu *}
{* <script type="text/javascript" src="modules/com_vtiger_workflow/resources/jquery-1.2.6.js"></script>
<script type="text/javascript">
 jQuery.noConflict();
</script> *}

<script type='text/javascript' src='modules/Improvements4You/ProductsAjaxSearch.js'></script>
{* //ITS4YOU-END *}

See also following picture.

Services.js

Find following code:

calcTotal(); return count;

and insert between these two rows additional code:

// ITS4YOU MaJu
set_productname_autocomplete(count);

// ITS4YOU-END

See also following picture.

😑 Servi	ces		1 🗄	Servic	es_	NEW is
310		colseven.innerHTML = ' ';	3	10		colseven.innerHTML = ' ';
311 312 313		//This is to show or hide the individual or group tax decideTaxDiv();	/ice	2 5	.j	S //This is to show or hide the individual or group tax decideTaxDiv();
314		Onginal	3	14		Opualeu
315	•	calciotai();		15		calciotal();
317				10	0	// ITS4VOU Maju
318			8 3	18	ŏ	set productname autocomplete(count);
319			3	19 >	-õ	// ITS4YOU-END
320		return count;	3:	20		return count;
321	L)		3:	21	L)
322			3	22		
323	7 3	Runction servicePickList(currObj,module, row_no) (ii 3:	23	P	function servicePickList(currObj,module, row_no) {
324		<pre>war trObj=currObj.parentNode.parentNode</pre>	3:	2.4		<pre>war trObj=currObj.parentNode.parentNode</pre>
325			3	2.5		
326		<pre>war rowId = row no;</pre>	3:	2.6		var rowId = row no;

Inventory.js

Find following code: calcTotal(); return count; and insert between these two rows additional code: // ITS4YOU MaJu set_productname_autocomplete(count); // ITS4YOU-END

See also following picture.

Change log

22.04.2013: **1.4**

• Products/Services Ajax Search - allows searching products and services in inventory modules (e.g. Quotes, Sales Order, Purchase Order, Invoice)

1.3

- the creation of the Quote directly from Opportunity detail
- the creation of the Event directly from Opportunity detail
- the creation of the To Do record directly from Opportunity

1.2

• the creation of the Sales Order from Purchase Order detail

1.1

- the creation of the Purchase Order from Sales Order detail
- the creation of the Multiple Purchase Orders from Sales Order detail