

# 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?

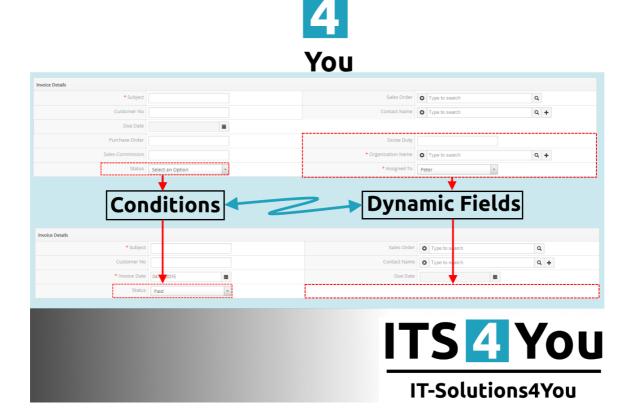
Until version 600.2.0 the main new features are:

- 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**



### 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**.

😒 vtiger	All Records	* Type	keyword and press enter Q Advanced					CRM Settings	
• Studio	V	==	Dashboard	V		5	Opportunities	Manage Users	
Edit Fields	V	۵.	Contacts	2		<u>0</u>	Organizations		
Picklist Editor	V		Leads	V		878. 87	Documents		
Picklist Dependency Setup Menu Editor	V	30	Calendar	2			Emails		
Module Manager	V	0	Tickets	12		1	Products		
<ul> <li>Templates</li> </ul>	V	2	FAQ	2			Vendors		
<ul> <li>Other Settings</li> </ul>		æ	Price Books	V		2	Quotes		
<ul> <li>Integration</li> </ul>	V	Po	Purchase Order	V		80	Sales Order		
Extension Store		<b>1</b> 2	Invoice	2		2	RSS		
	v (	D 🐥	ExtensionStore	V	۲		PDFMaker		
	<b>v</b> 0	D 🌲	Preinvoice						

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.

Import Modul	e from Zip	
	Disclaimer - Custom Files could put your CRM at risk This functionality has been made vaniable for Developers to test mew modules. If you are installing from a file provided 3rd party, please proceed only if you trust the publisher. Custom Modules co vulnerabilities and overwrite system files putting your CRM at risk. The module you are about to install has not been reviewed by Viger.	uld include security
2.	I accept with disclaimer and would like to proceed	
1.	Choose File	3. Import Cancel

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.

Voger Versen :: License  * Module : * Version : * Viger : * Supported browsers : Internet Explorer 7 or higher, Mozilla Firefox 3.0 or higher	erify Import Details		
License * Module : * Version :=e * Version :=e * Author :: TSolutions4You s.r.e - www.its4you.sk * Author :: TSolutions4You s.r.e - www.its4you.sk * Supported browsers : Internet Explorer 7 or higher, Mozilla Firefox 3.0 or higher	TO MAN POSTANTI A		
* Module : * Version :	Vtiger Version :		
* Modale: * Version:	License		
* Module * Version * Vager * Auther ::TSOldonis4You s.r.o - www.its4you.sk * Supported browsers : Internet Explorer 7 or higher, Mozilla Firefox 3.0 or higher			
* Version	*************************		
* Vilger: * Auther ::TS-Oklafons4 You s.r.o - www.its4you.sk * Supported browsers : Internet Explorer 7 or higher, Mozilla Firefox 3.0 or higher			
* Author :: 17:Solutions4You s r.o - www.its4you sk * Supported browsers : Internet Explorer 7 or higher, Mozilla Firefox 3.0 or higher			
* Supported browsers : Internet Explorer 7 or higher, Mozilla Firefox 3.0 or higher			
	Supported browsers : Internet Explorer / or higher, wozina r nerox 5.0 or higher		
accept the license agreement.	accept the license agreement.		

Picture 1.3: Installation of Dynamic Fields 4 You – Step 3

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

Import Successfull	×
module was imported successfully.	
	Ok

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

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

 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.

installation	
1 Validation 2 Finish	
Welcome to the Installation Wizard	
This will install into your vtiger CRM. It is highly recommended to finish the installation with	but any interruption.
Please check your Company information. Please insert a license key you received in purchase co Please make sure that your server has an internet acce	
Your Company Information	Change Company Information
Company Name:	10
Address:	6. UP Not Real 31 Birls Rearran
City:	angen .
State:	anas .
Country:	
Postal Code:	881
VAT ID:	0.000
License settings	
Your vtiger url:	
License key:	keykeykeykeykeykeykeykeykeykeykey
	Validate Order now

Picture 1.5: Validation of Dynamic Fields 4 You – Step 1

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

Collegester C	installation
1 Validation	2 Finish
	has been installed successfully.
	Finish

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).

🛇 vtiger <sup>.</sup>	All Records	ord and press enter Q	Advanced	CRM Settings	
Settings	Dynamic Fields 4 You			Manage Users	
User & Access Control	+ New Dynamic Fields	All	v	< 🗈 > F	
▶ Studio	Description		Module		
<ul> <li>Templates</li> </ul>					
<ul> <li>Other Settings</li> </ul>					
Announcement		NO	Dynamic Fields 4 You	I found	
Outgoing Server					
inantory fermi and Canditions					
Carrierone					
Market Company					

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

✤ New Dynamic Fields	All	Ŧ	1 to 2 🖸	< 🖹 > 🗡
Description		Module	e	
PaidInvoices-dynamic		Invoice	e	

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

Define new Dynamic Fields	
1 Module 2 Conditions 3 Fields	Opportunities
Step 1: Select module and set description       Select Module         Opportunities	Purchase Order
Description*	Campaigns Service Contracts Services PBXManager
	SMSNotifier Cancel

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.

Define new Dynamic Fields		
1 Module 2 Conditions 3 Fields	Back Next	Cancel
Step 2: Choose Conditions		
All Conditions (All conditions must be met)		
Add Condition		
Any Conditions (At least one of the conditions must be met)		
Add Condition		
L		
	Back Next	Cancel

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).

efine new Dynamic Fields				Click here t	o finish —
Module 2 Conditions 3 Fields					Back
		Set for a	a Block at once		
nvoice Details		Set : Select option	▼ Set		
Set fo	or each Field Separately	Mandatory		Show	Mandatory
Subject	Select option 💌		Sales Order	Select option	
Customer No	Select option *		Invoice No	Select option 🔹	
Contact Name	Select option	🗹 Set F	ield required Invoice Date	Show •	ø
<u>Due Date</u>	Read only		Purchase Order	Select option 🔹	
Adjustment	Q		Excise Duty	Select option 🔻	
Sub Total	Select option Show		Sales Commission	Select option 🔹	
Total	Hide Read only		Тах Туре	Select option 💌	
Discount Percent	Select option		Discount Amount	Select option 🔹	
S&H Amount	Select option		Organization Name	Select option	
Status	Select option 💌		Assigned To	Select option 🔻	
Created Time	Select option 💌		Modified Time	Select option 🔻	
Currency	Select option *		Conversion Rate	Select option 🔻	
Last Modified By	Select option *		Pre Tax Total	Select option 🔹	
Received	Select option		Balance	Select option	

*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 Follows-up Dynamic Fields and here you are able to set each field or each block by one. Read more: 3.4 Follows-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 New Dynamic Fields button
- Settings part used for License setting, Upgrade and Uninstall

## 3.1 List of created Dynamic Fields

Description	Module	
Indust marketing with	ny Markenig Koning	+/=
D:	ture 2 1: List of greated Dynamic Fig	1.1

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.

+ New Dynamic Fields All	Ŧ	1 to 2 🏾 C	<	₽	>	1-
Description	Module					
PaidInvoices-dynamic	Invoice					
Not paid Invoices- Dynamic	Invoice					

Picture 3.2: New Dynamic Fields button

## 3.3 Settings part

	F -
Setting part contains of:	
License setting	License settings
Upgrade	Upgrade
• Uninstall	Uninstall

Picture 3.3: Settings part of Dynamic Fields

## 3.4 Follows-up Dynamic Fields

The new functionality of Dynamic Fields is option to create Follows-up Dynamic Fields. It allows you to set field or block individually to existed Dynamic Fields.

Description	Module
Made Workstrag Activity	
h da Progetta de compresente	
Default	
407 Warfeling actuals Created show WEP Budget. Cannot planned	
Admitted To The Approad	
The approved families	
- Dam Data Institution	
-rolf rol colt-fueders)	
- tall said state data	
- inf planned matterly	
with not not makely	
-terr Werks grammel default	
Wikprit altertinal Real ofg	

Picture 3.4: Follows-up Dynamic Fields

It is useful to create a process or if you want to only edit a few fields to existed Dynamic Fields. Differences you can see in following steps:

1. Click on<sup>+</sup> button to follow Dynamic Fields

	Dynamic Fields 4 You			
	+ New Dynamic Fields	v	1 to 50 of	172 🔇 🖹 🕨 🗡 🗸
	Description		Module	
1	Default		Marketing Activity	
	1.1 MET Marketing, actually, "reasont show MET Redget, "Terrest planned		Barbarrag Activity	E
	1.1.1		Referrig to the	<b>+</b> _/ ≡
	1.1.2		And and a straight	Add Follows Up Dynamic Fields
	1.1.3		Ramang score)	

Picture 3.5: Follows-up Dynamic Fields

2. Fill Descriptions and choose if you want Pop-up window and click on Next

Define new Dynam	ic Fields		
1 Module 2 C	onditions 3 Fields	Next	Cancel
Step 1: Select module a	nd set description		
Select Module	Warhating Activity		
Description*	New Follows-up Dynamic Fields		
Pop-Up window	8		
		Next	Cancel

Picture 3.6: Follows-up Dynamic Fields – Description and Pop-Up window

#### 3. Add conditions and click on Next

ine new Dynamic Fields					
Module 2 Conditions 3 Fields				Back Next	Cancel
ep 2: Choose Conditions					
All Conditions (All conditions must be met)					
Genet	v	is not empty	•	â	
Add Condition					
Any Conditions (At least one of the conditions must b	e met)				
Add Condition					
				Back Next	Cance

Picture 3.7: Follows-up Dynamic Fields – set Conditions

Note: Follows-up Dynamic Fields executes if Conditions are true and previously Dynamic Fields are also executed.

cription	Module	
And the second second		
dell'eget alle qui cett		
efault 🗳 Conditions = true, ex	ecuted	
the management cause in	Conditions = true, executed	
-	Conditions = true, executed	
Paugground (arridant)	Conditions = true, executed	
	Conditions = false, not executed	
	Conditions = false, not executed	1
national and a first 😯	Conditions = true, not executed because previously Dynamic Fields is not executed	
ant second realist 😳	Conditions = false, not executed	
	Conditions = true, executed	
	Conditions = false, not executed	
This prot advantage front and	Conditions = true, executed	

Picture 3.8: How Follow-up Conditions works

 4. Now you can see new functionality of Dynamic Fields, setting of field or block individually. To add field or block please use buttons + Add Field or + Add Block and choose visibility of field or block. Then click on Finish.

Define new Dynamic Fields				
1 Module 2 Conditions 3 Fields			Back	Finish
Fields			Blocks	
	Action		Action	
Created Time 🔹	Show	Î	System Information Show 🔹	
Modified Time v	Select option 🔹	ŵ	+ Add Block	
+ Add Field	۹۹			
	Select option			
	Show			
	Hide			+
	Read only		Back	Finish
	Show As Mandatory		······································	

Picture 3.9: Follow-up Dynamic Fields – set field or block

## 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:

Status • is • x Paid	
Add Condition	

Picture 4.1: Limitation

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

		o 1 7. Limitation	
Invoice Date	Show	•	V

Picture 4.2: Limitation

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

Invoice Details		EditView	of Invoice		
* Subject	Inv2		Sales Order	O Type to search	٩
Customer No			Contact Name	O Test1	۹ +
Due Date			There is no Invoice date		
Purchase Order			Excise Duty	0.000	
Sales Commission	0.000		* Organization Name	OrganizationContact1	۹ +
Status	Created		* Assigned To	Demo640 Administrator 🔹	
Involce Details					
* Subject	Inv2		Sales Order	O Type to search	Q
* Subject Customer No	Inv2			Type to search     Test1	Q Q +
Customer No			Contact Name	O Test1	
Customer No * Invoice Date	02-11-2015	$\mathcal{V}$	Contact Name Due Date	O Test1	

Picture 4.3: Limitation

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

<ul> <li>Invoice Details</li> </ul>		DetailVie	w of Invoice	
Subject	Inv2		Sales Order	
Customer No			Invoice No	INV2
Contact Name	Test1			
Due Date			Purchase Order	
Excise Duty	0		Sales Commission	0
Organization Name	OrganizationContact1		Status	Created
Assigned To	Demo640 Administrator		Created Time	26-10-2015 4:47 PM
Modified Time	02-11-2015 4:09 PM			
<ul> <li>Invoice Details</li> </ul>				Status change to Paid
Subject	Inv2		Sales Order	
Customer No			Invoice No	INV2
Contact Name	Test1		Invoice date is not s	hown
Due Date			Purchase Order	
Excise Duty	0		Sales Commission	0
Organization Name	OrganizationContact1		Status	Paid
Assigned To	Demo640 Administrator		Created Time	26-10-2015 4:47 PM
Modified Time	02-11-2015 4:09 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:

Click on 
 Click on 
 Click on 
 Deactivate license button
 Confirm deactivation with button 
 Yes

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

License settings		
Your vtiger url:		
License key:		
	Reactivate license	Deactivate license

Picture 5.2: Deactivate Dynamics Fields 4 You – Step 3

Do yo	u really v	vant to	deactiva	te your l	icense l	key?			
								No	Yes
			-			<u>C</u> D			

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

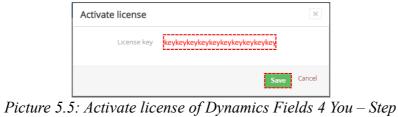
After deactivation of license Dynamics Fields 4 You doesn't work at all and Dynamics Fields 4 You work area is not accessible either as you can see on Picture 5.4.

To reactivate license you have to provide following steps:

- 1. Click on Activate license button
- 2. Insert license key
- 3. Click on Save

License settings	
Your vtiger url:	
License key:	
	Activate license

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



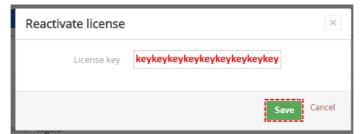
icture 5.5: Activate license of Dynamics Fields 4 You – Sta 2,3

## 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				
License settings				
Your Company Information	Change Company Information			
Company Name:	1911			
Address:				
City:				
State:	trans			
Country:	0.10			
Postal Code:				
VAT ID:	0.014			
Manage your Dynamic Fields 4 You License Key:				
License settings				
Your vtiger url:				
License key:	Reactivate license Deactivate license			

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.

A Calendar Leads Organizations Contact	s Opportunities Products Documents Tickets All		🖌 🚺 🛱 Demo640
©vtiger	All Records		+
Settings	Dynamic Fields 4 You		
<ul> <li>User &amp; Access Control</li> </ul>	+ New Dynamic Fields	All	1 to 2 🖸 < 🕀 🕨 🎽 🗡 🕶
► Studio	Description	Module	License settings
<ul> <li>Templates</li> </ul>	PaidInvoices-dynamic	Invoice	Upgrade
▼ Other Settings	Not paid Invoices- Dynamic	Invoice	Uninstall

Picture 5.8: Upgrade of Dynamic Fields 4 You

Import Module from Zip

Disclaimer - Custom Files could put your CRW 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 Modul vulnerabilities and overwrite system files putting your CRM at risk. The module you are about to install has not been reviewed by Vtiger.	s could include security
I accept with disclaimer and would like to proceed	
Choose File	Cancel

Picture 5.9: Upgrade of Dynamic Fields 4 You

Import Successfull	×
module was imported successfully.	
	ок

Picture 5.10: Upgrade of Dynamic Fields 4 You

## 5.4 Uninstall

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

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

Dynamic Fields 4 You		
+ New Dynamic Fields	All	1 to 2 🗸 < 🗄 > 🗡 -
Description	Module	License settings Upgrade
Paidinvoices-dynamic	Invoice	
Not paid Invoices- Dynamic	Invoice	Uninstall

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

2.	Click on	Uninstall	button		
				Remove Dynamic Fields 4 You completely from your vTiger.:	
				Uninstall	
		Pi	icture 5 1	2. Uninstall of Dynamic Fields 4	Vou stan?

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