



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 CRM. 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)

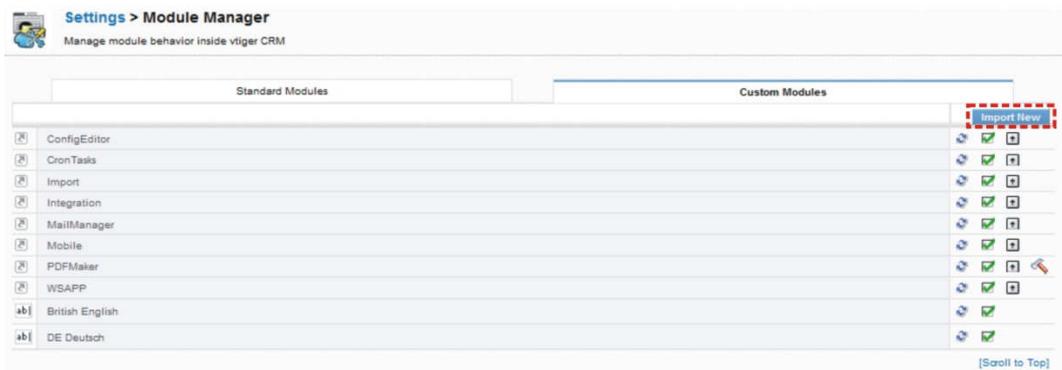
1 How to install Improvements 4You

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):

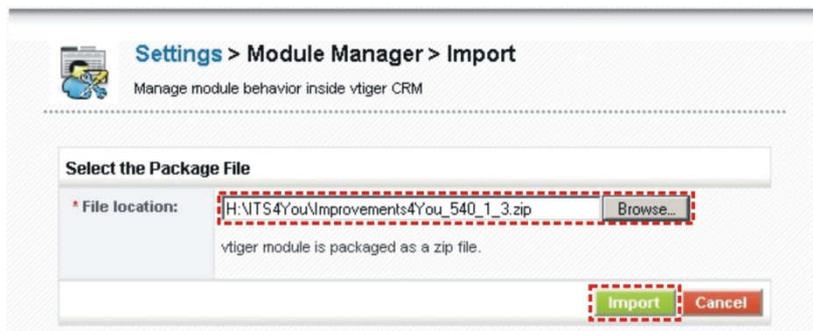
- vtigerCRM version (e.g. 5.4.0)
- Improvements 4You version (e.g. 540.1.3)
- Date and time
- Domain in md5 coding format (e.g. 916b25c201a77a6721003c0030977f3b)
- Action provided by you (INSTALL, REACTIVATE, DEACTIVATE)

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.



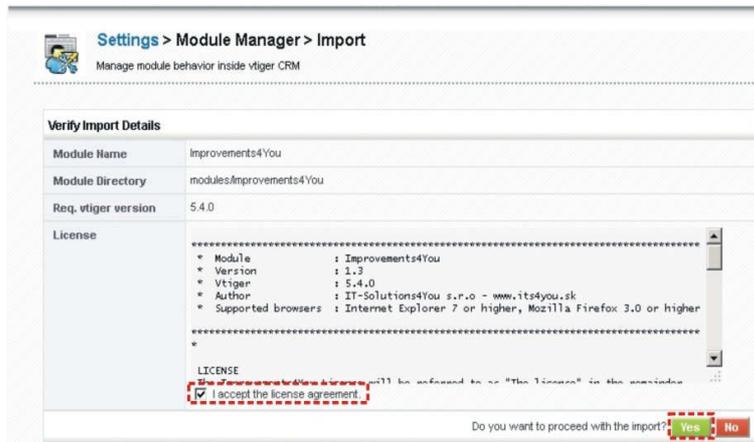
Picture 1.1 Installation of Improvements 4You – step 1

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



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.



Picture 1.3 Installation of Improvements 4You – step 3

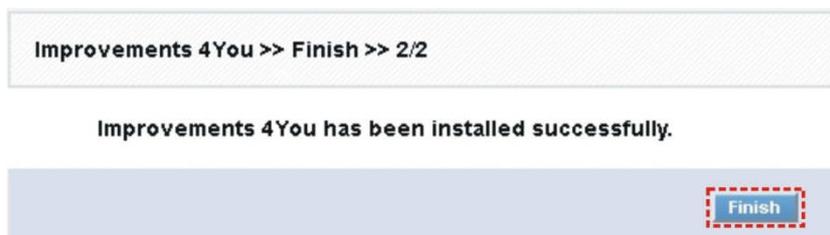
In order to finish installation, please provide following validation steps.

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



Picture 1.4 Validation step 1

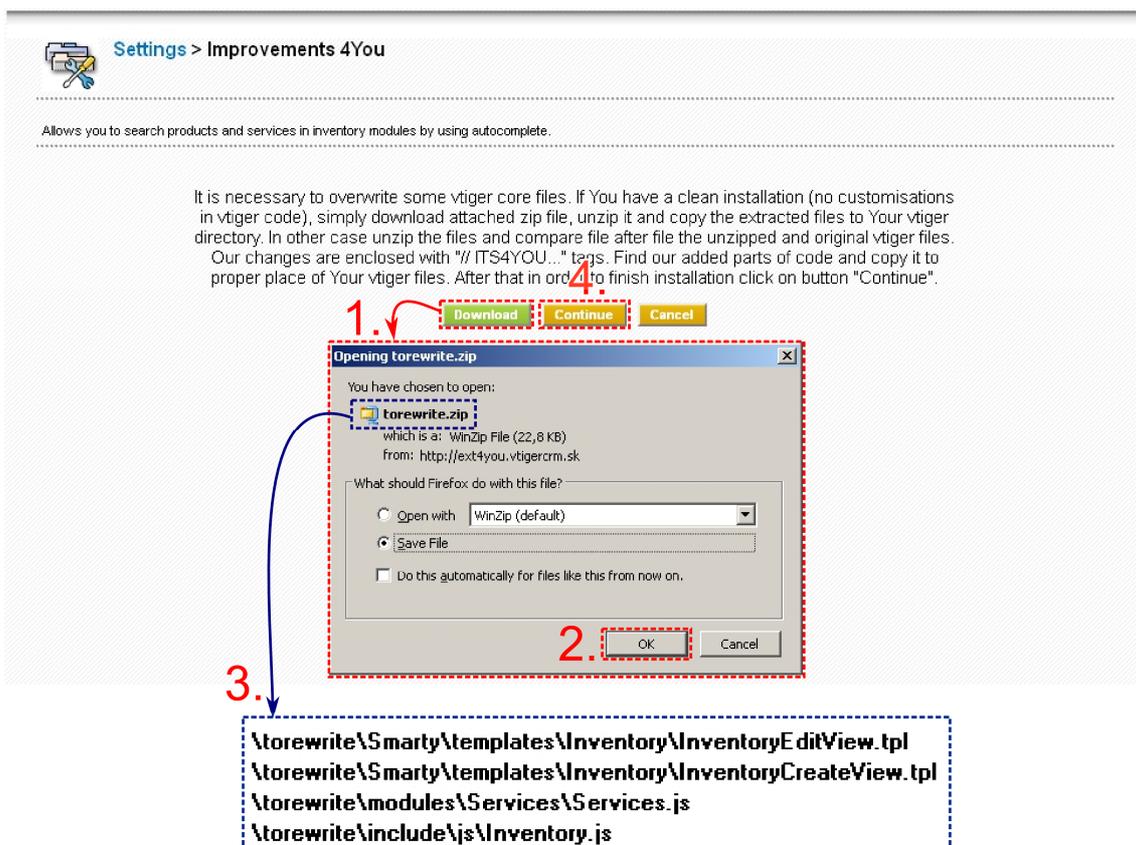
2. If Improvements 4You is installed successfully you will see following screen. Click on **Finish** button.



Picture 1.5 Validation step 2 – Finish installation

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**.



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



Purchase Order DetailView



Opportunities DetailView



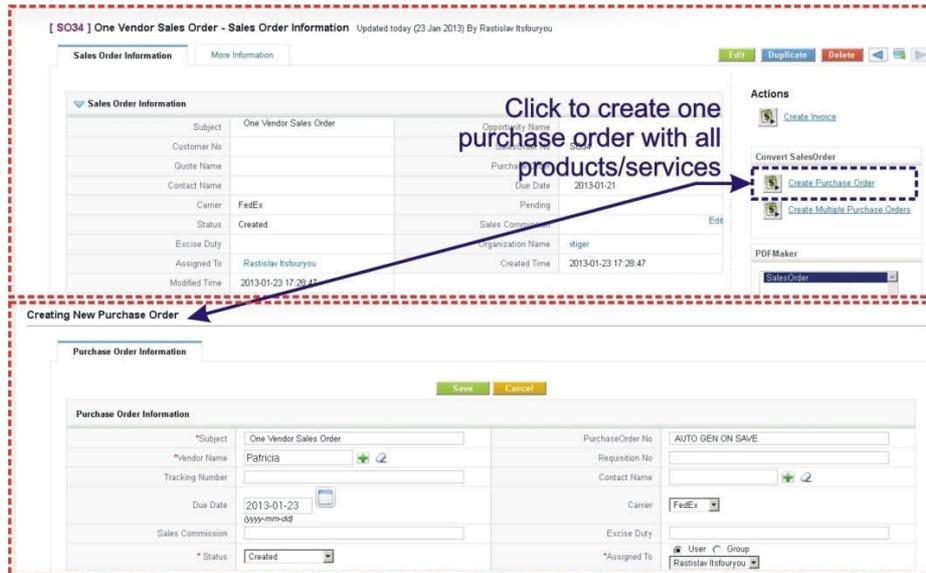
Picture 2.1 Improvements 4You action items

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**.

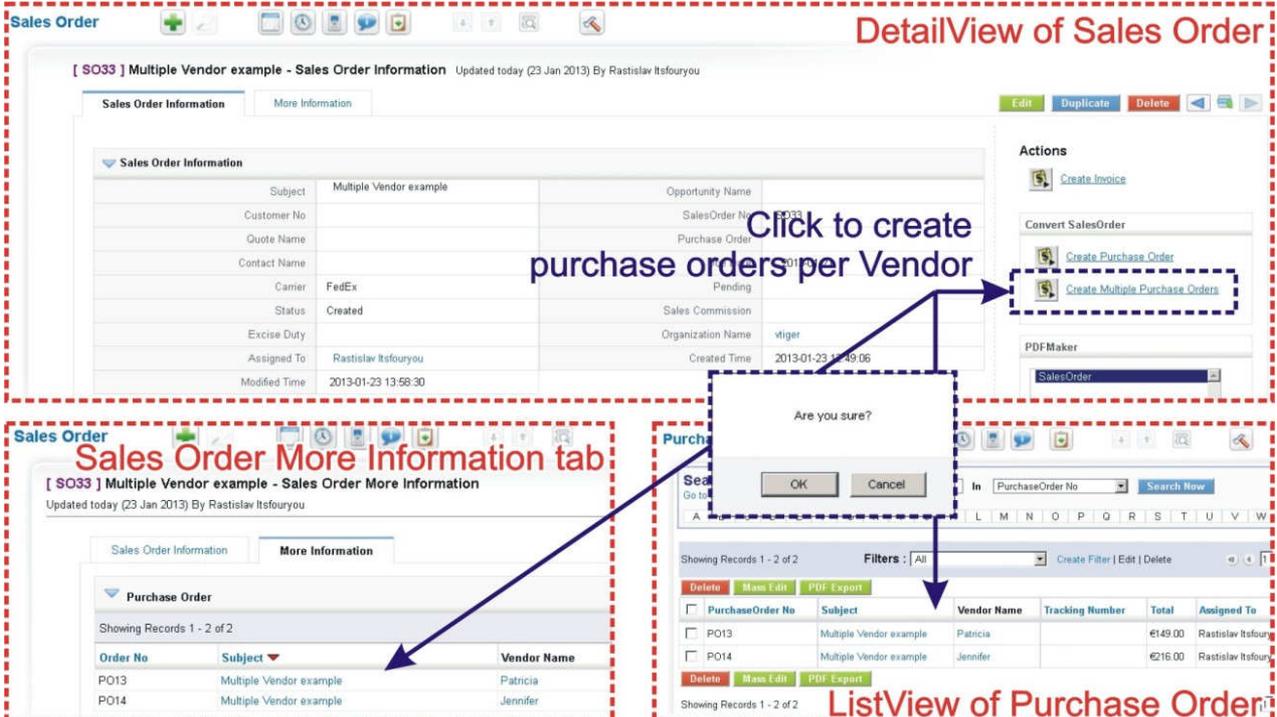
Note: As a vendor for new purchase order the vendor of the first product from sales order is selected. You can change it if necessary.



Picture 2.2 Create purchase order

2.2 Create Multiple Purchase Orders

The purpose of the  [Create Multiple Purchase Orders](#) link is also to create purchase order. In opposite to previous chapter the link  [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  [Create Multiple Purchase Orders](#) you are asked whether you really would like to create multiple purchase orders. Please click on button . 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).



The screenshot illustrates the workflow for creating multiple purchase orders. It is divided into three main sections:

- Detail View of Sales Order:** Shows the 'Sales Order Information' tab for a sales order with subject 'Multiple Vendor example'. The 'Status' is 'Created'. In the 'Actions' panel, the 'Create Multiple Purchase Orders' button is highlighted with a dashed blue box. A blue arrow points from this button to a confirmation dialog box.
- Sales Order More Information tab:** Shows the 'Purchase Order' section with a table of generated purchase orders. A blue arrow points from this section back to the 'Create Multiple Purchase Orders' button in the sales order view.
- ListView of Purchase Order:** Shows a table of purchase orders with columns for Order No, Subject, Vendor Name, Tracking Number, Total, and Assigned To. A blue arrow points from the 'Are you sure?' dialog box to this list view.

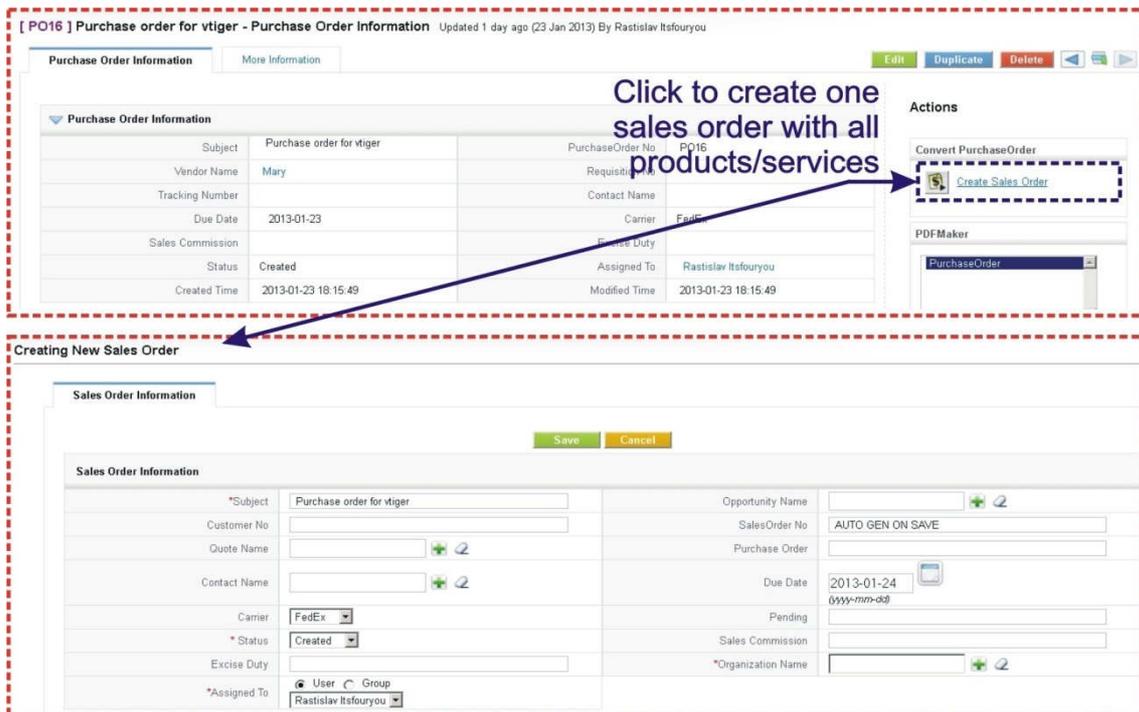
Order No	Subject	Vendor Name
PO13	Multiple Vendor example	Patricia
PO14	Multiple Vendor example	Jennifer

PurchaseOrder No	Subject	Vendor Name	Tracking Number	Total	Assigned To
PO13	Multiple Vendor example	Patricia		€149.00	Rastislav Itsfouryou
PO14	Multiple Vendor example	Jennifer		€216.00	Rastislav Itsfouryou

Picture 2.3 Create Multiple Purchase Order

2.3 Create Sales Order

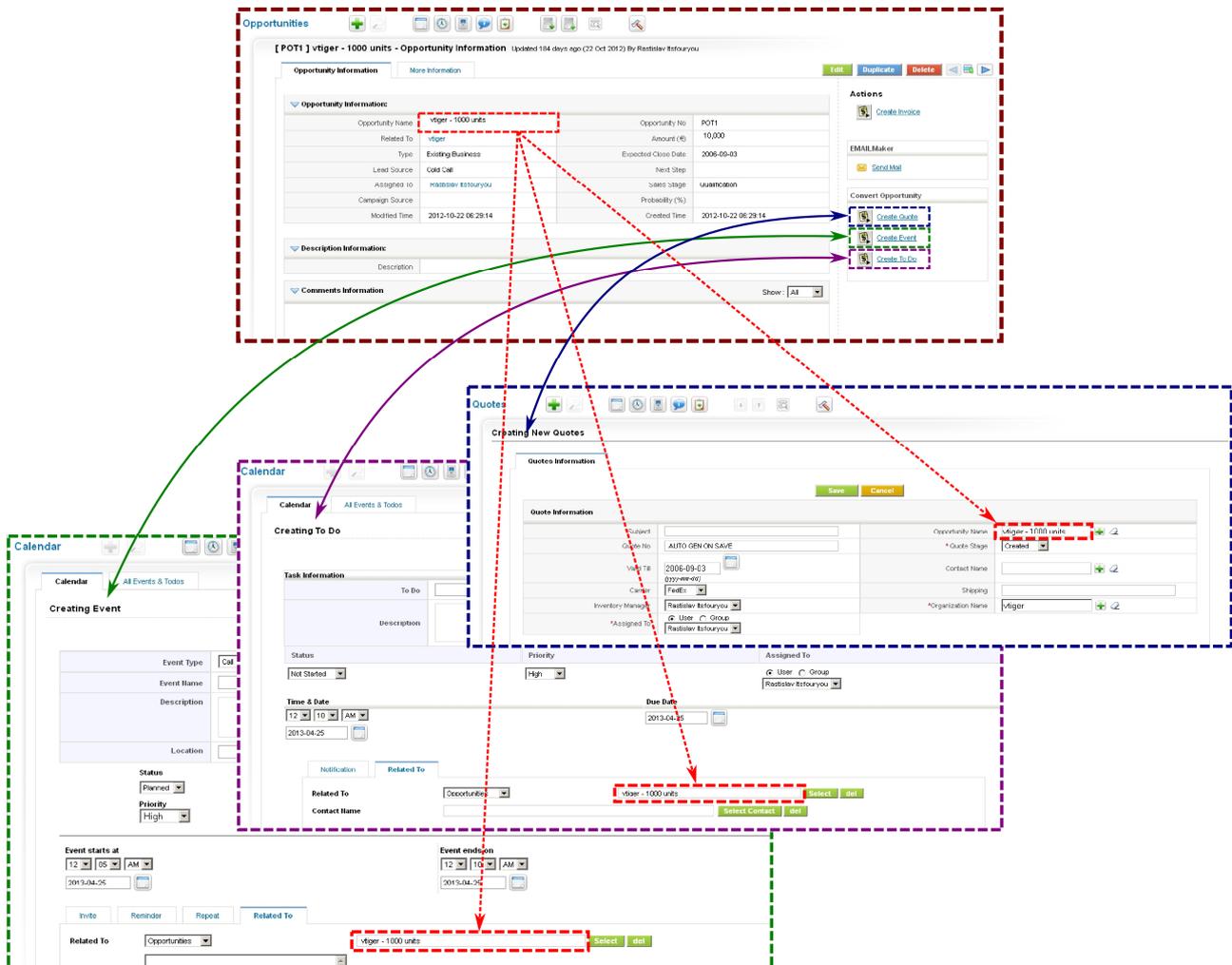
Based on customer requests we also developed the opposite tool to previous one which is  [Create Sales Order](#). It allows creating sales order from the DetailView of purchase order. In order to create sales order, just click on link  [Create Sales Order](#) in the DetailView of purchase order. You 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 **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).



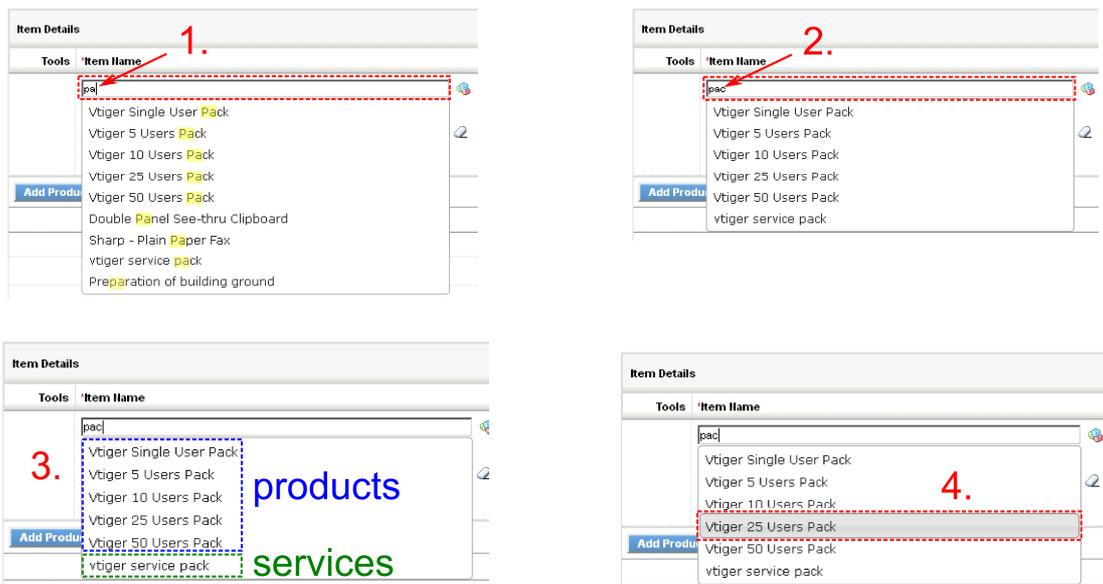
Picture 2.5 Create from the DetailView of the opportunity

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).



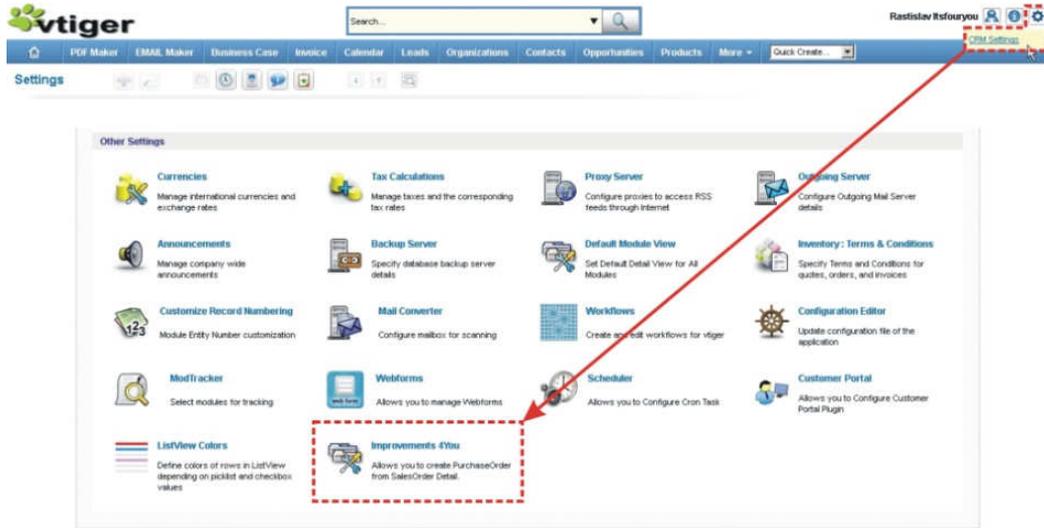
Picture 2.6 Products / Services Ajax Search

3 Settings

Within this chapter following settings are described:

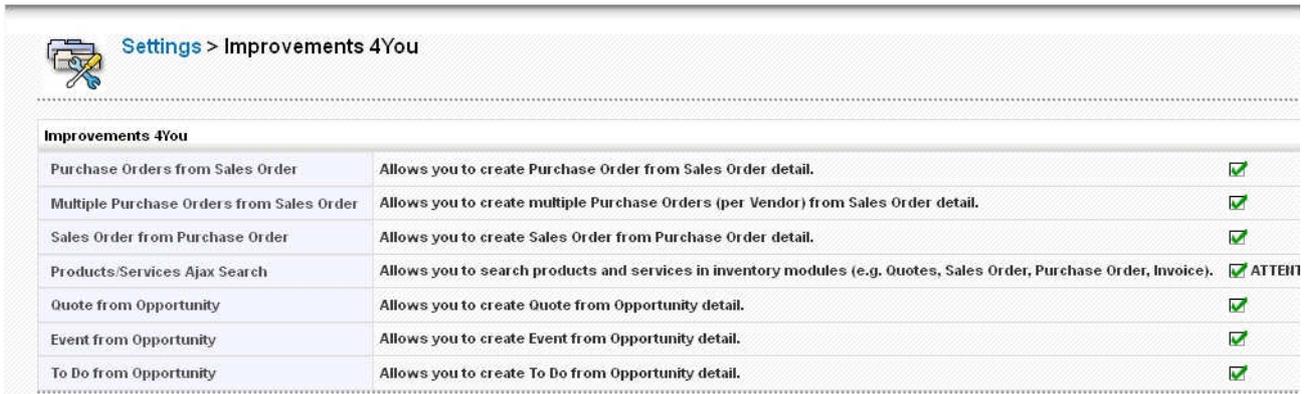
- Improvements 4You CRM settings
- Improvements 4You module manager items

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



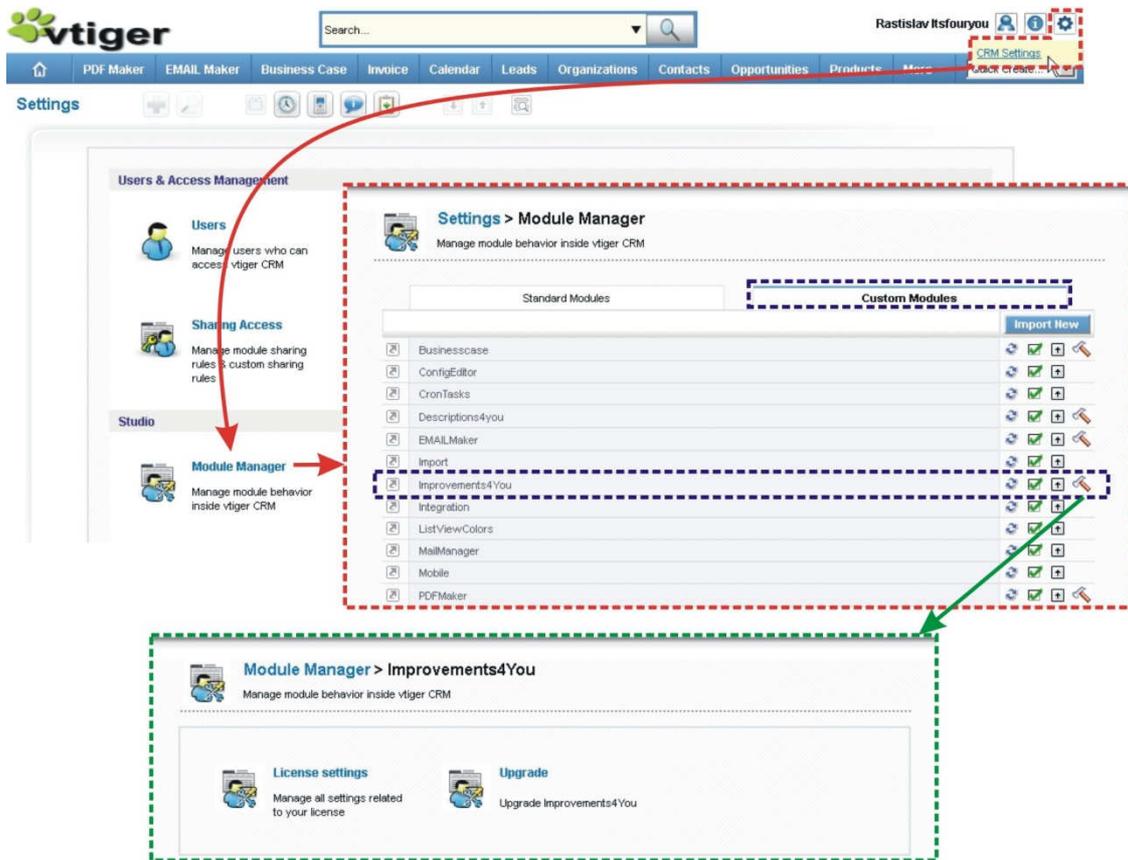
Picture 3.1 Improvements 4You CRM settings link

After click on link  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 .



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  related to Improvements 4You (Picture 3.3).



Picture 3.3 Module manager items

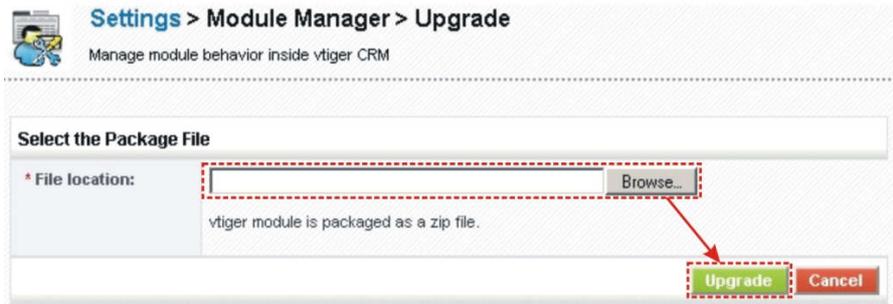
Improvements 4You module manager contains following items:

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

Please refer to following chapters for details.

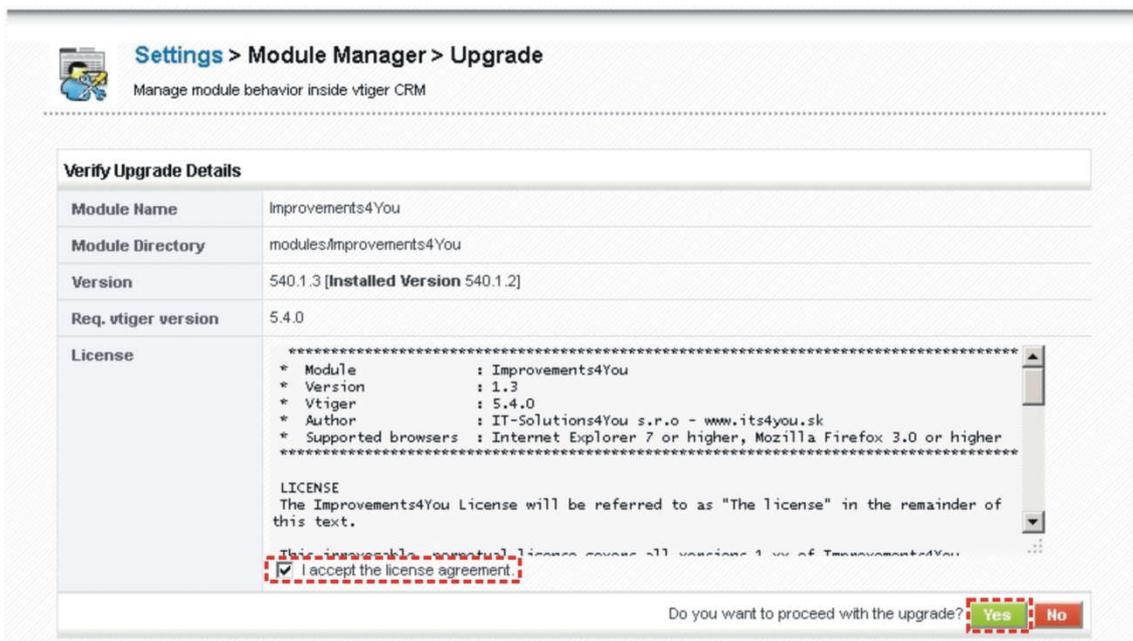
3.1 Upgrade of the Improvements 4You

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



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 to proceed or to cancel.



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.

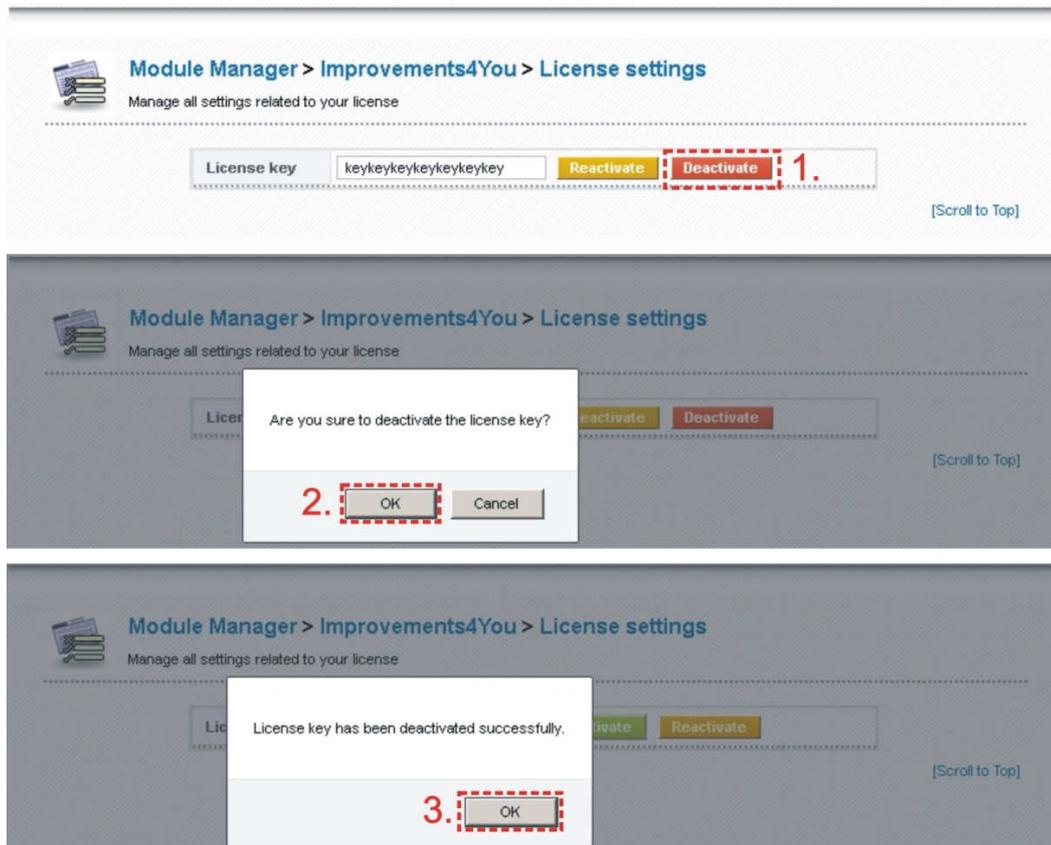


Picture 3.7 Upgrade failure

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 .

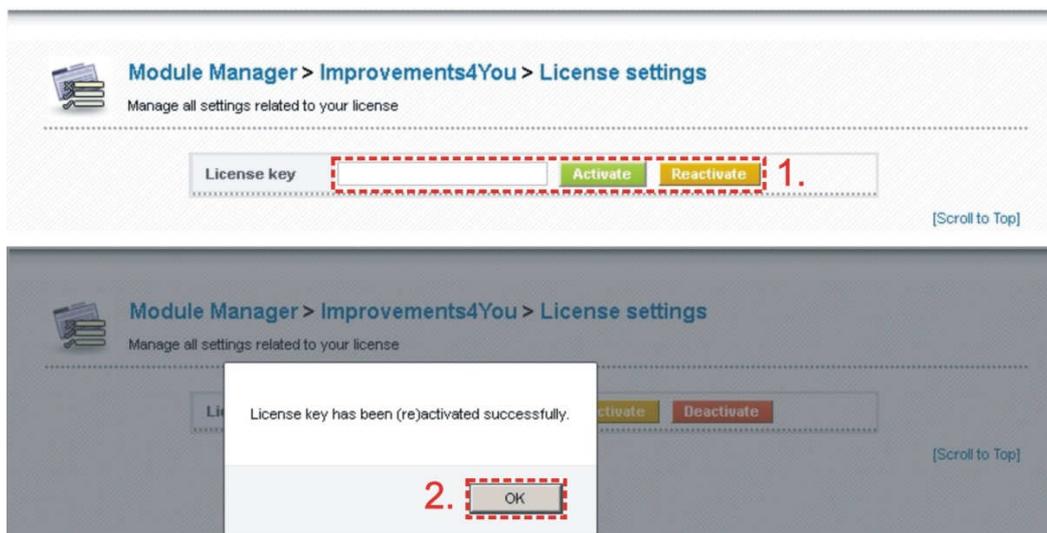


Picture 3.8 Deactivate license

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 **OK** button.



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.

Please note: All our ITS4You products are compatible to each other from overwriting core files point of view. It is enough to provide overwriting the files described in the chapter 1 and you don't need to provide manual update of the files.

InventoryEditView.tpl

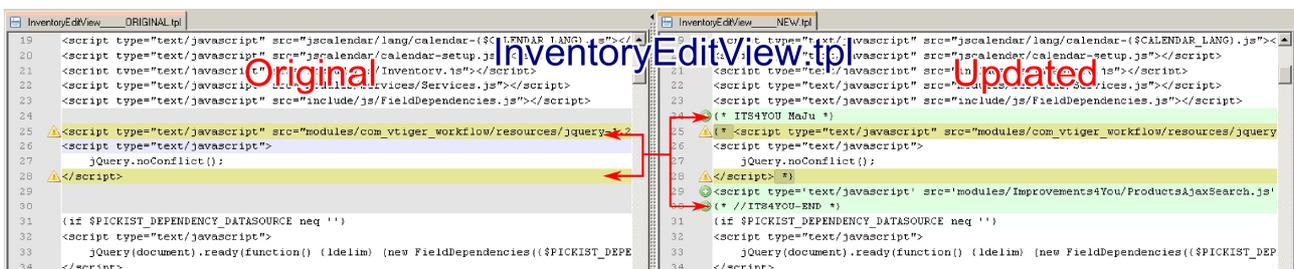
Find following code:

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

See also following picture.



InventoryCreateView.tpl

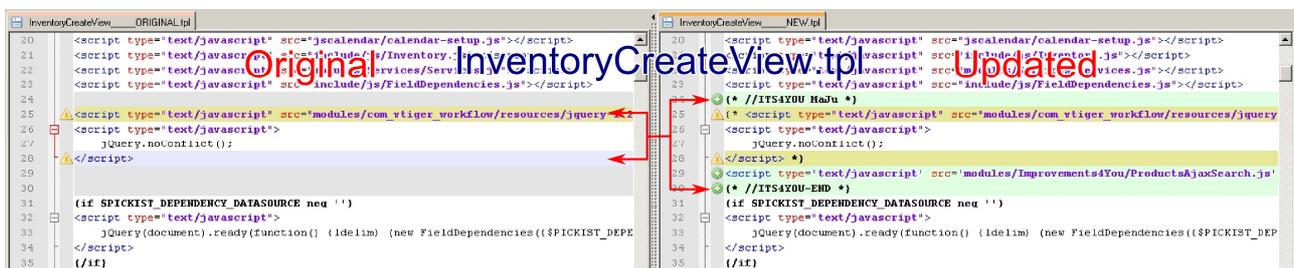
Find following code:

```
<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

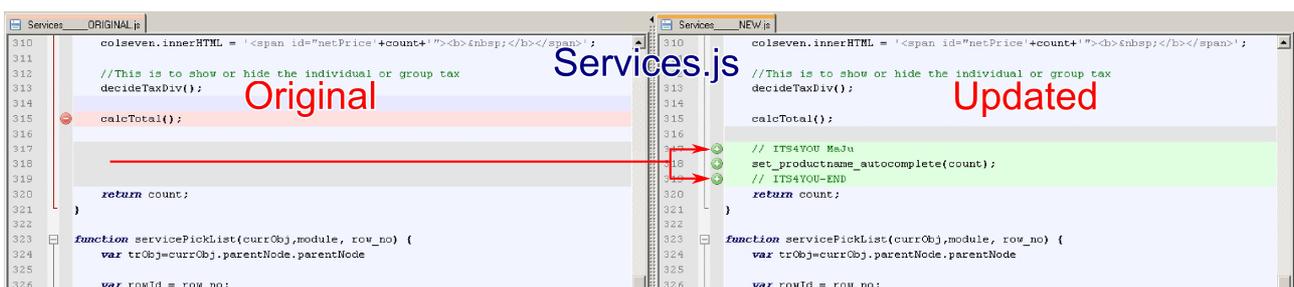
Find following code:

```
calcTotal();
return count;
```

and insert between these two rows additional code:

```
// ITS4YOU MaJu
set_productname_autocomplete(count);
// ITS4YOU-END
```

See also following picture.



Inventory.js

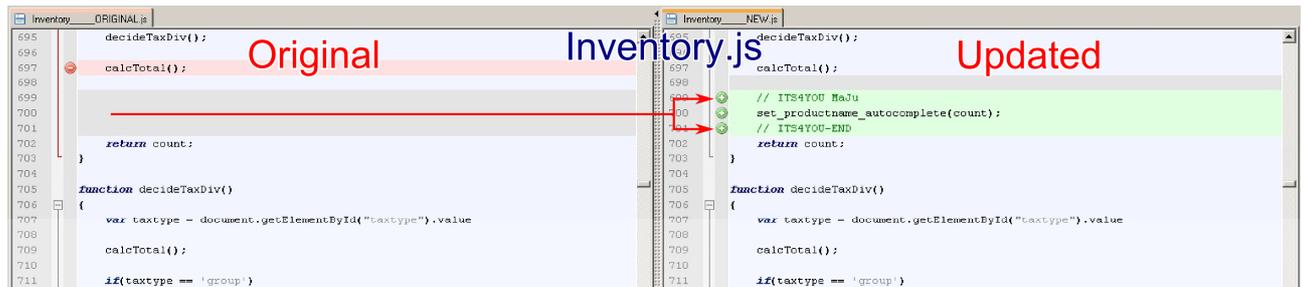
Find following code:

```
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