



TERMS & CONDITIONS 4YOU FOR VTIGER CRM

Introduction

The Terms & Conditions 4You is vTiger extension which allows you to create well formatted terms and conditions for records. The new terms and conditions can be stored separately, it means you can have additional terms and conditions to original one or you can simply replace original terms and conditions by new Terms & Conditions 4You. The Terms & Conditions 4You allows you to create terms and conditions templates for particular module as well as global terms and conditions templates, so you can create one global template and use it inside all supported vtiger CRM modules and save time with additional terms and conditions formatting. The new terms and conditions templates are created in CK Editor so you can use adding tables and images to make your terms and conditions more attractive.

Terms & Conditions 4You benefits:

- additional terms and conditions to original terms and conditions
- saving time using templates
- supports images, tables and other text formatting
- easy use using Terms and Conditions 4You block

Terms and Conditions

- Unless otherwise agreed in writing by the supplier all invoices are payable within thirty (30) days of the date of invoice, in the currency of the invoice, drawn on a bank based in India or by such other method as is agreed in advance by the Supplier.

- All prices are not inclusive of VAT which shall be payable in addition by the Customer at the applicable rate.



Terms and Conditions 4You

- Unless otherwise agreed in writing by the supplier all invoices are payable within **thirty (30) days** of the date of invoice, in the currency of the invoice, drawn on a bank based in India or by such other method as is agreed in advance by the Supplier.

- All prices **are not** inclusive of VAT which shall be payable in addition by the Customer at the applicable rate.

Content

- Introduction..... 1
- License agreement 3
- Terms and conditions 3
- Private policy 3
- 1 How to install..... 4
- 2 Quick start 7
- 3 Work area 9
 - 3.1 ListView 9
 - 3.2 DetailView 10
 - 3.3 EditView 11
 - 3.4 Terms & Conditions 4You block 11
- 4 Editing and usage..... 12
 - 4.1 Create new T&C template..... 12
 - 4.2 How to use T&C templates 13
- 5 Additional features 15
 - 5.1 Support of the PDF Maker 15
- 6 Settings 16
 - 6.1 Terms & Conditions 4You Input Editor 17
 - 6.2 Terms & Conditions 4You modules..... 17
 - 6.3 Deactivate/Reactivate license key 18
 - 6.4 Upgrade of the Terms & Conditions 4You 19

License agreement

- The Terms & Conditions 4You is covered by license which will be referred to as "The license" in the remainder of this text.
- This irrevocable, perpetual license covers all versions 1.xx of Terms & Conditions 4You.
- This license gives the holder right to install Terms & Conditions 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 Terms & Conditions 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 Terms & Conditions 4You.
- The license holder may not re-distribute the library or versions thereof to third party without prior written permission of the copyright holder.
- Terms & Conditions 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 Terms & Conditions 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 Terms & Conditions 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)
- Terms & Conditions 4You version (e.g. 540.01.01)
- Date and time
- Domain in md5 coding format (e.g. 916b25c201a77a6721003c0030977f3b)
- Action provided by you (INSTALL, REACTIVATE, DEACTIVATE)

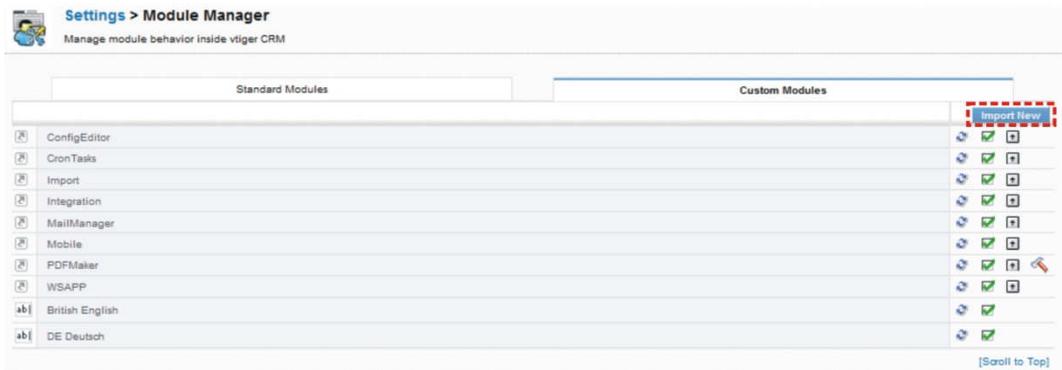
1 How to install

The module Terms & Conditions 4You is installed within one installation which consists of installation steps and validation steps. Please provide following steps in order to install Terms & Conditions 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):

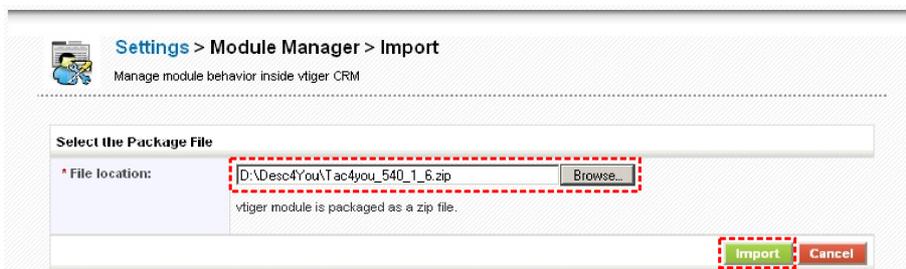
- vtigerCRM version (e.g. 5.4.0)
- Terms & Conditions 4You version (e.g. 540.01.01)
- Date and time
- Domain in md5 coding format (e.g. 916b25c201a77a6721003c0030977f3b)
- Action provided by you (INSTALL, REACTIVATE, DEACTIVATE)

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



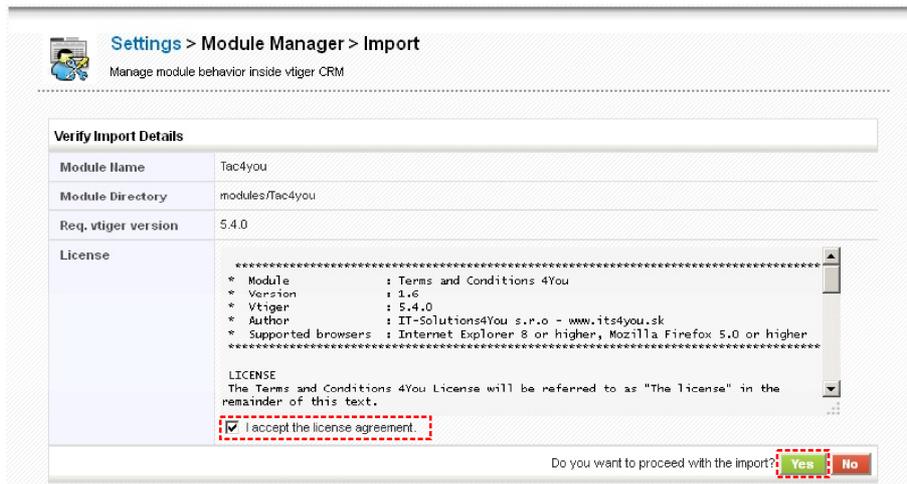
Picture 1.1 Installation of Terms & Conditions 4You – step 1

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



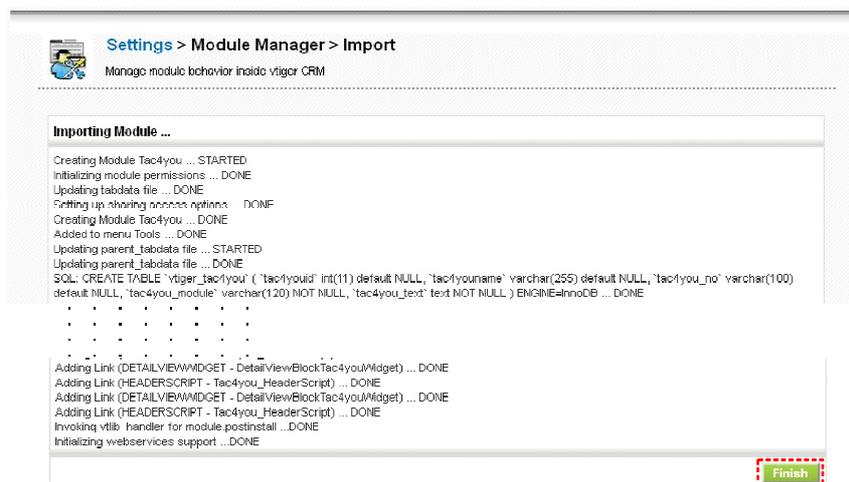
Picture 1.2 Installation of Terms & Conditions 4You – step 2

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 Terms & Conditions 4You – step 3

4. Click on **Finish** to complete the module import.

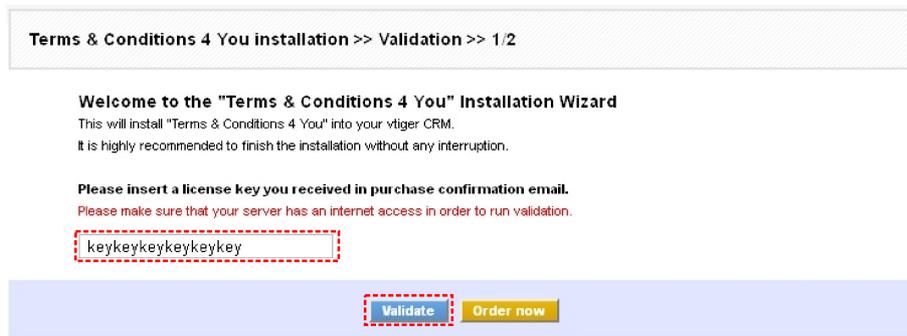


Picture 1.4 Installation of Terms & Conditions 4You – step 4

Please go to the More tab and from Tools column click on Terms & Conditions 4You link. You will be redirected to Validation steps of the installation process. So, in order to finish installation, please provide following validation steps.

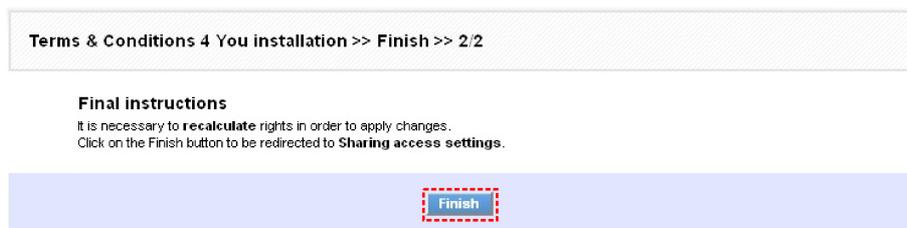
1. Please insert a license key and make sure that your server has internet access. Click on

[Validate](#).



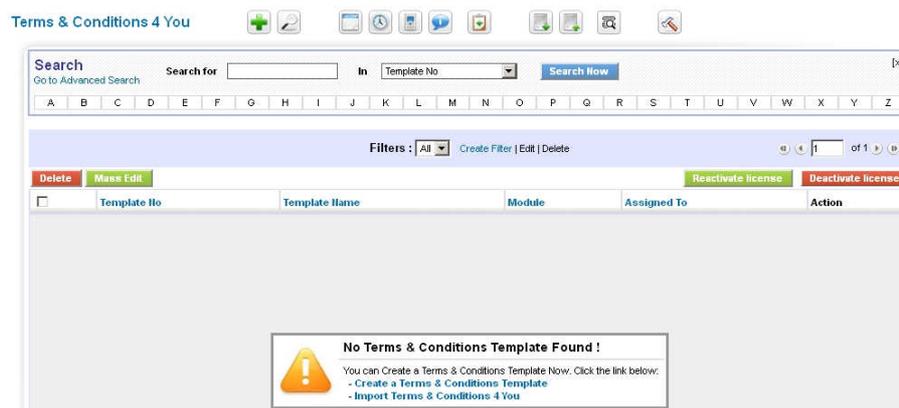
Picture 1.5 Validation step 1

2. If Terms & Conditions 4You is installed successfully you will see following screen. Click on [Finish](#) button.



Picture 1.6 Validation step 2 – Finish installation

After successful validation and start of the Terms and Conditions 4You you will see ListView of the Terms and Conditions 4You as can be seen below.



Picture 1.7 Terms & Conditions 4You ListView after installation and validation steps

2 Quick start

In the following section you can find how to create Terms & Conditions 4You (T&C 4You) record for vtiger CRM. The full description of the T&C 4You menus, tabs and icons can be found in the later chapters.

In order to create the T&C 4You record you have to start the T&C 4You which can be located under the More Tab and Tools column as seen below in the picture.



Picture 2.1 Start Terms and Conditions 4You

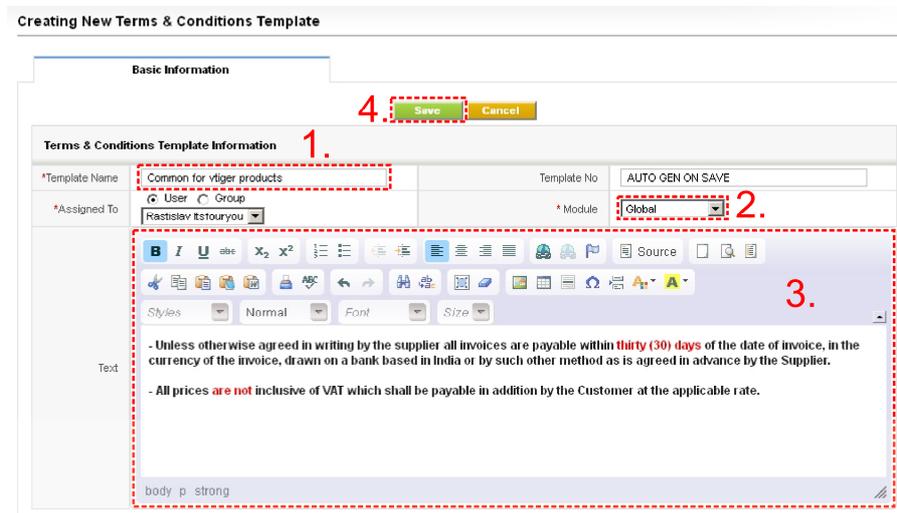
The screenshot below (Picture 2.2) shows Terms & Conditions 4You ListView. You can click  to add new template and new window “Creating New Terms & Conditions Template” will appear on the screen.



Picture 2.2 Add template in the ListView

The picture below shows window for creation of the new Terms & Conditions 4You template and necessary steps:

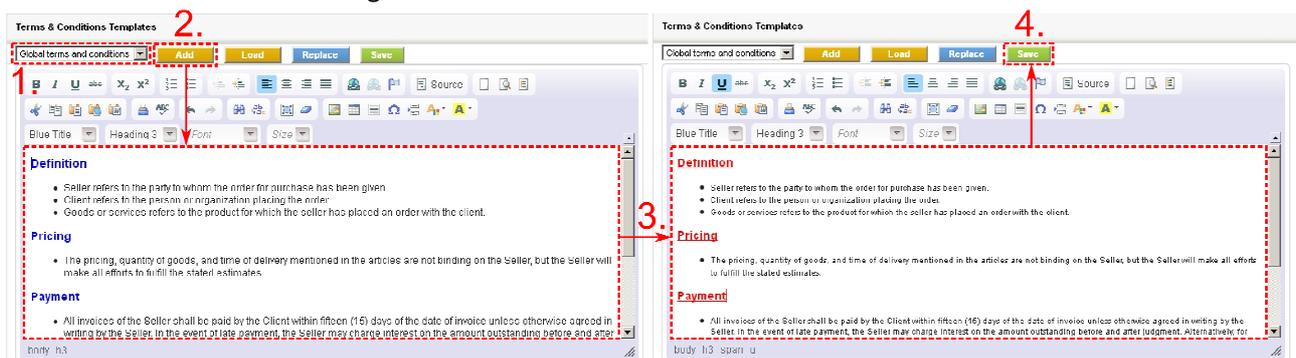
1. Define Template Name
2. Select Module
3. Using CK Editor insert text, pictures etc. and provide formatting
4. Save the template using button **Save**.



Picture 2.3 Creation of the new T&C template

Just created template you can immediately use in the particular module for particular record as shown in the Picture 2.4:

1. Select the T&C 4You template.
2. Click on button **Add** to add this template to edit area.
3. Update the T&C according to your needs and related to particular record.
4. Save the T&C using button **Save**.



Picture 2.4 How to use T&C 4You template

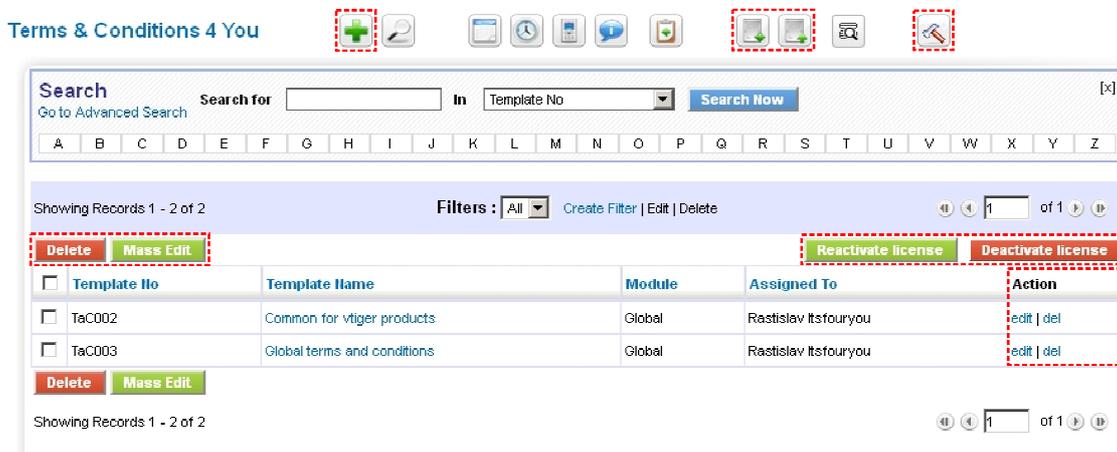
3 Work area

The Work Area of the Terms & Conditions 4You consists of:

- ListView – used for common tasks like add new T&C 4You templates, import and export T&C /data and access to others tools
- DetailView – shows already created T&C 4You templates in details
- EditView – allows the preparation of the new T&C 4You templates or editing existing T&C 4You templates
- Terms and Conditions 4You block – used to add, replace and save T&C 4You in particular modules

3.1 ListView

The common tasks like add/delete template, import/export actions or start editing have to be initiated via Terms & Conditions 4You ListView. Go to TOOLS → Terms & Conditions 4You and Terms & Conditions 4You ListView will appear on your screen.



Picture 3.1 ListView

There is group of buttons in the above part. The most important buttons are “add template” , “import/export” buttons   and button “settings” .

Note: The import and export within module T&C 4You is supported as standard vtiger functionality. Records present under the module T&C 4You can be saved in CSV format by clicking on Export button () , edited offline and can be re-imported using the Import functionality (). Please refer to web manual for more details (https://wiki.vtiger.com/index.php/Export_Import_Enhancements).

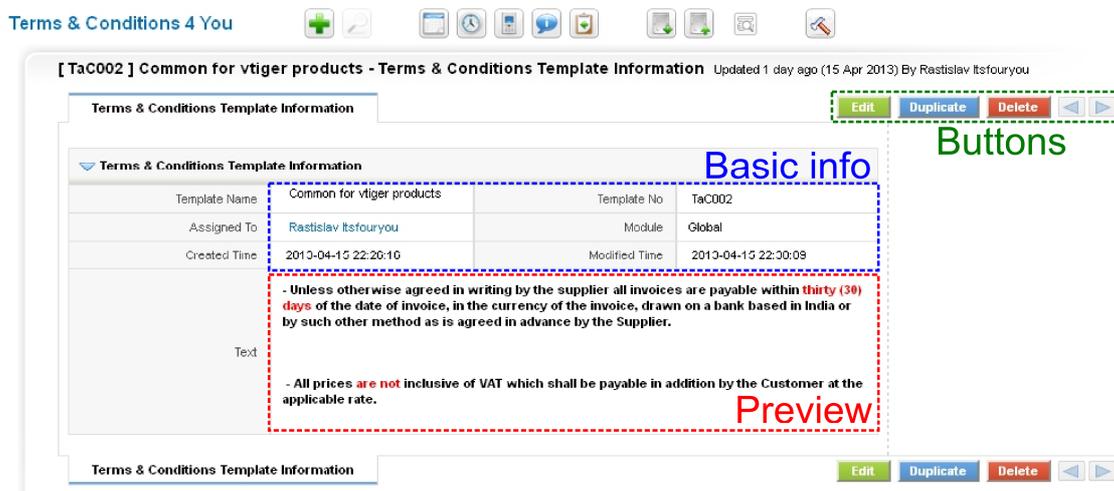
The main part of the Terms & Conditions 4You ListView consists of list of the T&C templates, which gives you information about the template number, the template name and primary module. In the list you can also select one or more templates and consequently delete () or edit () selected group of templates. As shown in the picture, it is also possible to use links in the "Action" column in order to edit or delete already created T&C templates directly from the ListView.

There are two additional buttons above the list of T&C templates  and  which are dealing with licensing described in the chapter 6.3.

3.2 DetailView

From ListView you can directly open any T&C template in the DetailView (Picture 3.2). The main purpose of the DetailView is to preview the T&C template, shows basic information about the T&C template and allows some additional actions. The DetailView consists of the following parts:

- Basic info – gives basic information of the T&C template
- Preview – preview of the T&C template
- Group of buttons:
 - **Edit** switch to EditView and start editing currently viewed template
 - **Duplicate** create duplicate of the template and start editing
 - **Delete** allows you to delete template
 -  navigation buttons (previous, jump, next)



Picture 3.2 DetailView

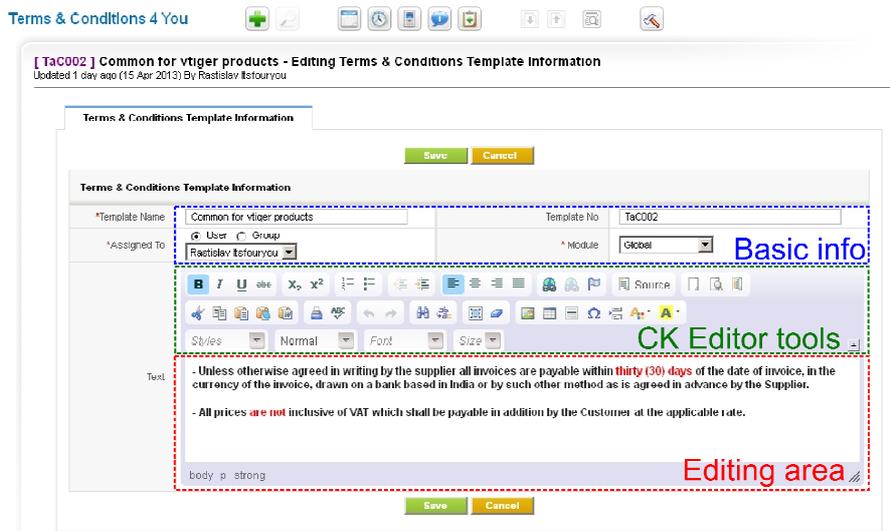
3.3 EditView

The EditView is initiated in three ways:

- button  opens the new template in the EditView
- Action link “edit” opens already created T&C template from the ListView
- button  opens already created T&C template from the DetailView

The EditView consists of:

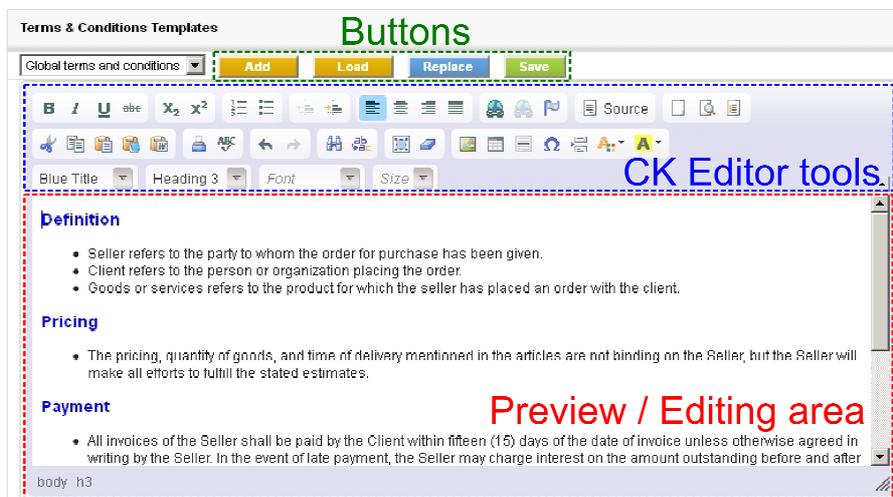
- Basic info part related to T&C template name, template number, module and assignment
- CK Editor tools
- Editing area



Picture 3.3 EditView

3.4 Terms & Conditions 4You block

The Terms & Conditions 4You block is used to add/load/replace T&C within particular records. This block is visible for all available modules. The most important is group of buttons. The Terms & Conditions 4You block buttons are described in details in the following chapter.



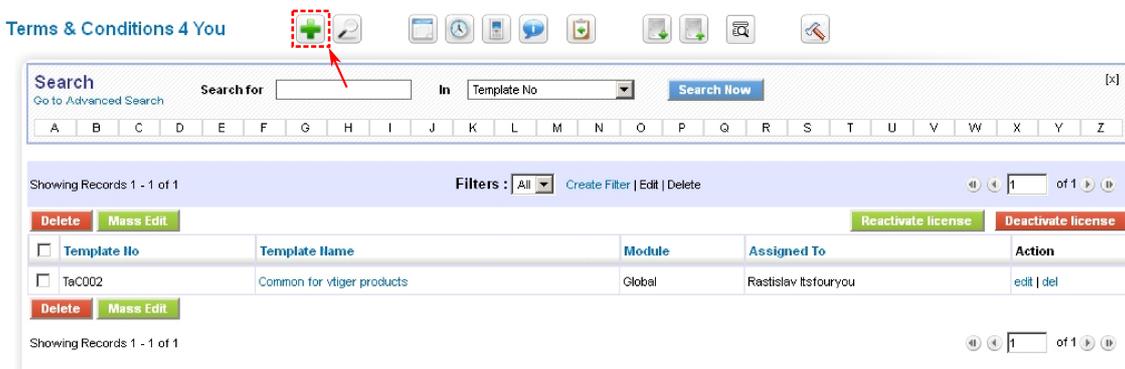
Picture 3.4 Terms & Conditions 4You block

4 Editing and usage

The editing of the T&C templates in the T&C 4You EditView is easy and is provided inside editing area. In order to have useful T&C template you can combine your own text with images and tables. Try to utilize CK Editor tools to change formatting of your text, images and tables according to your needs. Just select the text and click on any icon of the tool like font, color, bold, italic, alignment etc. For other details about using CK Editor please find description of the CK Editor on the following weblink: http://docs.cksource.com/CKEditor_3.x/Users_Guide.

4.1 Create new T&C template

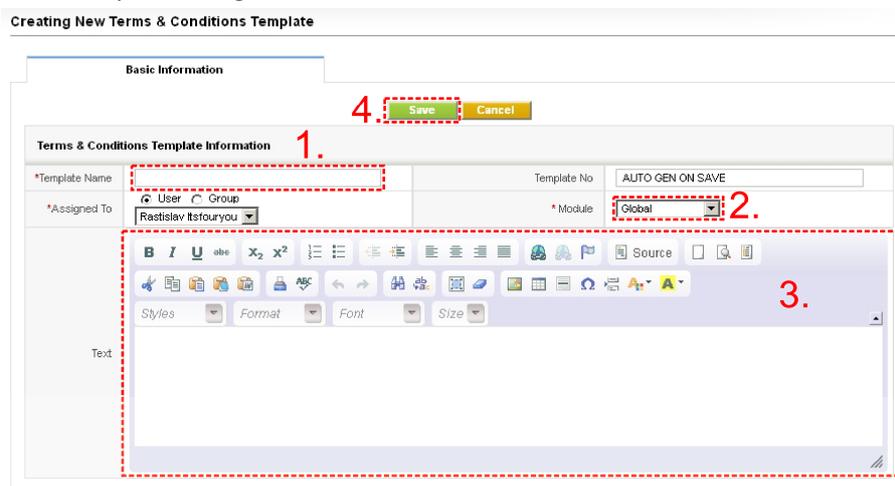
As was already described in the chapter 2, you can initiate creation of the new T&C template via button . The button will initiate the new EditView window “Creating New Terms & Conditions Template”.



Picture 4.1 Add new T&C template

In order to create the new T&C template please provide following steps:

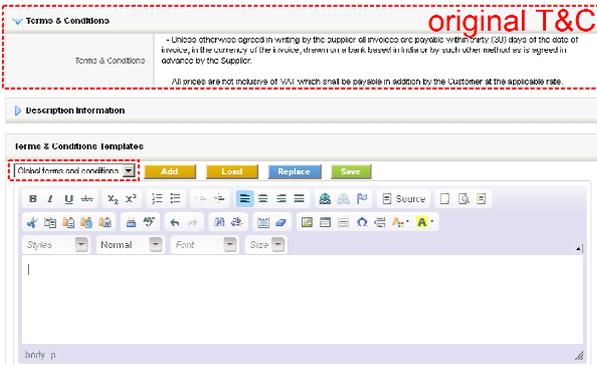
1. Define T&C template name
2. Select the module. The list of available modules contains also value “Global”. If you select the value “Global” then T&C template will be available for all supported modules.
3. Using CK editor insert your text, pictures, tables etc. and provide formatting according to your needs.
4. Save the template using button .



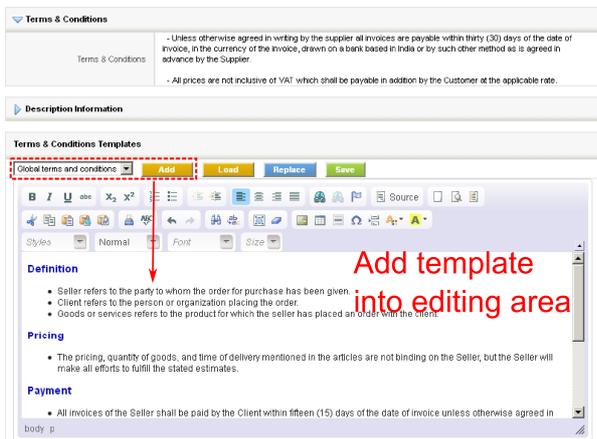
Picture 4.2 Creating new terms & conditions 4You template

4.2 How to use T&C templates

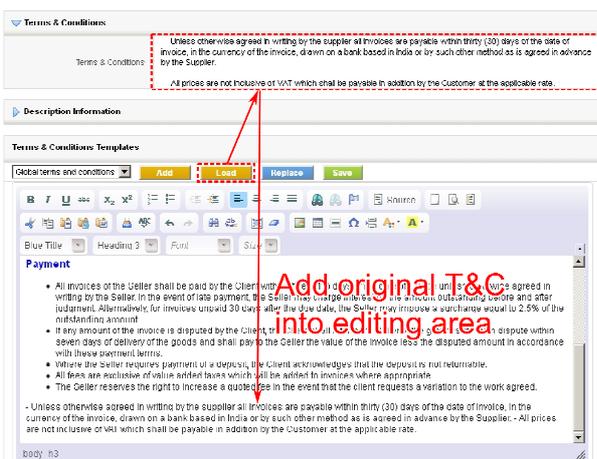
The T&C templates can be used in modules Quotes, Purchase Order, Sales Order and Invoice. The “Global” templates are visible for all four supported modules. In order to use T&C template for particular record the Terms & Conditions 4You block has to be used. The most important fact is that within Terms & Conditions 4You module the new field for T&C is included inside modules. It means that you can use in parallel original T&C and T&C 4You. Please refer to following section to see how you can use them.



Let’s assume that for some record the original T&C is already defined as well as “Global terms and conditions” T&C 4You template was created.

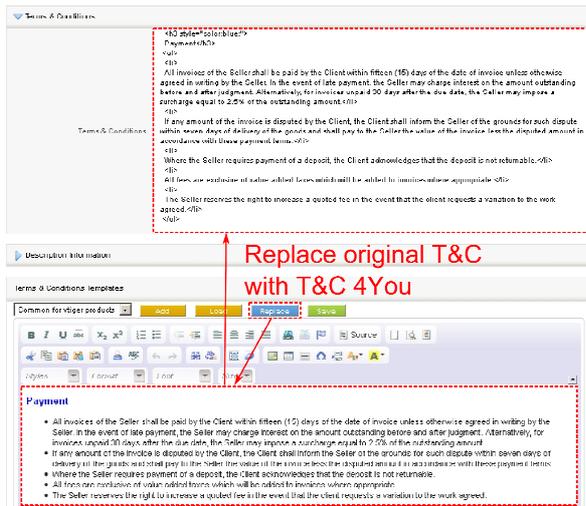


The button **Add** can be used to add selected T&C template into editing area. After addition of the template you can continue with editing the T&C according to your needs.

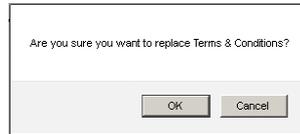


The button **Load** loads the original T&C into T&C 4You block editing area. In case that some content is already in the editing area, this content is not overwritten.

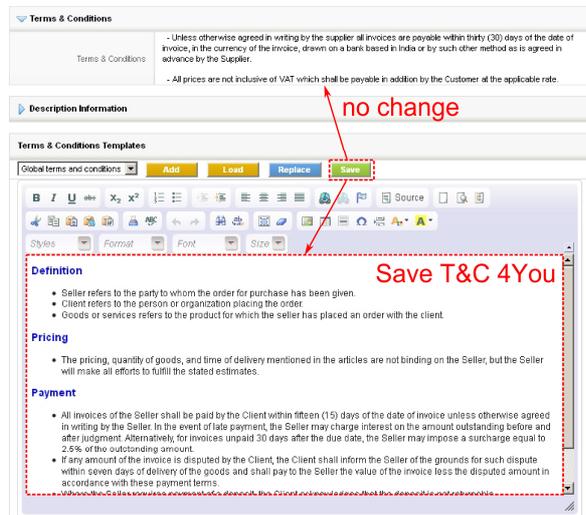
The better utilization of the button **Load** is in case that original T&C were written in html code. In this case using button **Load** you can easily load the original T&C into editing area with all original formatting.



In order to replace the original T&C with T&C 4You just click on button **Replace**. Please notice that original T&C will be overwritten i.e. lost. But you will be asked to confirm that step via dialog window:



Just confirm replacement by button **OK**.



The **Save** button saves created T&C 4You without any change to original T&C. So in case you would like to create new T&C 4You in addition to original T&C please provide following steps:

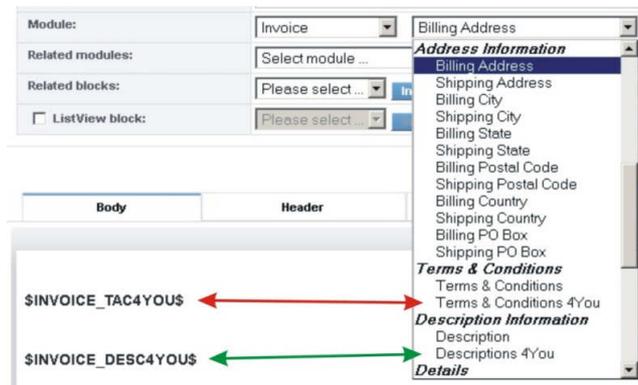
1. Select the T&C 4You template and click on button **Add**.
2. Edit the T&C 4You according to your needs.
3. Save the T&C 4You using button **Save**.

5 Additional features

5.1 Support of the PDF Maker

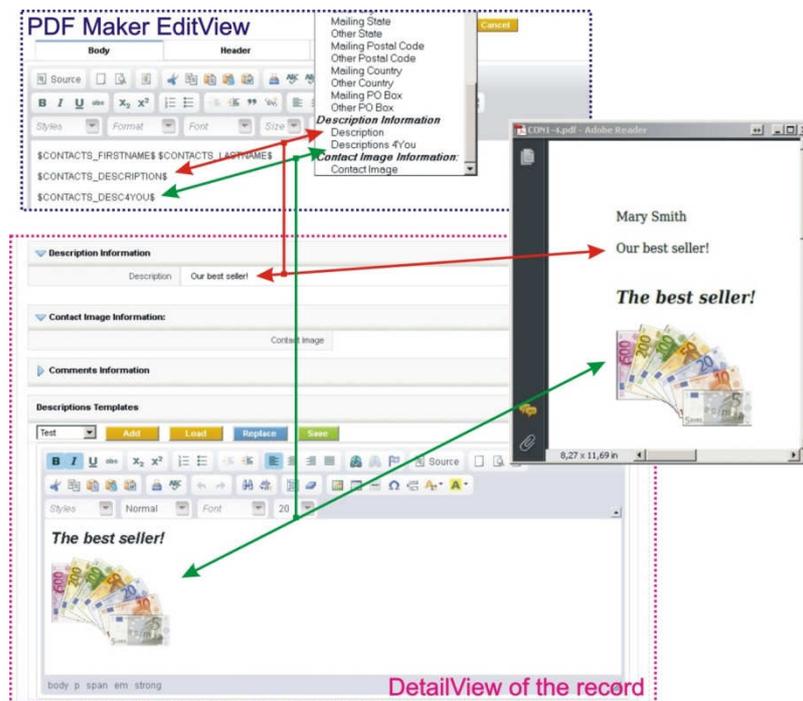
The Terms & Conditions 4You and Descriptions 4You which is also vTiger extension used to create well formatted descriptions were already integrated into PDF Maker. Please refer to our web page or manual for details about Descriptions 4You.

From PDF Maker point of view it is necessary to mention that separate fields for descriptions and terms and conditions created within Descriptions 4You and T&C 4You were introduced. They are “Terms & Conditions 4You” (\$*****_TAC4YOU\$ for example \$INVOICE_TAC4YOU\$ in Invoice module) and “Terms & Conditions 4You” (\$*****_DESC4YOU\$).



Picture 5.1 T&C4You and Desc4You fields

Please notice following: In case that you have in your record different values stored for “Description” and “Terms & Conditions 4You” it will be correctly introduced in PDF Document as can be seen in the example below. The same behavior is for “Terms & Conditions” and “Terms & Conditions 4You”.



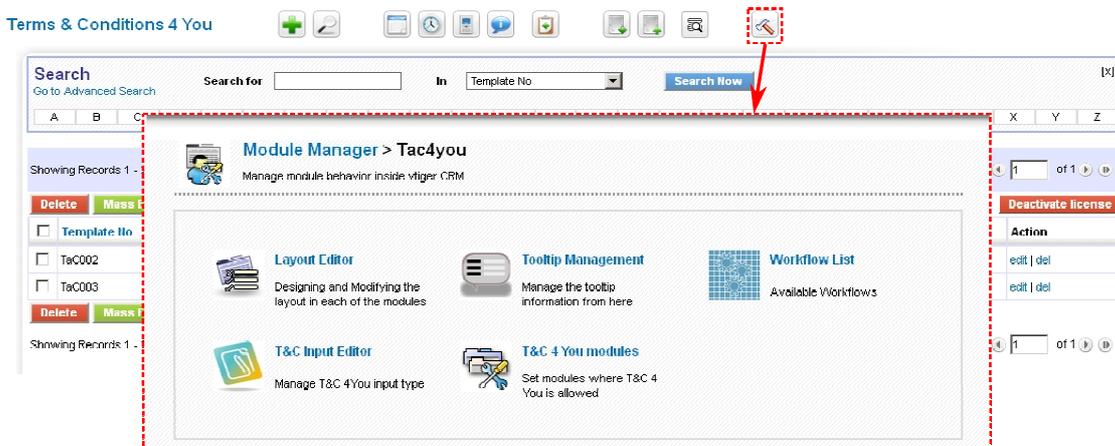
Picture 5.2 Description vs. Descriptions 4You in PDF Maker

6 Settings

The Terms & Conditions 4You settings can be initiated from ListView using button  as you can see in the picture below (Picture 6.1). In the Settings you can find:

- Standard vtiger settings:
 -  **Layout Editor** – configures the layout of a module
 -  **Tooltip Management** – utility to view detailed information of the record in the ListView when you hover on it
 -  **Workflow List** – a simple interface to add actions upon save of an entity. These actions will be triggered when the given conditions are met
- Terms & Conditions 4You settings:
 -  **T&C 4You Input Editor** – manage your input editor
 -  **T&C 4You modules** – manage for which modules is T&C 4You allowed

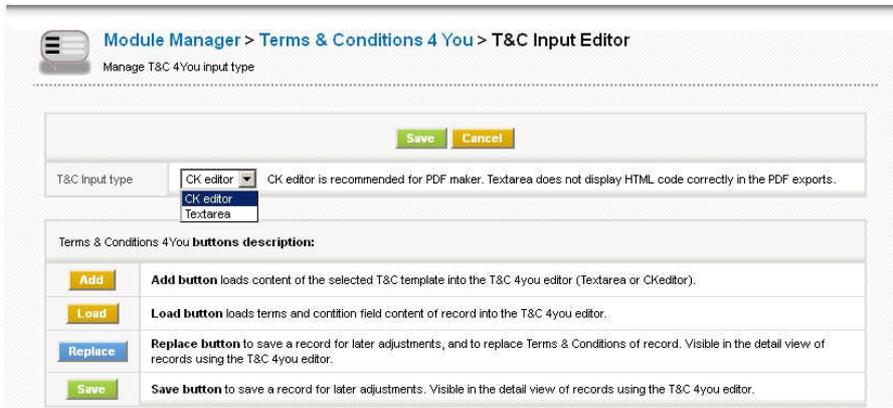
Please refer to following subchapters for details.



Picture 6.1 Terms & Conditions 4You settings

6.1 Terms & Conditions 4You Input Editor

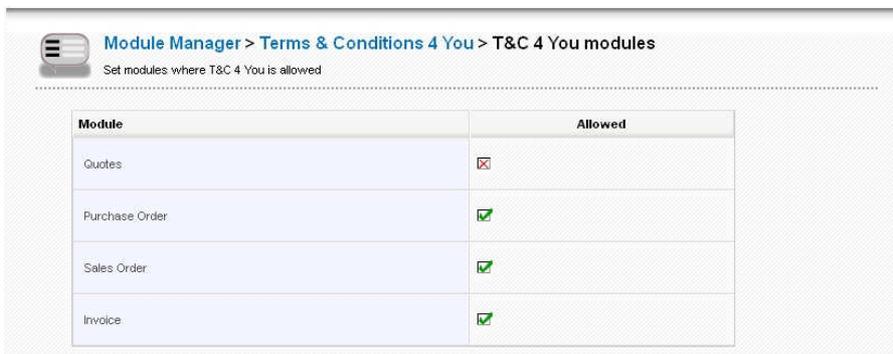
There exists possibility to select T&C 4You input editor, i.e. you can select from CK Editor and Textarea in the settings. In spite of that possibility we recommend to use CK editor, especially if you are using our PDF Maker extension tool to avoid incorrect display in the PDF exported files. Here you can also find short description of the T&C 4You buttons described in the chapter 4.2.



Picture 6.2 Settings Terms & Conditions 4You Input Editor

6.2 Terms & Conditions 4You modules

The Terms & Conditions 4You is available for four modules shown below. Within setting “Terms & Conditions 4You modules” you can customize the visibility of the Terms & Conditions 4You block (chapter 3.4) for particular module. Please use checkboxes in the column “Allowed” to make Terms & Conditions 4You block in/visible in the DetailView for particular module according to your needs.



Picture 6.3 Setting T&C 4You for particular modules

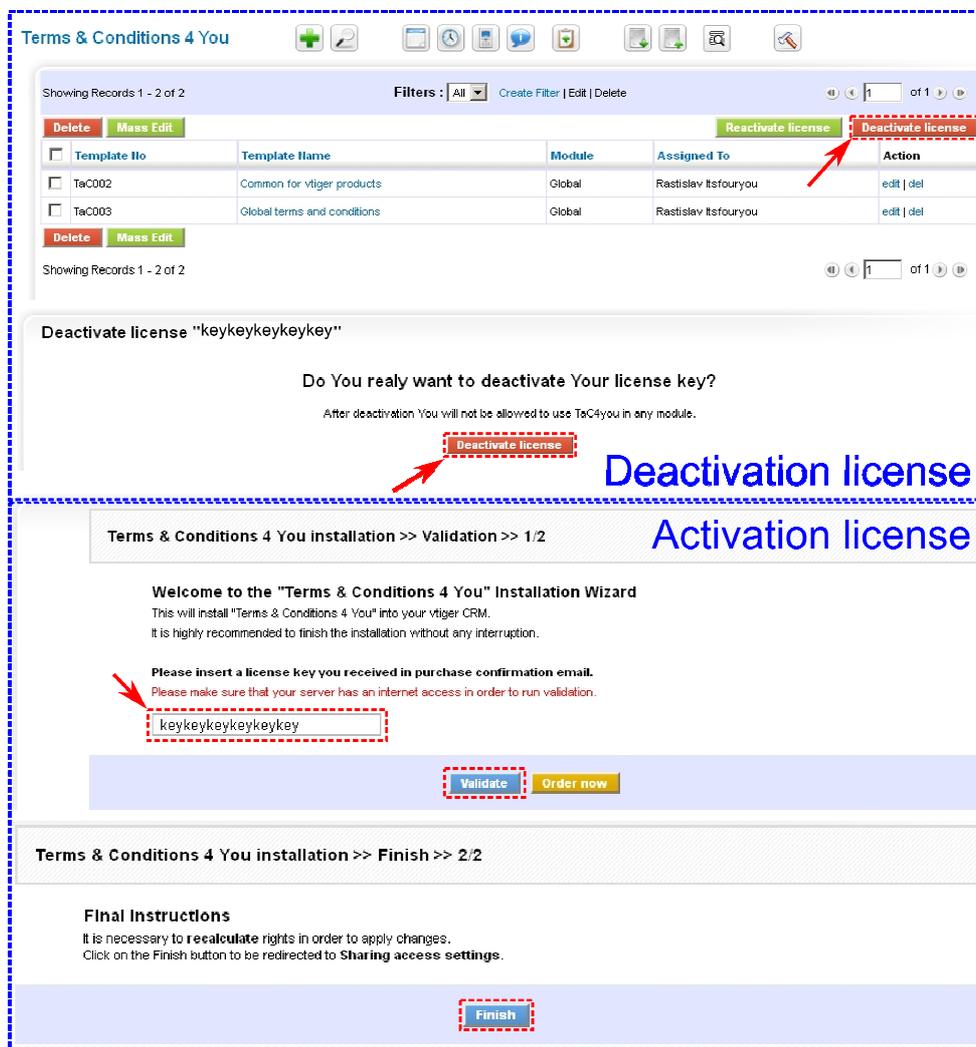
6.3 Deactivate/Reactivate license key

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

1. In the ListView click on **Deactivate license**.
2. Confirm deactivation using **Deactivate license** button in next window.

The license is deactivated and you will be redirected immediately to validation steps known from installation of the T&C 4You. It means after deactivation module as well as its records are not accessible. In order to continue you have to reactivate license:

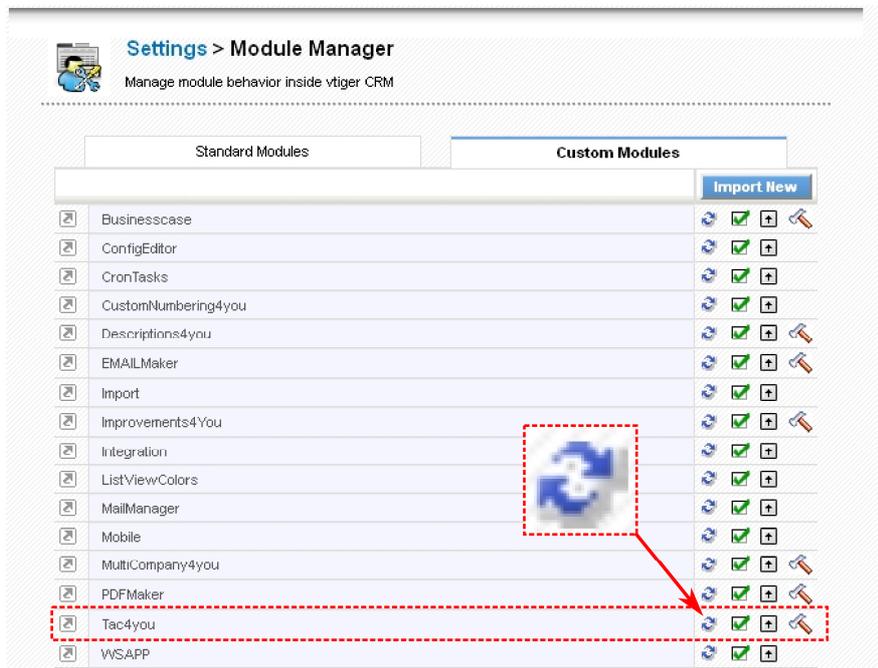
1. Please insert a license key and make sure that your server has internet access. Click on **Validate**.
2. Click on **Finish** button.



Picture 6.4 License de/activation

6.4 Upgrade of the Terms & Conditions 4You

The upgrade of Terms & Conditions 4You can be started using upgrade link button  in the module manager and tab “Custom Modules”.



Picture 6.5 Initialization the upgrade of the T&C 4You

Please browse the package using button and click on button .



Picture 6.6 Upgrade of Terms & Conditions 4You

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



Picture 6.7 Upgrade failure

Next steps are similar with installation of the Terms & Conditions 4You, therefore please refer to chapter 1 for additional information.