

# **DESCRIPTIONS 4YOU FOR VTIGER CRM**

### Introduction

The Descriptions 4You is vTiger extensions which allows you to create well formatted descriptions for records. The new descriptions are created in CK Editor so you can use adding tables and images to make your description attractive. The new descriptions can be stored separately, it means you can have additional description to original one or you can simply replace original descriptions by new descriptions 4You. The Descriptions 4You allows you to create description for particular module as well as global description templates, so you can create one global template and use it everywhere in vtiger CRM and save time with additional description formatting.

Descriptions 4You benefits:

- supported mostly for all modules
- additional description to original description
- supports images, tables and other text formatting
- easy use using Description 4You block



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# License agreement

- The Descriptions 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 Descriptions 4You.
- This license gives the holder right to install Descriptions 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 Descriptions 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 Descriptions 4You.
- The license holder may not re-distribute the library or versions thereof to third party without prior written permission of the copyright holder.
- Descriptions 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 Descriptions 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 Descriptions 4You and your license key as well (you will obtain common link and common license for both modules).

# **Private policy**

During installation it is necessary to exchange following information:

- vtigerCRM version (e.g. 5.4.0)
- Descriptions 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 Descriptions 4You is installed within one installation. Please provide following steps in order to install Descriptions 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)
- Descriptions 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)
- Install the .zip package of the Descriptions 4You module via Settings -> Module Manager. Select the *Custom Modules tab* and click on the <u>Import New</u> button.

	Standard Modules	Custom Modules
		Import New
9	ConfigEditor	2 R 1
9	CronTasks	8 R I
9	Import	2 R I
6	Integration	a 🖉 🖬
9	MailManager	2 R I
9	Mobile	0 R 🗉
•	PDFMaker	8 R 1 4
8	WSAPP	2 R 1
ЬĮ	British English	0 Ø
abi	DE Deutsch	0.00

Picture 1.1 Installation of Descriptions 4You – step 1

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

🎇 Manage mo	odule behavior inside vliger CRM
Select the Packag	le File
* File location:	D:\ITS4You\Descriptions4you_540_3.zip Browse
	vtiger module is packaged as a zip file.

Picture 1.2 Installation of Descriptions 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	Descriptions4you
Module Directory	modules/Descriptions4you
Req. vtiger version	5.4.0
License	<ul> <li>Module : Descriptions+You</li> <li>Version : 1.3.0</li> <li>Vtiger : 5.4.0</li> <li>Author : IIT-Solutions+You s.r.o - www.its4you.sk</li> <li>Supported browsers : Internat Explorer 7 or higher, Mozilla Firefox 3.0 or higher</li> <li>LICENSE</li> <li>The Descriptions+You License will be referred to as "The license" in the remainder of this text.</li> <li>This irrevocable, perpetual license covers all versions 1.xx of Descriptions+You.</li> <li>This license gives the holder right to install Descriptions+You on ONE vtiger CRM installation.</li> </ul>

Picture 1.3 Installation of Descriptions 4You – step 3

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

Settings > Module Manager > Import Manage module behavior inside vtiger CRM	
Importing Module	
Creating Module Descriptions4you STARTED	
nitializing module permissions DONE Jødating tabdata file DONE	
Setting up sharing access options DONE	
Creating Module Descriptions4you DONE Added to menu Tools DONE	
Adaed to menu Tools DONE Jpdating parent tabdata file STARTED	
Adding descriptions4you no to All fitter DONE	
Adding descriptions4you_no to All filter DONE Adding descriptions4youname to All filter DONE	
Adding descriptions4you_module to All filter DONE	
Adding assigned_user_id to All filter DONE Recalculating sharing rules DONE	
nvoking vtlib handler for module.postinstallSTART	
nvoking vtlib_handler for module.postinstallDONE	
nitializing webservices supportDONE	

Picture 1.4 Installation of Descriptions 4You – step 4

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

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

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

Picture 1.5 Validation step 1

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

Descriptions 4 You installation >> Finish >> 2/2	
Final instructions It is necessary to recalculate rights in order to apply changes. Click on the Finish button to be redirected to Sharing access settings.	
Finish	

Picture 1.6 Validation step 2 – Finish installation

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

B C D E F G H I J K L M N O P Q R S T U V W X Y Filters : Al Create Filter   Edit   Delete  I Mass Edit Template Ilo Template Ilame Module Assigned To Action
te Mass Edit. Reactivate license Deactivate li
Template IIo Template Ilame Module Assigned To Action

Picture 1.7 Descriptions 4You ListView after installation and validation steps

# 2 Quick start

In the following section you can find how to create Description 4You record for vtiger CRM. The full description of the Description 4You menus, tabs and icons can be found in the later chapters.

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

Tools
Terms and
Conditions 4You
Our Sites
Integration
PBX Manager
Mail Manager
Recycle Bin
Comments
Descriptions 4You
RSS
Email
Documents

Picture 2.1 Start Description 4You

The screenshot below (Picture 2.2) shows Descriptions 4You ListView. You can click 💼 to add new template and new window "Creating New Descriptions Template" will appear on the screen.

scriptions 4 You				<u>«</u>
Showing Records 1 - 1 of 1 Delete Mass Edit	Send Email	: All Create Filter   Edit	Delete () (	Deactivate license
Template No	Template Name	Module	Assigned To	Action
	Company with logo	Organizations	Rastislav Itsfouryou	edit   del

Picture 2.2 Add template in the ListView

The picture below shows EditView window for creation of the new Descriptions 4You template and necessary steps:

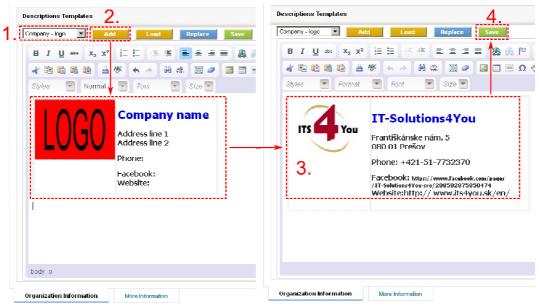
- 1. Define Template Name
- 2. Select Module
- 3. Using CK Editor insert text, pictures etc.
- 4. Save the template using button Save.

	E	Basic Information		1				
			6	Save Can	cel			
1	Descriptions Ten	nplate Information						
	*Template Name	Company - logo		1.	Template No			
	*Assigned To	C User C Gro Rastislav Itsfouryd			* Module	Organizations	2.	
		BIU ⇒+a ≰≊≊® Styles ♥		■ 三 三 三 ● 森 Ⅲ <i>●</i> ▼ Size ▼		🗟 Source	3.	<u>_</u>
	Text	IT5 <b>4</b> You	Address line 1 Address line 2 Phone: Facebook: website:	ne				

Picture 2.3 Creation of the template in EditView

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

- 1. Select the description template.
- 2. Click on button Add to add this template to edit area.
- 3. Update the description according to your needs and related to particular record.
- 4. Save the description using button Save



Picture 2.4 How to use description template

# 3 Work area

The Work Area of the Descriptions 4You consists of:

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

### 3.1 ListView

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

7/7/	arch to Advanced Search	Search for			In Te	emplate No		•	Search	Now							[
A	B C D	EF	GHI	J	КL	. M	NO	P	QR	S	Т	U	۷	W	Х	Y	Z
	wing Records 1 - 3 of			Filte	ers : Al	Crea	te Filter   E	dit   Dele	te	Rea	ictiva	te licen		<ul> <li>④ 1</li> <li>De</li> </ul>	activ	of 1 () ate lice	
De			femplate Name	Filte	ers : Al	Crea	te Filter   E	dit   Dele	te Assign	L	ictiva	le licen			activ Act	ate lic	
De	elete Mass Edit		femplate Name	Filte	ers : Al		te Filter   E	dit   Dele		ed To		le licen			Act	ate lic	
	elete Mass Edit Template No	1		Filte	ers : A	Module		dit   Dele	Assign	ed To Itsfou	ryou	te licen			Act edit	ate lice tion	

#### 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 Description 4You is supported as standard vtiger functionality. Records present under the module Description 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 (<u>https://wiki.vtiger.com/index.php/Export\_Import\_Enhancements</u>).

The main part of the Descriptions 4You ListView consists of list of the description 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 (<u>Delete</u>) or edit (<u>Mass Edit</u>) 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 description templates directly from the ListView.

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

### 3.2 DetailView

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

- Basic info gives basic information of the description template
- Preview preview of the description template
- Group of buttons:
  - o Edit switch to EditView and start editing currently viewed template
  - Duplicate create duplicate of the template and start editing
  - o Delete allows you to delete template

Descriptions Template	Information		Edit	Duplicate	Delete <
V Descriptions Template	e Information		Basic	info	Buttons
Template Name	Product simple	Template No	RH6		
Assigned To	Rastislav Itsfouryou	Module	Products		
Created Time	2013-04-07 18:49:27	Modified Time	2013-04-07 19:0	2:49	
Text	Product Name Description from	a catalog if availad	Prev	/iew	

Picture 3.2 DetailView

### 3.3 EditView

The EditView is initiated in three ways:

- button e opens the new template in the EditView
- Action link "edit" opens already created description template from the ListView
- button Edit opens already created description template from the DetailView

The EditView consists of:

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

criptions Template Inform	ation																						
									5	ave		lancel											
criptions Template Inform	ation																						
*Template Na	ne Co	mpan	/ · logo	0											Templat	e No	RH	5					
*Assigned															* Mo	dule	On	ganizati	ons 💌	1	Ba	isic	; in
		I	U	abo	<b>X</b> <sub>2</sub>	x <sup>2</sup>	1Ξ	E	e	-15	2	8 3	-		6. P	E	Sour	ce [		E			
	4	围	1	8	-	a I	ABC	4	rà -	<b>6</b> 8	<u>e</u>	1				周	Ae+	A -					
	St	yies	ľ		Form	ət.		Fd	ont			ize 💌						C	KI	E	dit	or t	loc
Т	ot	[(	)G(	0	Ad Ad Ph	dres dres one	ss lin ss lin	ie 1		am	e												
	riptions Template Inform *Template Na *Assigned	criptions Template Information *Template Nerres *Assigned To Real 4	Assigned To Company *Template Marine *Assigned To B Z Styles Styles Company Raticlav Styles Styles Company Raticlav Styles Styles Company Raticlav Styles Styles Styles Company Raticlav Styles Styles Styles Company Raticlav Styles Style	*Template Information *Template Name *Assigned To B Z U * We C Radiation tendor * We C * C * C * C * C * C * C * C *	Company - topo     Ansigned To     B Z U w      B Z U w      Styles w      Company - topo     Company -	Stiptions Template Information  *Template Information  *Assigned To  *Assigned To  *Assigned To  *Text  Text  Text  *Text  *Text  **Text  **Text *	Text Text Text Text Text Text Text Text	Company - topo *Assigned To *Assigned To #Assigned To	Image: Serie of the series     Company - kgg       Image: Series     Company - kgg       Image: Series     Company - kgg       Image: Series     Readelaw factory or Image: Series       Image: Series     Image: Series       Image: Series     Series	stiptions Template Information         *Template Information         *Template Information         *Assigned To         *Assigned To         *B Z U => Concoperty         *Residued To         <	Text	Text	See:     Cancel       *Terplate Information     Company - kgp       *Assigned bit     Company - kgp       *Assigned bit     Company - kgp       *Assigned bit     Pradiative Enformation       B     I     I are x_p x2*       IF     IF     IF       * Text     Format     Fort       Text     Company name       Address line 1       Address line 2       Phone:	Save     Cancel       striptions Template Information     Company - kgp       *Template Name     Company - kgp       *Assigned     Company - kgp       *Assigned     B       # Company and the company     Company and the company       Text     Company name       Address line 1     Address line 2       Phone:     Phone:	Same     Cancel       artipidons Template Information     Company - bogo       *Template Name     Company - bogo       *Assigned To     Company - bogo       *Assigned To     Provide to four company       Text     Four company       Text     Company name       Address line 1       Address line 2       Phone:	Some     Cancel       artificions Template Information     Imagine to find the concept of the conce	Same     Cancel       artipidas Template Information     Implate Norm       **Template Norm     Company -bage       *Assigned To     User © Group       *Assigned To     Implate Norm       Fort     Implate Norm       Phone:     Implate Norm	Some     Cancel       artipidas Information     Imaginate Information       **Template Information     Imaginate Information       **Assigned To     Imaginate Information       ************************************	Seem     Cancel       artpidon 5 Template Information     Implate No       **Template Information     Implate No       **Assigned To     Implate No       ************************************	Serve     Cancel       Cription Serve Jusc       Template Information       Template Inf	Same     Cancel       criptions Template Information     Implate Information       *Template Information     Implate Information       *Assigned To     Implate Informatin       *Assigned To	Some     Cancel       artpidon 5 Template Information     Implate Information       **Template Information     Implate Information       **Assigned To     Implate Information       ************************************	Swe Cancel         Cription Template Information         "Template Information         *Assigned to Company - topo         ***********************************

Picture 3.3 EditView

### 3.4 Description 4You block

The Descriptions 4You block is used to add/load/replace descriptions within particular records. This block is visible for all available modules. Most important is group of buttons. Their usage and usage all Description 4You block is described in details in the following chapter.



#### Picture 3.4 Descriptions 4You block

# 4 Editing and usage

The editing of the description templates in the Description 4You EditView is easy and is provided inside editing area. In order to have useful description 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: <a href="http://docs.cksource.com/CKEditor\_3.x/Users\_Guide">http://docs.cksource.com/CKEditor\_3.x/Users\_Guide</a>. In addition two following chapters describe how to insert images and tables into your descriptions.

### 4.1 Create new description template

As was already described in the chapter 2, you can initiate creation of the new description template via button 🐨 . The button will initiate the new EditView window "Creating New Descriptions Template".

scriptions 4	, <u></u> ,	Filters : Al 💌 Create Filter   E		e € 1 u t > @
Delete Mas:	s Edit		Reactivate licen	se Deactivate license
Template No	Template Name	Module	Assigned To	Action
🗆 RH4	Contact	Contacts	Rastislav Itsfouryou	cdit   diel
🗆 RHS	Company - logo	Organizations	Rastislav itstouryou	edit   del
□ RH6	Product simple	Products	Rastislav Itsfouryou	edit   del
	Product simple	Products	Rastislav Itsfouryou	edit   del

Picture 4.1 Add new description template

In order to create the new description template please provide following steps:

- 1. Define description template name
- 2. Select the module. The list of available modules contains also value "Global". If you select the value "Global" then description template will be available for all modules.
- 3. Using CK editor insert your text, pictures, tables etc. and provide formatting according to your needs.

### 4.2 Inserting images

Images can improve the design of your descriptions. CKEditor is used inside the Descriptions 4You and it allows you to add images into your descriptions in an easy and intuitive way.

So, if you would like to insert image please provide following steps:

1. Press the 🔤 button on the toolbar.

Image Properties
Image Info Link Upload Advanced 3.
URL //ogo/logo-its.jpg Browse Server
Alternative Text
Width Preview Height C Freview Hspace VSpace Align <not set=""></not>

Picture 4.2 Insert image

- 2. A pop-up window called "Image Properties" will appear. It includes four tabs that group image options.
- 3. Define the URL address of the image. You may also use the Browse Server in order to browse the files. Set up other properties of the image.
- 4. Click  $\sim \sim$  to add image into description templates.

For more info visit following site: <u>http://docs.cksource.com/CKEditor\_3.x/Users\_Guide/Rich\_Text/Images</u>

# 4.3 Creating tables

The tables can improve your description templates as well. Similarly to images, tables can be inserted into your templates in few simple steps:

1. Press the insert/edit table button in on the toolbar. After that a popup window called "Table Properties" will appear.

Footer		
(< → ) 44 森 (図)	Table Properties	۲
	Rows 3 Columns 2 Headers None Border size 1 Alignment <not set=""> Caption</not>	Width 200 pixels Height pixels Cell spacing 1 Cell padding 1
	Summary	
	3.	OK 🕨 Cancel 🛛

Picture 4.3 Creating tables

- 2. Set the basic table properties like number of columns and rows, width, height, etc.
- 3. Click on <sup>ok</sup> ▶ button.

After that the table is inserted into the template and you can write some text, insert logos etc. into the new table. You can also make some design adjustments like bold text, underline, etc.

For more info visit following site: <u>http://docs.cksource.com/CKEditor\_3.x/Users\_Guide/Rich\_Text/Tables</u>

### 4.4 How to use description templates

The description templates can be used in particular modules, or in case of "Global" templates for any available modules. In order to use description template for particular record the Descriptions 4You block has to be used. The most important fact is that within Descriptions 4You module new field for description is included inside modules. It means that you can use in parallel original description and description 4You. Please refer to following section to see how you can use them.

Description Information	original des	criptio
Description	11538/a0049You Františkanska nim. 5 090 01 Prečov Phone: +421-41-732370 Facebook: Https://www.tacegou.as/an/ Webstechted/as/www.tacegou.as/an/	
Comments Information		Show : Al
escriptions Templates		
Company - logo 💌 🛛 🗛 Add	Load Replace Save	
B I U abc X <sub>2</sub> X <sup>2</sup>	🗄 🗄 🍯 🛎 🗮 🗸 🙈 🎥 🍽 🖻 Source 🗌 🗔 🖻	
* 8 8 8 8 4 4	5 🐟 🖻 🖶 🗮 🥥 🖾 🖿 🖸 🖶 🗛 🗛	
Styles  Normal	Font Size	

Let's assume that for some record the original description is already defined as well as "Company – logo" description 4You template was created.

Description mon	nation			
	Description	IT-Solutions4 You Františkánske nám. 5 080 01 Prešov Phone: +421-51-773237 Facebook: https://www.ts	facebook.com/pages/IT-Solutions4You-sro/208502875850474	
Comments Inform	nation			Show: All
escriptions Templa	tes			
Company - logo 💌	Add	Lozd Repl	ace Save	
B <i>I</i> <u>U</u> abo	X <sub>2</sub> X <sup>2</sup>	E E 🤃 😫 🔳	🛎 🚍 🌉 🙈 🏁 🖻 Source 🗌 🐼 🖷	
🖌 Fa 🚳 🚳	🖻 占 💖	🔦 🤌 👭 🕸	🔟 🥔 🛅 🗏 Ω 🖑 Ατ' 🗛 '	
Styles 🔽	Normal	- Font -	Size 🔽	-
LOGO	Comp Address Address Phone:		Add template into editing area	<u>_</u>

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

	II Solutioner/You Franklikkinske päin. 5 080 01 Pročov Pinner +241-51-72727270 Pinner +241-51-72727270 Pinner +241-51-72727270 Pinner +241-51-72727270 Pinner +241-51-72727270	asebook.combagestf SolutionofYou gro208502575850174 gr u Mrvi
Comments Inforr	nation	Show: All
escriptions Templa	tes	
ompany - logo 💌	Add I oad Replac	Save
B 7 U ***		= = = ▲ A A M S Xource □ Q S
Styles 📼	Format 🔻 Font 💽 3i	a 🗖 🔹
LOGO	Company name	Add original description
	Address line 1 Address line 2	into editing area
	Phone: Lacebook: Websile:	
	Františkán ske nám. 5 0 80 01 Prešov F -sro/20050/20/50504/4 Website:http://	* Phone: +121-51-7732370 Facebook: https://www.facebook.com/pages (www.ifadwnu.skrien)
/II-Solutions4You	r510/20030/2013030414 vieusite.http://	

The button **Load** loads the original description into Description 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 description was written in html code. In this case using button Load you can easily load the original description into editing area with all original formatting.

Description Information	
Description	Class bordem@r cellpadsing="1" cellpadsing="1" height="210" weldb="200"     closelpadsing="2" weldb="100px;">     closelpadsing="2" weldb="100px;"     closelpadsin
Comments Information	↑ Replace original description
escriptions Templates	with Description 4You
Company - logo 🔹 💦 Add	Losc Replace Save
B I U obt X <sub>2</sub> X <sup>2</sup>	) = E 👒 🐐 🔎 = = = 📾 🙇 🏴 🖲 Source 🗌 🗔 🗐
* 19 19 18 19 🔺 🧐	<sup>6</sup> ♠ → ∰ 🎄 🗷 🖉 🔚 🗏 Ω 🖶 Ατ΄ Ατ
Styles 💌 Format	Font Size
ITS You	TT-Solutions4You
F	Phone: +421-51-7732370

In order to replace the original description with description 4You just click on button Replace. Please notice that original description will be overwritten i.e. lost.

Descriptio	Phone: +421-51-7732370		
Comments Information	Fecebook https://www.fecebook.com/pages/l Website:http://www.its4you.sk/en/	-solutione4You-ero/208502875850474	Show: All
scriptions Templates	Load Replace Save		
B / U ∞ X <sub>2</sub> X <sup>2</sup>	EE @ @ E 8 8 # ■ <b>8</b> ♥ < > # # # <b>E</b> 0 ■ ■	🚴 🏴 🗄 Source 🗌 🖗 [ Ξ Ω 🖏 Α:* 🗛*	1
Styles Format	IT-Solutions4You	Save	*
ITS You	Františkánske nám. 5 080 01 Prešov Phone: +421-51-7732370 Facebook: https://www.facebook.com/pages	descriptio	on 4You

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

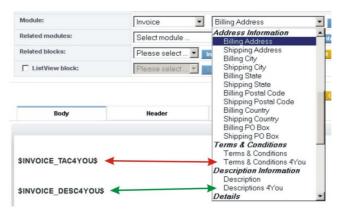
- Select the description 4You template and click on button Load
- 2. Edit the description 4You according to your needs.
- 3. Save the description 4You using button

# 5 Additional features

# 5.1 Support of the PDF Maker

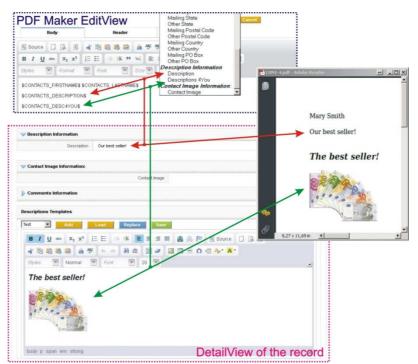
The Descriptions 4You (Desc4You) and Terms and Conditions 4You (T&C4You) which is also vTiger extensions used to create well formatted terms and conditions were already integrated into PDF Maker. Please refer to our web page or manual for details about Terms and Conditions 4You.

From PDF Maker point of view it is necessary to mention that separate fields for descriptions and terms and conditions created within Desc4You and T&C4You were introduced. They are *"Terms & Conditions 4You"* (\$\*\*\*\*\*\_TAC4YOU\$ for example \$INVOICE\_TAC4YOU\$ in Invoice module) and *"Descriptions 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 "Descriptions 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".



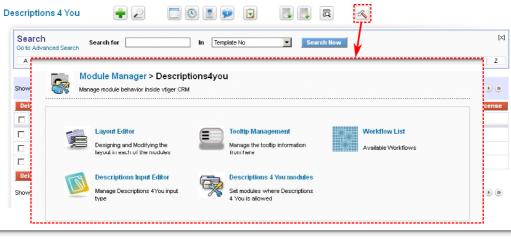
Picture 5.2 Description vs. Descriptions 4You in PDF Maker

# 6 Settings

The Descriptions 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
- Descriptions 4You settings:
  - Descriptions 4You Input Editor manage your input editor
    - Description 4You modules manage for which modules is Description 4You allowed

Please refer to following subchapters for details.



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### 6.1 Descriptions 4You Input Editor

There exists possibility to select Description 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 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 Description 4You buttons described in the chapter 4.4.

Manag	e Descriptions 4 You input type
	Save Cancel
Descriptions Inp	ut type CK editor CK editor is recommended for PDF maker. Textarea does not display HTML code correctly in the PDF exports.
Descriptions 41	fou buttons description:
Add	Add button loads content of the selected Descriptions template into the Descriptions 4you editor (Textarea or CKeditor).
Load	Load button loads descriptions field content of record into the Descriptions 4you editor.
Replace	Replace button to save a record for later adjustments, and to replace Descriptions of record. Visible in the detail view of records using the Descriptions 4you editor.

Picture 6.2 Settings Descriptions 4You Input Editor

### 6.2 Descriptions 4You modules

The Descriptions 4You is available for many modules. Within setting "Descriptions 4You modules" you can customize the visibility of the Descriptions 4You block (chapter 3.4) for particular module. Please use checkboxes  $\bowtie$  in the column "Allowed" to make Descriptions 4You block in/visible in the DetailView for particular module according to your needs.

Madula					
Module	Allowed				
Opportunities					
Contacts	<b>Z</b>				
Organizations					
Leads					
Trouble Tickets	×				

Picture 6.3 Setting Description 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 Descriptions 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 Description 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.

lesc	riptions 4 You	<b>+</b> 2	8 🛯 🗩 🕞	Deactivat	ion license
Sho	wing Records 1 - 3 of 3	F	Filters: 🗐 🔽 Create Filter   Ec	iit   Delete	0 0 1 of 1 🕨 🕒
D	elete Mass Edit Se	end Email		Reactivate	license Deactivate license
	Template Ilo	Template Name	Module	Assigned To	Action
Π	HH4	Contact	Contacts	Rastislav itstouryou	edit   del
	RHS	Company logo	Organizations	Rastislav Itsfouryou	edit   del
	RH6	Product simple	Products	Rastislav Itsfouryou	edit   del
Sho	wing Records 1 - 3 of 3		) 🖪 🗩 💼		(t) (t) 1 (t)
ſ	Deactivate lice	nse "testdesc4	you540''		
		Do You r	ealy want to dea	ctivate Your licer	nce kev/?
		Do loui	ealy want to dea		ISE KEY:
		After deactival	tion You will not be allowe	d to use Descriptions4you i	in any module.
			Deactivat	e license	
			1		
			1		
	Descriptions 4 Yo	u installation >> Vali	idation >> 1/2	Activat	ion license
	Welcome to This will install "D		You" Installation Wiza		ion license
	Welcome to This will install "D It is highly recom Please insert a	the "Descriptions 4 vescriptions 4 You" into your v mended to finish the installation license key you received	You" Installation Wiza	ard mail.	ion license
	Welcome to This will install "D It is highly recom Please insert a	the "Descriptions 4 vescriptions 4 You" into your v mended to finish the installation license key you received	You" Installation Wiza viger CRM. on without any interruption. I in purchase confirmation e	ard mail. dation.	ion license
	Welcome to This will install "D It is highly recome Please insert a Please make sure	the "Descriptions 4 vescriptions 4 You" into your v mended to finish the installation license key you received	Vou" Installation Wiz: vtiger CRM. on without any interruption. I in purchase confirmation e rnet access in order to run vali Validate Order no	ard mail. dation.	ion license
	Welcome to This will install "D It is highly recome Please insert a Please make sure make sure from the sure make sure please make sure the sure sure from the sure make sure please make sure please sure	the "Descriptions 4 escriptions 4 You" into your v mended to finish the installation license key you received that your server has an inte 4 You installation >	You" Installation Wiz: viger CRM. on without any interruption. In purchase confirmation e rinet access in order to run vali Validate Order no Finish >> 2/2 apply changes.	ard mail. dation.	ion license



### 6.4 Upgrade of the Descriptions 4You

The upgrade of Descriptions 4You can be started using upgrade link button <sup>3</sup> in the module manager and tab "Custom Modules".

	Standard Modules	Custom Modules
		Import New
2	Businesscase	ð 🗹 🖬 🔦
3	ConfigEditor	ð 🗹 🕇
3	CronTasks	I 🗹 🖬
2	CustomNumbering4you	2 🗹 🕇
2	Descriptions4you	a 🖬 🖌
2	EMAILMaker	/ 🖉 🖬 🔦
3	Import	2 🗹 🖬
3	Improvements4You	🖉 🗹 🗹 🔨
2	Integration	🦰 🖬 🕹 🗹 🛨
3	ListViewColors	a 🖉 🚽 👌 🗹 🗗
3	MailManager	ð 🗹 🖯
3	Mobile	2 🗹 🛨
3	MultiCompany4you	2 🗹 🖬 🔨
2	PDFMaker	ð 🗹 🖬 🔦
3	Tac4you	2 🗹 🖬 🔨
2	WSAPP	♂ ☑ F

Picture 6.5 Initialization the upgrade of the Description 4You

Please browse the package using button Browse... and click on button Upgrade.

Set	tings > Module N	Manager > Upgra	de		
C Mana	ge module behavior insid	e vtiger CRM			
Select the Pa	ckage File				
* File location	e [		Bi	rowse	
	vtiger module	is packaged as a zip file.			
				Upgrade	Cancel

Picture 6.6 Upgrade of Descriptions 4You

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

	Settings > Module Manager > Upgrade
S	Manage module behavior inside vtiger CRM
Upora	ide Failure
-040-0000	
Canno	t upgrade! Installed Version 540.3.0 matches Package Version
	Finish



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