

# ITS **4** You

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## IT-Solutions4You

### PREINVOICE 4 YOU for VTIGER CRM 6.x

#### Introduction

##### *PreInvoice – Pro-forma Invoice – Preliminary Invoice*

An abridged or estimated invoice sent by a seller to a buyer in advance of a shipment or delivery of goods. It notes the kind and quantity of goods, their value, and other important information such as weight and transportation charges. Pro forma invoices are commonly used as preliminary invoices with a quotation, or for customs purposes in importation. Proforma invoices are not recorded as an accounts receivable by the seller nor are they recorded as an accounts payable by the buyer.

Extension **PreInvoice 4 You** allows you to create PreInvoice from Quotes and Sales Order without risk that buyer does not pay Invoice and you will have to cancel Invoice. Also it is good way to create records of payment's deposits and then create real Invoice. **PreInvoice 4 You** is compatible with PDF Maker Professional, that means you are able to create PDF file from PreInvoice which you have created.

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## License agreement

- The PreInvoice 4 You will be referred to as "The license" in the remainder of this text.
- This irrevocable, perpetual license covers all versions 2.xx of PreInvoice 4 You.
- This license gives the holder right to install PreInvoice 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 PreInvoice 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 PreInvoice 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.
- PreInvoice 4 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 PreInvoice 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

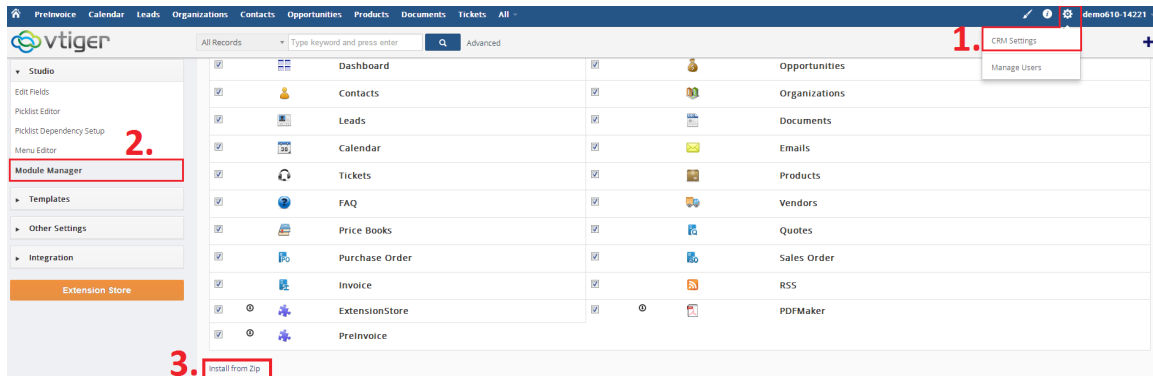
During installation it is necessary to exchange following information:

- vtigerCRM version (e.g. 6.x)
- PreInvoice 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 PreInvoice 4 You

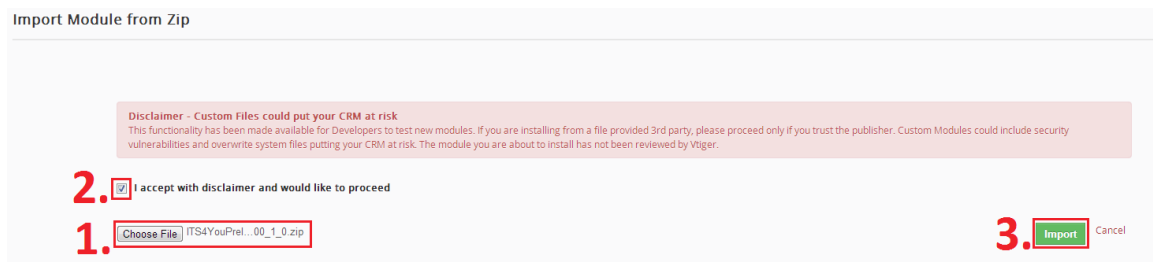
Please provide following steps in order to install PreInvoice 4 You:

1. Install the .zip (package) file of the PreInvoice 4 You module via CRM Settings -> Module Manager. Click on the **Install from Zip** .



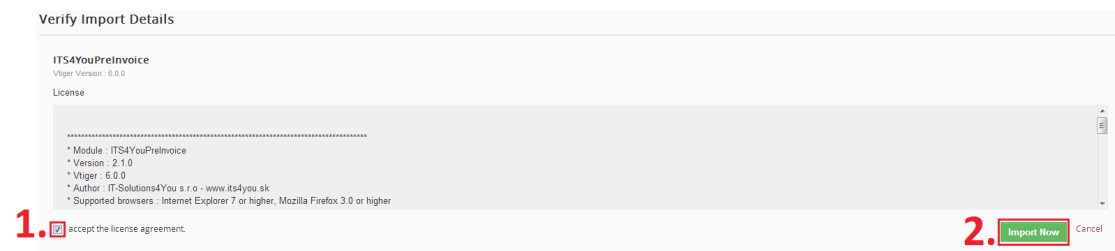
Picture 1.1: Installation of PreInvoice– Step 1

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.



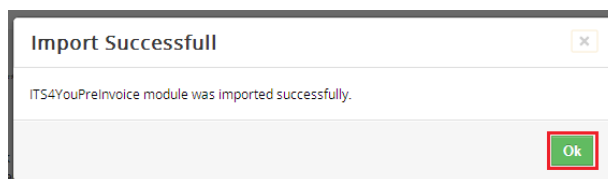
Picture 1.2: Installation of PreInvoice – Step 2

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.



Picture 1.3: Installation of PreInvoice – Step 3

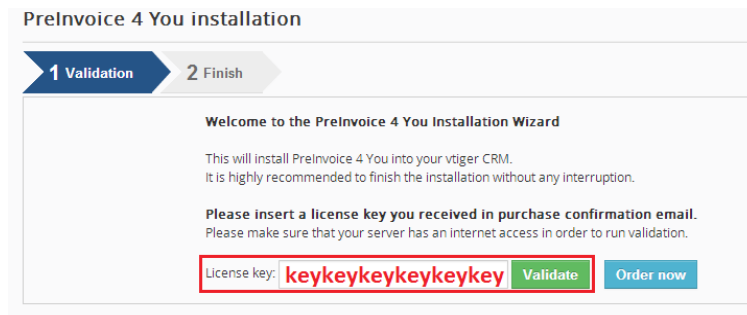
4. Click on **Ok** button to complete the module import.



Picture 1.4: Installation of PreInvoice – Step 4

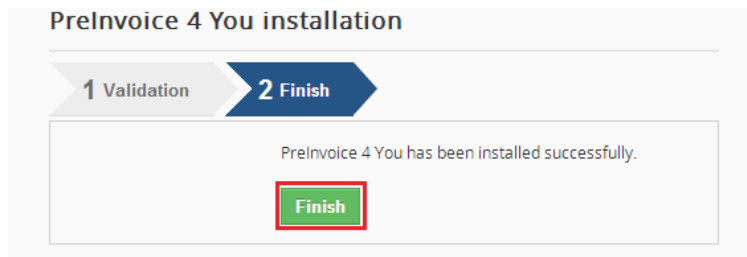
In order to finish installation, please provide following validation steps.

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



*Picture 1.5: Validation of PreInvoice – Step 1*

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



*Picture 1.6: Validation of PreInvoice – Step 2*

For Upgrade please check 5.3 Upgrade.

## 2 How to Create PreInvoice

### 2.1 Create PreInvoice from Sales Order

The mostly way to create PreInvoice, is generate PreInvoice from existing Sales Order. To create PreInvoice from Sales Order you have to provide following steps:

1. Go to **Sales Order** List and choose a Sales Order (Picture 2.1)
2. Click on **More** and now you have 2 option (Picture 2.2):
  - **Create PreInvoice** – if you do not need products from Sales Order in PreInvoice (e.g. Percentage PreInvoice of Sales Order, ... )
  - **Create PreInvoice with Products** – if you want to make PreInvoice with products and services from Sales Order
3. In appeared window please specify PreInvoice details according to your needs and click on **Save** button (Picture 2.3)

Subject	Organization Name	Quote Name	Total	Assigned To
SO3	Acc10	--	€2,946.40	demo610-14221 Administrator
SO2	Acc10	--	€1,104.90	demo610-14221 Administrator
SO1	Acc10	--	€787.40	demo610-14221 Administrator

Picture 2.1: Create PreInvoice from Sales Order

Sales Order Details

Subject	SO3	Opportunity Name	
Customer No		Sales Order Number	SO3
Quote Name		Purchase Order	
Contact Name		Due Date	
Carrier		Pending	
Status	Created	Sales Commission	0
Excise Duty	0	Organization Name	Acc10
Assigned To	demo610-14221 Administrator	Created Time	21-08-2014 15:43:53
Modified Time	21-08-2014 15:43:53		

Picture 2.2: Create PreInvoice from Sales Order

Creating New PreInvoice

Item Name	Quantity	Unit Price	Total	Net Price
Items	12	52.75	633.00	510.00

Grand Total: 633.00

Picture 2.3: Create PreInvoice with products from Sales Order

## 2.2 Create PreInvoice from Quotes

Next option to create PreInvoice is from existing Quotes. To create PreInvoice from Quote you have to provide following steps:

1. Go to **Quotes** List and choose a Quote (Picture 2.4)
2. Click on **More** and now you have 2 options (Picture 2.5):
  - **Create PreInvoice** – if you do not need products from Quote in PreInvoice (e.g. Percentage PreInvoice from Quote, ... )
  - **Create PreInvoice with Products** – if you want to make PreInvoice with products and services from Quote
3. In appeared window please specify PreInvoicedetails according to your needs and click on **Save** button (Picture 2.6)

Subject	Quote Stage	Opportunity Name	Organization Name	Total	Assigned To
Quote_3	Created	--	meine	€2,730.50	demo610-14221 Administrator
Quote_2	Created	--	meine	€2,501.90	demo610-14221 Administrator
Quote_1	Created	--	meine	€273.06	demo610-14221 Administrator


Picture 2.4: Create PreInvoice from Quote

Picture 2.5: Create PreInvoice from Quote



Item Name	Quantity	Unit Price	Total	Net Price
Product	14	50.00	700.00	700.00
<b>Items Total</b>			700.00	700.00
- Discount			0.00	0.00
+ Shipping & Handling Charges			0.00	0.00
<b>Net To Total</b>			700.00	700.00
+ Tax			0.00	0.00
+ Taxes For Shipping and Handling			0.00	0.00
Adjustment (gH4) (Details)			0.00	0.00
<b>Grand Total</b>			700.00	700.00

Picture 2.6: Create PreInvoice with products from Quote

## 2.3 Create new PreInvoice

Alternately, you can create new PreInvoice by using  button(Picture 3.1).

To create PreInvoice please provide following steps:

1. Click on  button
2. In appeared window please specify PreInvoice details according to your needs
3. Click on  button



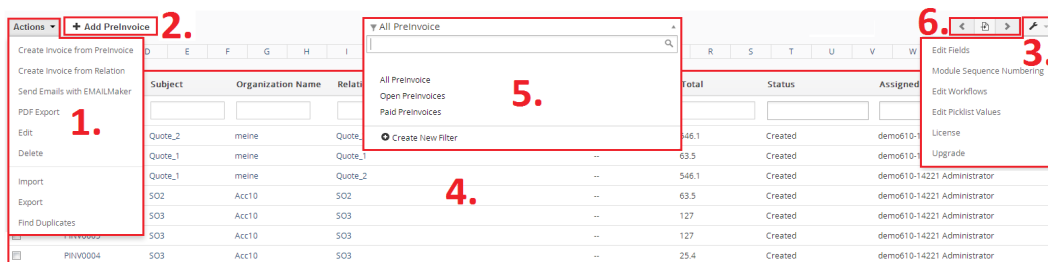
### 3 Work area

Work area of PreInvoice 4 You consists of:

1. ListView – used for common tasks like add new, edit and delete PreInvoice, import and export PreInvoice and access to others tools
2. DetailView – shows already created PreInvoice in details
3. References – show references to another Modules

#### 3.1 ListView

The common tasks like add/delete PreInvoice, import/export PreInvoice or start editing have to be initiated via PreInvoice 4 You ListView. Go to **All → MARKETING & SALES → PreInvoice** and PreInvoice 4 You ListView will appear on your screen.



Picture 3.1: Work area of PreInvoice 4 You

The main part of the PreInvoice 4 You ListView consists of list of the PreInvoice, which gives you information about a PreInvoice name, a reference, an amount and related dates. As shown in the picture, above the list of the payments you can find following:

1. **Actions** area – contains actions for mass edit, delete, import and export, finding duplicates. For options of PDF Export, Send Emails with EMAIL Maker please see (Additional features), create invoice from Preinvoice (4.1 Create Invoice from PreInvoice), create invoice from Relation (4.2 Create Invoice from Relation).
2. **+ Add PreInvoice** button – is used to add new PreInvoice
3. **Settings** area – vtiger related tools, License settings and Upgrade
4. List of created PreInvoices
5. **All PreInvoice** – filtering
6. **Navigation bar**

#### 3.2 DetailView

From ListView you can directly open any PreInvoice in DetailView. The DetailView consists of:

- PreInvoice details part
- Group of action buttons
  - **Edit** – switch to EditView and start editing

- **More** – allows to delete, duplicate, create Invoice, export to PDF and send Email with PDF (for support of PDF Maker and Email Maker please see Additional features)
- **Tools** – vtiger related tools, license setting and upgrade of PreInvoice 4 You
- **Navigation** – navigation buttons (previous/next PreInvoice)
- References part – most important is reference to Documents
- PDF Maker and Email Maker area – allows to create PDF or send mail with PDF please see (Additional features)

**PreInvoice List**

**Quote\_1**

**switch to EditView** → Edit More ↕

**navigation**

**support of PDF Maker and Email Maker**

**references**

**PreInvoice details**

**PreInvoice Details**

**Documents**

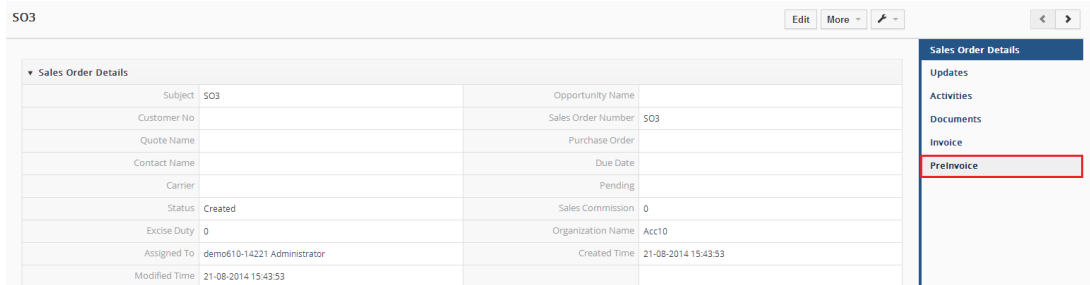
Item Details		Currency - Euro(E)	Tax Mode - group		Net Price
Item Name	Quantity	List Price	Total		
Papoo1	1	50.00	50.00		50.00
		(-) Discount :	0.00		
		<b>Total After Discount :</b>	50.00		
			<b>Items Total</b>		<b>50.00</b>
			(-) Discount		0.00
			(-) Shipping & Handling Charges		0.00
			<b>Pre Tax Total</b>		<b>50.00</b>
			(-) Tax		13.50
			(-) Taxes For Shipping and Handling		0.00
			<b>Adjustment</b>		<b>0.00</b>
			<b>Grand Total</b>		<b>63.50</b>

Picture 3.2: DetailView of PreInvoice

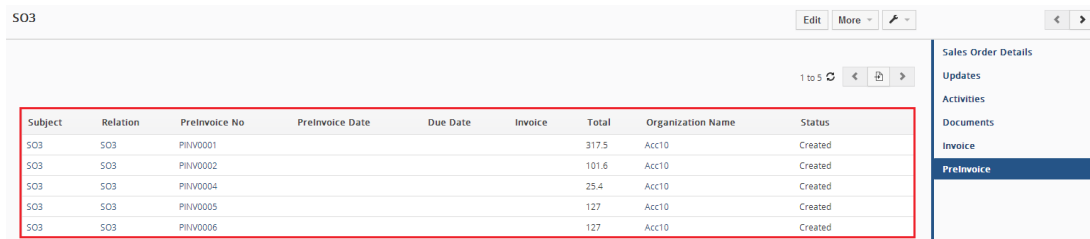
### 3.3 Reference

Every PreInvoice, you have created and is assigned to Sales Order or Quotes you can find in DetailView of Sales Order or Quotes.

1. To show PreInvoice assigned to Sales Order please go to **Sales Order** module, choose your Sales Order and click on **PreInvoice** link(Picture 3.3).

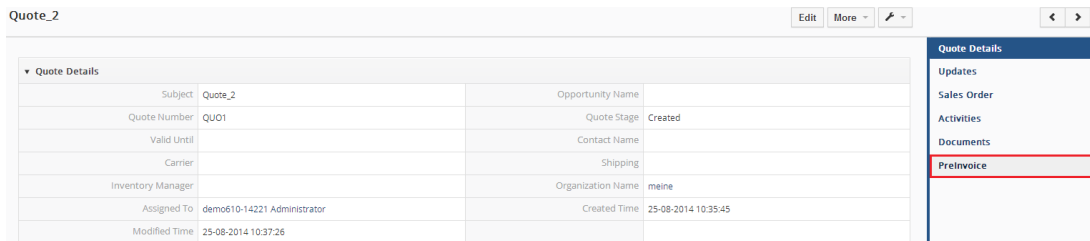


Picture 3.3: PreInvoice in DetailView of Sales Order



Picture 3.4: PreInvoices related to Sales Order

2. To show PreInvoice assigned to Quotes please go to **Quotes** module, choose your Quote and click on **PreInvoice** link(Picture 3.5).



Picture 3.5: PreInvoice in DetailView of Quote

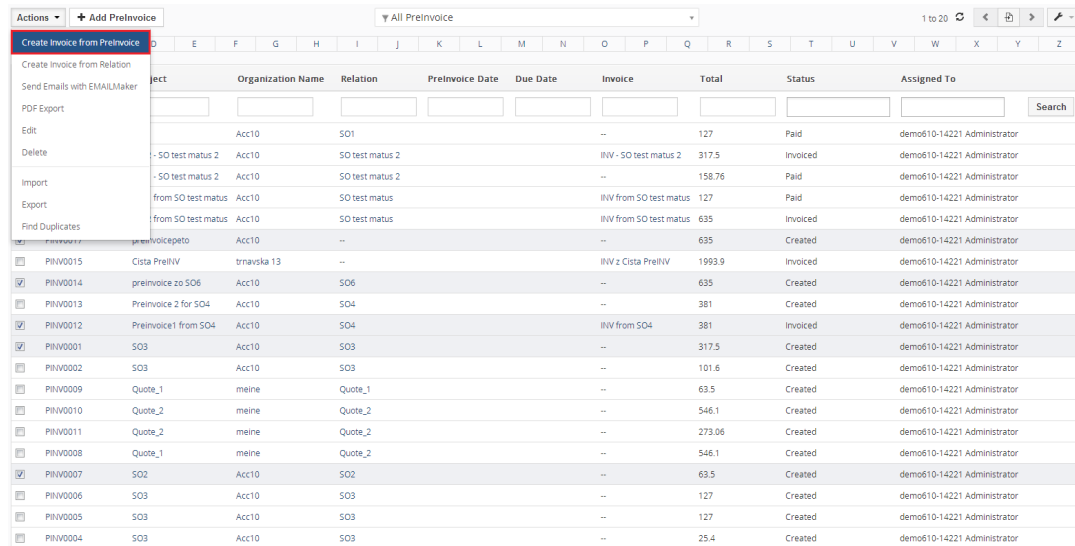


Picture 3.6: PreInvoices related to Quote

## 4 Additional features

### 4.1 Create Invoice from PreInvoice

In the DetailView of PreInvoice you are able to create Invoice. To create Invoice you need to choose one or more Preinvoice(s). Please note that organization must be the same. Click on **Actions** button and then **Create Invoice from PreInvoice**. In appeared window please specify PreInvoice details according to your needs and click on **Save** button.



The screenshot shows a web application interface for managing PreInvoices. At the top, there is a search bar with 'All PreInvoice' and a '1 to 20' indicator. Below this is a table with columns: Object, Organization Name, Relation, PreInvoice Date, Due Date, Invoice, Total, Status, and Assigned To. A dropdown menu is open over the table, with 'Create Invoice from PreInvoice' highlighted in red. The table contains several rows of data, including PreInvoice IDs like P#INV0015, P#INV0014, P#INV0013, P#INV0012, P#INV0001, P#INV0002, P#INV0009, P#INV0010, P#INV0011, P#INV0008, P#INV0007, P#INV0006, P#INV0005, and P#INV0004.

Object	Organization Name	Relation	PreInvoice Date	Due Date	Invoice	Total	Status	Assigned To
P#INV0015	Cista PreiIV	trnavska 13	--	--	INV z Cista PreiIV	1993.9	Invoiced	demo610-14221 Administrator
P#INV0014	preinvoice zo SO6	Acc10	SO6	--	--	635	Created	demo610-14221 Administrator
P#INV0013	Preinvoice 2 for SO4	Acc10	SO4	--	--	381	Created	demo610-14221 Administrator
P#INV0012	Preinvoice1 from SO4	Acc10	SO4	--	INV from SO4	381	Invoiced	demo610-14221 Administrator
P#INV0001	SO3	Acc10	SO3	--	--	317.5	Created	demo610-14221 Administrator
P#INV0002	SO3	Acc10	SO3	--	--	101.6	Created	demo610-14221 Administrator
P#INV0009	Quote_1	meine	Quote_1	--	--	63.5	Created	demo610-14221 Administrator
P#INV0010	Quote_2	meine	Quote_2	--	--	546.1	Created	demo610-14221 Administrator
P#INV0011	Quote_2	meine	Quote_2	--	--	273.06	Created	demo610-14221 Administrator
P#INV0008	Quote_1	meine	Quote_2	--	--	546.1	Created	demo610-14221 Administrator
P#INV0007	SO2	Acc10	SO2	--	--	63.5	Created	demo610-14221 Administrator
P#INV0006	SO3	Acc10	SO3	--	--	127	Created	demo610-14221 Administrator
P#INV0005	SO3	Acc10	SO3	--	--	127	Created	demo610-14221 Administrator
P#INV0004	SO3	Acc10	SO3	--	--	25.4	Created	demo610-14221 Administrator

Picture 4.1: Create Invoice from PreInvoice

In the created Invoice will be (all) product(s) and service(s) from Preinvoice(s) included.

### 4.2 Create Invoice from Relation

You are able to create Invoice from Relation. To create Invoice please choose one or more Preinvoice(s). Click on **Actions** button and then **Create Invoice from Relation**. In appeared window please specify PreInvoice details according to your needs and click on **Save** button.

In the created Invoice will be (all) product(s) and service(s) assigned to Relation(s) included.

### 4.3 Support of PDF Maker

The PDF Maker is extension tool designed by ITS4You for vtiger CRM. It is powerful and flexible tool which allows users of vtiger CRM to create own pdf templates.

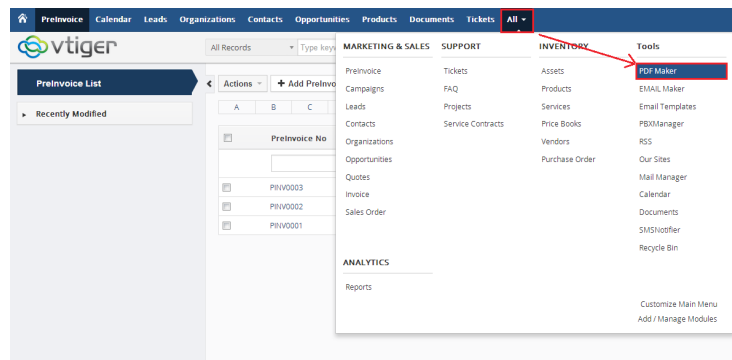
**Please note that this will work only with PDF Maker Professional.**

Before creating PDF file you need to create template of PDF Maker. To create template please check manual for PDF Maker:

([http://www.its4you.sk/images/pdf\\_maker/pdf\\_maker\\_for\\_vtiger6\\_crm.pdf](http://www.its4you.sk/images/pdf_maker/pdf_maker_for_vtiger6_crm.pdf))

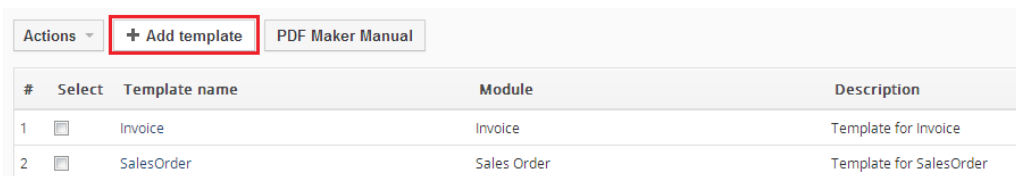
or please provide following steps:

1. In vtiger CRM menu (Picture 4.1), please go to **All -> Tools** and click on **PDF Maker**



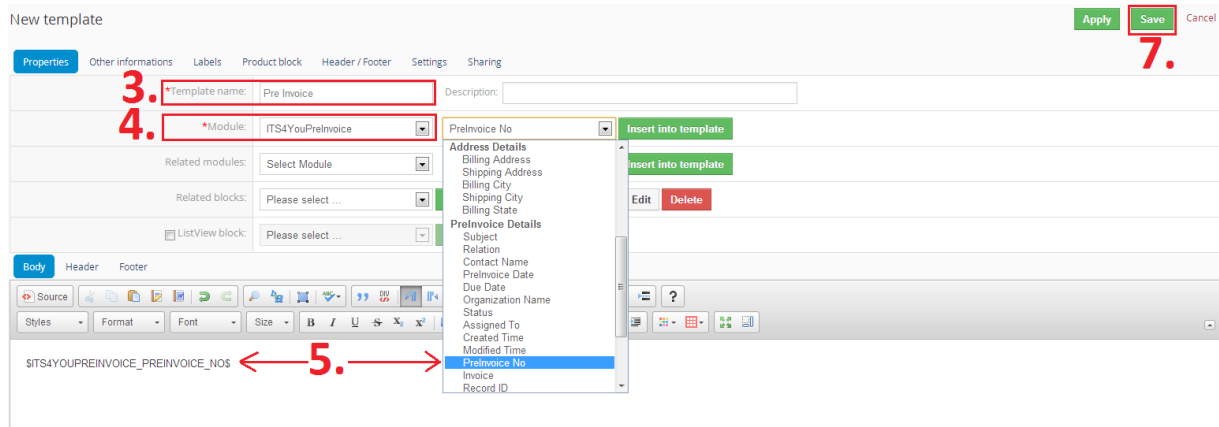
Picture 4.2: Create template – Step 1

2. The screenshot below (Picture 4.2) shows PDF Maker ListView. You can click on **+ Add template** to add new template.



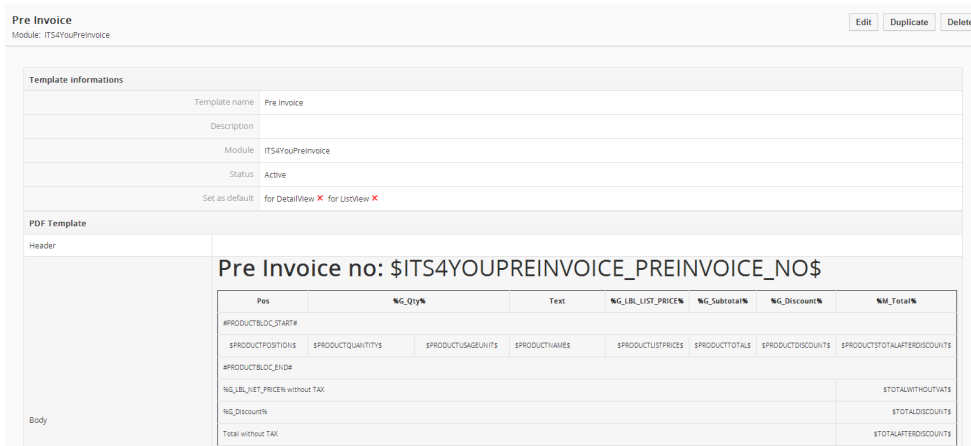
Picture 4.3: Create template – Step 2

3. In the EditView (Picture 4.3), go to Properties tab and define the template name and the description.



Picture 4.4: Create template – Step 3,4,5,6,7

4. Choose the module from the list (i.e. ITS4YouPreInvoice).
5. Choose one of the all available fields from the selected module (i.e. PreInvoice No) and **Insert into template** click on button
6. Repeat the steps 5. and 6. to finish your pdf template according to your needs
7. Finally click on the **Save** button

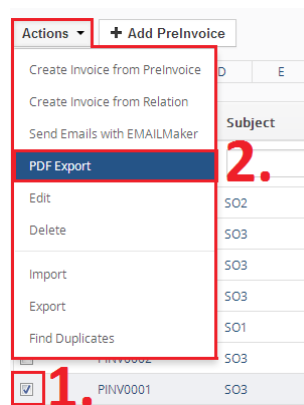


Picture 4.5: PDF Maker template for PreInvoice 4 You

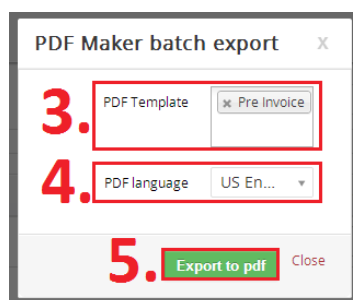
In the following pictures you can see how to generate PDF file in the ListView or DetailView using PDF Maker:

### ListView

1. Select record(s)
2. Click on **Actions** button and select "PDF Export"
3. Select the PDF template(s)
4. Select the language
5. Click on **Export to pdf** button
6. Dialog box will appear on the screen depending on your web browser. The PDF file is generated




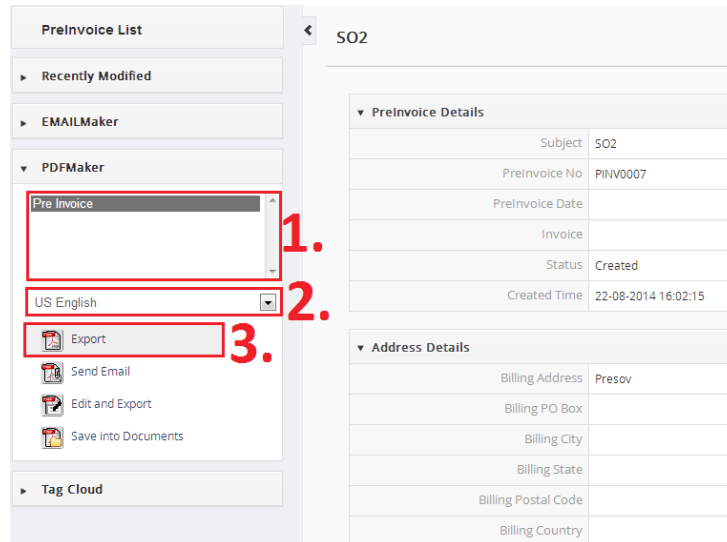
Picture 4.6: Create PDF file from ListView – Step 1,2



Picture 4.7: Create PDF file from ListView – Step 3,4,5

## DetailView

1. Select the PDF template(s)
2. Select the language
3. Click on  Export link
4. Dialog box will appear on the screen depending on your web browser. The PDF file is generated



Picture 4.8: Create PDF file from DetailView – Step 1,2,3

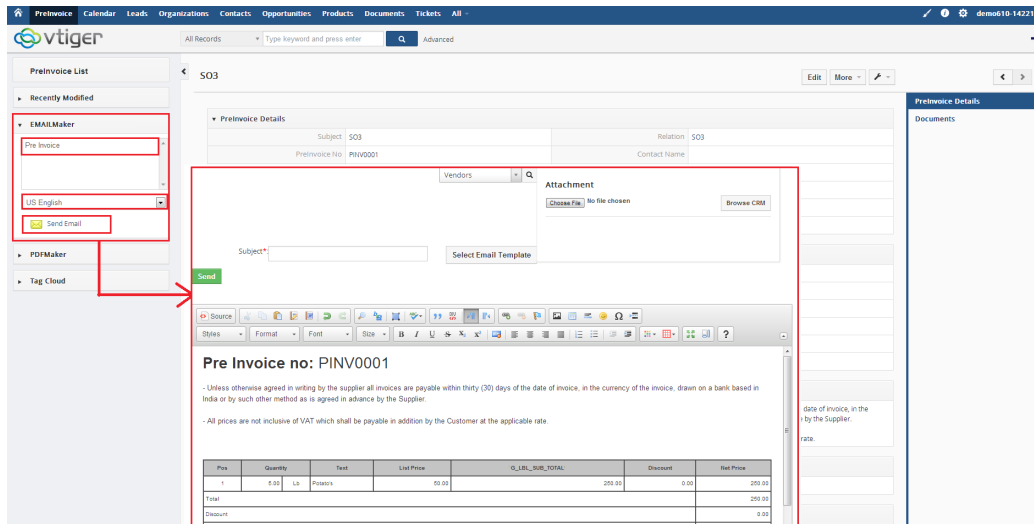
## 4.2 Support of Email Maker

The Email Maker is extension tool designed for the vtiger CRM. Using EMAIL Maker you can create email templates with predefined information and send them from all the modules. There are available all the fields from source and related modules, the fields related to recipients, the company information and many more. The intention was to provide powerful and flexible tool which allows users of vtiger CRM to create own email templates. Using the email templates you can send mass emails from ListViews (e.g. Invoices, Quotes, Products, etc.) and finally save lot of your time. Sending is running in background. You are informed about sending process by small popup window.



Picture 4.9: Email Maker

You are able to send Email from DetailView of PreInvoice.



Picture 4.10: Sending Email from DetailView of PreInvoice

Notice: If POP-up window do not show, please allow POP-up window in your browser.

Full functionality of Email Maker you can find on following link:

[http://www.its4you.sk/images/stories/email-maker/Email\\_Maker\\_for\\_vtiger\\_CRM\\_6.pdf](http://www.its4you.sk/images/stories/email-maker/Email_Maker_for_vtiger_CRM_6.pdf)

## 4.5 Support of CashFlow4You

The Cashflow4You module is designed for vtiger CRM 6.x. The Cashflow4You module helps you to register your incoming or outgoing payments and associate that payment with other entities in the vtiger CRM Open Source. The extension allows you to track incoming payments that we will receive from customers or will have to make in the future. So it is easy to create a Report or Custom view on payments forecast for incoming or outgoing payment made by our company. It enables you to define payments for some categories like (goods, services, ...).

▼ Payments		
<b>Grand Total</b>		<b>1,270.00 €</b>
Received	04-09-2014	100.00 €
Paid	10-09-2014	150.00 €
Waiting	11-09-2014	200.00 €
<b>Total amount</b>		<b>150.00 €</b>
<b>Balance</b>		<b>1,120.00 €</b>

↑  
 click here to create new payment

Picture 4.11: Payment block of Cashflow4You

For more information about **CashFlow4You** please check:

<http://www.its4you.sk/images/cashflow4you/Cashflow4You.pdf>


<http://www.its4you.sk/en>

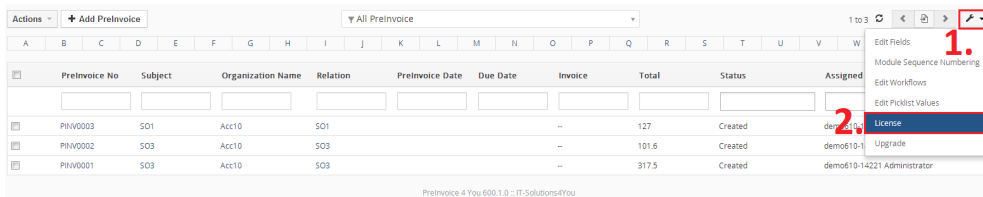


## 5 Settings

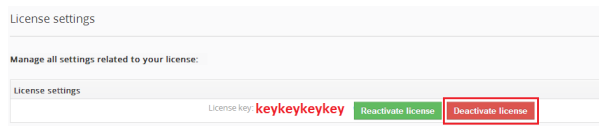
### 5.1 Deactivate license

In case you need to reinstall PreInvoice 4 You you have to deactivate and reactivate license key. To deactivate license key please provide following steps:

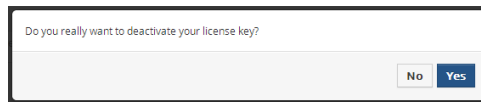
1. Click on 
2. Click on Licence
3. Click on **Deactivate license** button
4. Confirm deactivation with button **Yes**



Picture 5.1: Deactivate PreInvoice – Step 1,2



Picture 5.2: Deactivate PreInvoice – Step 3

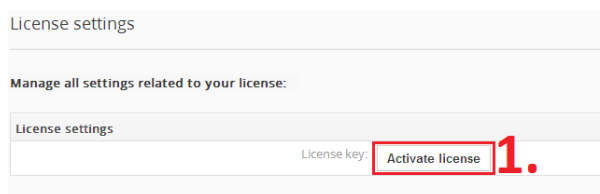


Picture 5.3: Deactivate license of PreInvoice – Step 4

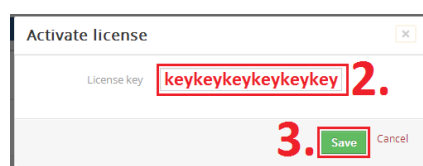
After deactivation of license PreInvoice 4 You doesn't work at all and PreInvoice 4 You work area is not accessible either as you can see on Picture 5.4.

To reactivate license you have to provide following steps:

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



Picture 5.4: Activate license of PreInvoice – Step 1

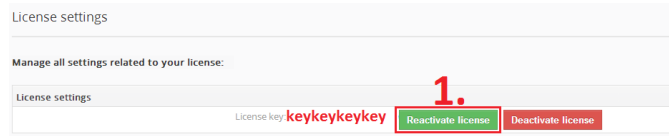


Picture 5.5: Activate license of PreInvoice – Step 2,3

## 5.2 Reactivate license

In case that some problem occurs with license key (moving, copying, migrating) you need to reactivate your license key. To reactivate license key please provide following step:

1. Click on **Reactivate license**
2. Insert license key
3. Click on **Save**



Picture 5.6: Reactivate license of PreInvoice – Step 1



Picture 5.7: Reactivate license of PreInvoice – Step 2,3

## 5.3 Upgrade

The upgrade of the PreInvoice 4 You is initiated in the same way as PreInvoice 4 You installation. So please refer to above installation part for details how to initiate the import module from zip (Picture 1.1). As can be seen on the below picture you will be notified that the PreInvoice 4 You module already exists. The upgrade will start immediately when you click on the **Update Now** button. After upgrade the notification about successful upgrade is shown and click on **Ok** button.



Picture 5.8: Upgrade PreInvoice 4 You

## Change log of PreInvoice 4 You

- December 2014: **600.1.1**
  - bug fixes
- September 2014: **600.1.0**

## Change log of Manual for PreInvoice 4 You

- September 2014: manual is based on PreInvoice 4 You version: **600.1.0**
  - first initiate version for vTiger 6.1