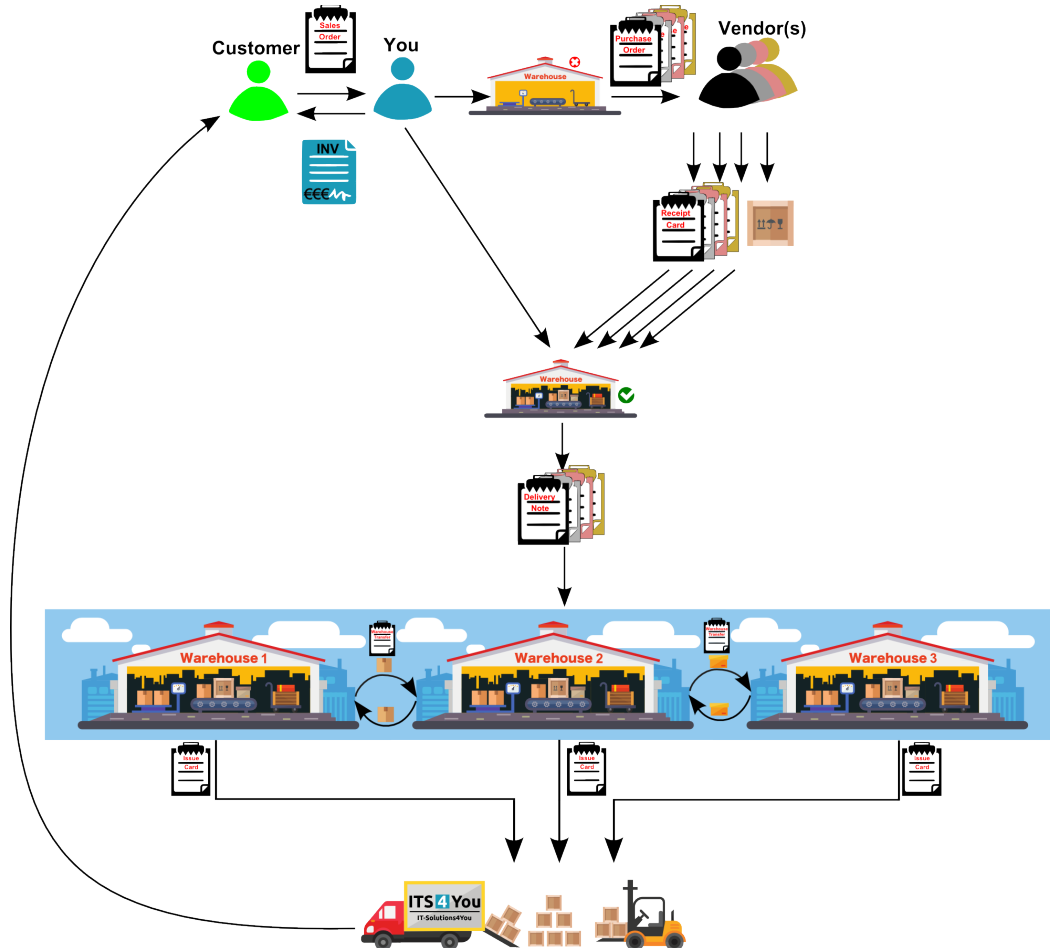


## WAREHOUSES 4 You for VTIGER CRM 6.x



- Are you looking for **Warehouse** module for **vtiger 6.x.x**?
  - **Yes.** -> **Warehouses 4 You** is for You
  - **Yes, but I have more Warehouses.** -> **Warehouses 4 You** is for You
  - No. -> maybe **Warehouses 4 You** change your mind
- Do you want to be able create Delivery Note, Issue Cards or Receipt Cards in vtiger?
  - Answer is **Warehouses 4 You**

### Benefits of **Warehouses 4 You**:

- unlimited count of **Warehouses**
- unlimited count of **Products** or **Services**
- compatible with **vtiger 6.x.x**
- other useful modules: Delivery Notes, Outgoing Products, Incoming Products, Issue Card, Receipt Card

# Content

License agreement .....	3
Terms and conditions.....	3
Private policy .....	3
1 How to install Warehouses 4 You.....	4
2 Modules included in Warehouses 4 You.....	6
2.1 Warehouses.....	7
2.2 Warehouse Transfer.....	7
2.3 Issue Card.....	8
2.4 Receipt Card.....	8
2.4 Incoming Products.....	9
2.5 Outgoing Products.....	9
2.7 Delivery Notes.....	9
3 How to start using Warehouses.....	10
3.1 Create Warehouse.....	10
3.2 Add your Product(s) into Warehouse.....	11
4 The process of using Warehouses.....	13
4.1 SO → DN → INV.....	13
4.2 INV → DN.....	19
5 Blocks and Variables of Warehouses 4 You.....	32
5.1 Blocks of Warehouses.....	32
5.2 Variables.....	35
6 Settings.....	36
6.1 Deactivate license.....	36
6.2 Reactivate license.....	37
6.3 Update.....	38
6.4 Uninstall.....	39
6.5 Enable/Disable Services in Delivery process.....	40
7 Tips & tricks.....	41
7.1 Rename blocks of Warehouses 4 You.....	41
7.2 All Warehouses modules together.....	42
7.3 Aren't You sure about quantity of Products in your Warehouses?.....	43
Change log of Warehouses 4 You.....	44
Change log of Manual for Warehouses 4 You.....	44

## License agreement

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

**It is strongly required to deactivate the license before moving installation to another server (different url) in order to avoid any license conflicts.  
After movement and repeated installation you can reactivate your license.**

## Terms and conditions

We accept all major credit cards, PayPal and Bank transfer. Our deliveries:

Credit Card: delivered immediately

PayPal: delivered immediately

Bank transfer: delivered in 2 - 5 days

After payment you will obtain email with info for download and your license key as well.

## Private policy

During installation it is necessary to exchange following information:

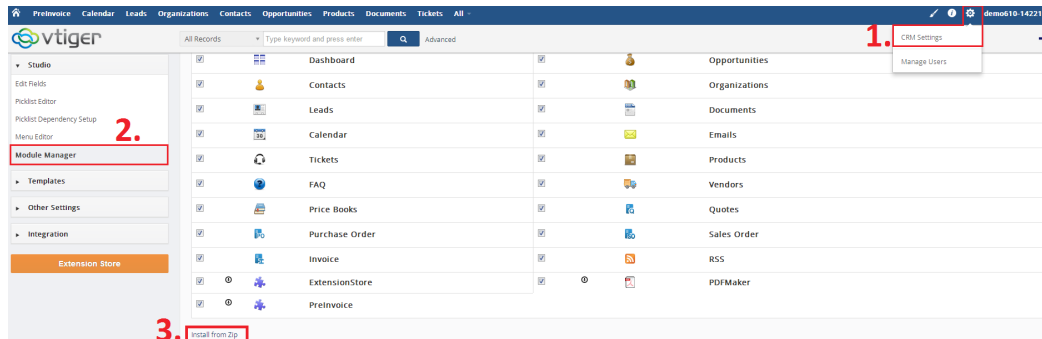
- vTiger CRM version (e.g. 6.x)
- Warehouses 4 You version (e.g. 2.xx)
- Date and time
- Domain in md5 coding format (e.g. 916b25c201a77a6721003c0030977f3b)
- Action provided by you (INSTALL, REACTIVATE, DEACTIVATE)

# 1 How to install Warehouses 4 You

Following process you can also find: <https://youtu.be/vHUm8PFIFkw>

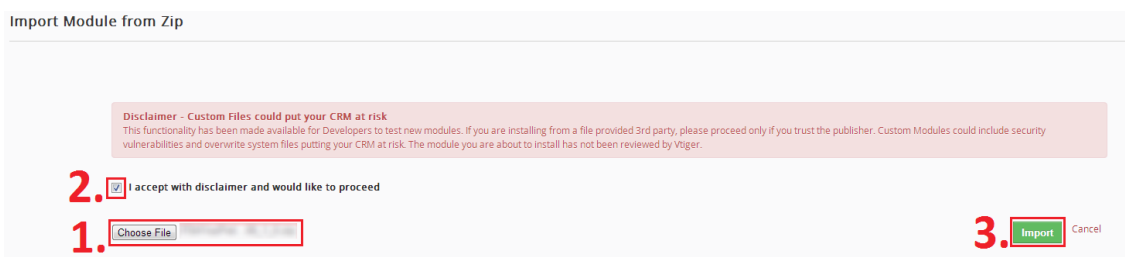
Please provide following steps in order to install Warehouses 4 You:

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



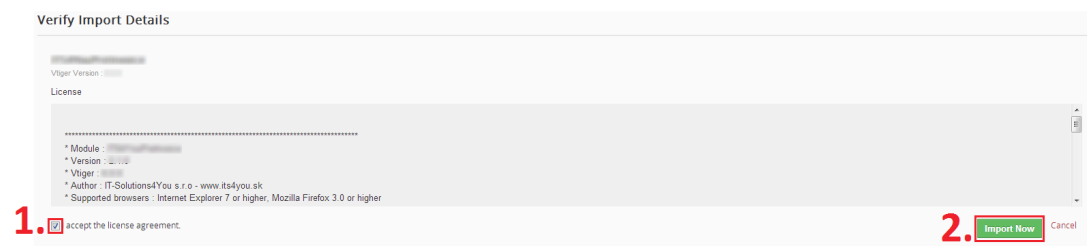
Picture 1.1: Installation of Warehouses 4 You – Step 1

2. Select the .zip (package) file that you downloaded from our shop. Please check that you accepted the disclaimer and would like to proceed. Click on the **Import** button.



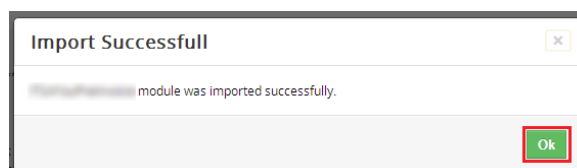
Picture 1.2: Installation of MultiWarehouses 4 You – Step 2

3. Verify the import details parsed from the .zip (package) file. Please check that you accepted the license agreement and click **Import Now** to proceed **Cancel** or to cancel.



Picture 1.3: Installation of Warehouses 4 You – Step 3

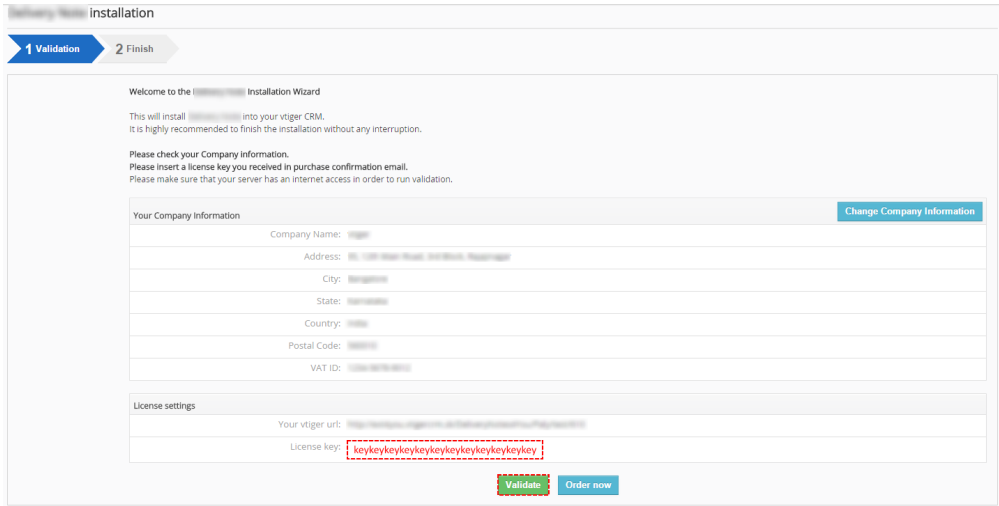
4. Click on **Ok** button to complete the module import.



Picture 1.4: Installation of Warehouses 4 You – Step 4

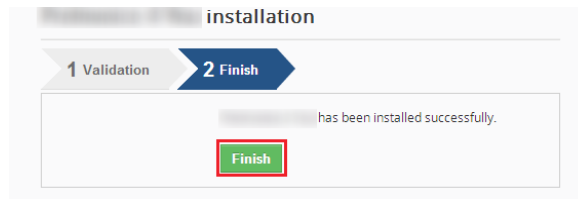
In order to finish installation, please provide following validation steps:

1. Warehouses 4 You Validation Step. Please check your Company information and insert license key. Make sure that your server has **Internet access**. Click on **Validate** button. If you want to change your Company information click on **Change Company Information** button.



Picture 1.5: Validation of Warehouses 4 You – Step 1

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



Picture 1.6: Validation of Warehouses 4 You – Step 2

For Upgrade please check 6.3 Update.

After successful installation, we would recommend to check these workflows and deactivate (if they are active).



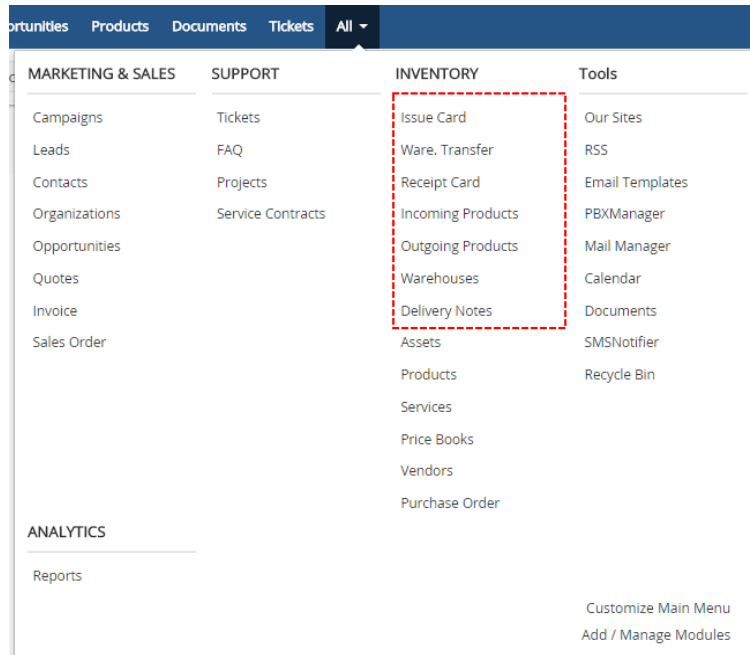
Picture 1.7: Deactivate Invoice Workflow



Picture 1.8: Deactivate Purchase Order Workflow

## 2 Modules included in Warehouses 4 You

After installation of Warehouses your vtiger will contain these modules:



- Warehouses - serves to add Warehouse(s) into your vtiger
- Warehouse Transfer - serves to transfer Product between Warehouses
- Issue Card - serves to issue Product from Warehouse
- Receipt Card - serves to add Products to your Warehouse
- Incoming Products - evidence of incoming Products
- Outgoing Products - evidence of outgoing Products
- Delivery Notes - allows you create Delivery Note

Now, You can read short description of these modules. Usage will be described in process of usage.

## 2.1 Warehouses

Here you can see and add your Warehouses.

Warehouse No	Warehouse Name	Street	City	State	Country	Description	Assigned To
WH2	Warehouse2					testwarehouse2	Warehouses
WH1	Warehouse1					testwarehouse1	Warehouses

Picture 2.1: Warehouses

## 2.2 Warehouse Transfer

Warehouse Transfer is used for transferring Products from one Warehouse to other Warehouse. Products Quantity of Warehouse Transfer is deducted from submission Warehouse. After confirmation of receive Products of receiving Warehouse, Quantity is imputed to Warehouse's Product Quantity.

Warehouses Transfer Information	
Subject	Transfer1
From Warehouse	Warehouse1
To Warehouse	Warehouse2
Warehouses Transfer No	WT1
Required Delivery Date	Due Date
Requisition No	Tracking No
Status	Transferred from Warehouse
Assigned To	Warehouses
Carrier	
Modified Time	02-05-2016 2:53 PM
Created Time	02-05-2016 2:51 PM

Description Information	
Description	

Item Details	
*Item Name	Quantity
product1	10

Picture 2.2: Warehouse Transfer

## 2.3 Issue Card

Issue Card module serves to issue Product from Warehouse. The reason may be Promo action or you can based Issue Card create Delivery Note.

The screenshot shows the 'Issue Card' module interface. At the top, there are navigation tabs: Opportunities, Products, Documents, Tickets, Issue Card, and All. Below the tabs is a search bar with the text 'All Records' and a search icon. The main content area displays the details for 'IC6'. A progress bar at the top indicates the status: Created, Approved, Transferred from Warehouse (highlighted), and Delivered. To the right of the progress bar are buttons: Return Products, Cancel Issue Card, Edit, and More. Below the progress bar is a table with the following data:

Issue Card Information	
Issue Card No	IC6
Warehouse	Warehouse1
Day of issue	02-05-2016
Type	
Related to	
Created Time	02-05-2016 2:31 PM

Below this table is another table for 'Description Information':

Description Information	
Description	Promo

At the bottom, there is an 'Item Details' table:

*Item Name	Qty. in Stock	Quantity
product1	110	5

On the right side, there is a sidebar titled 'Issue Card Details' with links for Updates, Documents, and Receipt Cards.

Picture 2.3: Issue Card

## 2.4 Receipt Card

Receipt Card module is used for adding Products to your Warehouse. You can see here Warehouse transfers. Also you can see receipt products from your Purchase Order(s).

The screenshot shows the 'Receipt Card' module interface. At the top, there are navigation tabs: Opportunities, Products, Documents, Tickets, Receipt Card, and All. Below the tabs is a search bar with the text 'All Records' and a search icon. The main content area displays the details for 'RC11'. A progress bar at the top indicates the status: Created and Received (highlighted). To the right of the progress bar are buttons: Receive products, Cancel Receipt Card, Edit, and More. Below the progress bar is a table with the following data:

Receipt Card Information	
Receipt Card No	RC11
Date of receipt	02-05-2016
Warehouse	Warehouse2
Related To	WT2
Contact Name	
Assigned To	Warehouses
Created Time	02-05-2016 2:54 PM

Below this table is another table for 'Description Information':

Description Information	
Description	

At the bottom, there is an 'Item Details' table:

*Item Name	Quantity	List Price	Total	Net Price
product1	10	10	100	100
		(-) Discount:	0	
		Total After Discount:	100	

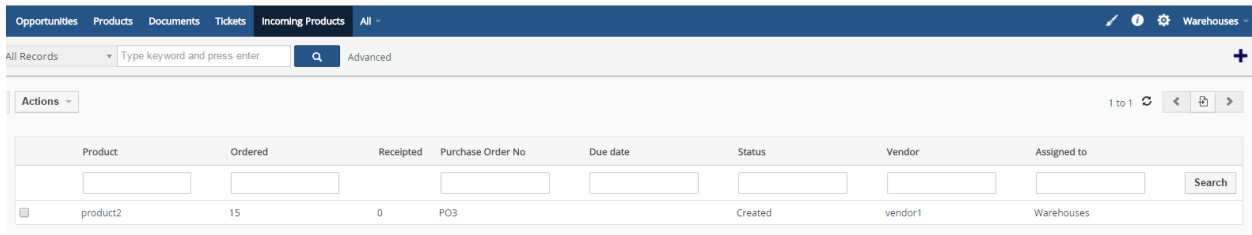
On the right side, there is a sidebar titled 'Receipt Card Details' with links for Updates, Documents, Purchase Order, Ware. Transfer, and Issue Card.

Picture 2.4: Receipt Card



## 2.4 Incoming Products

Incoming Products module serves for evidence of Products which are ordered but not received yet.

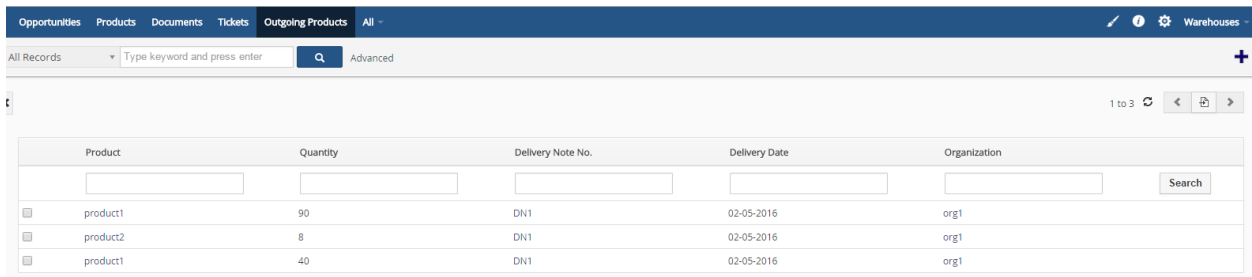


Product	Ordered	Received	Purchase Order No	Due date	Status	Vendor	Assigned to
product2	15	0	PO3		Created	vendor1	Warehouses

Picture 2.5: Incoming Products

## 2.5 Outgoing Products

Here you can see Products that are Ready to Deliver. These Products are in you Warehouses and you are able to deliver these Products.

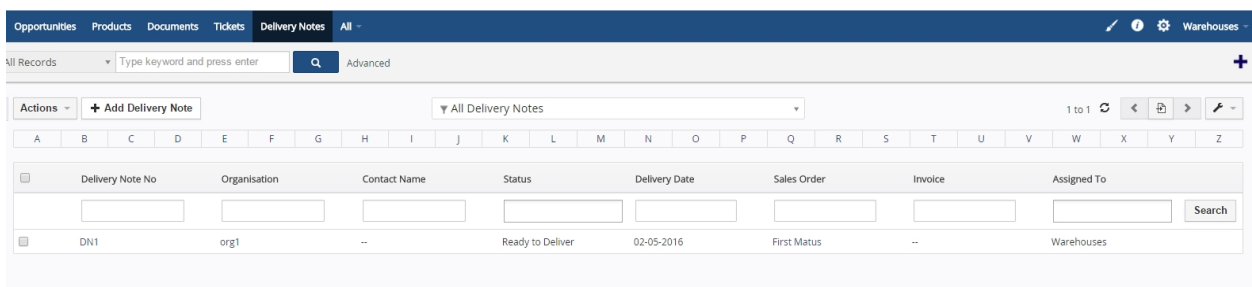


Product	Quantity	Delivery Note No.	Delivery Date	Organization
product1	90	DN1	02-05-2016	org1
product2	8	DN1	02-05-2016	org1
product1	40	DN1	02-05-2016	org1

Picture 2.6: Outgoing Products

## 2.7 Delivery Notes

Delivery Notes module allows you create Delivery Note, manage it. Here you can see which Delivery Notes are in status Ready to Deliver, which are Deliver and which are Invoiced.



Delivery Note No	Organisation	Contact Name	Status	Delivery Date	Sales Order	Invoice	Assigned To
DN1	org1	--	Ready to Deliver	02-05-2016	First Matus	--	Warehouses

Picture 2.7: Delivery Notes

More about Delivery Notes module you can read here:

<http://www.its4you.sk/en/images/extensions/DeliveryNotes4You/manual/DeliveryNotes4You.pdf>

### 3 How to start using Warehouses

Next steps you can also find: <https://youtu.be/ulcwX2XITZc>

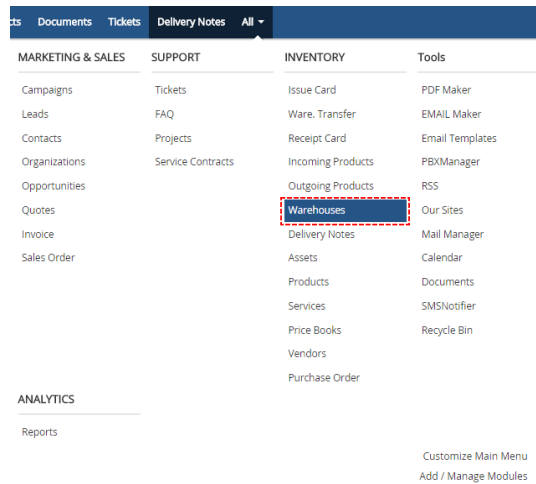
#### 3.1 Create Warehouse

The first step to start using Warehouses is create Warehouse(s).

Warehouses extension allows you to have one or more Warehouses.

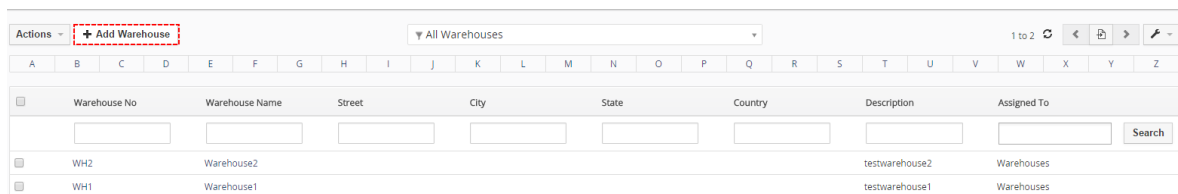
To create Warehouse please provide next steps:

- Click on **Warehouses**



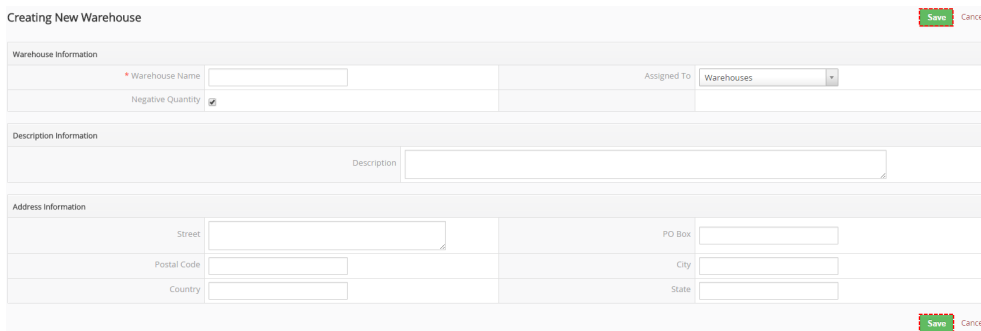
Picture 3.1: How to create Warehouse

- Here you can see your Warehouse(s). To add new please click on **+ Add Warehouse**



Picture 3.2: How to create Warehouse

- Now, fill information about your Warehouse (if you check Negative Quantity – quantity of Products in your Warehouse can have negative count, if you not check Negative Quantity – then quantity of Products can't have negative count) and click on **Save**

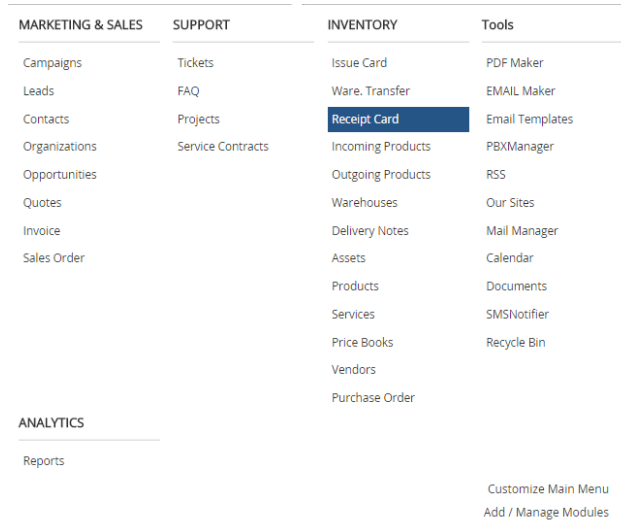
A screenshot of a form titled 'Creating New Warehouse'. The form is divided into three sections: 'Warehouse Information', 'Description Information', and 'Address Information'. In the 'Warehouse Information' section, the 'Warehouse Name' field is required (marked with a red asterisk), and the 'Negative Quantity' checkbox is checked. The 'Assigned To' dropdown menu is set to 'Warehouses'. The 'Description Information' section has a 'Description' text area. The 'Address Information' section includes fields for 'Street', 'Postal Code', 'Country', 'PO Box', 'City', and 'State'. At the bottom right, there are 'Save' and 'Cancel' buttons, with the 'Save' button highlighted in green.

Picture 3.3: How to create Warehouse

### 3.2 Add your Product(s) into Warehouse

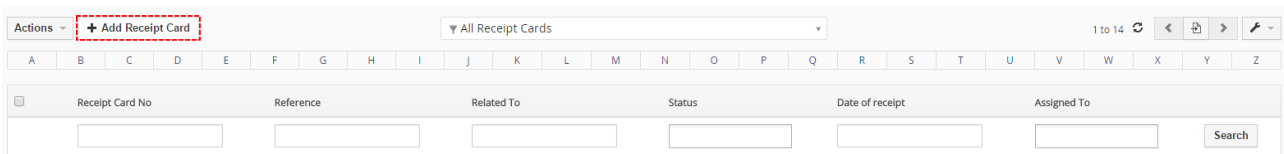
Now, you need to add your Product(s) into Warehouse. We would recommend to provide next steps:

- Prepare count of your Product(s)
- Click on **Receipt Card**



Picture 3.4: How to add Products into Warehouse

- Click on **+ Add Receipt Card**



Picture 3.5: How to add Products into Warehouse

- Fill following information.  
Mandatory are: Date of receipt, Warehouse(where are your Products), Assigned To.  
Then add Products, if you do not have Products, add your Products into vtiger.  
How to add your Products into vtiger you can find here:  
[https://wiki.vtiger.com/vtiger6/index.php/Products#Create\\_Products\\_Manually](https://wiki.vtiger.com/vtiger6/index.php/Products#Create_Products_Manually)  
Finally, click on **Save**

Picture 3.6: How to add Products into Warehouse

- Now, confirm Receipt Card and your Products will be added

Picture 3.7: How to add Products into Warehouse

## 4 The process of using Warehouses

There are 2 ways to use our Warehouses that we recommend. Also it depends on how you add your Products into Warehouse if you do not have enough Products in Warehouse:

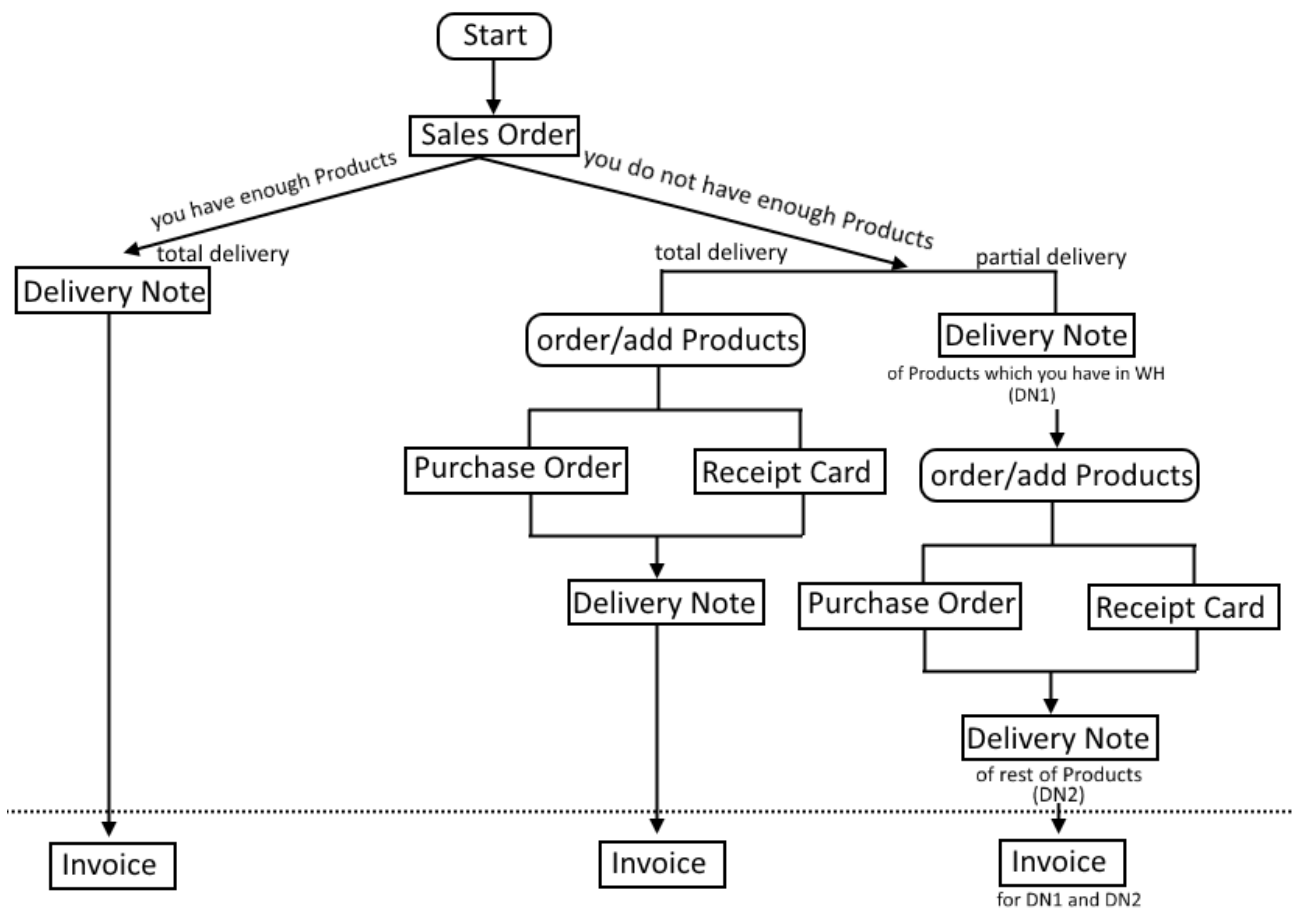
- You can add your Products simply by Receipt Card
- If you need to buy Products from your supplier then the way is to create Purchase Order and when Products arrive then add into your Warehouse

In following situations, You can see way to use Warehouses as well as both ways to add your Products. Warehouses 4 You support also partial delivery.

### 4.1 SO → DN → INV

Next process you can see also here: <https://youtu.be/7JPirigHRjM>

The first way that we recommend is from Sales Order create Delivery Notes. If you have enough Products then you can Deliver these Products. If you do not have enough Products we will describe how to add Products simply by Receipt Card. After it, You are able to deliver Products. The final step is create Invoice.



Picture 4.1: SO → DN → INV process

- Choose module Sales Order and click on **+ Add Sales Order**

Subject	Quote Name	Organization Name	Assigned To	Status
TestSO		org1	Warehouses	Delivered
SO		org1	Warehouses	Delivered
salesorder		org1	Warehouses	Delivered
First Matuz		org1	Warehouses	Delivered

Picture 4.2: Creating Sales Order

- When you choose more Products like you have in Warehouse you will see **Not enough stock** **Maximum value is**. However you are able create Sales Order.

Item Name	Quantity	List Price	Total	Net Price
product1	150	10	1500	1500.00
		(-) Discount:	0	
		Total After Discount:	1500.00	
Items Total			1500	
(-) Discount			0.00	
(-) Shipping & Handling Charges			0	
Pre Tax Total			1500.00	
(-) Tax			405	
(-) Taxes For Shipping and Handling			0	
Adjustment @ Add @ Deduct			0	
Grand Total			1905.00	

Picture 4.3: Creating Sales Order

- Now, you can see WHActionBlockBase. More about blocks of MultiWarehouses you can read here: 5.1 Blocks of Warehouses

Click on **Actions** or **Show Delivery Overview**. If you choose Actions button you can create Delivery Notes or order Products.

Sales Order List	
Recently Modified	
<b>WHActionBlockBase</b> Not available 1 Partially Available 1 <b>Actions</b> Create Delivery Note Order products <b>Show Delivery Overview</b>	
PDFMaker	
Tag Cloud	

Sales Order Details	
Subject	Test-SO-DN-INV
Customer No	
Quote Name	
Contact Name	
Carrier	
Status	Created
Excise Duty	0
Assigned To	Warehouses
Modified Time	02-12-2016 1:25 PM

Picture 4.4: WHActionBlockBase block

If you choose Show Delivery Overview button you can see window with information about Sales Order and Products in Warehouse as well as Overall Purchased and Ordered Products.

Product Name	Qty. In Stock	Overall Purchased	Overall Ordered	Reorder Level	OptimalLevel	Ordered	Ready to deliver	Delivered	Ready to Invoice	Invoiced
product1	137	0	150	0	0	150	0	0	0	0

Buttons: Order products, Create Delivery Note, Cancel

Picture 4.5: Delivery Overview

You can see that Ordered Products are more than Qty. In Stock. Now, you have 2 options:

- deliver part of Products, order/add rest of Products and then deliver rest (partial delivery)
- order/add missing Products and then delivery all Products (total delivery)

In next steps, We will show you how to add Products by Receipt Card

- Open Receipt Card module and click on **+ Add Receipt Card**

Actions														▼ All Receipt Cards														1 to 14		
A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z					
<input type="checkbox"/>	Receipt Card No	Reference	Related To	Status	Date of receipt	Assigned To																			Search					

Picture 4.6: How to add Products into Warehouse

- create Receipt Card with Qty. of your Products and choose your Warehouse

Receive products

Receipt Card Information									
* Date of receipt: 02-12-2016					Delivery No: <input type="text"/>				
* Warehouse: Warehouse1					Tracking No: <input type="text"/>				
Vendors: <input type="text"/>					Purchase Order: <input type="text"/>				
Contact Name: <input type="text"/>					Carrier: Select an Option				
* Assigned To: Warehouses									
Description Information									
Description: <input type="text"/>									
Item Details				Currency: Euro (€)			Tax Mode: Group		
Tools	*Item Name	Quantity	List Price	Total	Net Price				
	product1	13	10.00	130	130				
				(-) Discount:	0.00				
				Total After Discount:	130.00				
+ Add Product									
				Items Total	130.00				
				(-) Discount	0.00				
				(+) Shipping & Handling Charges	<input type="text"/>				
				Pre Tax Total	130.00				
				(-) Tax	35.1				
				(-) Taxes For Shipping and Handling	0.00				
				Adjustment: Add Deduct	<input type="text"/>				
				Grand Total	165.10				

Save Cancel

Picture 4.7: Creating Receipt Card

- receive your Products by

Receipt Card Information	
Receipt Card No	RC17
Date of receipt	02-12-2016
Warehouse	Warehouse1
Related To	
Contact Name	
Assigned To	Warehouses
Created Time	02-12-2016 3:00 PM

Picture 4.8: Receive Products

- Now, you are able Delivery whole Sales Order. Open Sales Order and click on Show Delivery Overview button. You can see that you have enough Products to deliver. Click on Create Delivery Note button.

Product Name	Qty. in Stock	Overall Purchased	Overall Ordered	Reorder Level	OptimalLevel	Ordered	Ready to deliver	Delivered	Ready to Invoice	Invoiced
ProductWH1	150	0	150	0	0	150	0	0	0	0



Picture 4.9: Creating Delivery Note

- Confirm Quantity and click on **Create Delivery Note**

Product Name	Qty. in Stock	To deliver	Quantity	Action
product1	150	150	150.00	Delete

Picture 4.10: Create Delivery Note



- If you have Products in more Warehouses, here you can see from which Products will be delivered. Also you can choose from which Warehouse Products will be delivered. If you click on  button once you remove warehouse if you click on this button again you will remove whole line. To add again line or add new line to add warehouse please click on  .


Fill info and and click on 

The form contains the following sections:

- Invoice:** Type to search, Tracking No.
- Assigned To:** vtiger650 Administrator
- Description Information:** Description
- Address Information:** Copy Shipping Address from (Organization/Contact), Street (test), PO Box, ZIP, City, Country, State.
- Terms & 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.
- Item Details:**

*Item Name	Warehouse	Qty. In Stock	Quantity
product1	Warehouse1	104	104.00
	Warehouse2	46	46.00
			Sum of delivered products: 150

Picture 4.11: Create Delivery Note

- Delivery Note is created. Now, you can click on  to deliver products. You can also open Issue Card, export to PDF(with PDF Maker) for employees to know how many products should leave from Warehouse.

The interface includes the following elements:

- Progress Bar:** Created, Waiting Availability, **Ready to Deliver**, Delivered, Invoiced.
- Buttons:** Deliver products, Cancel Delivery Note, Edit, More.
- Delivery Note Information:**

Delivery Note No	DN1	Status	Ready to Deliver
Organisation	IT-Solutions4You	Contact Name	
Delivery Date	11-01-2017	Type	Sale
Sales Order	TestWarehouses	Carrier	
Invoice		Tracking No	
Assigned To	vtiger650 Administrator	Created Time	11-01-2017 1:07 PM
Modified Time	11-01-2017 1:07 PM		
- Item Details:**

*Item Name	Warehouse	Quantity
product1	Warehouse1	10
	Warehouse2	140

Picture 4.12: Deliver Products

- Click on [Save](#)

Picture 4.13: Deliver Products

- Now, Delivery Note is in status Delivered. You are able to invoice it. Click on [Invoice products](#) fill info you need and click on [Save](#)

Picture 4.14: Invoice Products

- Now, in Sales Order or Invoice you can see in WHActionBlockBase that you have Invoiced Products. You can also click on [Show Delivery Overview](#) for more information.

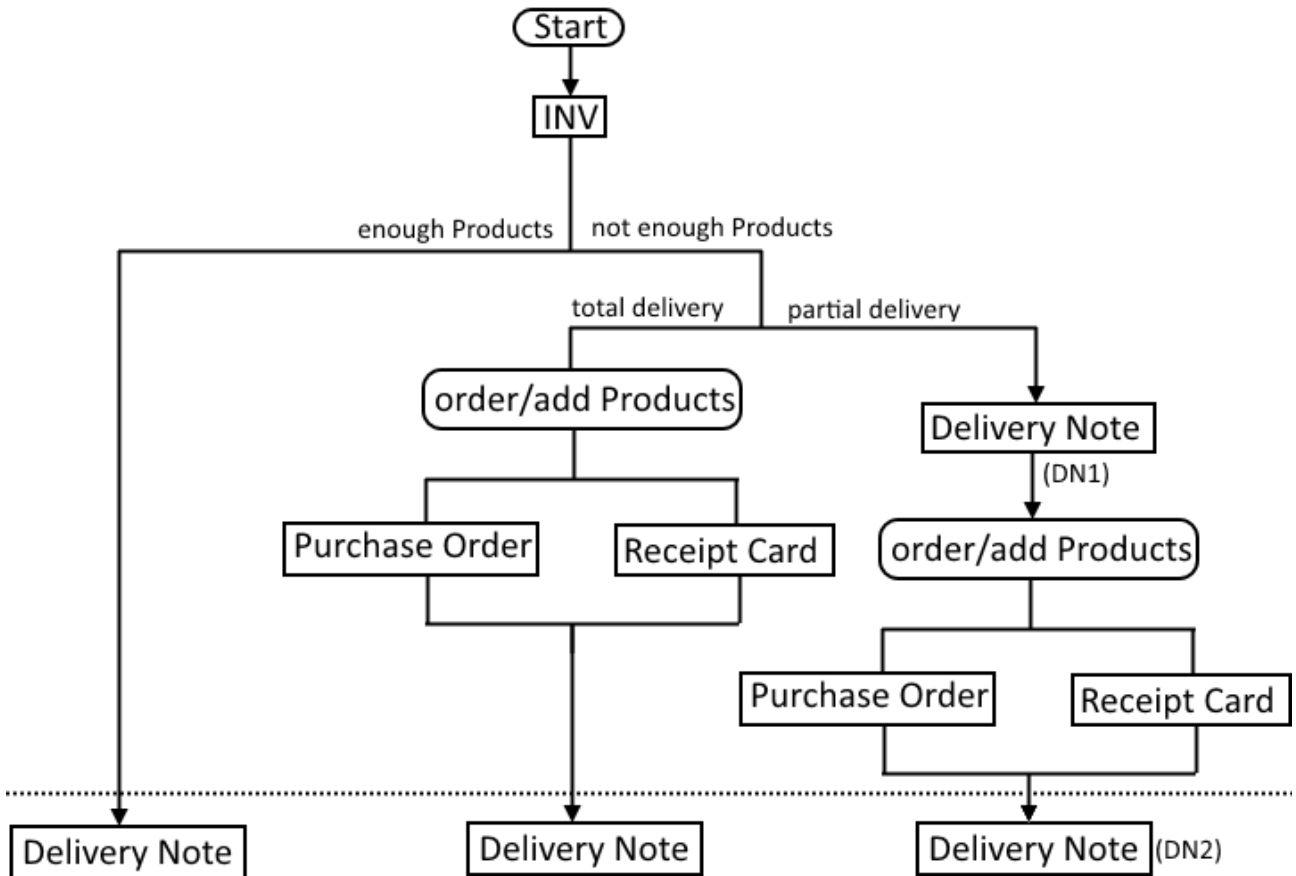
Product Name	Qty. in Stock	Overall Purchased	Overall Ordered	Reorder Level	OptimalLevel	Ordered	Ready to deliver	Delivered	Ready to Invoice	Invoiced
product1	150	0	0	0	0	150	0	150	0	150

Picture 4.15: Delivery Overview

## 4.2 INV → DN

Next process you can see also here: <https://youtu.be/BMjKXKHU5gM>

The other way that we recommend is from Invoice create Delivery Notes. If you have enough Products then you can Deliver these Products. If you do not have enough Products we will describe how to add Products using Purchase Order. After it, You are able to deliver Products.



Picture 4.16: INV → DN process

- Choose module Invoice and click on **+ Add Invoice**

Subject	Sales Order	Status	Total	Assigned To
DN13	Test-SO-DN-INV		€1,905	Warehouses
DN12	--		€152.4	Warehouses

Picture 4.17: Creating Invoice

- When you choose more Products like you have in Warehouse you will see **Not enough stock**  
**Maximum value is :** However you are able create Invoice.

Item Name	Quantity	List Price	Total	Net Price
product1	200 <i>Not enough stock Maximum value is 178</i>	10.00 (-) Discount : Total After Discount :	2000 0.00 2000.00	2000
product2	400 <i>Not enough stock Maximum value is 241</i>	20.00 (-) Discount : Total After Discount :	8000 0.00 8000.00	8000

Picture 4.18: Creating Invoice

- Now, you can see WHActionBlockBase. More about blocks of Warehouses you can read here: 5.1 Blocks of Warehouses

Click on **Actions** or **Show Delivery Overview**. If you choose Actions button you can create Delivery Notes or order Products.

**Invoice List**

Recently Modified

**WHActionBlockBase**

Not available 2

Partially Available 2

**Actions**

Create Delivery Note

Order products

Show Delivery Overview

EMAILMaker

PDFMaker

test-INV-DN

**Invoice Details**

Subject: test-INV-DN

Customer No:

Contact Name:

Due Date:

Excise Duty: 0

Organization Name: org1

Assigned To: Warehouses

Modified Time: 02-15-2016 12:55 PM

**Address Details**

Picture 4.19: WHActionBlockBase

If you choose Show Delivery Overview button you can see window with information about Invoice and Products in Warehouse.

Product Name	Qty. In Stock	Overall Purchased	Overall Ordered	Reorder Level	OptimalLevel	Invoiced	Ready to deliver	Delivered
product1	178	0	200	0	0	200	0	0
product2	241	0	400	0	0	400	0	0

Picture 4.20: Delivery Overview

You can see that Invoiced Products are more then Qty. In Stock. Now, you have 2 options:

- deliver part of Products, order/add rest of Products and then deliver rest (partial delivery)
  - order/add missing Products and then delivery all Products (total delivery)
- Now, we make partial Delivery Note. Click on **Create Delivery Note**. You can see Qty. In Stock and quantity to deliver. You can deliver less then Qty. in Stock but not more. Click on **Create Delivery Note**.

Product Name	Qty. in Stock	To deliver	Quantity	Action
product1	178	200	178.00	Delete
product2	241	400	241.00	Delete

Picture 4.21: Partial delivery

- Check information and confirm Delivery Note by **Save** button

*Picture 4.22: Partial Delivery Note*

- Delivery Note is created. Products from this Delivery Note you can see in Outgoing Products module too.

Product	Quantity	Delivery Note No.	Delivery Date	Organization
product1	178	DN16	02-16-2016	org1
product2	241	DN16	02-16-2016	org1

*Picture 4.23: Outgoing Products*

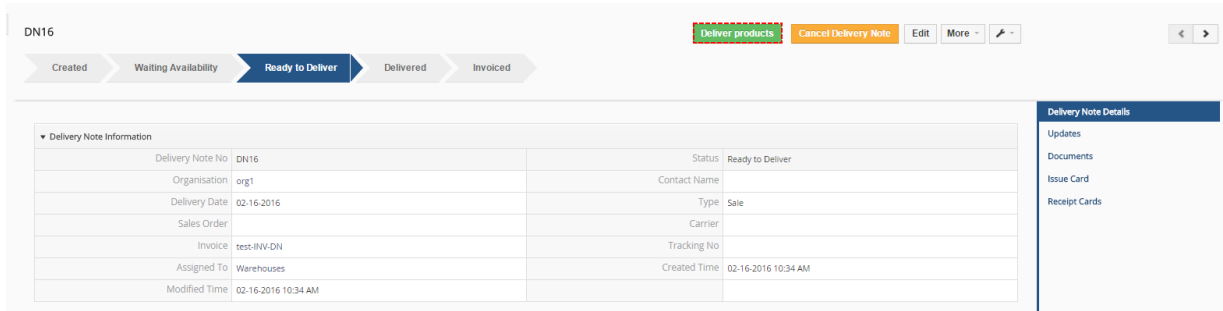
Also Issue Card is related to Delivery Note.

Status	Issue Card No.	Related to	Assigned To	Description	Day of issue
Transferred from Warehouse	IC29	DN16	Warehouses		02-16-2016

*Picture 4.24: Issue Card related to Delivery Note*

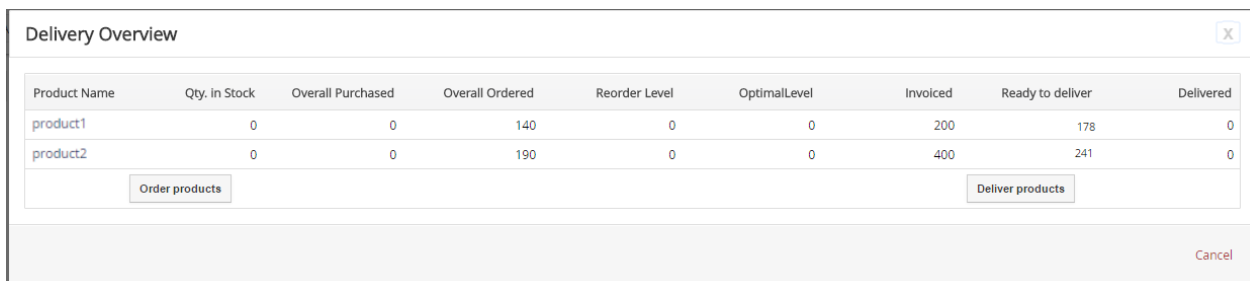
- Now, you are able to deliver Products from Delivery Note or from Invoice.

- From Delivery Note just click on **Deliver products**



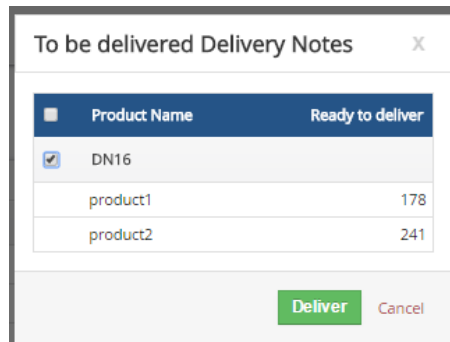
Picture 4.25: Deliver Products

- From Invoice, click on **Show Delivery Overview** in WHActionBlockBase and click on **Deliver products**



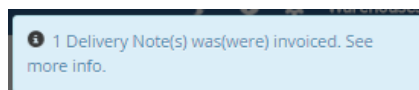
Picture 4.26: Deliver Products - partial

- Choose Delivery Note(s) to deliver and click on **Deliver** button



Picture 4.27: Deliver Products – choose Delivery Notes

- Products was delivered, you can see window



Picture 4.28: Deliver Products

- In next steps, We will show you how to order (add) rest of Products by Purchase Order.

- Click on **Show Delivery Overview** in DetailView of Invoice and choose **Order products**

Product Name	Qty. in Stock	Overall Purchased	Overall Ordered	Reorder Level	OptimalLevel	Invoiced	Ready to deliver	Delivered
product1	0	0	140	0	0	200	178	178
product2	0	0	190	0	0	400	241	241

Picture 4.29: Delivery Overview

- Now, you can see window. To create Purchase Order choose Quantity and click on **Order products** button

Product Name	Qty. in Stock	Overall Purchased	Overall Ordered	Reorder Level	OptimalLevel	Due date	Quantity	List price	Action
product1	0	0	140	0	0	11-01-2017	578	10.00	Delete
product2	0	0	190	0	0	11-01-2017	512	20.00	Delete
Total								16020.00	

Picture 4.30: Order products

Name	Description
<b>Product Name</b>	Name of Products
<b>Qty. in Stock</b>	Qty. of Products in your Warehouse (if you have more Warehouses then sum of Qty)
<b>Overall Purchased</b>	Qty. of all Products that are purchased but not receipt yet
<b>Overall Ordered</b>	Qty. of all Products that are ordered in other Invoices, SO, DN
<b>Reorder Level</b>	we use to know when it is good time to create Purchase Order and fill your Warehouses.
<b>OptimalLevel</b>	Optimal quantity of Product in Warehouse (see chapter: 5.2 Variables)
<b>Receipt date</b>	Date of receipt your Products
<b>Quantity</b>	Quantity to order Products (Quantity = Overall Ordered – Qty. In Stock – Overall Purchased + Optimal Level)
<b>List price</b>	Price of Products to order

Table 1: Variables



- Choose Vendor and click on **Save**

Creating New Purchase Order **Save** Cancel

**Purchase Order Details**

* Subject	test-INV-DN	* Vendor Name	Type to search
Requisition Number		Tracking Number	
Contact Name	Type to search	Due Date	
Carrier	Select an Option	Sales Commission	0.000
Excise Duty	0.000	* Status	Created
* Assigned To	Warehouses		

**Address Details**

**Terms & Conditions**

**Item Details**

Item Name	Quantity	List Price	Total	Net Price
product1	578.00	10.00 (-) Discount : Total After Discount :	5780.00 0 5780.00	5780.00
product2	512.00	20.00 (-) Discount : Total After Discount :	10240.00 0 10240.00	10240.00

+ Add Product

Picture 4.31: Creating Purchase Order

- Purchase Order was created

Calendar Leads Organizations Contacts Opportunities Products Documents Tickets **Purchase Order** All

vtiger All Records Type keyword and press enter Advanced

**Purchase Order List**

test-INV-DN Edit More

**Purchase Order Details**

Subject	test-INV-DN	Purchase Order Number	PO9
Vendor Name	vendor1	Requisition Number	
Tracking Number		Contact Name	
Due Date		Carrier	
Sales Commission	0	Excise Duty	0
Status	Created	Assigned To	Warehouses
Created Time	02-16-2016 12:25 PM	Modified Time	02-16-2016 12:25 PM

**Address Details**

**Terms & Conditions**

**Description Details**

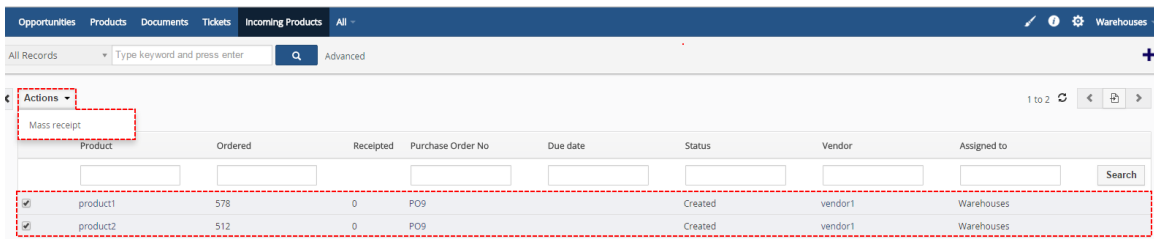
**Item Details**

Item Name	Quantity	List Price	Total	Net Price
product1	578	10 (-) Discount : Total After Discount :	5,780 0 5,780	5,780
product2	512	20 (-) Discount : Total After Discount :	10,240 0 10,240	10,240

Picture 4.32: Purchase Order

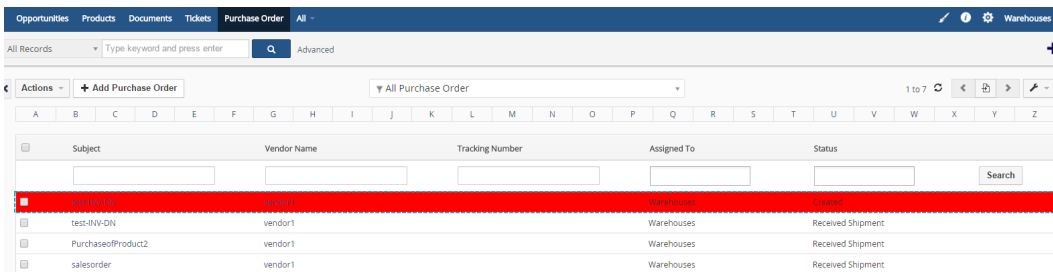
## How to receive purchased Products from different modules

1. **From Incoming Products:** All purchased Products (from all Purchase Orders) you can see in Incoming Products module. You are able receipt Products in Incoming Products module using **Actions** button and Mass receipt.

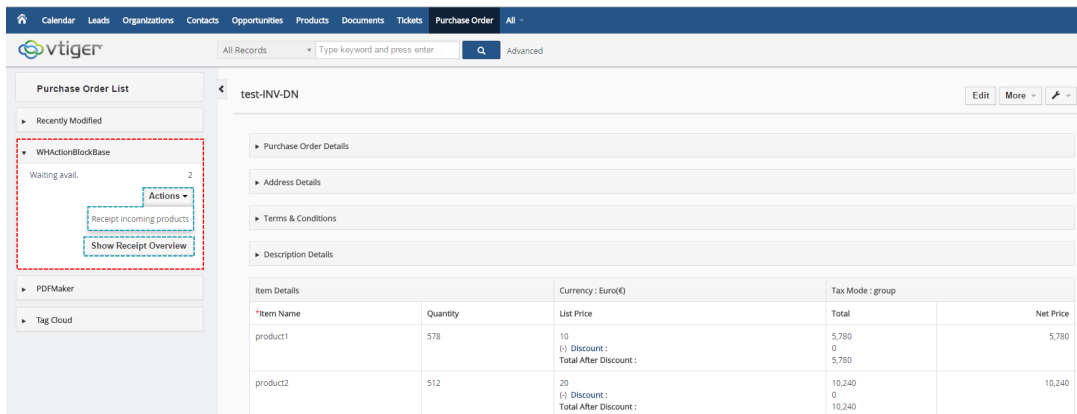


Picture 4.33: Incoming Products – receipt Products

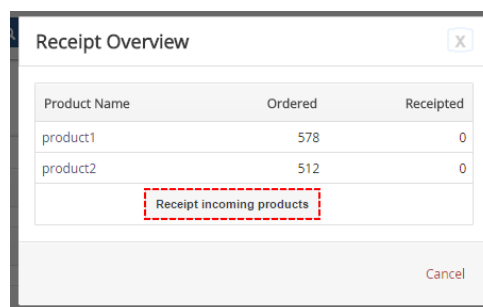
2. **From Purchase Order:** You are also able to receive Products from Purchase Order. Open Purchase Order module and find your Purchase Order (to better overview we recommend ListView Colors 4 You extensions). Click on **Show Delivery Overview** or **Actions** in WHActionBlockBase and choose *Receipt incoming products*.



Picture 4.34: Choose Purchase Order

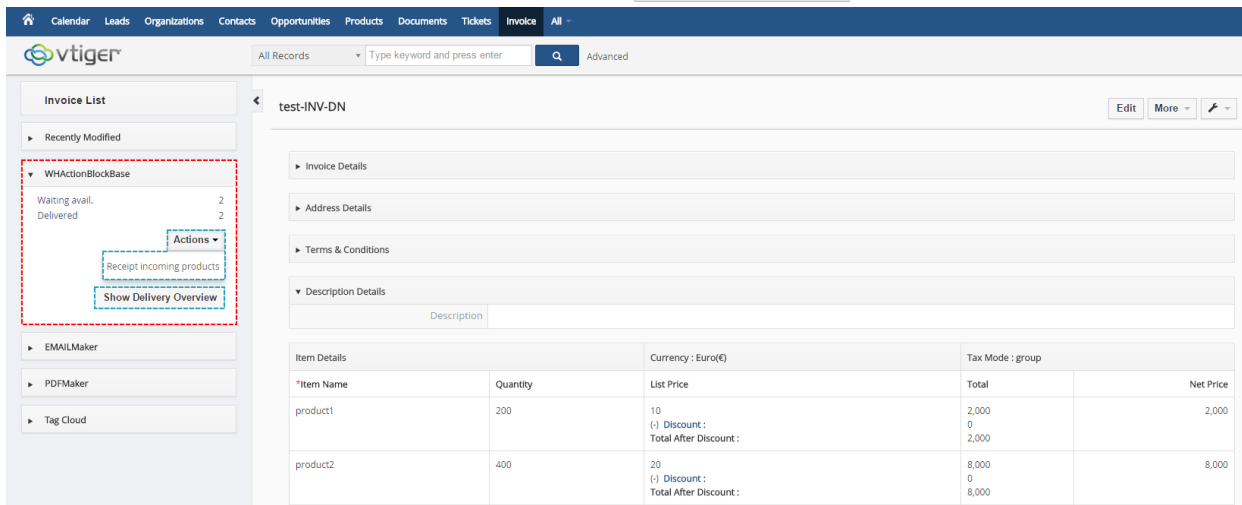


Picture 4.35: WHActionBlockBase in Purchase Order

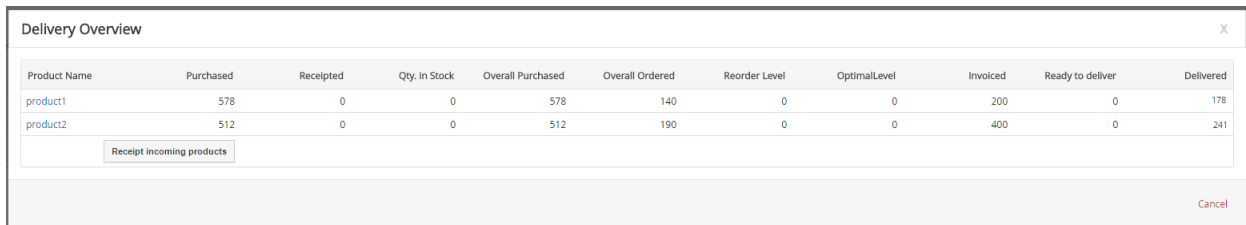


Picture 4.36: Receipt Incoming Products

3. **From Invoice:** Open Invoice module and find your Invoice. Click on **Show Delivery Overview** or **Actions** in WHActionBlockBase and choose **Receipt incoming products** .

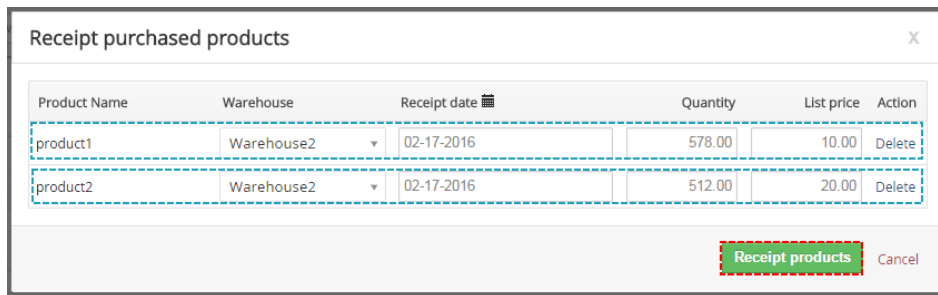


Picture 4.37: Invoice



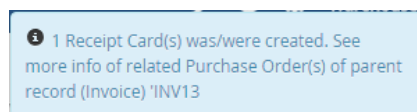
Picture 4.38: Delivery Overview in Invoice

- Next steps to receipt are same for all previously modules. If you have more Warehouses then choose Warehouse where you receive products. Click on **Receipt products** button.



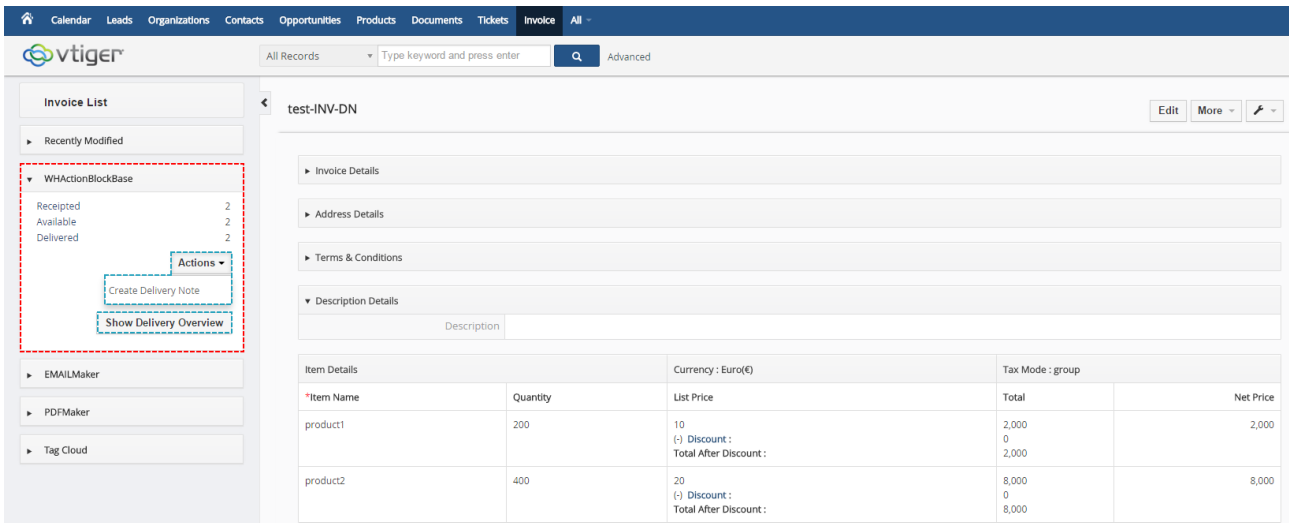
Picture 4.39: Receipt Products

- Products were received. You can see in Product module, Receipt Card Module or in Purchase Order



Picture 4.40: Notification

- Now, You are able to deliver the rest of invoiced Products. Click on **Show Delivery Overview** or **Actions** in WHActionBlockBase and choose *Create Delivery Note*



Picture 4.41: Create Delivery Note

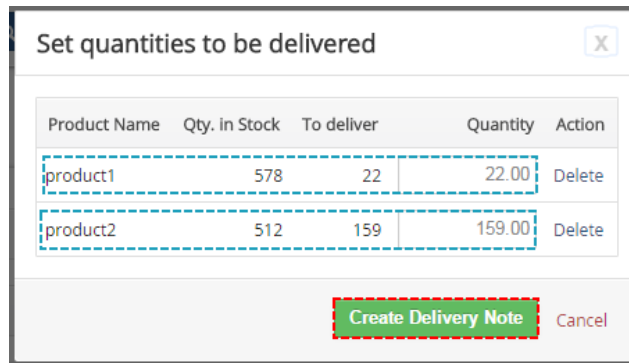
The screenshot shows the 'Delivery Overview' window. It contains a table with the following data:

Product Name	Purchased	Received	Qty. in Stock	Overall Purchased	Overall Ordered	Reorder Level	OptimalLevel	Invoiced	Ready to deliver	Delivered
product1	578	578	578	0	140	0	0	200	0	178
product2	512	512	512	0	190	0	0	400	0	241

Below the table, there is a 'Create Delivery Note' button highlighted with a red dashed box. A 'Cancel' button is also visible at the bottom right.

Picture 4.42: Delivery Overview

- Check information and click on **Create Delivery Note**



Picture 4.43: Create Delivery Note

- Now, please check again information and confirm Delivery Note by **Save**

Picture 4.44: Create Delivery Note

- Delivery Note is created. Products from this Delivery Note you can see in Outgoing Products module too.

Product	Quantity	Delivery Note No.	Delivery Date	Organization
product1	22	DN17	02-17-2016	org1
product2	159	DN17	02-17-2016	org1

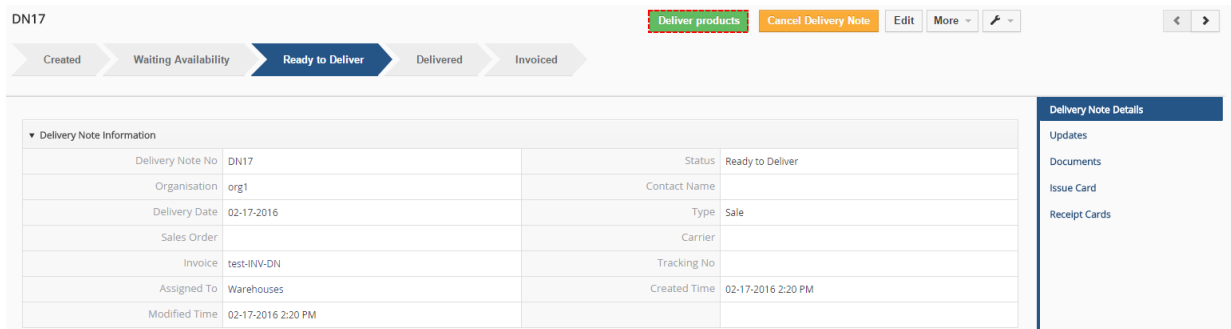
Picture 4.45: Outgoing Products

Also Issue Card is related to Delivery Note.

Picture 4.46: Issue Card

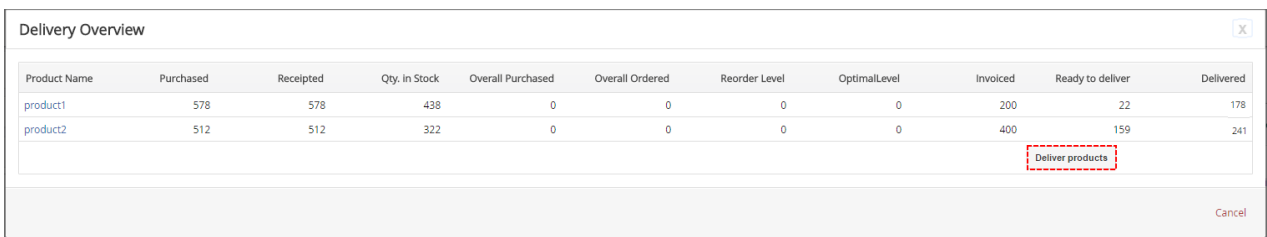
- Now, you are able to deliver Products from Delivery Note or from Invoice.

- From Delivery Note just click on **Deliver products**



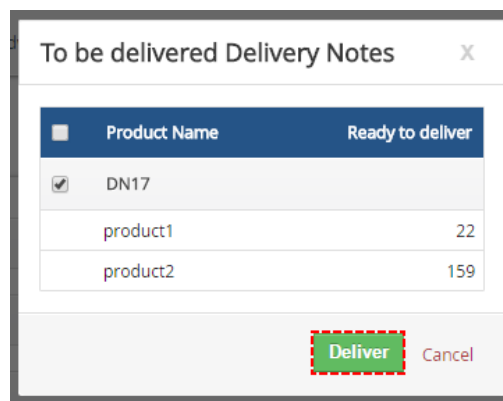
Picture 4.47: Deliver Products

- From Invoice, click on **Show Delivery Overview** in WHActionBlockBase and click on **Deliver products**



Picture 4.48: Deliver Products

- Choose Delivery Note(s) to deliver and click on **Deliver** button



Picture 4.49: Deliver Products – choose Delivery Notes

- Products was delivered.

- Now, **Actions** button in WHActionBlockBase is missing. Also if you click on **Show Delivery Overview** button, you can not see any button to order or deliver.

Product Name	Purchased	Received	Qty. in Stock	Overall Purchased	Overall Ordered	Reorder Level	OptimalLevel	Invoiced	Ready to deliver	Delivered
product1	578	578	438	0	0	0	0	200	0	200
product2	512	512	322	0	0	0	0	400	0	400

Cancel

*Picture 4.50: Delivery Overview*

# 5 Blocks and Variables of Warehouses 4 You

## 5.1 Blocks of Warehouses

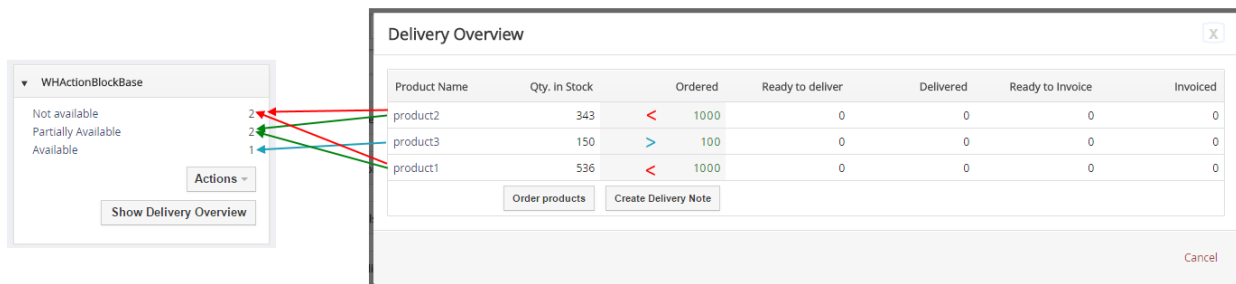
### WHActionBlockBase

WHActionBlockBase you can find in Invoice, Sales Order, Purchase Order and Delivery Notes modules. WHActionBlockBase allows you provide action like order products, deliver, receive, invoice.

If there is option to provide any action with your Invoice, Sales Order, Purchase Order or Delivery note then you can show in WHActionBlockBase **Actions** as well as **Show Delivery Overview** button. On the other hand if there is no option to provide any actions there is only Show Delivery Overview button where you can find information about your INV, SO, PO or DN.

In WHActionBlockBase you can see these statuses and numbers to each status (This number does not mean how many Products are in this Status. It means which Products (Products entity) are in this Status):

- **Not available** – you can see this status when you do not have Products in Warehouse
- **Partially Available** – you will see this status when you have part of ordered quantity
- **Available** – you are able to deliver Products in this Status
- **Ready to deliver** – Delivery Note was created and now you can confirm delivery
- **Delivered** – if you delivered Product but it is not invoiced yet
- **Invoiced** – in this Status are Products after invoicing
- **Received** – this Status you can see when you confirm receive Products from Purchase Order
- **Waiting avail.** – you can see when you created Purchase Order but you not confirm receive

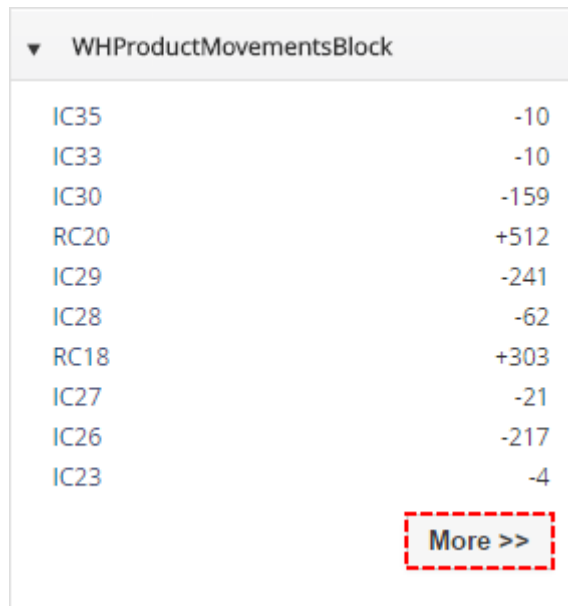


Picture 5.1: Statures in WHActionBlockBase



## WHProductMovementsBlock

In DetailView of Product you can see WHProductMovementsBlock. Here you are able find movements of Product.

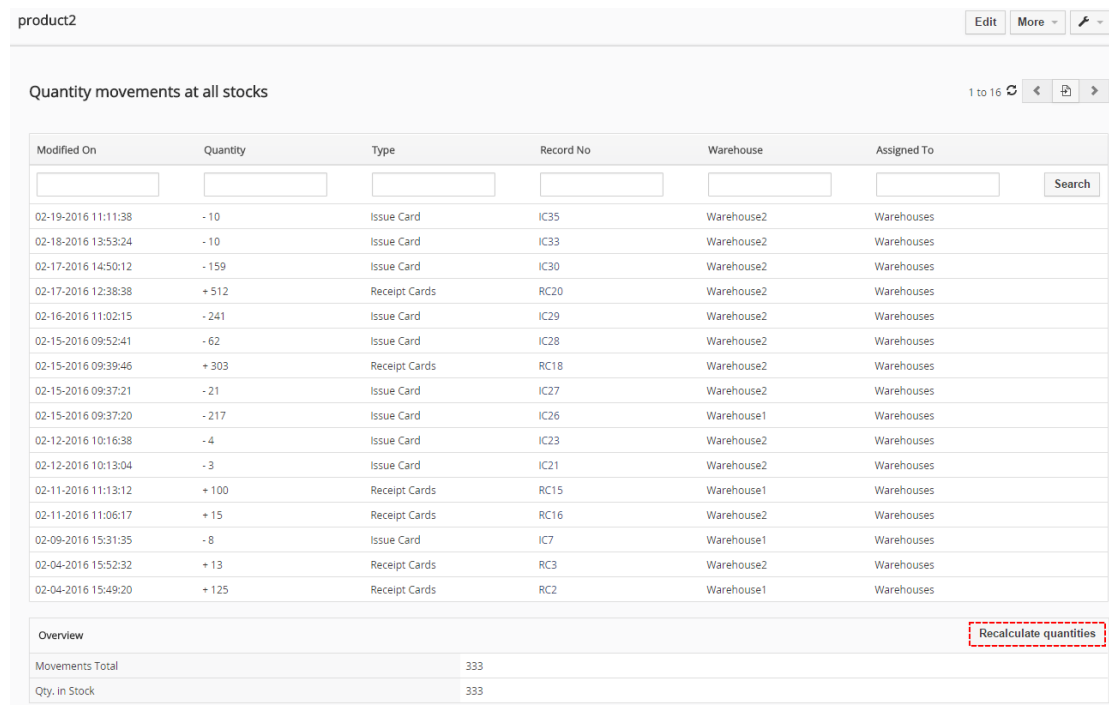


WHProductMovementsBlock	
IC35	-10
IC33	-10
IC30	-159
RC20	+512
IC29	-241
IC28	-62
RC18	+303
IC27	-21
IC26	-217
IC23	-4

[More >>](#)

Picture 5.2: WHProductMovementsBlock

In WHProductMovementsBlock are only 10 last movements shown. If you want to see all movements please click on [More >>](#) button.



product2 Edit More ↗

Quantity movements at all stocks 1 to 16 ↶ ↷

Modified On	Quantity	Type	Record No	Warehouse	Assigned To
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
02-19-2016 11:11:38	- 10	Issue Card	IC35	Warehouse2	Warehouses
02-18-2016 13:53:24	- 10	Issue Card	IC33	Warehouse2	Warehouses
02-17-2016 14:50:12	- 159	Issue Card	IC30	Warehouse2	Warehouses
02-17-2016 12:38:38	+ 512	Receipt Cards	RC20	Warehouse2	Warehouses
02-16-2016 11:02:15	- 241	Issue Card	IC29	Warehouse2	Warehouses
02-15-2016 09:52:41	- 62	Issue Card	IC28	Warehouse2	Warehouses
02-15-2016 09:39:46	+ 303	Receipt Cards	RC18	Warehouse2	Warehouses
02-15-2016 09:37:21	- 21	Issue Card	IC27	Warehouse2	Warehouses
02-15-2016 09:37:20	- 217	Issue Card	IC26	Warehouse1	Warehouses
02-12-2016 10:16:38	- 4	Issue Card	IC23	Warehouse2	Warehouses
02-12-2016 10:13:04	- 3	Issue Card	IC21	Warehouse2	Warehouses
02-11-2016 11:13:12	+ 100	Receipt Cards	RC15	Warehouse1	Warehouses
02-11-2016 11:06:17	+ 15	Receipt Cards	RC16	Warehouse2	Warehouses
02-09-2016 15:31:35	- 8	Issue Card	IC7	Warehouse1	Warehouses
02-04-2016 15:52:32	+ 13	Receipt Cards	RC3	Warehouse2	Warehouses
02-04-2016 15:49:20	+ 125	Receipt Cards	RC2	Warehouse1	Warehouses

**Overview** Recalculate quantities

Movements Total	333
Qty. In Stock	333

Picture 5.3: Quantity movements at all stocks

### Good to know:

If you are not sure that quantity is right. Click on [Recalculate quantities](#) to recalculate quantities.

## WHProductInWarehouses

In DetailView of Product you can see WHProductInWarehouses. Here you are able find quantity of Product in Warehouse(s).

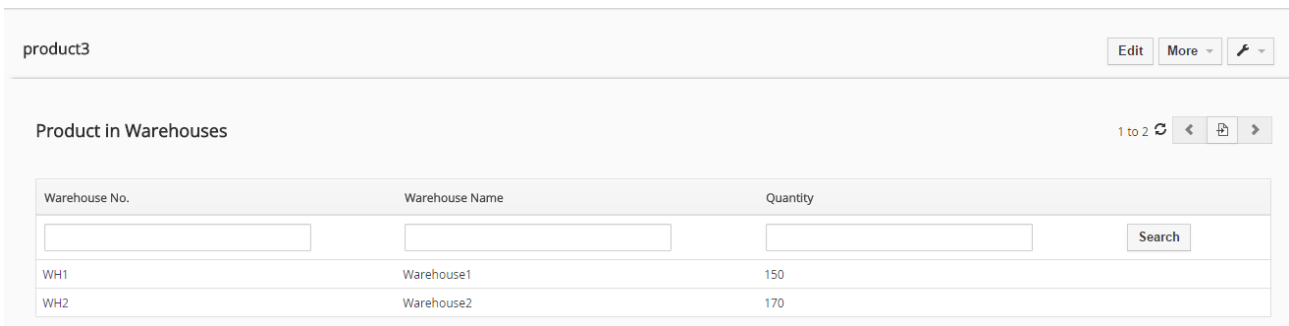


The screenshot shows a table titled 'WHProductInWarehouses' with two rows of data. The first row shows 'WH1' with a quantity of 150. The second row shows 'WH2' with a quantity of 170. A 'More >>' button is located at the bottom right of the table, highlighted with a red dashed border.

WHProductInWarehouses	
WH1	150
WH2	170

Picture 5.4: WHProductInWarehouses

In WHProductInWarehouses are only 10 last quantities of Products shown. If you want to see all quantities of Products in Warehouses please click on [More >>](#) button.



The screenshot shows the 'Product in Warehouses' section for 'product3'. It features a table with columns for 'Warehouse No.', 'Warehouse Name', and 'Quantity'. The table contains two rows: 'WH1' with 'Warehouse1' and quantity 150, and 'WH2' with 'Warehouse2' and quantity 170. There are search filters for each column and a 'Search' button. The table is paginated to show 1 to 2 items.

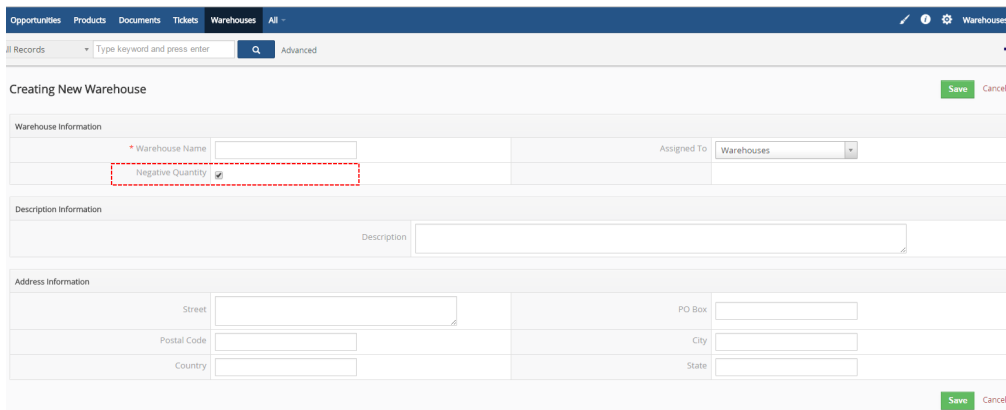
Warehouse No.	Warehouse Name	Quantity
WH1	Warehouse1	150
WH2	Warehouse2	170

Picture 5.5: Quantities of Products in all Warehouses

## 5.2 Variables

### Negative Quantity

You can find Negative Quantity variable in Warehouses module. You can select it or not. You can check it then Warehouses 4 You allows you to create Delivery Note although quantity of Products in Warehouses decrease to negative value.



The screenshot shows the 'Creating New Warehouse' form. The 'Warehouse Information' section includes a 'Warehouse Name' field, a 'Negative Quantity' checkbox (highlighted with a red dashed box), and an 'Assigned To' dropdown menu set to 'Warehouses'. The 'Description Information' section has a 'Description' field. The 'Address Information' section includes fields for 'Street', 'Postal Code', 'Country', 'PO Box', 'City', and 'State'. 'Save' and 'Cancel' buttons are visible at the bottom right.

Picture 5.6: Negative Quantity of Products

### Qty. in Stock

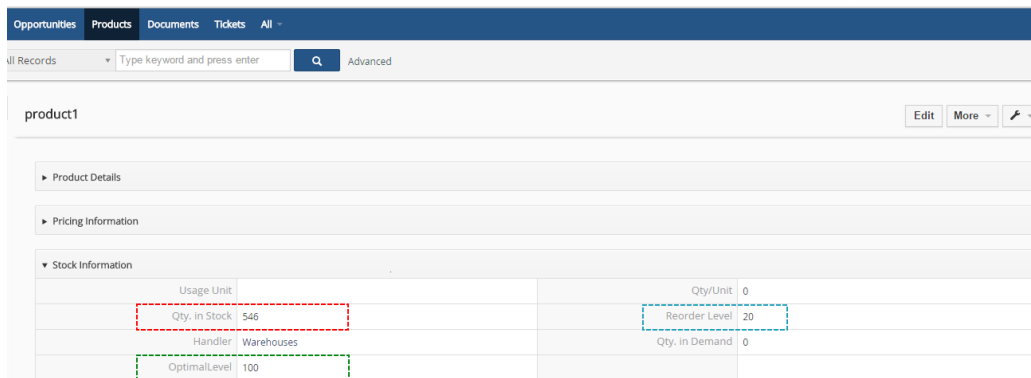
Qty. in Stock variable you can find in Products module. Actual quantity of products in your Warehouses.

### Reorder Level

Reorder Level variable you can find in Products module. Reorder Level variable we use to know when it is good time to create Purchase Order and fill your Warehouses. When Quantity of “free” products (Qty. In Stock – all Products from SO and INV) is less than Reorder Level then is the time to create Purchase Order.

### OptimalLevel

OptimalLevel variable you can find in Products module. Here you can set how many products you want to have in Warehouses. Purchase Order will be automatically create with quantity of Products that after delivery all Products from Sales Order and Invoices in Warehouses stay OptimalLevel products quantity.



The screenshot shows the 'product1' form. The 'Stock Information' section is expanded, showing a table with the following data:

Usage Unit	Qty/Unit
Qty. in Stock: 546	0
Reorder Level	20
Handler: Warehouses	Qty. in Demand: 0
OptimalLevel: 100	


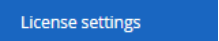
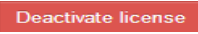

The 'Qty. in Stock' field is highlighted with a red dashed box, 'Reorder Level' with a blue dashed box, and 'OptimalLevel' with a green dashed box. 'Edit', 'More', and a refresh icon are visible at the top right.

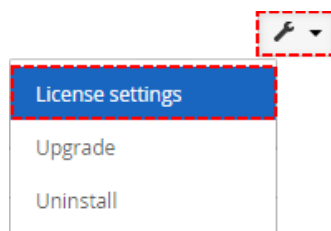
Picture 5.7: Products variables of MultiWarehouses 4 You

## 6 Settings

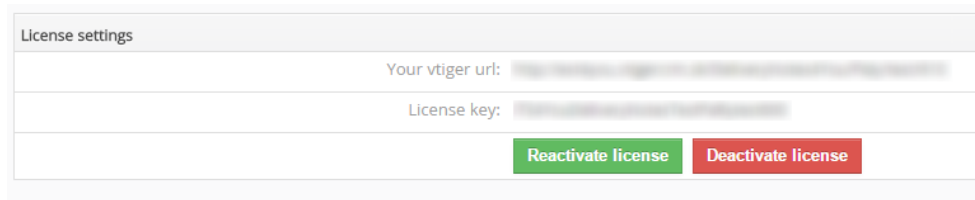
### 6.1 Deactivate license

In case you need to install Warehouses 4 You on other url(server) you have to deactivate and reactivate license key. To deactivate license key please provide following steps:

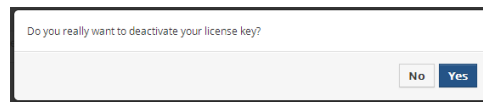
1. Click on 
2. Click on 
3. Click on  button
4. Confirm deactivation with button 



Picture 6.1: Deactivate Warehouses 4 You – Step 1,2





Picture 6.2: Deactivate Warehouses 4 You – Step 3

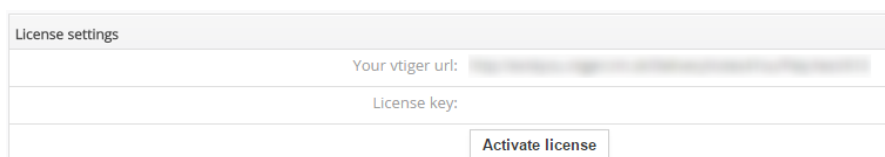


Picture 6.3: Deactivate license of Warehouses 4 You – Step 4

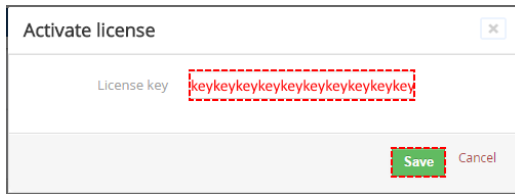
After deactivation license of Warehouses 4 You doesn't work at all and Warehouses 4 You work area is not accessible either.

To reactivate license you have to provide following steps:

1. Click on  button
2. Insert license key
3. Click on 



Picture 6.4: Activate license of Warehouses 4 You – Step 1

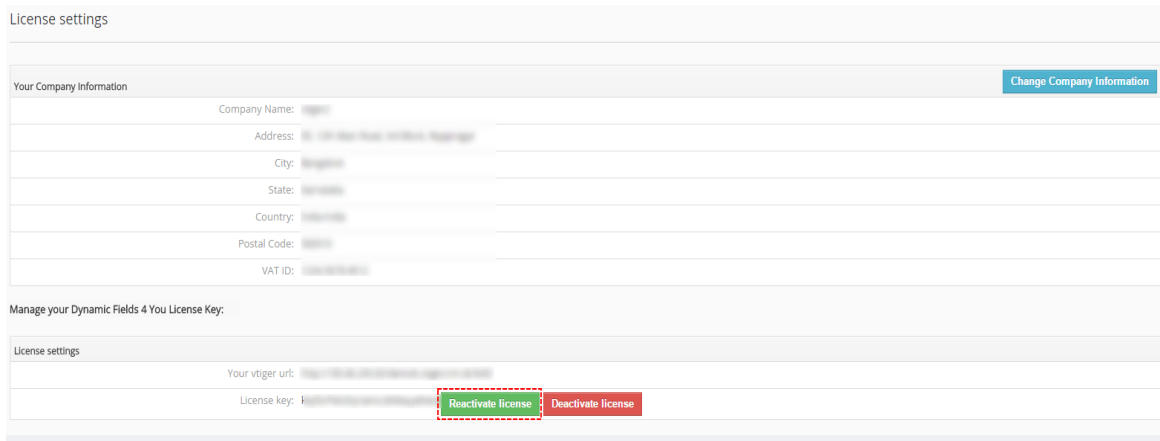


Picture 6.5: Activate license of Warehouses 4 You – Step 2,3

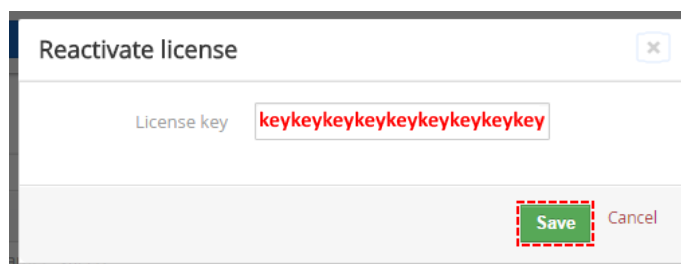
## 6.2 Reactivate license

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

1. Click on **Reactivate license**
2. Click on **Save**



Picture 6.6: Reactivate license of Warehouses 4 You – Step 1



Picture 6.7: Reactivate license of Warehouses 4 You – Step 2

## 6.3 Update

**Because Warehouses 4 You is huge solution we recommend before updating make backup of your vtiger files and your Database.**

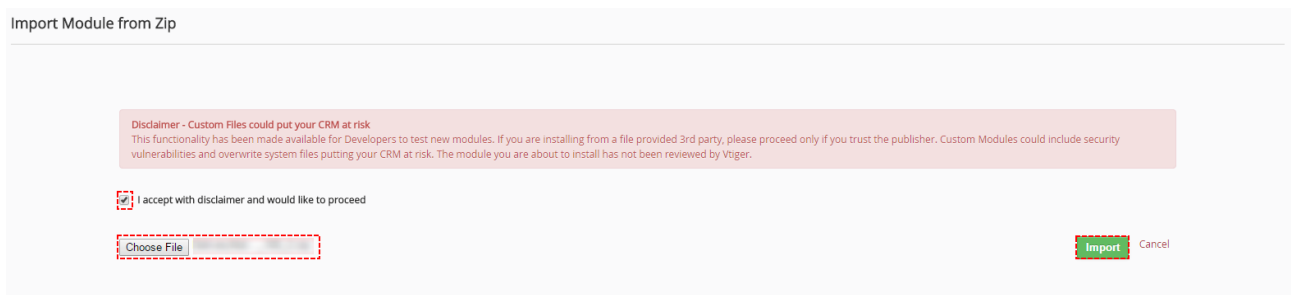
The update of the Warehouses 4 You is little different like Installation. **One difference** between Install and Update is unzip step.

First at all you need to unzip .zip file of Warehouses 4 You and then install each module (7) separately. How to install you can find in chapter ( How to install Warehouses 4 You).

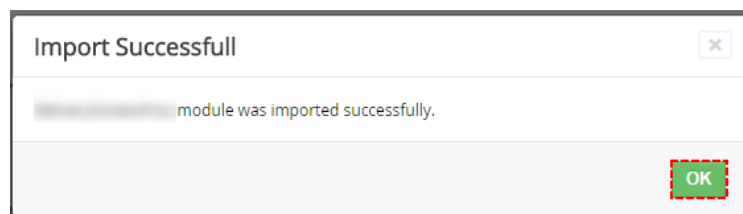
After unzipping please provide updating in order:

1. ITS4YouDeliveryNotes
2. ITS4YouWarehouses
3. ITS4YouWarehouseTransfers
4. ITS4YouIssuecards
5. ITS4YouReceiptcards
6. ITS4YouIncomingProducts
7. ITS4YouOutgoingProducts

So please refer to above installation part for details how to initiate the import of the module from the file. After update the notification about successful update is shown (Picture 6.9)and click on **OK** button.





Picture 6.8: Update of Warehouses 4 You

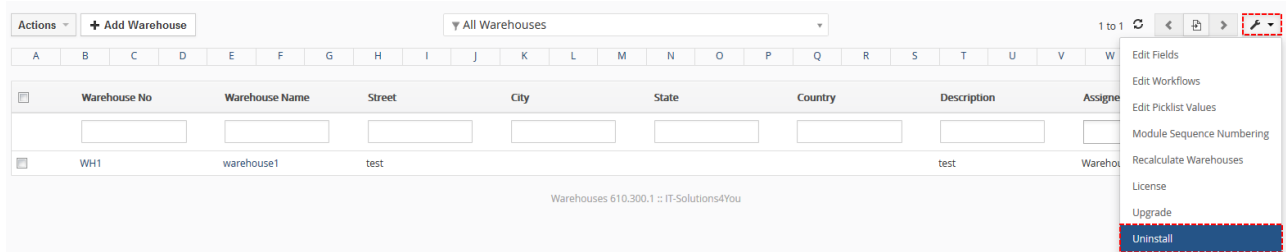


Picture 6.9: Update of Warehouses 4 You


## 6.4 Uninstall

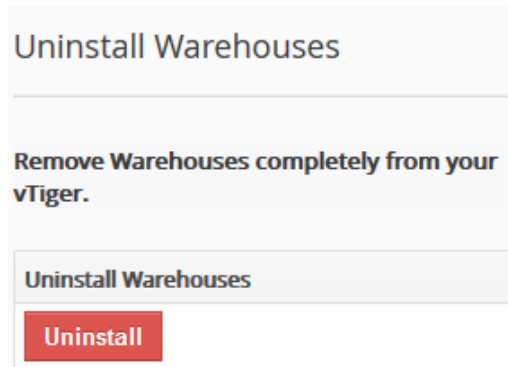
If you want to remove Warehouses 4 You from your vtiger please provide following steps:

1. In any module of Warehouses 4 You area please click on  button and choose  option




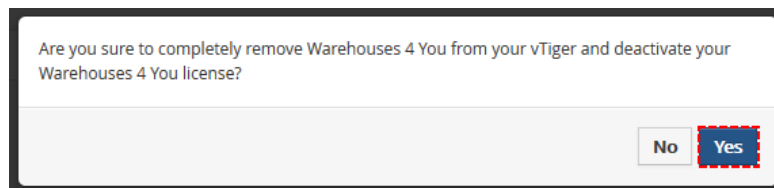
Picture 6.10: Uninstall of Warehouses 4 You – step 1

2. Click on  button



Picture 6.11: Uninstall of Warehouses 4 You – step 2

3. Confirm uninstall by  button




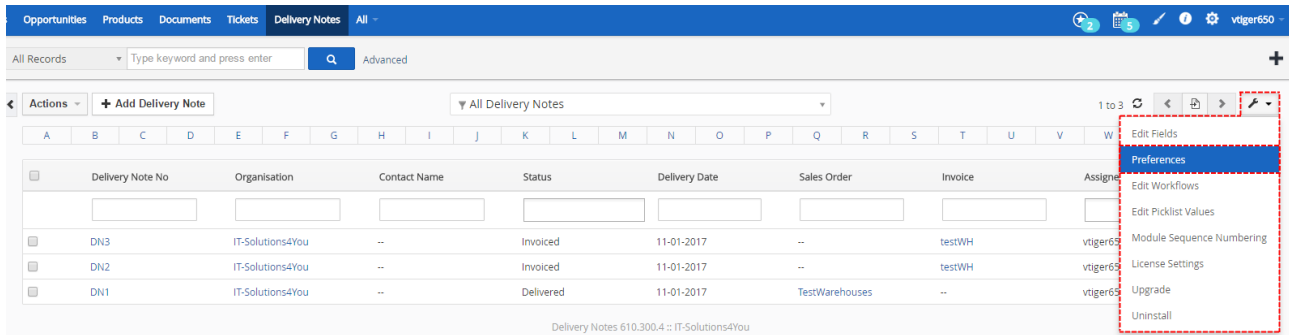
Picture 6.12: Uninstall of Warehouses Fields 4 You – step 3

Now, Warehouses 4 You has been removed from your vtiger and your license has been deactivated. To use Warehouses 4 You again you need to provide installation and validation steps (see chapter How to install Warehouses 4 You).


## 6.5 Enable/Disable Services in Delivery process

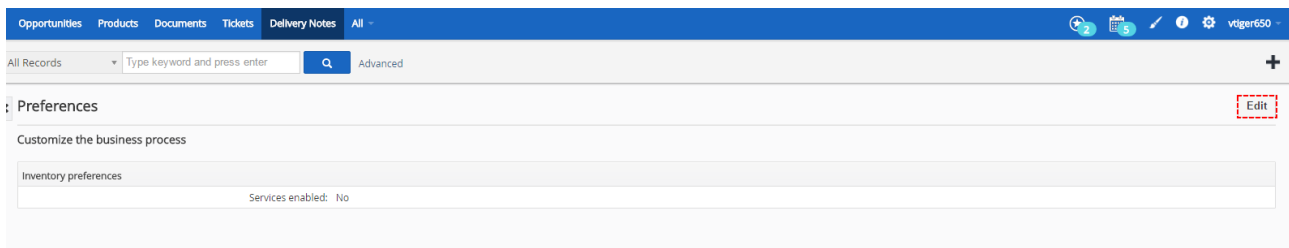
Since **610.300.4** version there is option to enable or disable(default) Services in Delivery process. To enable please provide following steps:

1. Open Delivery Note module
2. Click on Setting button 
3. Choose Preferences



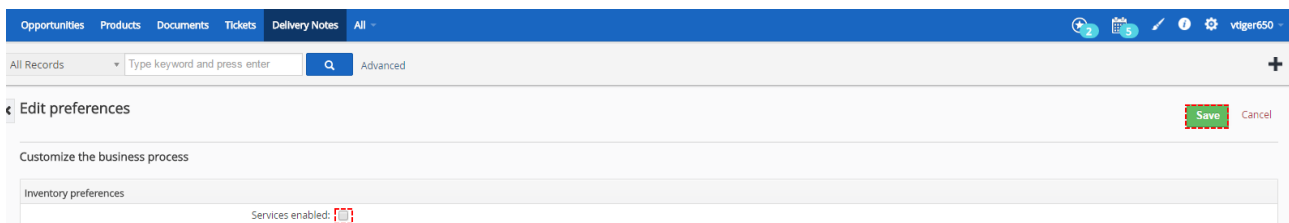
Picture 6.13: Services in Delivery process

4. Click on 



Picture 6.14: Services in Delivery process

5. Check/Uncheck option to use Services
6. Save your settings



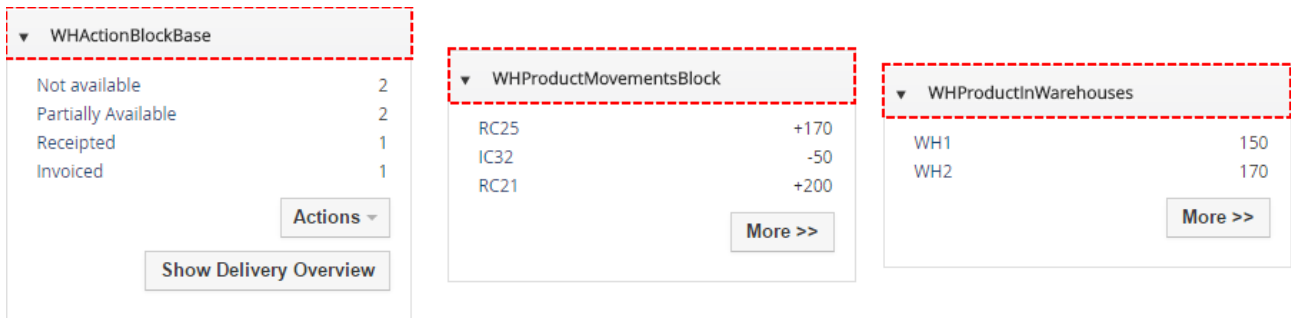
Picture 6.15: Services in Delivery process

7. Now you are able to use Services in Delivery process



## 7 Tips & tricks

### 7.1 Rename blocks of Warehouses 4 You



Picture 7.1: Original name of Blocks

We named blocks to be the best described their functions. To rename it for your best performance please provide following steps:

1. find file vtiger/languages/(your\_language)/Vtiger.php
2. insert variables into **Vtiger.php**:
  - o "WActionBlockBase"=>"your name of Block",
  - o "WHProductMovementsBlock"=>"your name of Block",
  - o "WHProductInWarehouses"=>"your name of Block" ,

```
648 "WActionBlockBase"=>"Warehouses Block",  
649 "WHProductMovementsBlock"=>"Movements of Products",  
650 "WHProductInWarehouses"=>"Quantity of Products in Warehouses" ,
```

Picture 7.2: Insert variables

3. Enjoy your names of Blocks



Picture 7.3: New name of Blocks

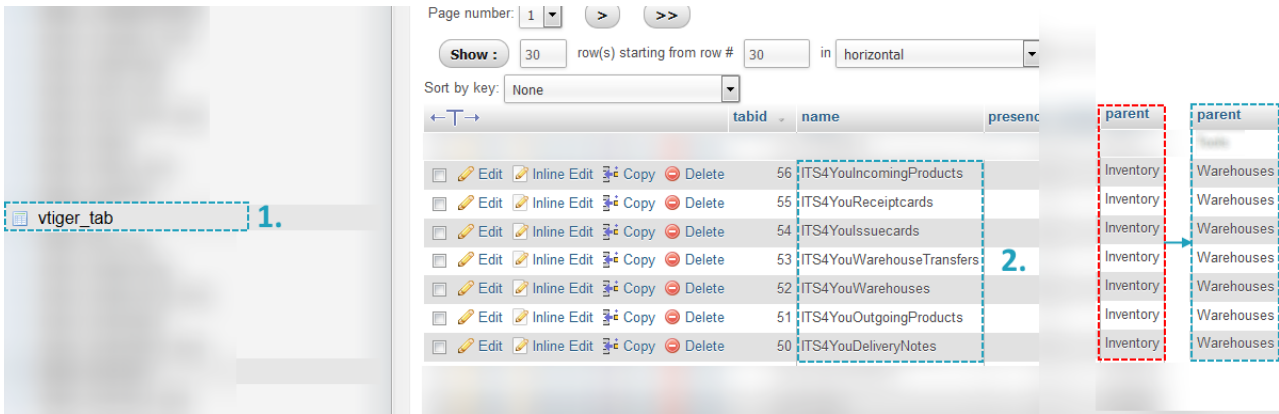
## 7.2 All Warehouses modules together

MARKETING & SALES	SUPPORT	INVENTORY	Tools
Campaigns	Tickets	Issue Card	EMAIL Maker
Leads	FAQ	Ware. Transfer	PDF Maker
Contacts	Projects	Receipt Card	Email Templates
Organizations	Service Contracts	Incoming Products	PBXManager
Opportunities		Outgoing Products	RSS
Quotes		Warehouses	Our Sites
Invoice		Delivery Notes	Mail Manager
Sales Order		Assets	Calendar
		Products	Documents
		Services	SMSNotifier
		Price Books	Recycle Bin
		Vendors	
		Purchase Order	
<b>ANALYTICS</b>			
			Reports
<p style="text-align: right;">Customize Main Menu Add / Manage Modules</p>			

Picture 7.4: Standard location of modules

If you want to have all Warehouses modules together we recommend to provide following steps:

1. in your Database find table *vtiger\_tab*
2. find files:
  - ITS4YouIncomingProducts
  - ITS4YouReceiptcards
  - ITS4YouIssuecards
  - ITS4YouWarehouseTransfers
  - ITS4YouWarehouses
  - ITS4YouOutgoingProducts
  - ITS4YouDeliveryNotes
3. edit **Parent** from *Inventory* to **Warehouses**
4. find file `vtiger/languages/(your_language)/Vtiger.php`
5. insert into **Vtiger.php**:
  - `"LBL_WAREHOUSES"=>"Warehouses" ,`
6. Enjoy it



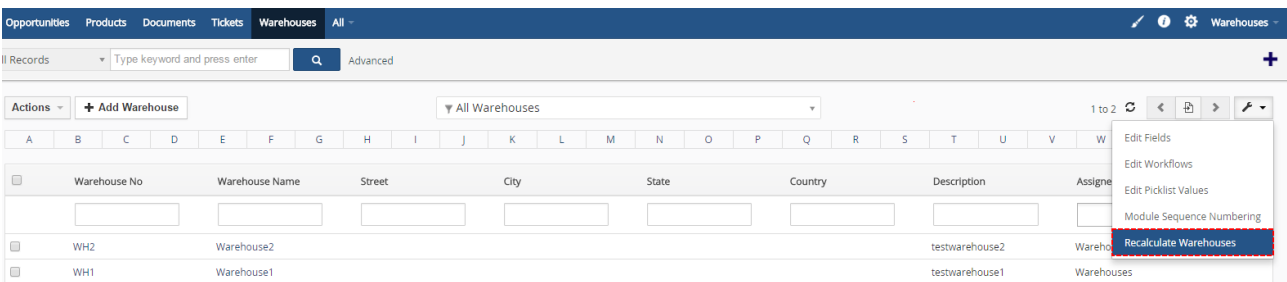
Picture 7.5: Edit Database



Picture 7.6: All Warehouses modules together

### 7.3 Aren't You sure about quantity of Products in your Warehouses?

In ListView of Warehouses or in WHProductMovementsBlock you can find option to recalculate quantities of Products.



Picture 7.7: Recalculate in Warehouse module



Picture 7.8: Recalculate in WHProductMovementsBlock

## Change log of Warehouses 4 You

- January 2017: **610.300.4**
  - **option to delivery Services**
  - receipt card description issue fixed
  - warehouses transfer takes products only from chosen warehouse
  - Convert SubProducts from Sales Order to Delivery notes fixed
- May 2016: **610.300.3**
  - first initiate

## Change log of Manual for Warehouses 4 You

- January 2017: manual is based on Warehouses 4 You version: **610.300.4**
  - **new chapters:** 6.5 Enable/Disable Services in Delivery process
  - **updated chapters:** 6.3 Update
  - **updated pictures:** Picture 4.5, Picture 4.9, Picture 4.11, Picture 4.12, Picture 4.15, Picture 4.20, Picture 4.22, Picture 4.26, Picture 4.29, Picture 4.30, Picture 4.38, Picture 4.44, Picture 4.48
- May 2016: manual is based on Warehouses 4 You version: **610.300.3**
  - first initiate version for vtiger 6.4