



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

Description

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Description 4You

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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)

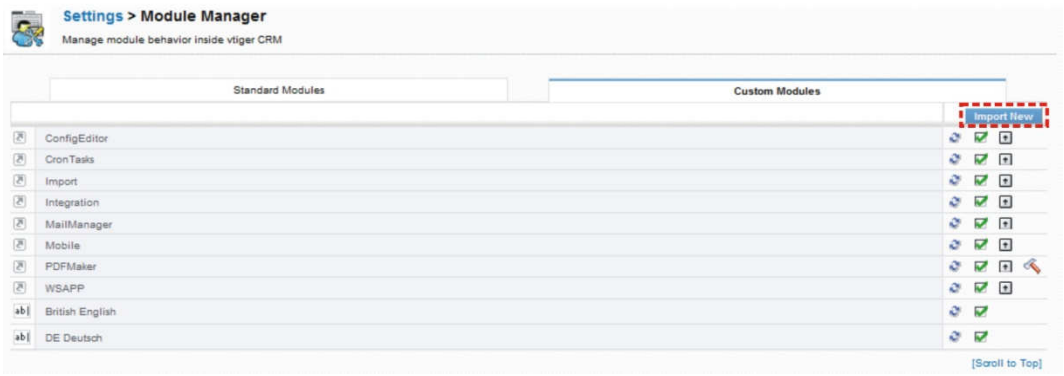
1 How to install

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):

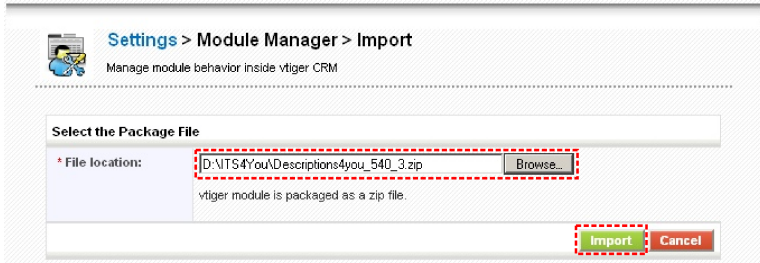
- vtigerCRM version (e.g. 5.4.0)
- Descriptions 4You version (e.g. 540.01.01)
- Date and time
- Domain in md5 coding format (e.g. 916b25c201a77a6721003c0030977f3b)
- Action provided by you (INSTALL, REACTIVATE, DEACTIVATE)

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



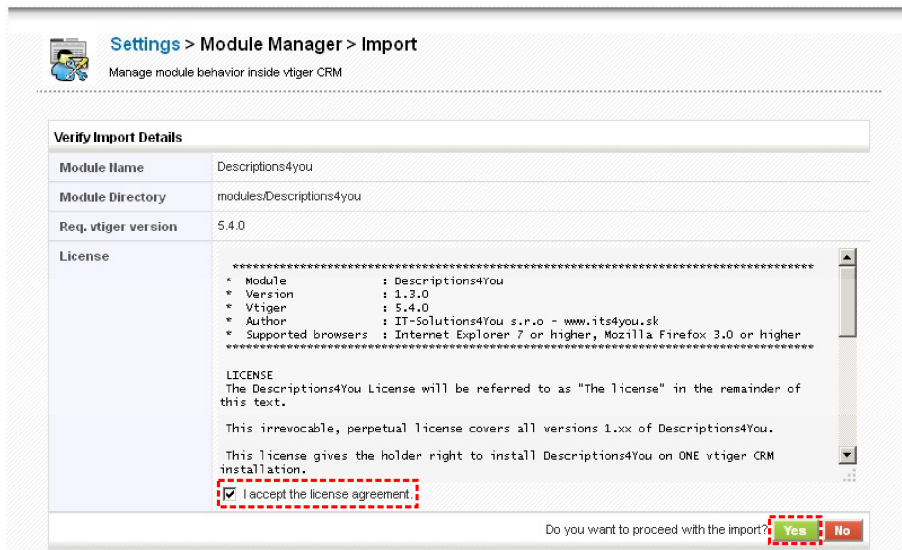
Picture 1.1 Installation of Descriptions 4You – step 1

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



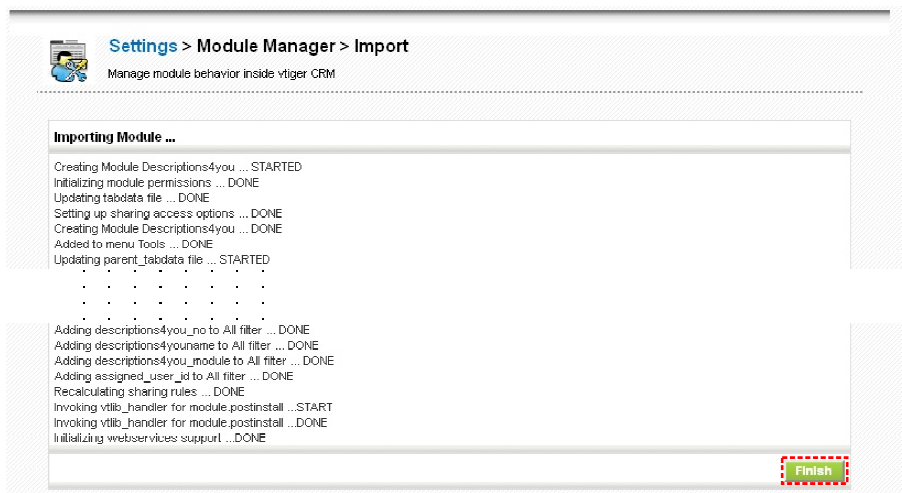
Picture 1.2 Installation of Descriptions 4You – step 2

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.



Picture 1.3 Installation of Descriptions 4You – step 3

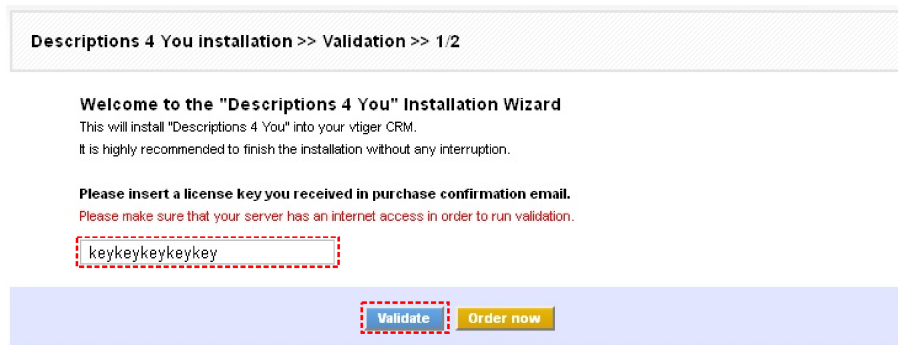
4. Click on **Finish** to complete the module import.



Picture 1.4 Installation of Descriptions 4You – step 4

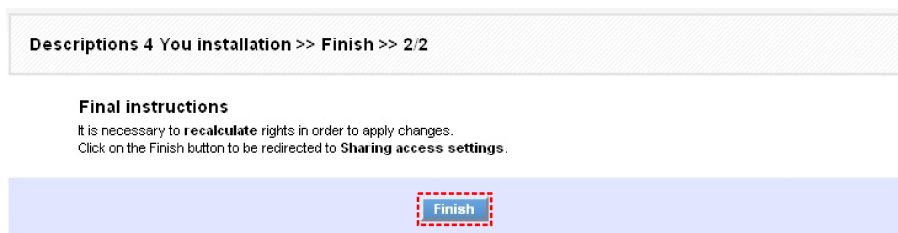
Please go to the More tab and from Tools column click on Descriptions 4You link. You will be redirected to Validation step of the installation process. So, in order to finish installation, please provide following validation steps.

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



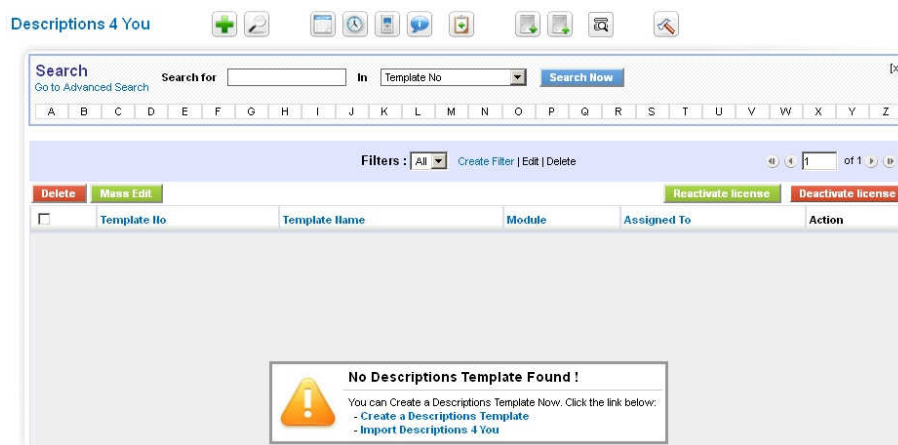
Picture 1.5 Validation step 1

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



Picture 1.6 Validation step 2 – Finish installation

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

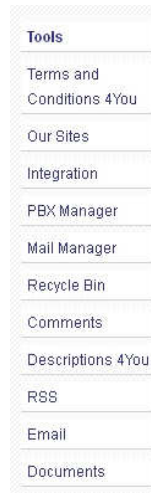


Picture 1.7 Descriptions 4You ListView after installation and validation steps


2 Quick start

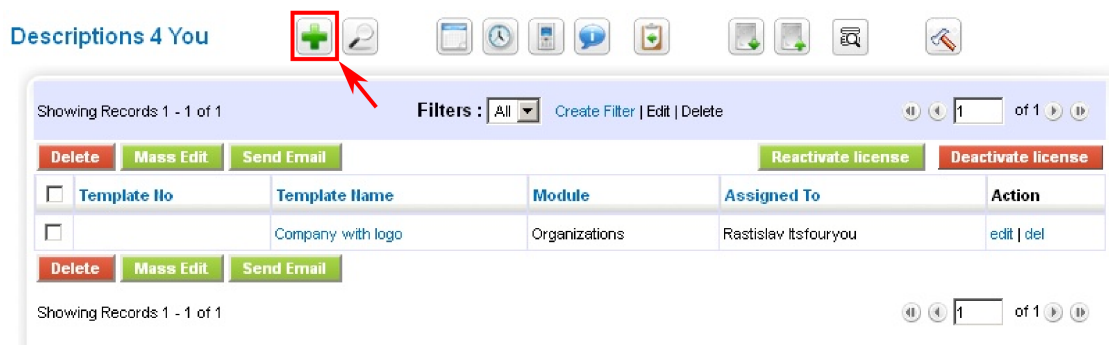
In the following section you can find how to create Description 4You record for vtiger CRM. The full description of the Description 4You menus, tabs and icons can be found in the later chapters.

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.



Picture 2.1 Start Description 4You

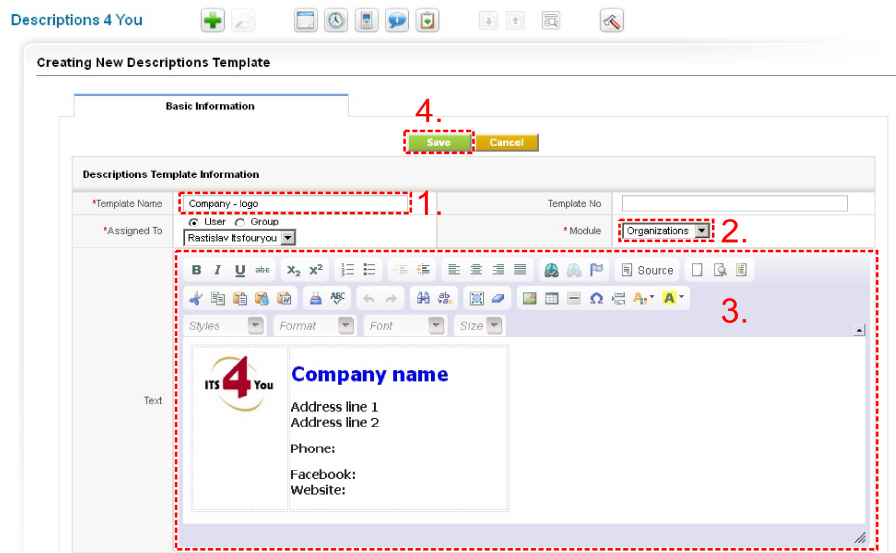
The screenshot below (Picture 2.2) shows Descriptions 4You ListView. You can click  to add new template and new window “Creating New Descriptions Template” will appear on the screen.



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:

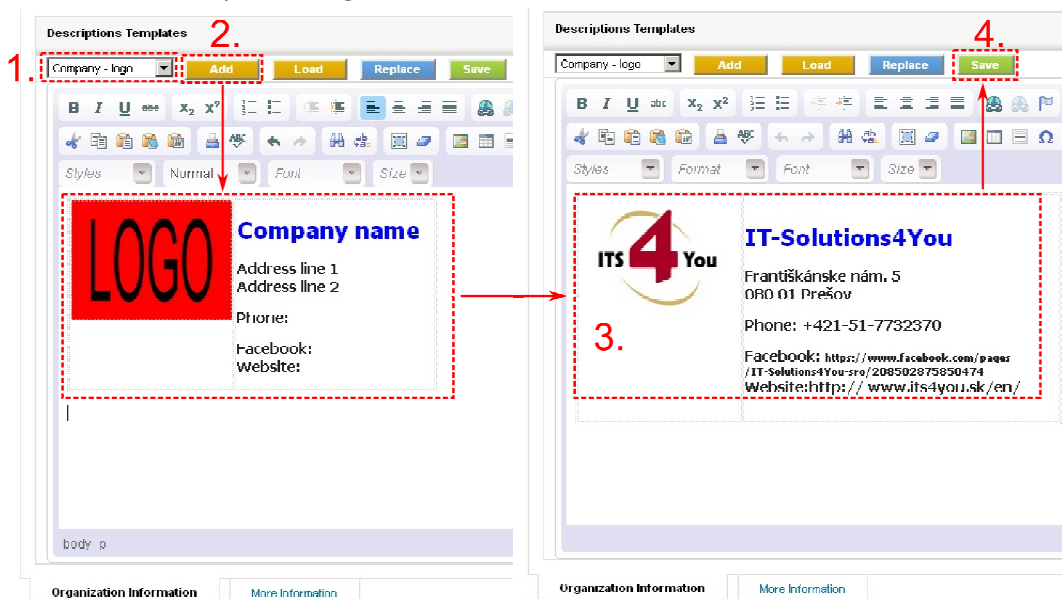
1. Define Template Name
2. Select Module
3. Using CK Editor insert text, pictures etc.
4. Save the template using button **Save**.



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

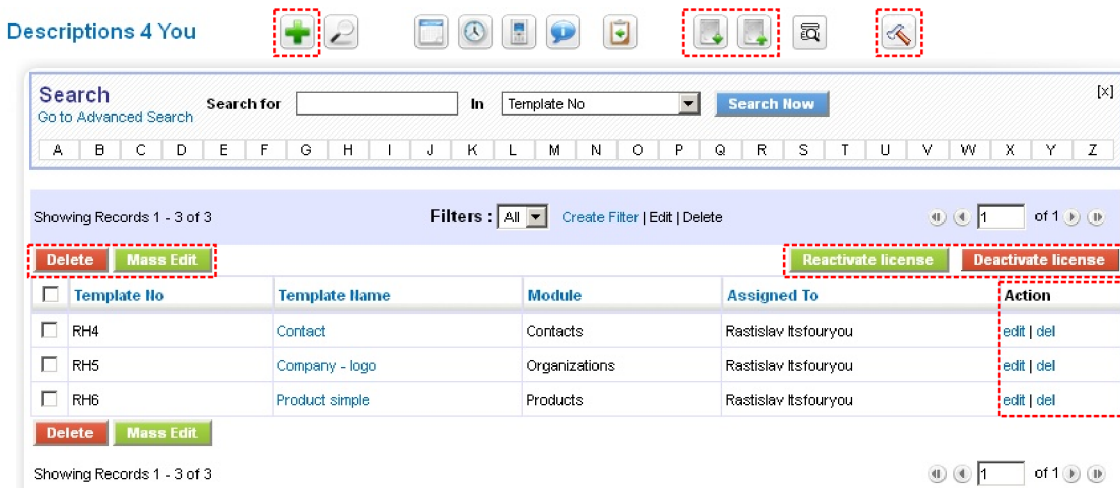
3 Work area

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 → Descriptions 4You and Descriptions 4You ListView will appear on your screen.





Picture 3.1 ListView

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


Note: The import and export within module 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 (https://wiki.vtiger.com/index.php/Export_Import_Enhancements).

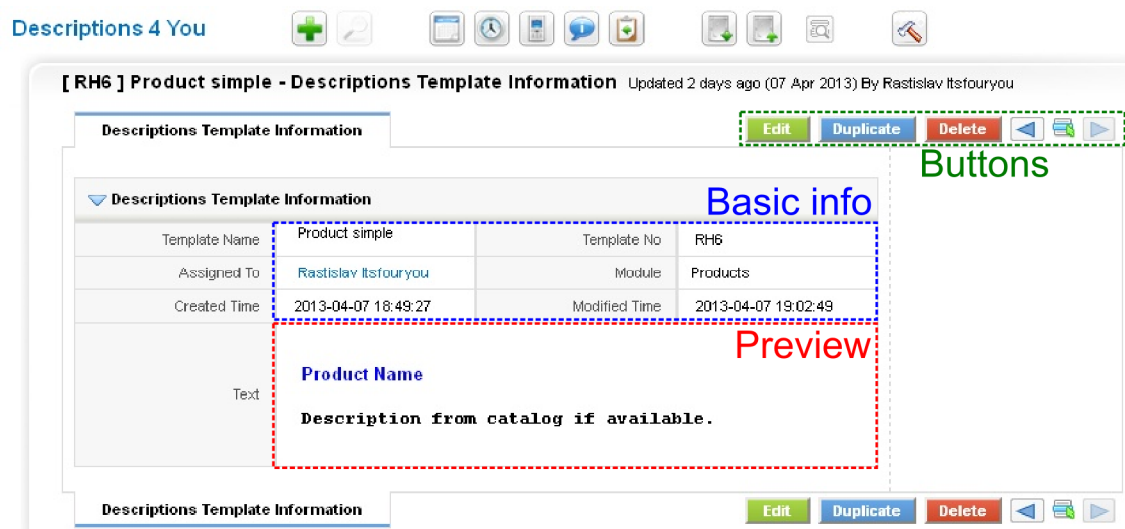
The main part of the Descriptions 4You ListView consists of list of the description templates, which gives you information about the template number, the template name and primary module. In the list you can also select one or more templates and consequently delete () or edit () selected group of templates.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

There are two additional buttons above the list of description templates  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:
 - **Edit** switch to EditView and start editing currently viewed template
 - **Duplicate** create duplicate of the template and start editing
 - **Delete** allows you to delete template
 -  navigation buttons (previous, jump, next)



Picture 3.2 DetailView

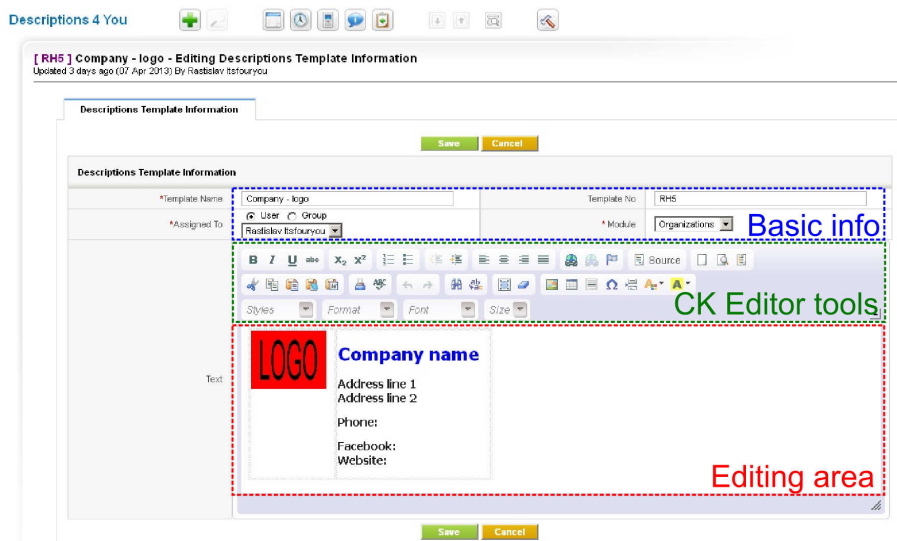
3.3 EditView

The EditView is initiated in three ways:

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

The EditView consists of:

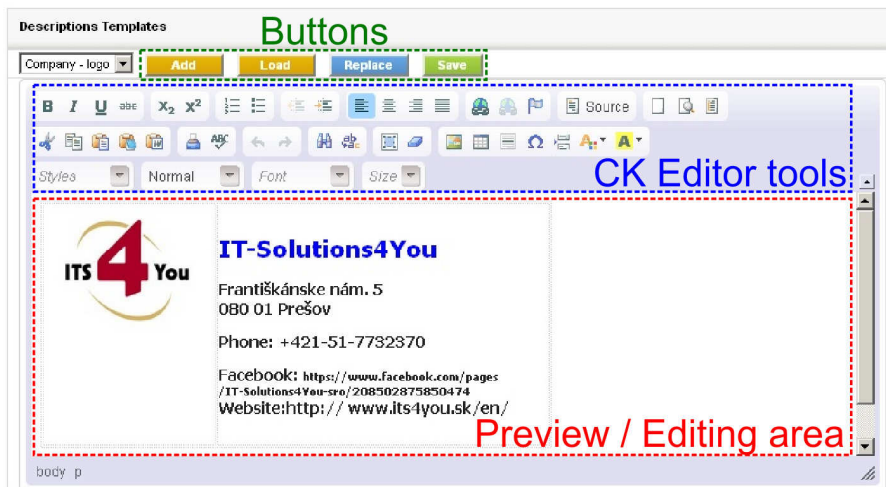
- Basic info part related to description template name, template number, module and assignment
- CK Editor tools
- Editing area



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.




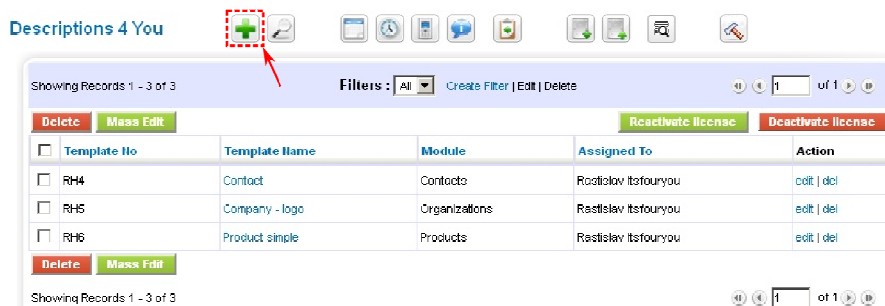
Picture 3.4 Descriptions 4You block

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: http://docs.cksource.com/CKEditor_3.x/Users_Guide. In addition two following chapters describe how to insert images and tables into your descriptions.


4.1 Create new description template

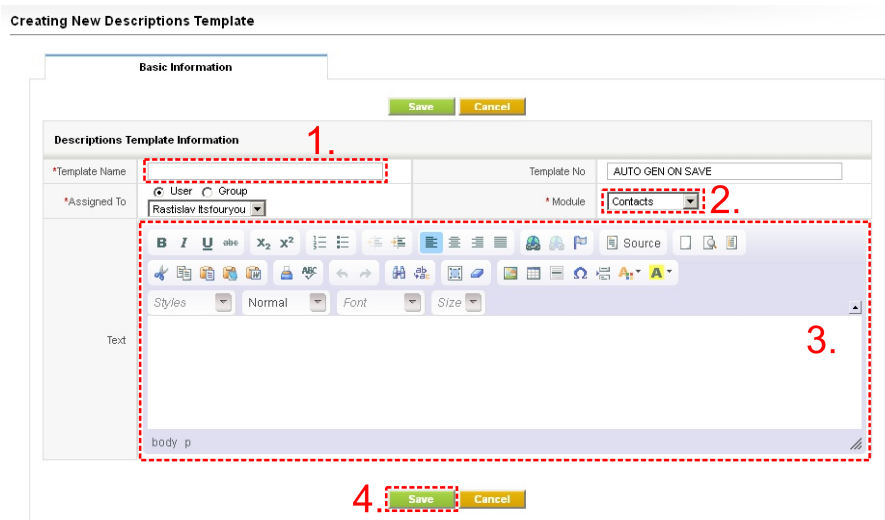
As was already described in the chapter 2, you can initiate creation of the new description template via button . The button will initiate the new EditView window “Creating New Descriptions Template”.



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. Save the template using button .

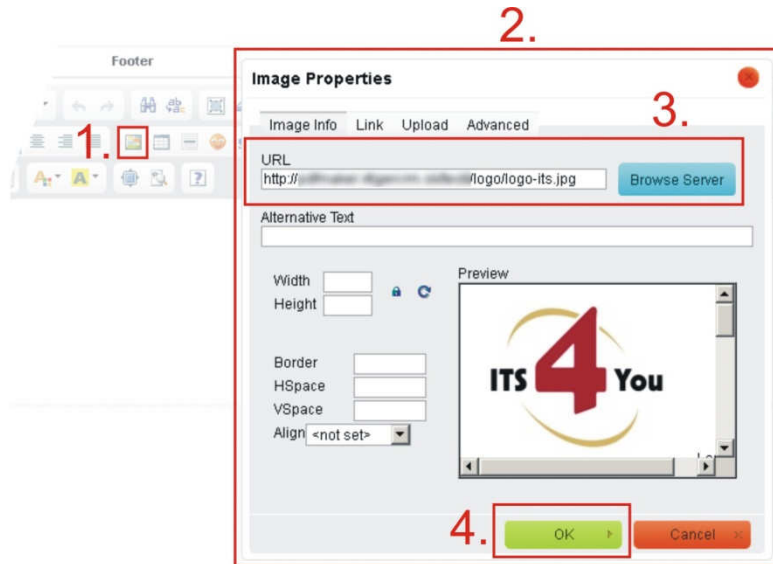


4.2 Inserting images



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.




Picture 4.2 Insert image

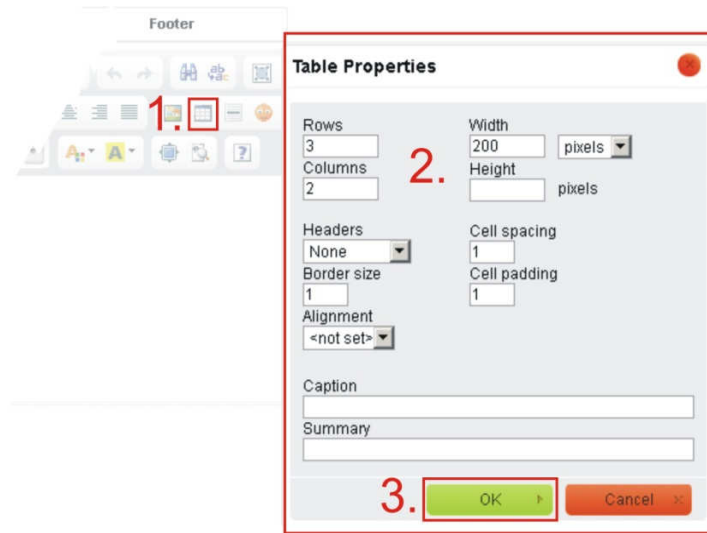
2. A pop-up window called "Image Properties" will appear. It includes four tabs that group image options.
3. Define the URL address of the image. You may also use the  in order to browse the files. Set up other properties of the image.
4. Click  to add image into description templates.

For more info visit following site: http://docs.cksource.com/CKEditor_3.x/Users_Guide/Rich_Text/Images


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  on the toolbar. After that a popup window called "Table Properties" will appear.



Picture 4.3 Creating tables

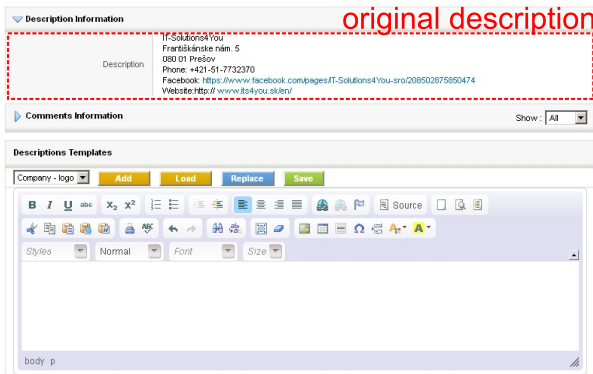
2. Set the basic table properties like number of columns and rows, width, height, etc.
3. Click on  button.

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.

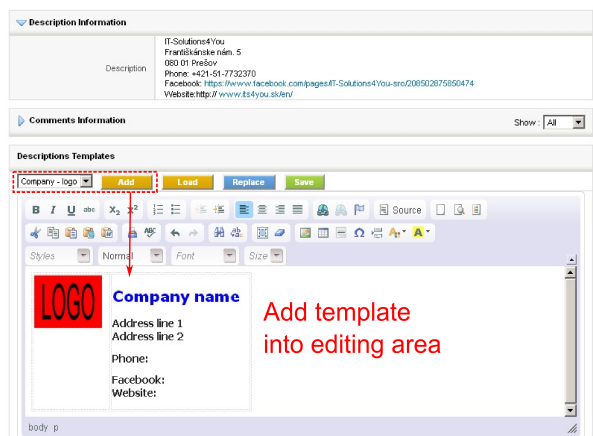
For more info visit following site: http://docs.cksource.com/CKEditor_3.x/Users_Guide/Rich_Text/Tables

4.4 How to use description templates

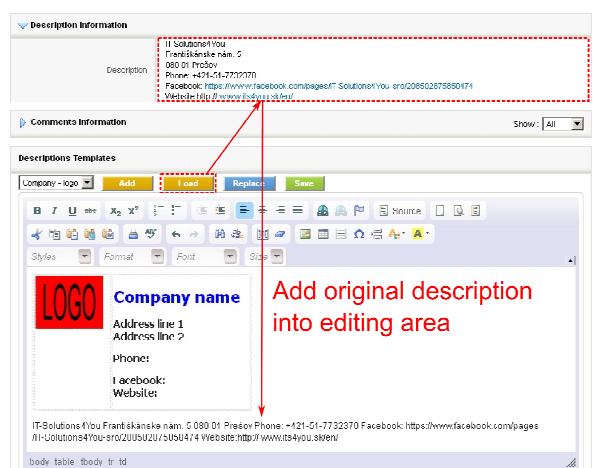
The description templates can be used in particular modules, or in case of “Global” templates for any available modules. In order to use description template for particular record the Descriptions 4You block has to be used. The most important fact is that within Descriptions 4You module new field for 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.



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

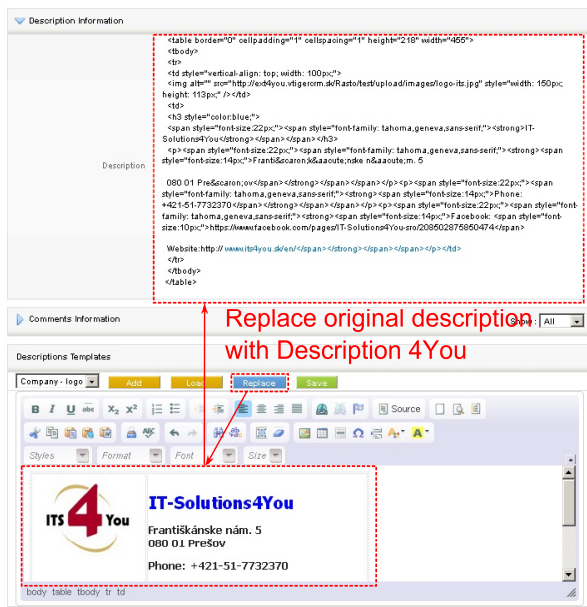


The button **Add** can be used to add selected description template into editing area. After addition of the template you can continue with editing description according to your needs.

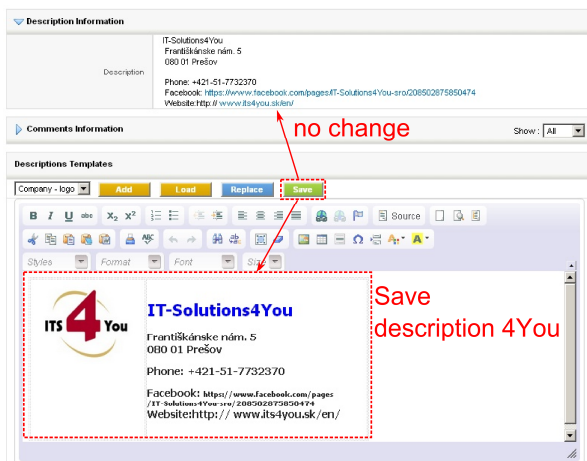


The button **Load** loads the original description into Description 4You block editing area. In case that some content is already in the editing area, this content is not overwritten.

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.



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.



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:

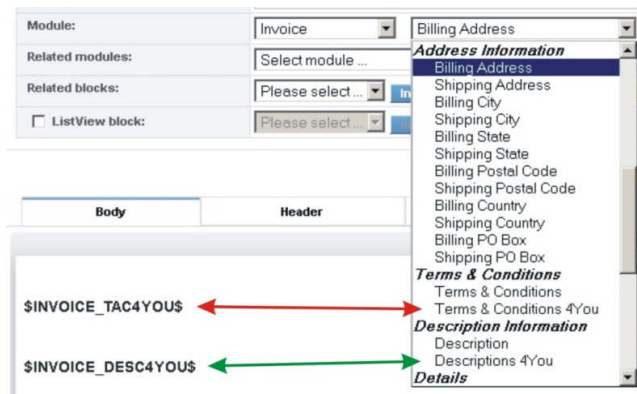
1. Select the description 4You template and click on button **Load**.
2. Edit the description 4You according to your needs.
3. Save the description 4You using button **Save**.

5 Additional features

5.1 Support of the PDF Maker

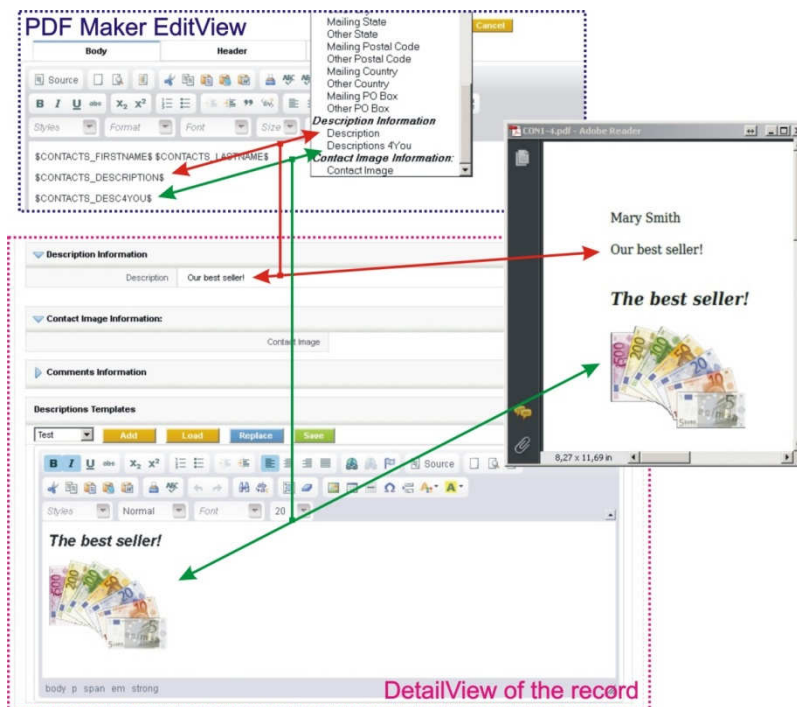
The Descriptions 4You (Desc4You) and Terms and Conditions 4You (T&C4You) which is also vTiger extensions used to create well formatted terms and conditions were already integrated into PDF Maker. Please refer to our web page or manual for details about Terms and Conditions 4You.

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”.



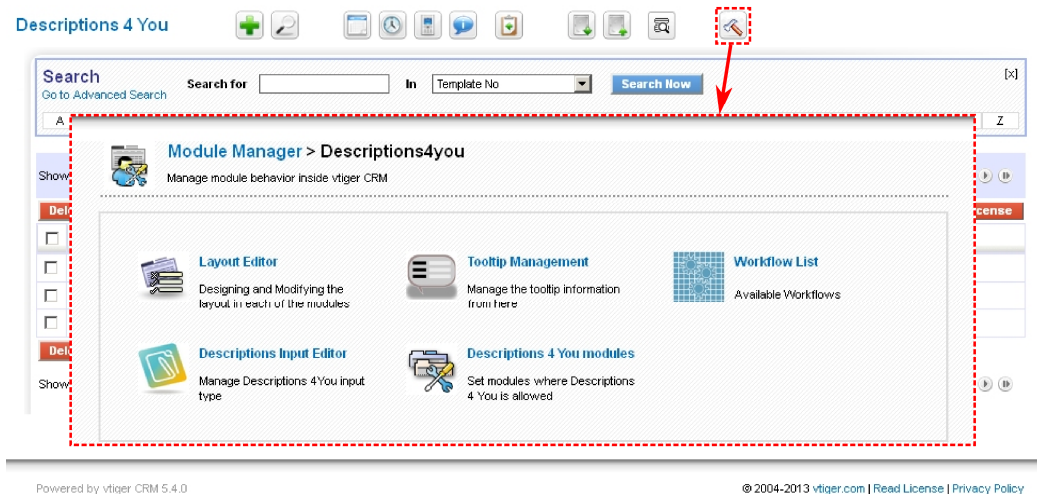
Picture 5.2 Description vs. Descriptions 4You in PDF Maker

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

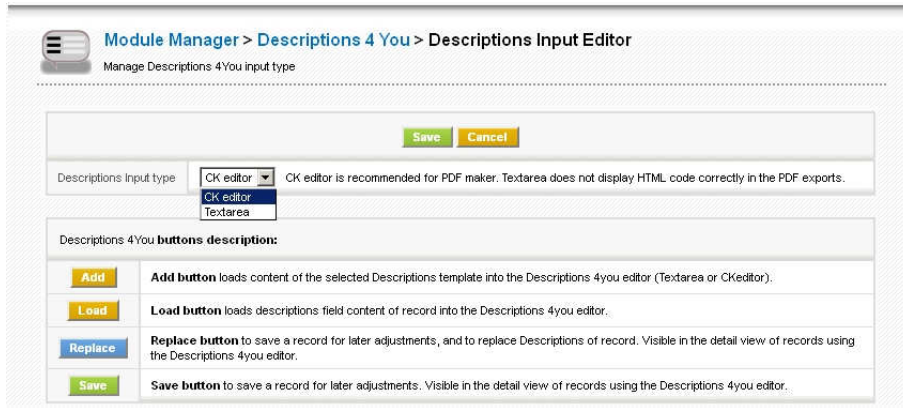
Please refer to following subchapters for details.



Picture 6.1 Descriptions 4You settings

6.1 Descriptions 4You Input Editor

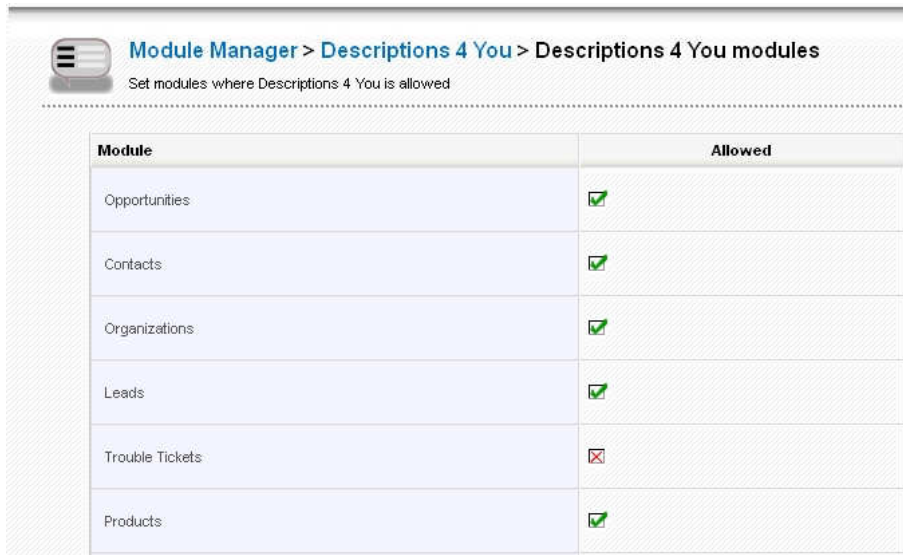
There exists possibility to select Description 4You input editor, i.e. you can select from CK Editor and Textarea in the settings. In spite of that possibility we recommend to use CK editor, especially you are using our PDF Maker extension tool to avoid incorrect display in the PDF exported files. Here you can also find short description of the Description 4You buttons described in the chapter 4.4.



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 in the column “Allowed” to make Descriptions 4You block in/visible in the DetailView for particular module according to your needs.



Picture 6.3 Setting Description 4You for particular modules

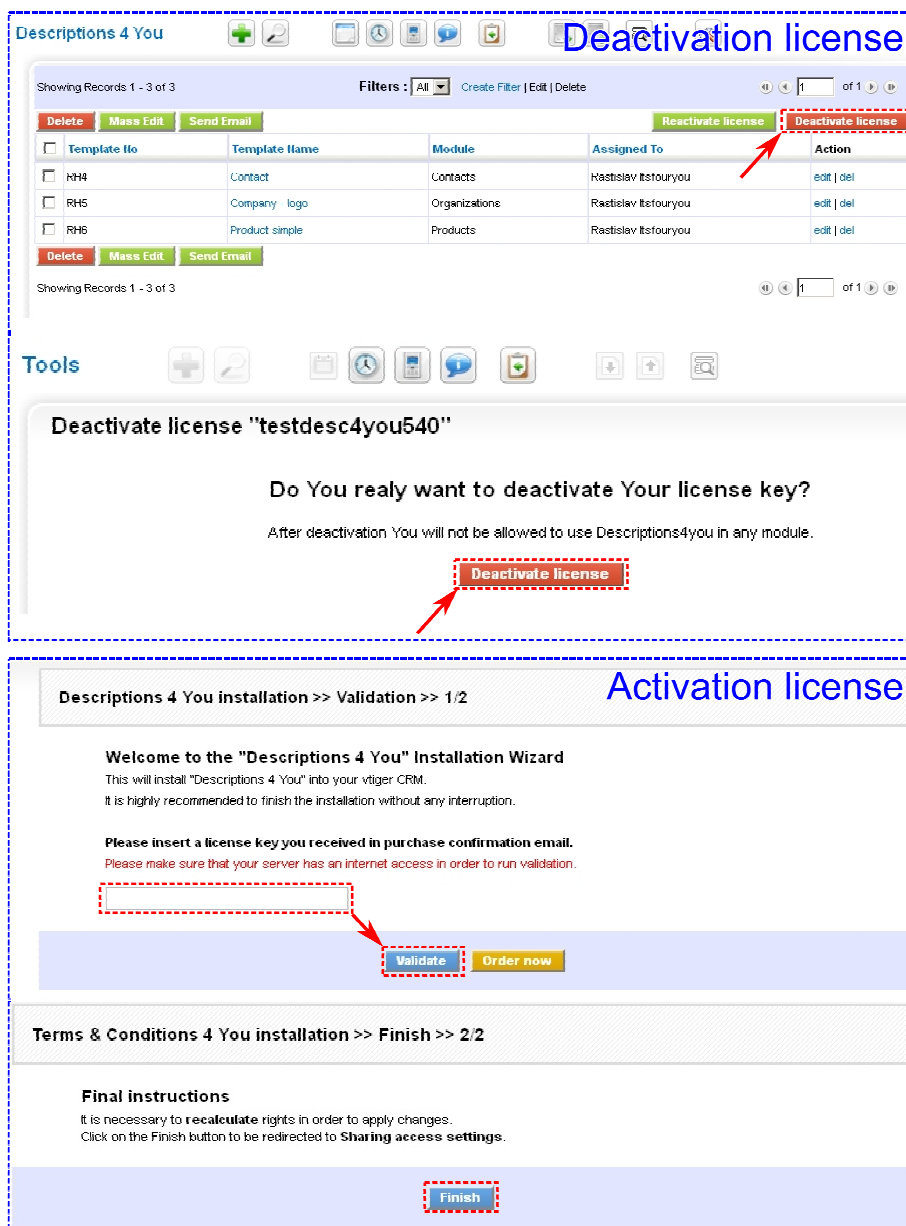
6.3 Deactivate/Reactivate license key

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:

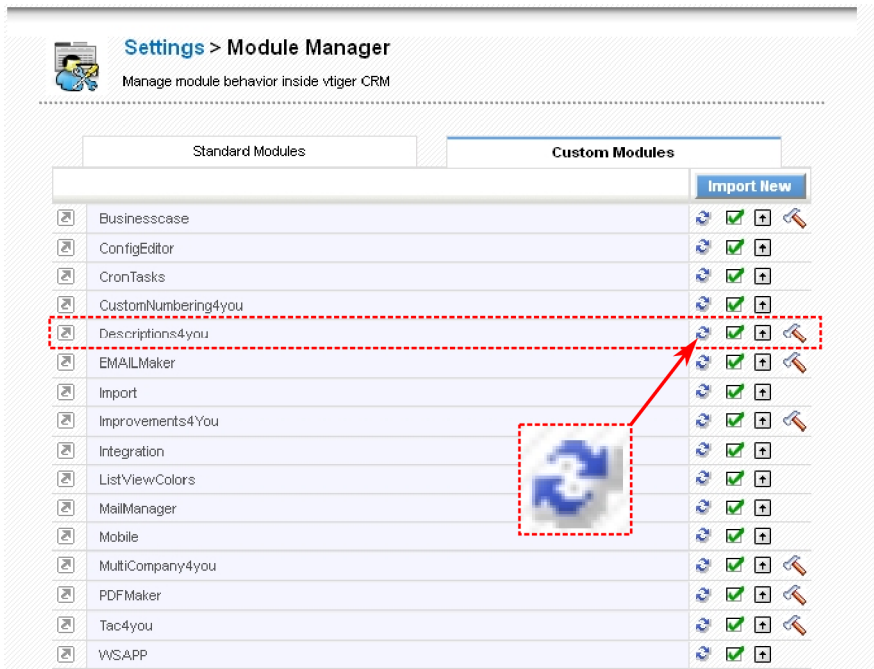
1. Please insert a license key and make sure that your server has internet access. Click on **Validate**.
2. Click on **Finish** button.



Picture 6.4 License deactivation

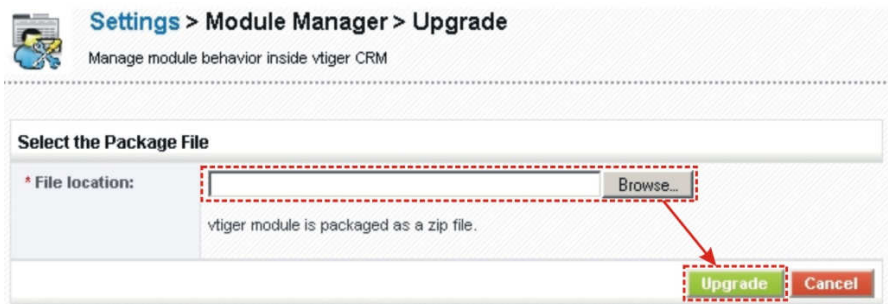
6.4 Upgrade of the Descriptions 4You

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



Picture 6.5 Initialization the upgrade of the Description 4You

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



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.



Picture 6.7 Upgrade failure

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