

PDF Maker Free for vtiger 7.x.x

by IT-Solutions4You

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1. Introduction to PDF Maker Free

The PDF Maker is extension tool designed for vtiger CRM. There is already possibility of the export to pdf format in vtiger CRM functionality but it covers just few modules. In addition pdf templates are hardcoded and cannot be edited. Therefore, the intention was to provide powerful and flexible tool which allows users of vtiger CRM to create own pdf templates.

The PDF Maker Free benefits are:

- Personalized Invoice, Quotes, Sales Orders and Purchase Orders formats
- Personalized Product Profiles with image
- Terms and Conditions

Product Features :

- You can use all Fields (including custom)
- Company and User information
- Translation from Global and Module languages
- Print from list view module
- Define Page format (A3, A4, A5, A6, Letter, Legal and own format is possible)
- Using Products images in Invoice, Quotes, Purchase or Sales Order

2. How to install PDF Maker Free

To install PDF Maker Free you have 2 options:

- install via vtiger Marketplace
- install via module manager

2.1. Install PDF Maker Free via module manager

To install PDF Maker Free via module manager you need to have installation .zip file. You can find Section to free downloads in our eshop. Please login or register into our eshop.

PDF Maker FREE for vtiger CRM

Most acknowledged extension to the vtiger CRM Open Source

The Free version allows you to create customized Quotes, Sales Orders, Purchase Orders and Invoices but only allows for 1 template. Although still very useful and powerful, the free version is limited but does give a feel for what it possible with paid versions.

How to install PDF Maker Free via module manager

After login you will see Free Downloads section.

Here you can download .zip file to install PDF Maker Free.

It is also useful to register because we will and more free extensions into this section.

The image shows a login panel with the following elements:

- Login Panel** (title)
- Email ID:** followed by a text input field.
- Password:** followed by a password input field.
- Forgot Password?** (a link)
- Sign Up** (a link)
- LOG IN** (a blue button)

Authenticated user

Logout

- Orders
- Invoices
- Licenses
- Download

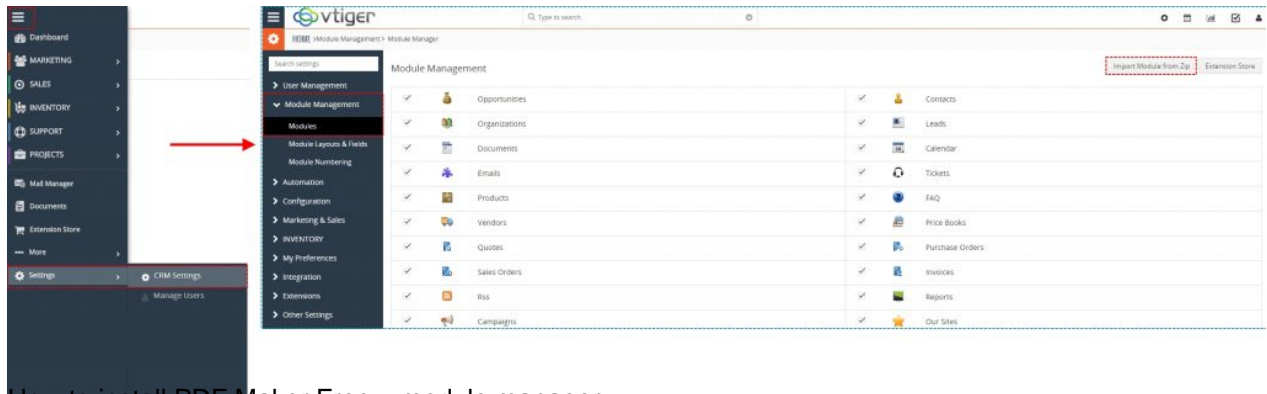
Free Downloads

- Styles 4 You for vtiger CRM
- PDF Maker Free for vtiger CRM

How to install PDF Maker Free – module manager

Now please provide following steps in order to install PDF Maker

1. Install the .zip (package) file of the PDF Maker module via Setting -> CRM Settings -> Module Management -> Modules. Click on the Import Module from Zip.



How to install PDF Maker Free – module manager

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.

Import Module from Zip

Disclaimer - Custom Files could put your CRM at risk
This functionality has been made available for Developers to test new modules. If you are installing from a file provided 3rd party, please proceed only if you trust the publisher. Custom Modules could include security vulnerabilities and overwrite system files putting your CRM at risk. The module you are about to install has not been reviewed by Vtiger.

I accept with disclaimer and would like to proceed

Select from My Computer

Import

Cancel

How to install PDF Maker Free – module manager

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 or [Cancel] to cancel.

Verify Import Details

PDFMaker

Vtiger Version : 7.0.0

License

```
*****  
* Module : PDF Maker  
* Version : 700.0.3  
* Vtiger : 7.0.0  
* Author : IT-Solutions4You s.r.o - www.its4you.sk  
* Supported browsers : Internet Explorer 7 or higher, Mozilla Firefox 3.0 or higher  
*****
```

I accept the license agreement.

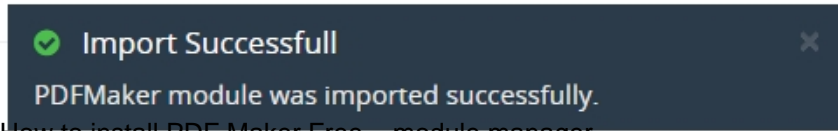
Import Now

Cancel

How to install PDF Maker Free – module manager

For successfully completing the installation is necessary download mPDF library into PDFMaker module from external storage place, because mpdf.zip is over 2MB and many customers has MAX_UPLOAD_SIZE set to 2 MB (webhosting) so we have make available download it from our server.

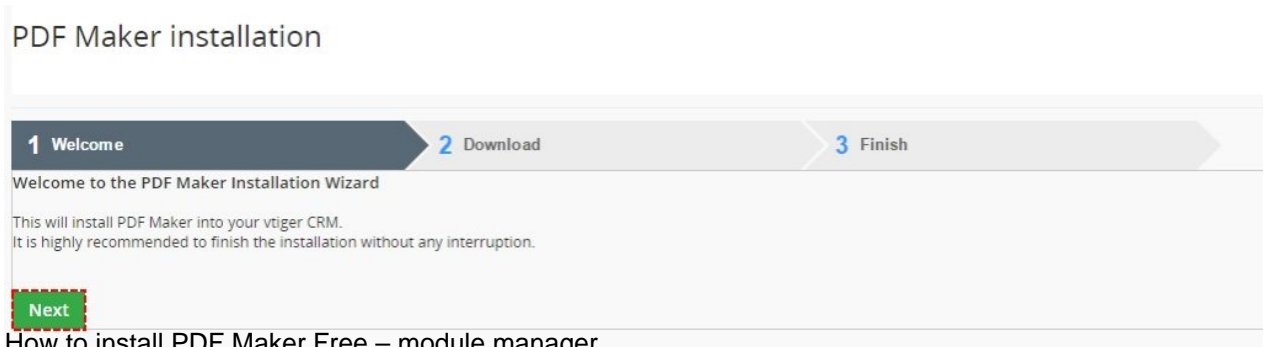
4. PDF Maker was imported



How to install PDF Maker Free – module manager

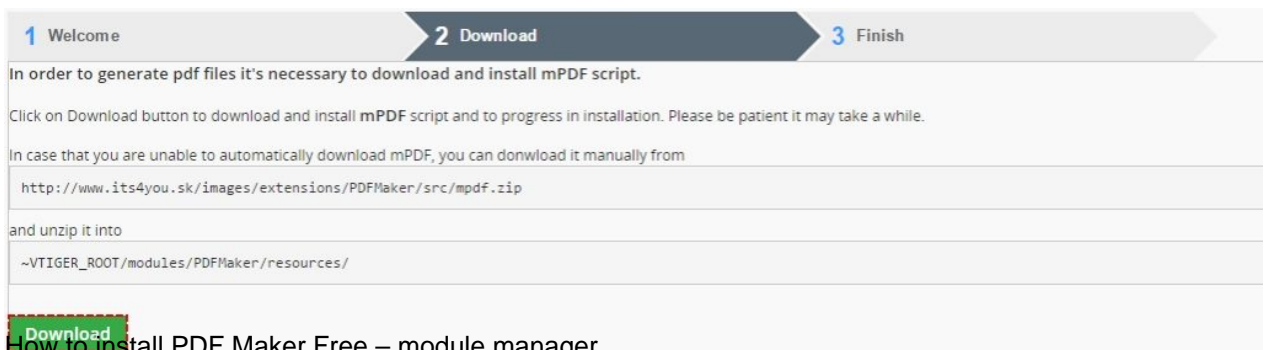
In order to finish installation, please provide following installation steps.

1. Open PDF Maker module Projects -> PDF Maker. Click on [Next]



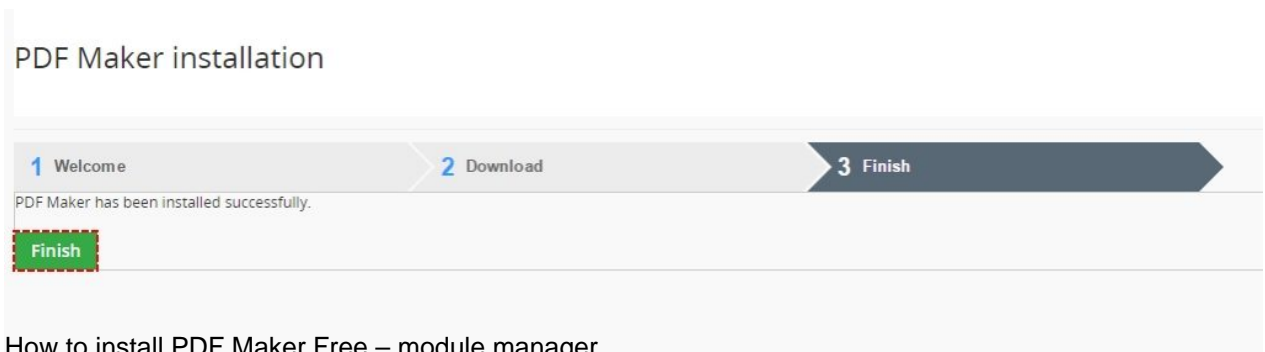
How to install PDF Maker Free – module manager

2. Mpdf Download. Click on [Download] button to download and install mpdf script.



How to install PDF Maker Free – module manager

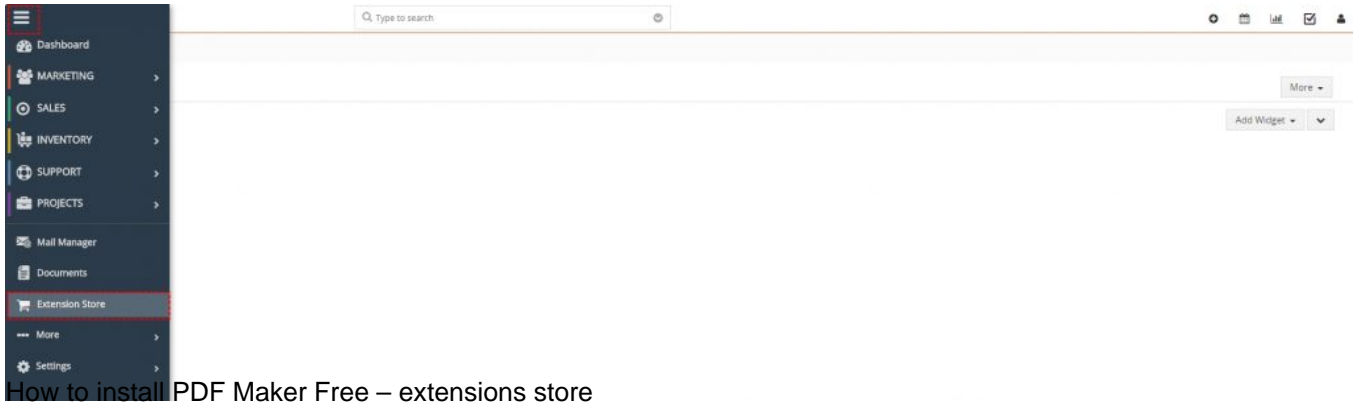
3. If PDF Maker is installed successfully you will see following screen. Click on [Finish].



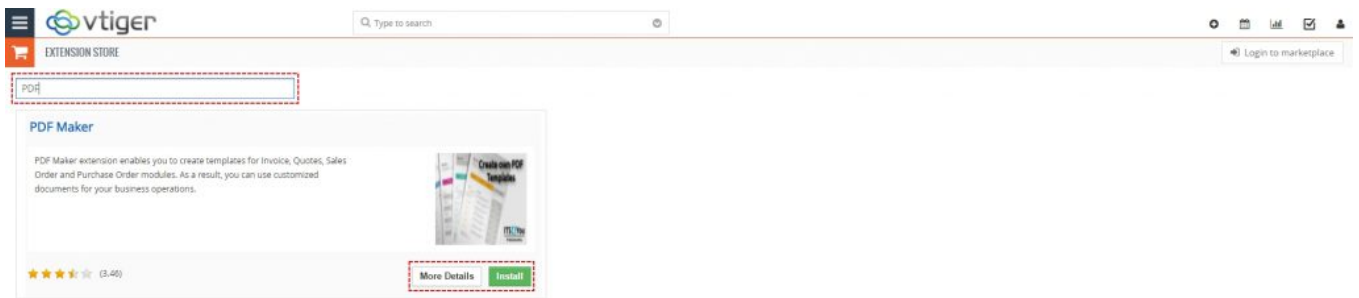
How to install PDF Maker Free – module manager

2.2. Install PDF Maker Free via Marketplace

In your vtiger please find Extension Store.



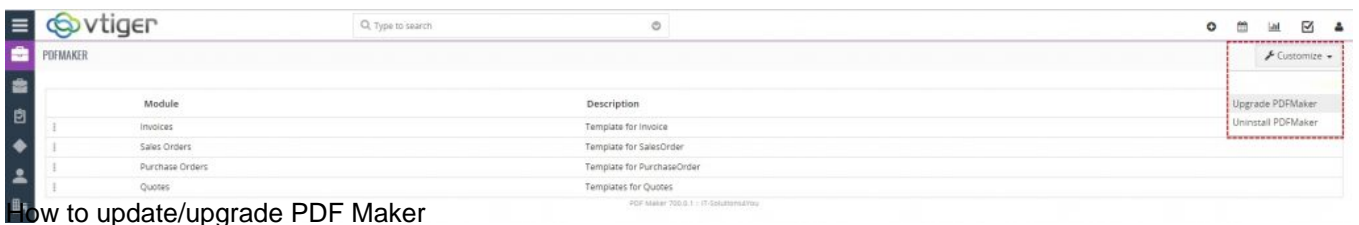
Search PDF Maker and then click on Install or More Details



How to install PDF Maker Free – extensions store

3. How to update/upgrade PDF Maker

The upgrade of the PDF Maker is initiated in the same way as PDF maker installation or click on Upgrade PDFMaker link in Customize tab of PDF Maker.



So please refer to above installation part for details how to initiate the import of the module from the file. As can be seen on following picture you will be notified that the PDF Maker module already exists. The upgrade will start immediately when you click on the [Update Now] button.

Verify Import Details

PDFMaker **Exists**

Vtiger Version : 7.0.0

License

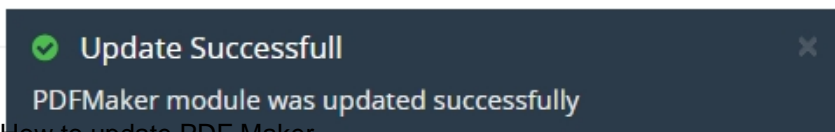
```
*****  
* Module : PDF Maker  
* Version : 700.0.3  
* Vtiger : 7.0.0  
* Author : IT-Solutions4You s.r.o - www.its4you.sk  
* Supported browsers : Internet Explorer 7 or higher, Mozilla Firefox 3.0 or higher  
*****
```

accept the license agreement.

Update Now Cancel

How to update PDF Maker

After upgrade the notification about successful upgrade is shown.



How to update PDF Maker

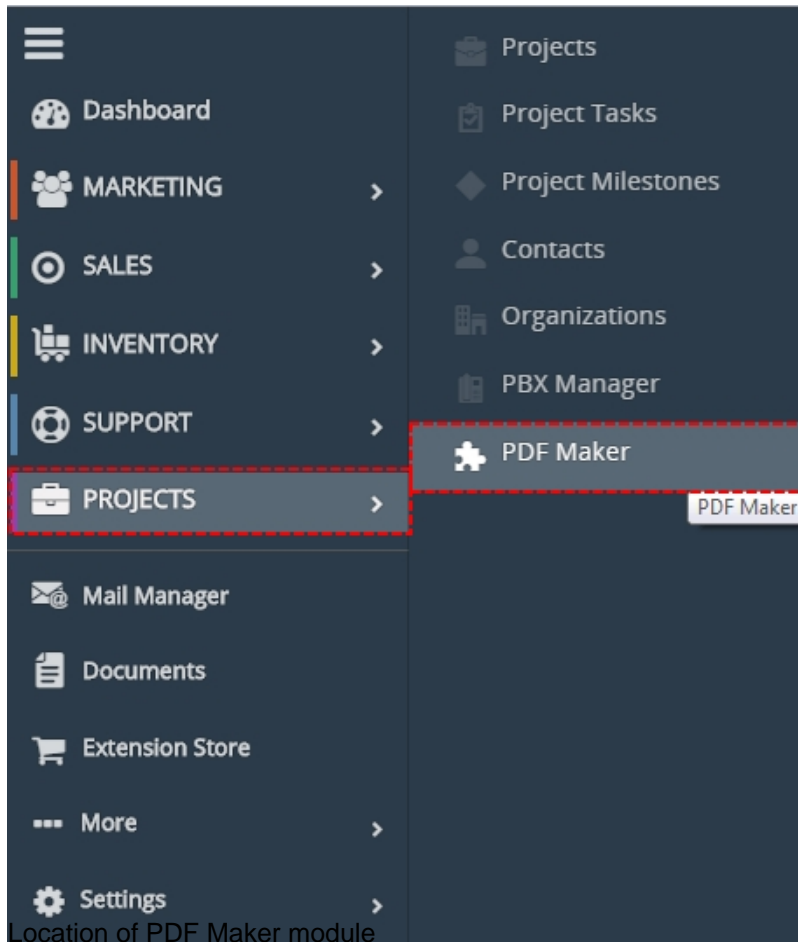
4. Quick start

In the following section you can find short description how to edit your PDF template for vtiger CRM using PDF Maker.

4.1. Edit the PDF template

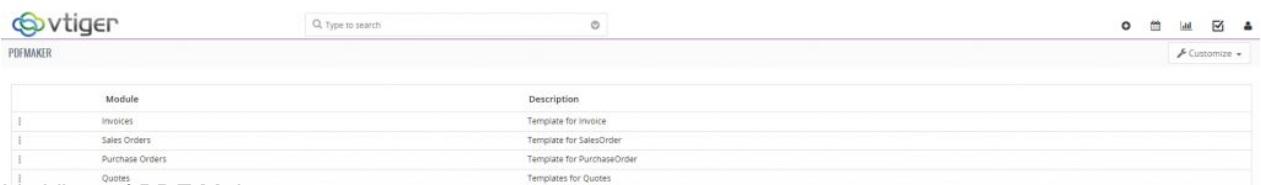
In order to edit the PDF template you have to start the PDF Maker tool which can be after installation located under the Projects as seen below on the picture.

1. In vtiger CRM menu please go to Projects and click on PDF Maker (since vtiger 7 there is no Tools part so records which used to be in Tools tab are in Projects tab now)



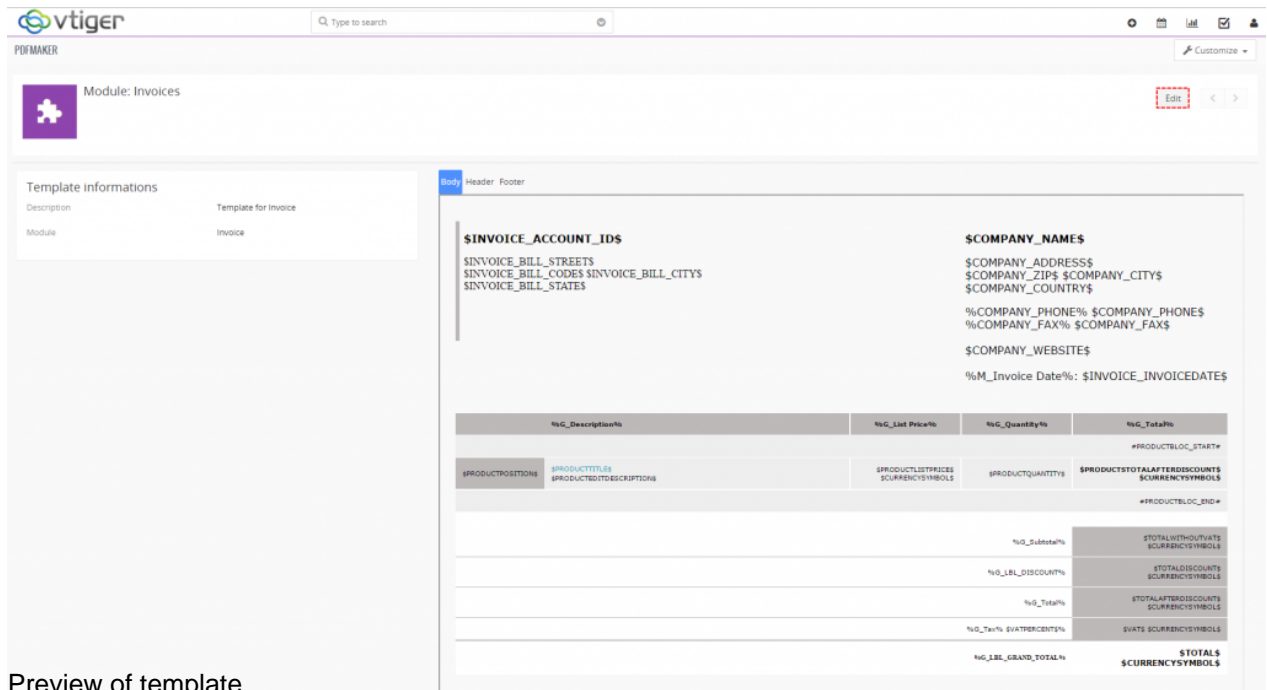
Location of PDF Maker module

2. The screenshot below shows PDF Maker ListView. You can click on template to see preview.



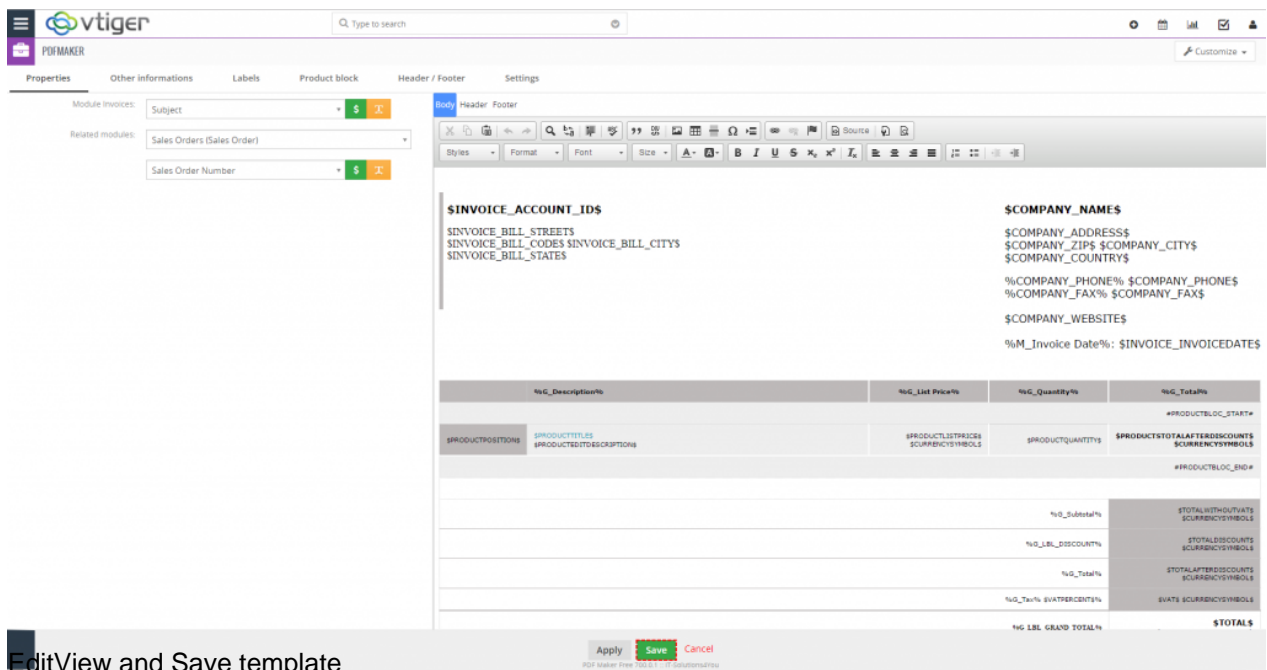
ListView of PDF Maker

3. In preview click on [Edit] to start editing templates



Preview of template

4. After editing click on [Save] button



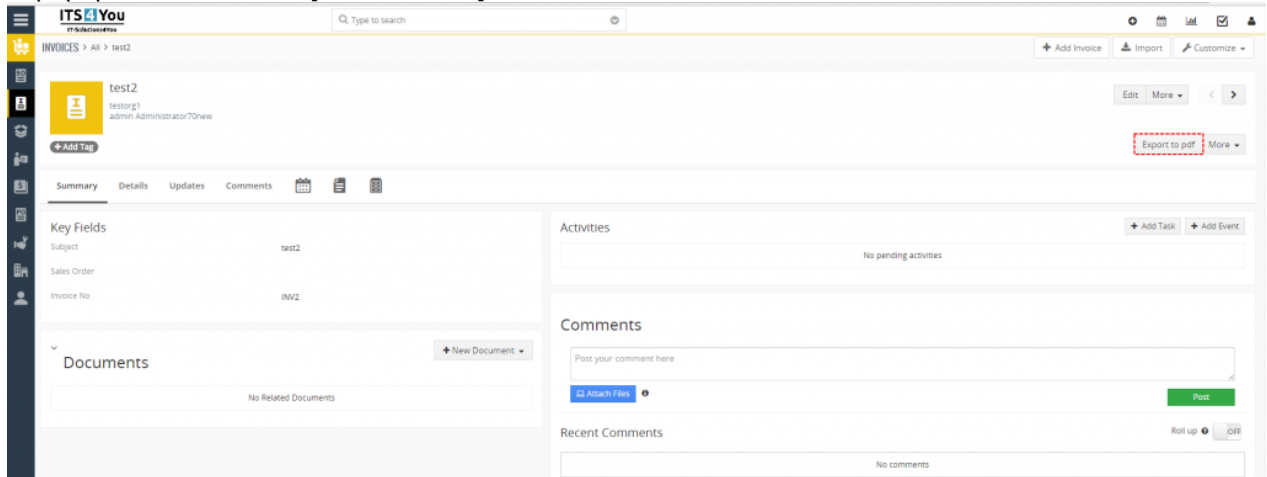
EditView and Save template

4.2. How to generate PDF file with PDF Maker template

With PDF Maker Free you can generate PDF file only from DetailView.

To generate PDF file please provide following steps:

1. To generate without changing default language click in DetailView of record on [Export to pdf] button and in popup window click on [Download file]



How to export PDF file

Preview ✕

index.php 1 / 2 ↻ ↓ 🖨

ITS4You IT-Solutions4You **Invoice No INV2**

testorg1

test
test test
test

IT-Solutions4You s.r.o.

Address
Postal Code City
Country

Phone 123456
Fax 654321

www.its4you.sk

Invoice Date:

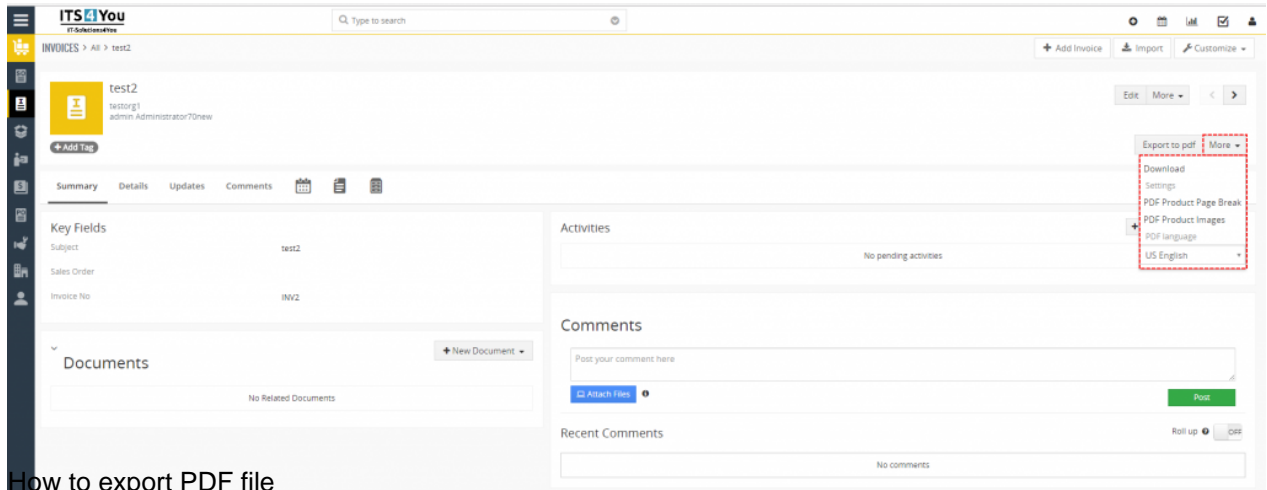
Description	Selling Price	Quantity	Total
1 test1	100,00 €	1,00	100,00 €
Sub Total			100,00 €
Discount			0,00 €
Total			100,00 €
Tax 27,00%			27,00 €
Grand Total			127,00 €

⌵ ⌶ ⌷

[Download file](#) [Print](#) [Cancel](#)

How to export PDF file

2. First, if you want to change language of pdf file or add PDF Product Page Break or change PDF Product Images click on [More] button



How to export PDF file

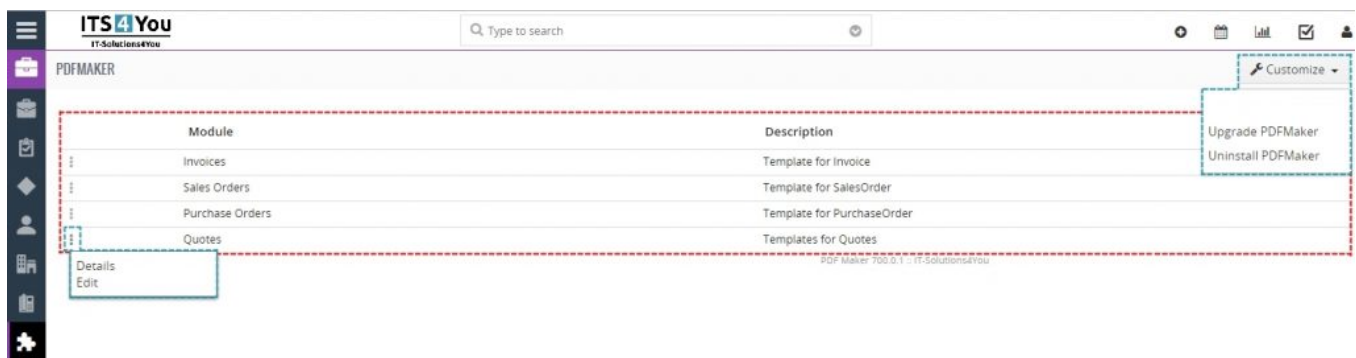
3. Then click on [Download] or [Export to pdf] button

5. Work area

The Work Area of PDF Maker consists of:

- ListView – list of your templates
- DetailView – shows already created pdf template in details
- EditView – allows you to edit existing templates
- PDF Maker block – mainly used for export records to pdf file

5.1. ListView of PDF Maker Free



ListView of PDF Maker Free

The main part of the PDF Maker ListView consists of list of the PDF templates, which gives you information about a module and a short description.

Under customize button you can find:

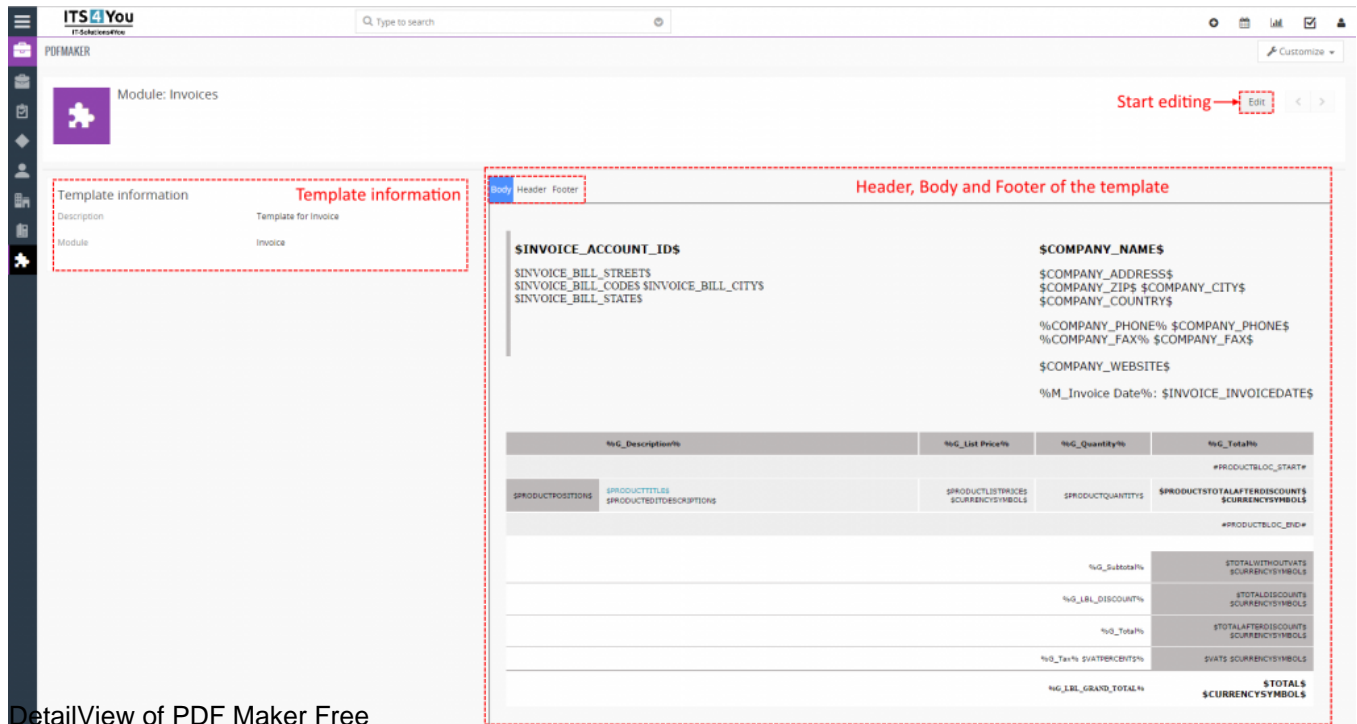
- Upgrade PDF Maker
- Uninstall PDF Maker

There are also buttons to see PDF template details and Edit PDF template.

5.2. DetailView of PDF Maker Free

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

- Template information part – gives basic information of the template
- PDF template itself which consist of Header, Body and Footer part.
- [Edit] button – switch to EditView and start editing

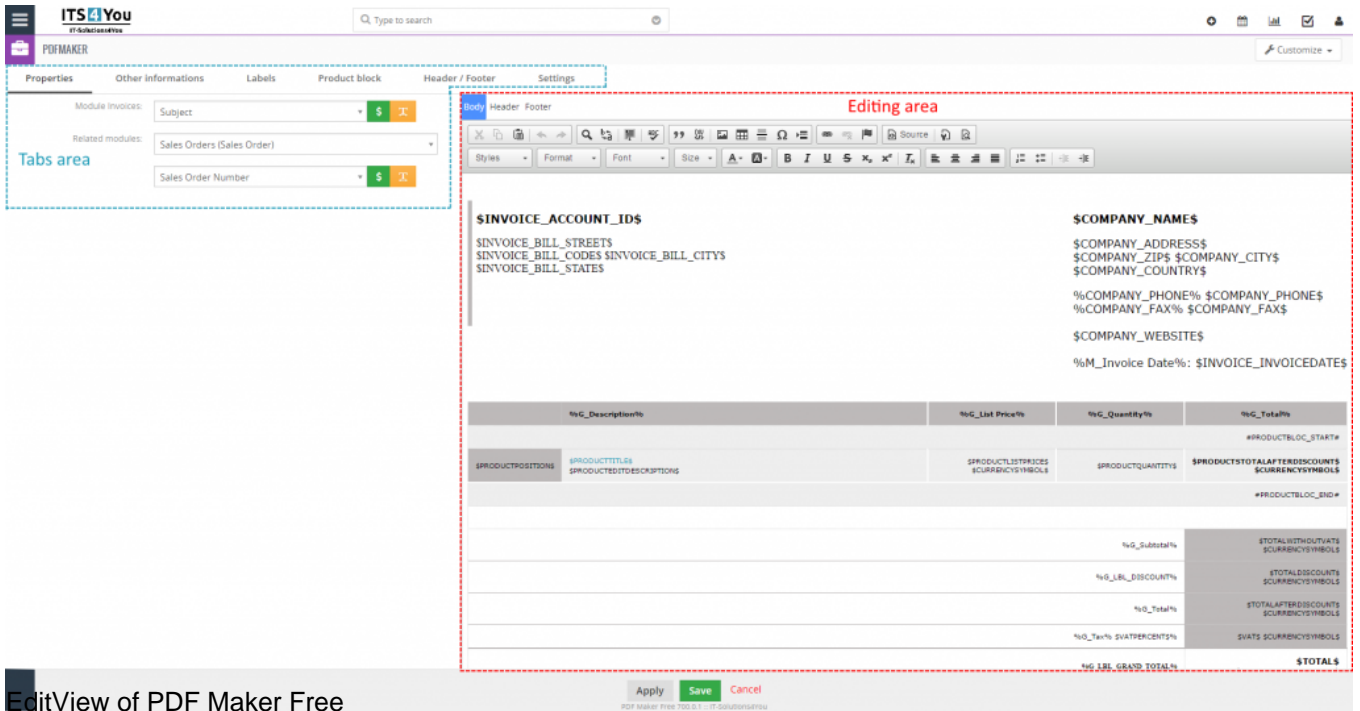


DetailView of PDF Maker Free

5.3. EditView of PDF Maker Free

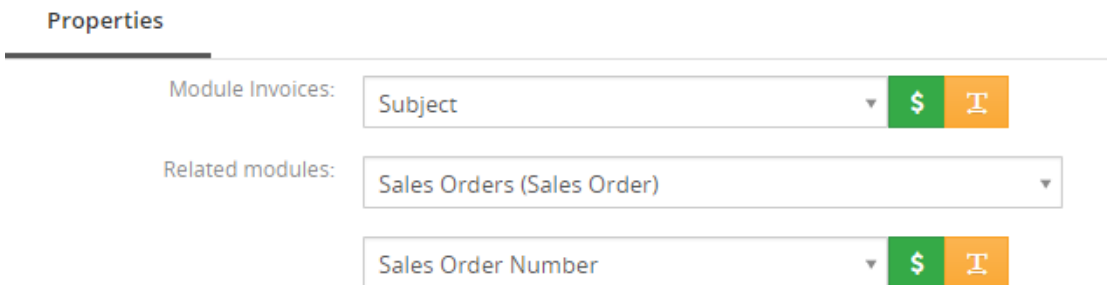
The EditView shown in the picture below is divided into two areas;

- **Tabs area** – allows user to insert into template different kind of values, fields, labels and to set up properties and other common settings of the pdf template. Tabs area consists of following tabs, which are described in the following subchapters:
 - Properties
 - Other informations
 - Labels
 - Product block
 - Header/Footer
 - Settings
- **Editing area** – is mainly used for inserting/editing your own text, tables, images etc. and to make some design adjustment of the template like font change, color, format, size, background color of the text etc. This editing can be initiated via many toolbars located inside three tabs (Body, Header and Footer) in the above part of Editing area.



5.3.1. Properties

The main purpose of the Properties tab is to add variables of module and related modules.



Properties

Name	Description
Primary Module	Template will be based and available only for one primary module and its fields.
Related modules	If exists related module(s) to selected module, it is possible here to select and use fields from any related modules.

5.3.2. Other information

As shown below Other informations tab contains several fields. They are Company and User information, Terms and Conditions, Current date, Barcodes, QR code and Custom functions.

Other informations

Company and User information:

name \$

Terms and Conditions: \$

Current date: \$

Other information

Name	Description
Company and User information	Comprises group of fields from Company information, Assigned to User, Logged in User, Modified by User and Created by User. Custom fields also supported.
Terms and Conditions	Terms and Conditions.
Current date	Current date in several formats.

5.3.3. Labels

Labels tab consists of Global language and Module language. Labels are very useful especially in case you need to print/save documents in two or more languages.

Labels

Global language:

Module language:


Labels


Name	Description
Global language	Global labels.
Module language	Labels related only to selected module.


5.3.4. Product block


The product block tab allows inserting product block template and editing it. In addition, you can create your own product block using “Block start”, “Block end” and fields for products and services.


Product block

Product block template: 

Product block: 

*Common fields for Products & Services: 

*Available fields for Products: 

*Available fields for Services: 

* fields are placed into Product block. Product block will be shown for every product/service in PDF.


Product block

Name	Description
Product block template	Insert predefined and created product block templates.
Product block	Products and Services Block start, Products and Services Block end. Products Block start, Products Block end. Services Block start, Services Block end. Each product block has to start with "Block start" and ends with "Block end".
Common fields for Products & Services	Fields common for products & services. You can find same fields for products and services separately as well, but it is recommended to prefer common fields in the templates.
Available fields for Products	Fields for products.
Available fields for Services	Fields for services.

5.3.5. Header/Footer

The Header / Footer tab comprises some variables and header/footer settings related to displaying.

Header / Footer

Header/Footer variables: 

Display header: **All pages** **First page** **Other pages**

Display footer: **All pages** **First page** **Other pages** **Last page**

Header/footer

Name	Description
Header / Footer	"Current page", "Total pages" and "Page/pages".

variables	
Display header	Allows defining how to display the header of the pdf document.
Display footer	Allows defining how to display the footer of the pdf document.

5.3.6. Settings

The settings tab allows defining Description of template, page format, page settings, number format and other settings from usage of template point of view.

Settings

Description:

Page format:

Page orientation:

Ignored picklist values:

Margins:

Top	<input type="text" value="2.0"/>
Bottom	<input type="text" value="2.0"/>
Left	<input type="text" value="2.0"/>
Right	<input type="text" value="2.0"/>

Number format:

Decimal point separator	<input type="text" value=","/>
Decimal point number	<input type="text" value="2"/>
Thousands separator	<input type="text" value="."/>

Settings

Name	Description
Description	The description of the pdf template.
Page format	A3, A4, A5, A6, Letter, Legal or Custom. Custom page format allows to define width and height of the page in mm. Maximum values are 2000 mm x 2000 mm and minimum values are 100mm x 100mm.
Page orientation	Portrait or landscape.
Ignored picklist values	Define picklist values which will be ignored in the final pdf document like None, none, keine etc. Entered

	values have to be separated with comma.
Margins	Margins in cm. Maximum value is 9.9 cm and minimum value is 0 cm.
Number format	Decimal point separator – comma, dot (but any symbol can be used) Number of decimal points – 0-3 Thousands separator – comma, dot, space (but any symbol can be used)

5.4. PDF Maker block of PDF Maker Free

The PDF Maker block can be found inside the specific module. In the module ListView it is necessary to click on any record to see details and on the right side, you can find the block. PDF Maker block contains of 2 buttons.

- [Export to pdf] – you will see Preview of pdf with default options (Language, Product Page Break and Product Image) and you can see options to Download and print PDF file

Preview

index.php 1 / 2

ITS4You
IT-Solutions4You

testorg1

test
test test
test

Invoice No INV2

IT-Solutions4You s.r.o.

Address
Postal Code City
Country

Phone 123456
Fax 654321

www.its4you.sk

Invoice Date:

Description	Selling Price	Quantity	Total
1 test1	100,00 €	1,00	100,00 €
Sub Total			100,00 €
Discount			0,00 €
Total			100,00 €
Tax 27,00%			27,00 €

Download file
Print
Cancel

Preview

- [More] – in more button you can find Download option to direct download pdf file, PDF Product Page Break to move product on other page, PDF Product Images to choose Product image for Products and set size. Also there is option to change PDF language

test2
testorg1
admin Administrator?0new

+ Add Tag

Summary Details Updates Comments

Key Fields
Subject test2
Sales Order INV2

Activities
No pending activities

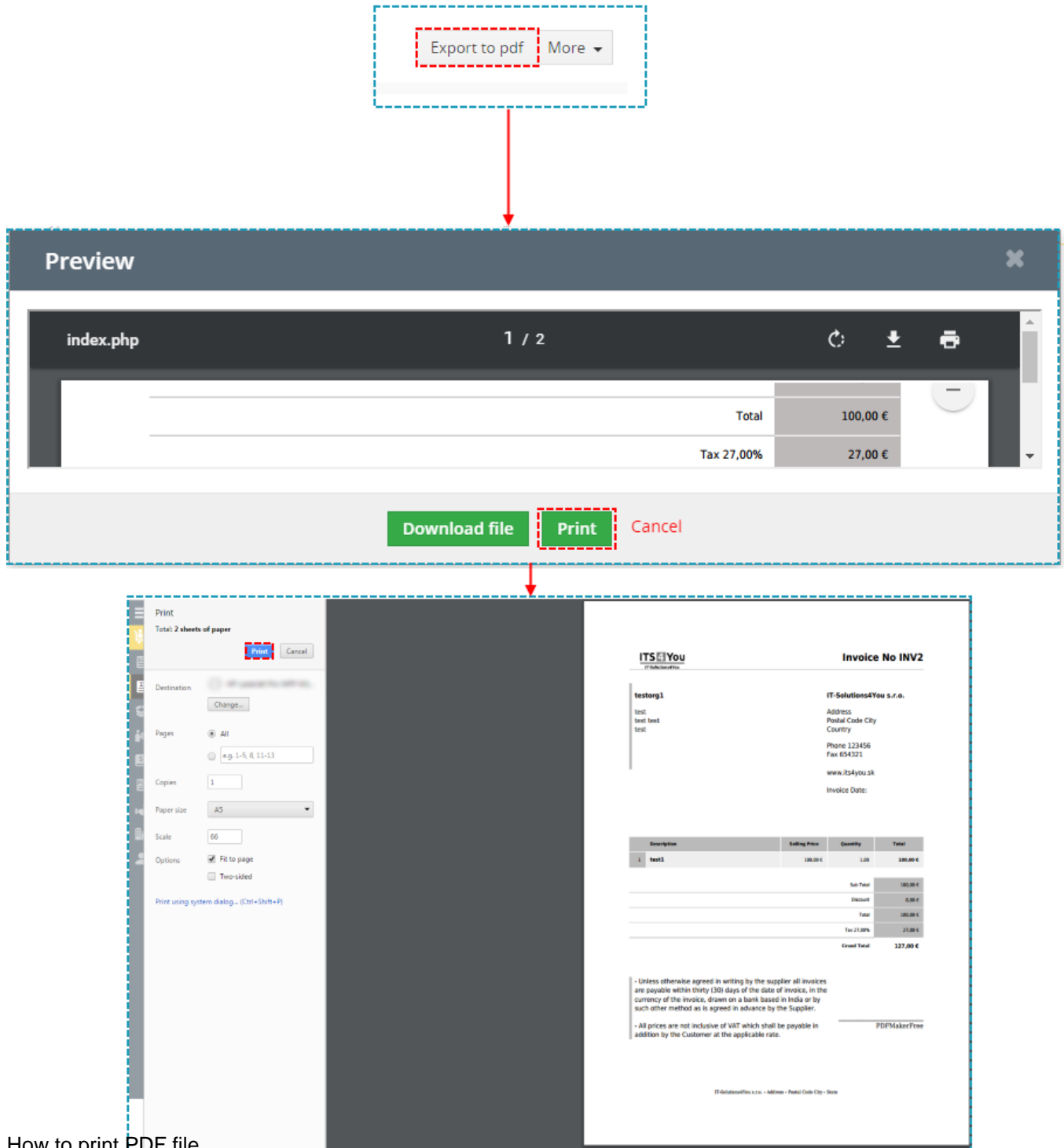
Export to pdf More

- Download
- Settings
- PDF Product Page Break
- PDF Product Images
- PDF language
- US English

PDF Maker Block

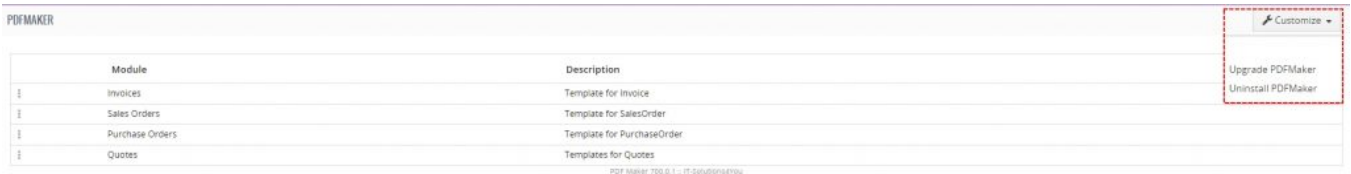
6. How to print PDF file

With Free version of PDF Maker you can also print PDF file directly from you crm. To please click on [Export to pdf] button and in Preview click on [Print] button.



How to print PDF file

7. Settings of PDF Maker Free



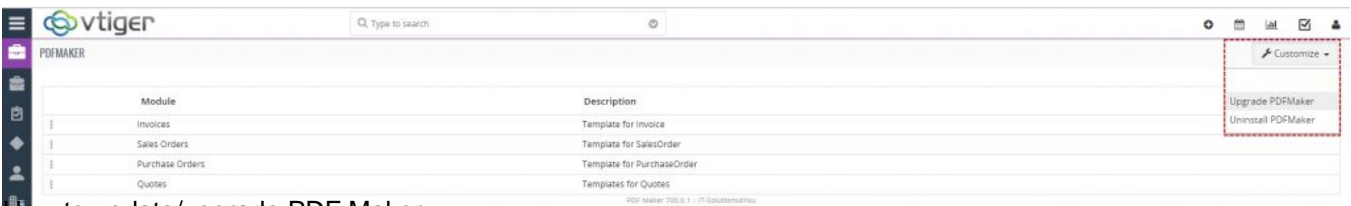
Settings

Settings part contains of:

- Upgrade PDF Maker
- Uninstall PDF Maker

7.1. Upgrade/Update PDF Maker

The upgrade of the PDF Maker is initiated in the same way as PDF maker installation or click on Upgrade PDFMaker link in Customize tab of PDF Maker.



How to update/upgrade PDF Maker

So please refer to above installation part for details how to initiate the import of the module from the file. As can be seen on following picture you will be notified that the PDF Maker module already exists. The upgrade will start immediately when you click on the [Update Now] button.

Verify Import Details

PDFMaker **Exists**

Vtiger Version : 7.0.0

License

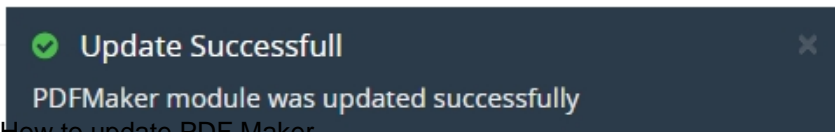
```
*****  
* Module : PDF Maker  
* Version : 700.0.3  
* Vtiger : 7.0.0  
* Author : IT-Solutions4You s.r.o - www.its4you.sk  
* Supported browsers : Internet Explorer 7 or higher, Mozilla Firefox 3.0 or higher  
*****
```

accept the license agreement.

Update Now Cancel

How to update PDF Maker

After upgrade the notification about successful upgrade is shown.

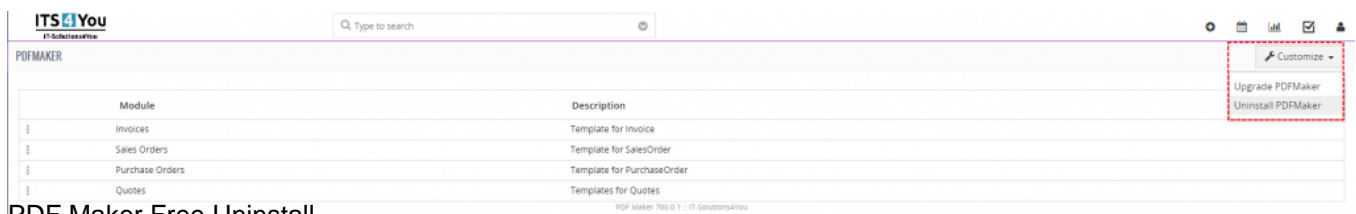


How to update PDF Maker

7.2. Uninstall PDF Maker

There is also available option to remove PDF Maker from your vTiger. To uninstall please provide following steps:

- Go to the ListView of PDF Maker and choose option Uninstall PDFMaker

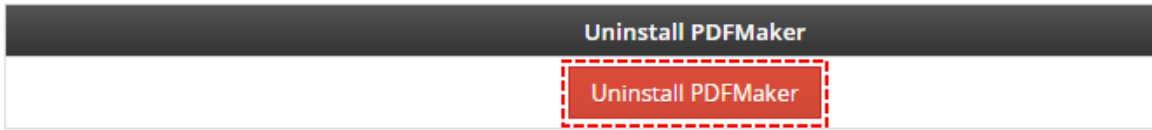


PDF Maker Free Uninstall

- Click on [Uninstall PDF Maker] button

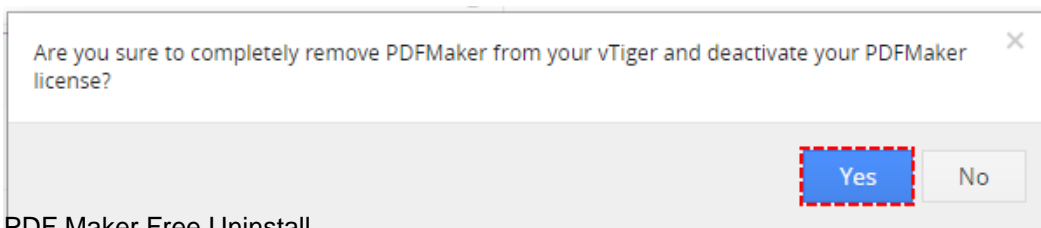
Uninstall PDFMaker

Remove PDFMaker completely from your vTiger.:



PDF Maker Free Uninstall

- Confirm uninstall with [Yes] button



PDF Maker Free Uninstall

Now, PDF Maker is removed from your vTiger. To use PDF Maker again you need to provide installation steps.

8. Change log

8.1. PDF Maker Free

- 31. May 2017 – **PDF Maker 700.1.0**
 - compatibility with vtiger 7.0.0

8.2. Manual of PDF Maker Free

- 31. May 2017: manual based on **PDF Maker 700.1.0**
 - first initiate for vtiger 7.x.x