Tons 4 OU



http://www.its4you.sk/en/ email: info@its4you.sk phone: +421-51-7732370

PDF MAKER FOR VTIGER CRM

Introduction

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 benefits are:

- supported mostly inside all modules
- unlimited number of PDF templates within one module
- simple addition, edit, duplication or deletion of the pdf template
- simple direct sending of the pdf files
- advanced and more creative editing of pdf files using inserting images, tables, barcodes
- creation of an own product block
- mass export to PDF from list view

What's new?

Here is the list of the new features, improvements and layouts provided within versions 1.36.x, 1.37.x and 1.38.x available for vtiger CRM versions 5.2.1 - 5.4.0:

- PDF files saved into Documents can be assigned to contact or organization (see chapter 5.4)
- possibility to select language for pdf templates used within workflow (see chapter 7.1.2)
- mass export also into rtf format (see chapter 6.1)
- additional profile settings for Export to RTF (see chapter 7.1.2)
- added debugging info new column with min/recommended values (see chapter 7.7)
- removed deprecated usage of ereg_replace, fixed memory limit settings and other fixes
- <rowpagebreak /> available (see chapter 4.10.4)

Please refer also to chapter Change log at the end of this manual. Same information is available on our webpage <u>http://www.its4you.sk/en/pdfmaker/change-log.html</u>

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License agreement

- The PDF Maker License will be referred to as "The license" in the remainder of this text.
- This irrevocable, perpetual license covers all versions 1.xx of PDF Maker.
- This license gives the holder right to install PDF Maker 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 PDF Maker 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 PDF Maker.
- The license holder may not re-distribute the library or versions thereof to third party without prior written permission of the copyright holder.
- PDF Maker 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 PDF Maker.

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 PDF Maker and your license key as well.

Private policy

During installation it is necessary to exchange following information:

- vtigerCRM version (e.g. 5.4.0)
- PDF Maker version (e.g. 530.34.3)
- Date and time
- Domain in md5 coding format (e.g. 916b25c201a77a6721003c0030977f3b)
- Action provided by you (INSTALL, REACTIVATE, DEACTIVATE)

1 How to install PDF Maker

Please provide following steps in order to install PDF Maker:

It is highly recommended to finish the installation without any interruption. For successful installation we need to exchange information (see previous chapter for details).

 Install the .zip package of the PDF Maker module via Settings -> Module Manager. Click on the Import New button.

J	Manage module behavior inside vtiger CRM	
	Standard Modules	Custom Modules
		Import New
3	ConfigEditor	0 V 1
5	CronTasks	0 e 1
3	Import	0 🗹 🖬
5	Integration	e 🗹 🖬
5	MailManager	0 R E
5	Mobile	0 R I
5	WSAPP	0 🗹 🖬
bl	British English	0 Ø
abl	DE Deutsch	0 V

Picture 1.1 Installation of PDF Maker – step 1

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

Manage m	ndule hebavior inside vtiger CRM
Select the Packag	je File
* File location:	H.\ITS4You\PDFMaker_135_3.zip Browse
	vtiger module is packaged as a zip file.



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.

Verify Import Details					
Module Name	PDFMaker				
Module Directory	modules/PDFMaker				
Req. vtiger version	5.4.0				
License	Module : PDF Maker Version : 1.35.3 Vtiger : 5.4.0 Author : IT-Solutions4You s.r.o - www.its4you.sk Supported browsers : Internet Explorer 7 or higher, Mozilla Firefox 3.0 or higher LICENSE The PDF Maker License will be referred to as "The license" in the remainder of this				

Picture 1.3 Installation of PDF Maker – step 3

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

Settings > Module Manager > Import Manage module behavior inside vtiger CRM		
Importing Module		
Creating Module PDFMaker STARTED Initializing module permissions DONE Updating tabdas file DONE Creating Module PDFMaker DONE Added to menu Tools DONE Updating pasent_tabdas file STARTED Updating pasent_tabdas file DONE SQL: CREATE TABLE iF NOT EXISTS 'vilger_pdfmaker_seq' ('Id' nit11) SQL: CREATE TABLE IF NOT EXISTS 'vilger_pdfmaker_seq' ('Id' nit11) 'decimal point' chard?) NOT NULL 'margin_right' desimalit2.1) default NULL, 'for decimal point' chard?	liename' varchar(100) NOT NULL, 'module' var ₩E=InnoDB DONE IOT NULL default ''' I ENSINE=InnoDB DONE ted' int(11) NOT NULL 'aragin_top' decimal(1) rmat' varchar(256) NOT NULL default 'A4', 'orie 'beader' tett NOT NULL 'rotar' tett NOT N	char(255) NOT NULL, 'body' longblob NOT NULL, 'description' text NOT NULL, E 2, 1) default NULL, 'margin_bottom' decimal(12,1) default NULL, 'margin_left' Ination' varchar(255) NOT NULL default 'portrait, 'decimals' timpint(2) NOT NULL III. L'encodino', VARCHAR (2) NOT NULL DEFAULT 'suive'. Time name' VARCHAR
:	:	:
:	:	:
L'shareid', 'setype') ENGINE = InnOB DONE Adding Link (HEADERSCRIPT - PDFMakerAdionsJS) DONE Invoking vittib_handler for module.postinstallSTART Adding Link (DETALI/NEWWIDGET - PDFMaker) DONE Adding Link (LISTVIEWASIC - PDF Export) DONE Adding Link (DETALI/NEWWIDGET - PDFMaker) DONE Adding Link (DETALI/NEWWIDGET - PDFMaker) DONE Adding Link (DETALI/NEWWIDGET - PDFMaker) DONE Adding Link (DETALI/NEWMIDGET - PDFMaker) DONE Adding Link (LISTVIEWBASIC - PDF Export) DONE		
and and the mount position in the second		Finish

Picture 1.4 Installation of PDF Maker – step 4

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

1. PDF Maker Validation Step. Please insert a license key and make sure that your server has internet access. Click on Validate.



As can be seen in the picture below, you can be automatically notified if the new update of the PDF Maker or mPDF is available. How to enable this feature is described in the chapter 7.5.

Tools	> PDF	Maker	🔹 🖂	1 🗩 🛛	i I			E 3					
	Delete							Nev	v PDF Maker 5	40.35 available. New mPDF 4 available.		Add template	PDF Maker Manual
	Select	Template name			Module					Description	Order	Statu:	Action
1		Invoice DV			Invoice			7		Template for Invoice	4	Inéctiv	e Edit Duplicate
2	83	SalesOrder			Sales Order		not	ifico	tion	Template for SalesOrder	1	Active	Edit Duplicate
3		PurchaseOrder			Purchase Or	ser	nouncation		uon	Template for PurchaseOrder	1	Active	Edit Duplicate
4		Quotes			Quotes					Templates for Quotes	1	Active	Edit Duplicate
5		Invoice LV			Invoice					Template for Invoice	3	Active	Edit Duplicate

Picture 1.8 Automatic notification of the updates

2 Quick start

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

Note: The full description of the PDF Maker's menus, tabs and icons can be found in the later chapters.

2.1 Create the simple PDF template

In order to create the PDF template you have to start the PDF Maker tool which can be located under the More Tab and Tools column or in older versions under the Tools tab as seen below on the picture.

1. In vtiger CRM menu (Picture 2.1), please go to TOOLS and click on PDF Maker.

			RSS
	Tools	Sales	Our Sites
	PDF Maker	Invoice	Documents
	Our Sites	Sales Ord	PBX Manager
ler	Integration	Ouotes	Recycle Bin
	PBX Manager		Comments
	Mail Manager		SMSNotifier
	Recycle Bin		PDF Maker 43
	SMSNotifier		
	Comments		
	RSS		

a) 5.4.0

b) 5.1.0 - 5.3.0

Picture 2.1 Start PDF Maker

 The screenshot below (Picture 2.2) shows PDF Maker ListView. You can click Add template or to add new template.

1	Delete			<u> </u>	Add template	PDF	Maker Manual
#	Select	Template name	Module	Description	Order	Status	Action
1		Invoice	Invoice	Template for Invoice	1	Active	Edit Duplicate
2		SalesOrder	Sales Order	Template for SalesOrder	1	Active	Edit Duplicate
I		PurchaseOrder	Purchase Order	Template for PurchaseOrder	1	Active	Edit Duplicate
		Quotes	Quotes	Templates for Quotes	1	Active	Edit Duplicate

Picture 2.2 Add template in the ListView

3. In the EditView (Picture 2.3), go to *Properties tab* and define the template name and the description.

Properties	Other information	Labels	Product block	Heade
*Template name: 2	Basic Invoice			
Description:	Invoice for daily use			
*Module: 4.		Invoice No	Insert into templat	e
Related modules:	Select module	Sales Order	nto template	
Related blocks:	Please select 💌	Customer No Contact Name	t Delete	
ListView block:	Please select 🔻	Invoice Date	6	
		Purchase Order	.	
		Sales Commission Excise Duty	Apply Sa	ve Cancel
Body	Header	Organization Name		8
	- Y	Assigned To		0.
🗄 Source 📘 🗔 🔍 🗐 🖌 🦓	🛍 🚔 ASC ASC - 🍝 🥱	Created Time Modified Time		
B I U → x ₂ x ² ⅓ ⊞ 🦛 4	🤊 🐝 📄 🚊 🗐 🚺	Invoice No		
Styles 🔄 Normal 🖃 Font	🝷 Size 💌 🗛 🗛 🏟	Address Information		
		Billing Address Shinning Address		
		Billing City	-	
		Chipping City		

Picture 2.3 Creation of the template in EditView

- 4. Choose the module from the list (i.e. Invoice).
- 5. Type the text into the Body section.
- Choose one of the all available fields from the selected module (i.e. Invoice No) and click on the button Insert into template
- 7. Repeat the steps 5. and 6. to finish your pdf template according to your needs.
- 8. Finally click on the Save button.

2.2 Generate the PDF file

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

ListView

- 1. Select record(s).
- 2. Click on button PDF Export
- 3. Select the PDF template(s).
- 4. Select the language.
- 5. Click on button Export To PDF
- 6. Dialog box will appear on the screen.
- 7. Click on button
- 8. The PDF file is generated.

DetailView

- 1. Select the PDF template(s).
- 2. Select the language.
- 3. Click on link 🖺 Export To PDF.
- 4. Dialog box will appear on the screen.
- 5. Click on button
- 6. The PDF file is generated.



Picture 2.4 Generate the PDF file

3 Work area

The Work Area of PDF Maker consists of:

- ListView used for common tasks like add new template, import and export templates and access to others tools
- DetailView shows already created pdf template in details
- EditView allows the preparation of the new pdf template or editing existing templates
- PDF Maker block mainly used for export records to pdf file or send it via email

3.1 ListView

The common tasks like add/delete template, import/export templates or start editing have to be initiated via PDF Maker ListView. Go to TOOLS \rightarrow PDF Maker and PDF Maker ListView will appear on your screen.

Too	ls > P	DF Maker	•2	o : : : : : : : : : : : : : : : : : : :	.		
Ĩ	Delete	(Add template	PDF	Maker Manual
#	Select	Template name	Module	Description	Order 🔒	Status	Action
1		Invoice	Invoice	Template for Invoice	1	Active	Edit Duplicate
2	2	SalesOrder	Sales Order	Template for SalesOrder	1	Active	Edit Duplicate
з		PurchaseOrder	Purchase Orde	r Template for PurchaseOrder	1	Active	Edit Duplicate
4	2	Quotes	Quotes	Templates for Quotes	1	Active	Edit Duplicate
				DDF Maker Professional 540 35 3 ··· IT Solutions/ Vou			**************************************

Picture 3.1 ListView

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

Note: How to import or export pdf template is described in the chapter 6.2.

The main part of the PDF Maker ListView consists of list of the pdf templates, which gives you information about a template name, a primary module, a short description, an order of the template and its status. In the list you can also select one or more templates and consequently delete or export the 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 duplicate already created pdf templates directly from the ListView.

There are two additional buttons above the list of pdf templates:

- Add template
 is used to add new template
- PDF Maker Manual is link to this document

Within ListView you can define the order of the templates in PDF Maker block. To change it just put numbers into column order in the ListView and click on save button.

# 5	Select	Template name	Module 📥	Description		Order	Status	Action
1		Accounts	Accounts	DDEMokor	Click here	1	Active	Edit Duplicate
2		Accounts with list of invoices	Accounts	PDFMaker	to save Order	1	Active	Edit Duplicate
3		Asset related	Assets	Asset basic		3	Active	Edit Duplicate
4		Asset basic	Assets	Asset with details Asset related		1	Active	Edit Duplicate
5		Asset with details	Assets			2	Active	Edit Duplicate
				<u>×</u>	1			
				US English	1			
				Export To PDF				



3.2 DetailView

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

- Properties part gives basic information of the template
- Group of buttons
 - Edit switch to EditView and start editing
 - Duplicate create duplicate of the template and start editing
 - Set as inactive / Set as active change status see chapter 4.9.2
 - Set as default / Unset as default setting of default see chapter 4.9.3
 - Delete allows you to delete template
- PDF template itself which consist of Header, Body and Footer part.

Properties "I	Invoice with Adjustment 2"				Edit Du	plicate Set as inactiv	e Set as default Dele
Template na	me: Invoice v	with Adjustment 2					-
Description:						F Decie in	5.3
Module:	Invoice						
Status:	Active					~~~~~	
Set as defau	ilt: for DetailVi	ew 🗙 for ListView 🗙					
DF Template	e						
	ITS You					₹ Head	er
Body							~~
Body	%6_Invoice No%: \$IM	VOICE_INVOICE	E_NO\$ @ty%	Text	%G_LBL_LIST_PRICE% \$CURRENCYCODE\$	%G_LBL_NET_PRICE%	%G_LBL_NET_PRICE% \$CURRENCYCODE\$
Body	%6_Invoice No%: \$IN Pos #PRODUCTELOC_START#	VOICE_INVOICE	E_NO\$ Qty%	Text	%G_LBL_LIST_PRICE% \$CURRENCYCODE\$	%G_LBL_NET_PRICE%	%G_LBL_NET_PRICE% \$CURRENCYCODE\$
Body	96G_Invoice No96: \$IN Pos #PRODUCTELOC_START# \$PRODUCTPOSITION\$	IVOICE_INVOICE %6_1 \$PRODUCTQUANTITY\$	E_NO\$ aty% \$PRODUCTUSAGEUNT\$	Text \$PRODUCTNAME\$	%G_LBL_LIST_PRICE% \$CURRENCYCODE\$ \$PRODUCTLISTPRICE\$	%G_LBL_NET_PRICE%	%G_LBL_NET_PRICE% \$CURRENCYCODE\$
Body	96G_Invoice No%: \$IN Pos #PRODUCTELOC_START# \$PRODUCTPOSITION\$ #PRODUCTELOC_END#	IVOICE_INVOICE %6_0 \$PRODUCTGUANTITY\$	E_NO\$ aty% \$PRODUCTUSAGEUNT\$	Text \$PRODUCTNAME\$	%G_LBL_LIST_PRICE% \$CURRENCYCODE\$ \$PRODUCTLISTPRICE\$	%G_LBL_NET_PRICE%	%G_LBL_NET_PRICE% \$CURRENCYCODE\$
Body	96G_Invoice No96: \$IN Pos #PRODUCTELOC_START# \$PRODUCTPOSITION\$ #PRODUCTELOC_END# TOTALAFTERDISCOUNT_SUBTOTA	VOICE_INVOICE %6_0 \$PRODUCTQUANTITY\$	E_NO\$ aty% \$PRODUCTUSAGEUNT\$ DISCOUNT_SUB	Text \$PRODUCTNAME\$ STOTALS	%G_LBL_LIST_PRICE% \$CURRENCYCODE\$ \$PRODUCTLISTPRICE\$	%G_LBL_NET_PRICE%	%G_LBL_NET_PRICE% \$CURRENCYCODE\$
Body	9/06_Invoice No%: \$IN Pos #PRODUCTELOC_START# \$PRODUCTPOSITION\$ #PRODUCTELOC_END# TOTALAFTERDISCOUNT_SUBTOTAL TOTAL_SUBTOTAL	VOICE_INVOICE %6_ \$PRODUCTOLIANTITY\$ \$TOTALAFTERI \$TOTAL_SUBT(E_NO\$ 9ty% \$PRODUCTUSAGEUNT\$ DISCOUNT_SUE OTAL\$	Text SPRODUCTNAMES	%G_LBL_LIST_PRICE% \$CURRENCYCODE\$ \$PRODUCTLISTPRICE\$	WG_LBL_NET_PRICEW	%G_LBL_NET_PRICE% \$CURRENCYCODE\$
Body	9/bG_Invoice No9/b: \$IN Pos #PRODUCTELOC_START# \$PRODUCTELOC_END# TOTALAFTERDISCOLINT_SUBTOTAL TOTAL_SUBTOTAL TOTALSUM_SUBTOTAL	VOICE_INVOICE %6_ \$PRODUCTQUANTITYS \$TOTALAFTERI \$TOTAL_SUBTO \$TOTAL_SUBTO	E_NO\$ aty% SPRODUCTUSAGEUNITS DISCOUNT_SUB OTALS UBTOTALS	Text SPRODUCTNAMES STOTALS	%G_LBL_LIST_PRICE% \$CURRENCYCODE\$ \$PRODUCTLISTPRICE\$	*G_LBL_NET_PRICE*	%G_LBL_NET_PRICE% \$CURRENCYCODE\$

Picture 3.3 DetailView

3.3 EditView

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, sharing and other common settings of the pdf template. Tabs area consists of following tabs, which are described in the following subchapters:
 - o Properties
 - Other information
 - o Labels
 - Product block
 - Header/Footer
 - o Settings
 - Sharing
- 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. Please refer to the chapter 4 for
 the details related to editing.

Note: If you click on *Body tab* in editing area you are automatically switched to *Properties tab*. Also if you click on *Header tab* or *Footer tab* in editing area then it switches *Tabs area* to *Header/Footer tab*.

lew template						
Properties	Other information	Labels Product block	Header / Footer	Settings	Sharing	
*Template name:						
Description:						
*Module:	Please select 💌	Select 💌 Insert into temp	plate			
Related modules:	Select module 💌	Select 💌 Insert into temp	late			
Related blocks:	Please select 💌	Insert into template Create	Edit Delete		Ta	he area
ListView block:	Please select 💌	insert into template			10	
ListView block:	Please select 💌	Insert into template				
ListView block:	Please select 💌	Apply Sat	ve Cancel			
ListView block:	Please select	Apply Sat	Cancel			
ListView block: Body	Please select	Footer	ve Cancel			
B J U able X2 X2	Please select ⊻ Header ≪ 問 問 問 聞 @ @ ▲ ♥ E E ⊂ 注 9 Wi	Footer	e Cancel			
Body Body B Source Q I B I U abe X ₂ X ² Styles Format	Please select ▼ Header ★ ● ● ● ● ● ● ● ● ● ● ↓ □ □ □ □ □ □ ● ● ● ●	Apply Sat Footer # #** # #** # # #	e Cancel			
E List∀iew block: Body Bource □ Q. I B I U obe X ₂ X ² Styles ▼ Format	Please select ▼ Header ★ 12 10 10 10 10 10 10 10 10 10 10 10 10 10	Apply Sat Footer 4 ● 4 ● 4 ● 4 ● 4 ● 4 ● 4 ● 4	ve Cancel			
E ListView block: Body Source G G G B I U over X2 X2 Styles Format	Please select ▼ Header	Apply Sat Footer 4 4 4 4 4 4 4 4 4 5 5 4 4 5 5 6 5 7 4 6 5	ve Cancel			
E ListView block: Body Source G. G. E B I U une X2 X2 Styles Format	Please select ▼ Header	Apply Sat Footer Apply Sat Apply Sat Apply Sat	re Cancel			

Picture 3.4 New template work area

3.3.1 Properties

The main purpose of the *Properties tab* is to define template name and module for which pdf will be used. Although description is not required, it is recommended to describe here main purpose and properties of the template for future edit or re-usage.

Properties	Other information	Labels	Product block	Header / Footer	Settings	Sharing
*Template name:						
Description:						
*Module:	Invoice	Subjec	t	Insert into templ	ate	
Related modules:	Select module	•	🔹 Select 💌 📑	nsert into template		
Related blocks:	Please select	Insert into	template Create	Edit Delete		
ListView block:	Please select		A REAL PROPERTY AND A REAL			

Picture 3.5 Properties tab

The *Properties tab* contains fewer items for header and footer part of the pdf template (Picture 3.6).

Properties	Other information	Labels	Product block	Header / Footer	Settings	Sharing
*Template name:						
Description:						
*Module:	Please select	Select.	🗾 🛛 Insert into temp	plate		

Picture 3.6 Properties tab for header/footer

Name	Description
Template name	The name of the template. It is mandatory field for template creation.
Description	The description of the pdf template.
Module	Template will be based and available only for one selected 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.
Related blocks	Related block(s) to selected module, with buttons to insert, create, edit or delete
	related block. For details please refer to chapter 4.6.
ListView block	For details please refer to chapter 4.7.

Table 3-1 Properties tab

3.3.2 Other information

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

Properties	Other information	Labels	Product block	Header / Footer	Settings	Sharing
Company and User information	n: Company inform	nation 💌 🏼 Ple	ase select 💌 🔳	ert into template		
Terms and Conditions:	Please select.	. 💽 Ins	sert into template			
Current date:	dd.mm.yyyy 💌	Insert into te	mplate			
Barcodes, QR code:	EAN13			Insert code i	nto template 🛛 👰	0
Custom functions:	Please select	•1	Insert into tem	plate		

Picture 3.7 Other information tab

Name	Description
Company and User	Comprises group of fields from Company information, Assigned to User and
information	Logged in User.
Terms and Conditions	Terms and Conditions.
Current date	Current date in several formats.
Barcodes, QR code	Several types of Barcodes and QR code. For details please refer to chapter 4.3.
Custom functions	Custom functions. For details please refer to chapter 6.4.

Table 3-2 Other information tab

3.3.3 Labels

Labels tab consists of Global language, Module language and Self-defined labels part. Labels are very useful especially in case you need to print/save documents in two or more languages. Please refer to chapter 4.4 to see details.

Properties	Other information	Labels	Product block	Header / Footer	Settings	Sharing	
Global language:	and						Insert into template
Module language: A record number must be			cified to delete the ∨tig	er_account.			Insert into template
Self-defined labels:	Select						Insert into template

Picture 3.8 Labels tab

Name	Description
Global language	Global labels.
Module language	Labels related only to selected module.
Self-defined labels	Labels defined by user.
Table 2-2 Labels tab	

Table 3-3 Labels tab

3.3.4 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. How to insert, edit and create product block is described in chapter 4.5.

Properties	Other inform	mation	Labels	Product block	Header / Footer	Settings	Sharing
Product block template:		Please selec	:t	Insert into	template		
Product block:	ſ	Please sele	ct 💌 🛛 Ins	ert into template			
*Common fields for Produc	ts & Services:	Record ID			Insert into templ	ate	
*Available fields for Product	s: [Product Nam	ne	Insert into to	emplate		
*Available fields for Service	s: [Service Nam	1e	Insert into templ	ate		

Picture 3.9 Product block tab

Name	Description
Product block template	Insert predefined and created product block templates. For details please
	refer to chapter 4.5.
Product block	Block start, Block end. Each product block has to start with "Block start"
	and ends with "Block end"
Common fields for Products &	Fields common for products & services. You can find same fields for
Services	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.
Table 0. A Duadous black ask	

Table 3-4 Product block tab

3.3.5 Header / Footer

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

Properties	Other information	Labels	Product block	Header / Footer	Settings	Sharing
Header/Footer variables:	Current page	Insert into	template			
Display header:	All pages 🔽 🛛 Firs	t page 🔽 🛛 Other	pages 🔽			
Display footer:	All pages 🔽 🛛 Firs	t page 🔽 🛛 Other	pages 🔽 🛛 Last page 🔽			

Picture 3.10 Header / Footer tab

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

Table 3-5 Header / Footer tab

3.3.6 Settings

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

Properties	Other information	Labels	Product block	Header / Footer	Settings	Sharing
File name:					Select	•
Page format:	A4 💌					
Page orientation:	Portrait 💌					
Ignored picklist values:						
Margins:	Top (cm) 2	Bottom (cm) 2	Left (cm) 2	Right (cm) 2		
Number format:	Decimal point separ	ator , P	lumber of Decimal poin	ts (precision) 2	Thousands separ	ator
Status:	Active 💌					
Set as default:	for DetailView 🔲 f	or ListView 🕅				
Set for Customer Portal:	Г					

Picture 3.11 Settings tab

Name	Description
File name	File name in different formats. Please refer to chapter 4.9.1 for details.
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)
Status	Active / Inactive. Please refer to chapter 0 for details.
Set as default	Set/unset as default for DetailView and ListView. For details please refer to chapter 4.9.3.
Set for Customer Portal	Set/unset for customer portal. For details please refer to chapters 4.9.4 and 7.1.1. This setting is available only for modules <i>Invoice</i> and <i>Quotes</i> .
Table 3-6 Settings tab	

3.3.7 Sharing

The *Sharing tab* changes depend on whether pdf template is shared (Picture 3.12) or public/private (Picture 3.13). Using this tab you can define how to share your template between you and other users or groups. Please refer to chapter 6.3 to see details.

Properties	Other information	Labels	Product block	Header / Footer	Settings	Sharing	
Template owner:	Administrator 💌						
Sharing:	Share 💌						
	Available Entities	& Members			Selected Mer	nbers	
	Entity: Groups	•					
	Members of Entity				Members of ""		
	Group::Team Selling) 		<u>.</u>			<u></u>
	Group::Support Gro	oup		>>			
	Group::test						
				-			-

Picture 3.12 Sharing tab

Properties	Other information	Labels	Product block	Header / Footer	Settings	Sharing
Template owner:	Administrator	•				
Sharing:	Public 💌					

Picture 3.13 Sharing tab for private/public template

Name	Description
Template owner	Select template owner from the list.
Sharing	Select "Public", "Private", "Share"

Table 3-7 Sharing tab

3.4 PDF Maker block

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. Depends on type of module and whether template already exists for selected module following forms of pdf maker block can be seen in the screen (after PDF Maker installation, the PDF Maker block is visible only for modules with at least one already created pdf template):

- a) PDF Maker block just inform that there is no pdf template inside the selected module for logged user (this block is visible when you delete all templates for particular module)
- b) Standard layout of the PDF Maker block.
- c) Extended layout of the PDF Maker block available for modules Invoice, Sales Order, Purchase Order, Quotes.

PDFMaker	PDFMaker	PDFMaker			
No pdf templates have been created for this module.	Leads with details	Invoice for individual TAX Invoice for individual TAX with Invoice with Adjustment Invoice with adjustment withou Invoice without logo			
	US English	US English			
	Export To PDF	Export To PDF			
	Send Email With PDF	Send Email With PDF			
	Edit and Export To PDF	Edit and Export To PDF			
	Save PDF into Documents	Save PDF into Documents			
	Export To RTF	PDF Product Page Break			
		PDF Product Images			
		Export To RTF			
a)	b)	c)			

Picture 3.14 PDF Maker block

4 Editing

The editing of the pdf templates in the PDF Maker is easy and is provided inside editing area in EditView. As can be seen in the picture below, in order to have useful pdf template you can combine: your own text, module fields or related module fields, images, tables, barcodes, labels, products block templates, related blocks, etc...

Just click inside the editing area below the *Body/Header/Footer tabs* and start typing your text. You can continue with adding additional fields.

Body/Header/Footer tabs allows you to change formatting of your text and other inserted fields using a lot of toolbars. Just select the text/field and click on any icon of the tool like font, color, bold, italic, alignment etc.



Picture 4.1 Editing

4.1 Inserting images

Images can improve the design of your documents. CKEditor is used inside the PDF Maker and it allows you to add images into your documents in an easy and intuitive way.

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

1. Press the 🔤 button on the toolbar.

	Image Properties
	Image Info Link Upload Advanced 3.
A.* A.* @ S. 2	URL http:// /logo/logo-its.jpg Browse Server
	Alternative Text

Picture 4.2 Insert image

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

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

4.2 Creating tables

The tables are inseparable component of many documents. Similarly to images, tables can be inserted into your templates in few simple steps:

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

Footer		
	Table Properties	۲
	Rows 3 Columns 2 Headers None Border size 1 Alignment <not set=""> Caption</not>	Width 200 pixels Height pixels Cell spacing Cell padding 1
	Summary	
	J.	UK P Cancel ×

Picture 4.3 Creating tables

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

After that the table is inserted into the template and you can write some text, insert all available fields from chosen and related Modules or add some images into the new table. You can also make some design adjustments like bold text, underline, etc.

Please refer also to the chapter 4.10.1 for more details.

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

4.3 Inserting barcodes and QR codes

There is a "Barcodes, QR code" field in the Other information tab.

In order to insert the barcode into the template please provide following steps:

- 1. Choose your barcode type.
- 2. Click on Insert code into template button.
- 3. Barcode is inserted into template.
- 4. Replace "YOURCODE" with static number/string (4a) for making the barcode or you can use the variables from the actual template (4b).



Picture 4.4 Barcode selection

How to insert QR code shows next picture:

- 1. In *Other information* tab please select QR field from "Barcodes, QR code" and click on Insert code into template button.
- 2. In inserted part [BARCODE|QR=YOURCODE|BARCODE] replace "YOURCODE" with your QR code value.

Properties	Other information	Labels	Product block	Heade
Company and User information:	Company information 💌 Please se	elect 💌 Insert into ten	nplate	
Terms and Conditions:	Please select	o template		
Current date:	dd.mm.yyyy 🗾 Insert into template			
Barcodes, QR code:	QR	•	Insert Barcode into template	2
Custom functions:	Please select	Insert into template		
				_
			Apply	Save Cancel
Body	Header		Footer	
🖲 Source 🔲 🗔 📕 💰	🖻 🛍 🛍 🚔 🕸 💖 - 😽 🤛	ACC1.pdf - Ado	be Reader	
B I U abe X ₂ X ² ⅓=	E 🖷 🕸 🕫 🖬 🖬 🗄 🔳 📕	a 🖦 🗈 👘		
Styles 🔽 Format 🔽	Font 🔄 Size 👻 🍂 🗛 📢	Hi,	please visit our websit	te!
Hi, please visit our website!			142-151	
PARCODELOR-http://www.ite.tvou	skian/IBABCODEL			
BARCODEJ@R=Intp://www.its4you.	SNEID[BARCODE]			
2				
		-		

Picture 4.5 How to insert QR code

4.3.1 Formatting barcodes and QR codes

The inserted barcodes or QR codes can be formatted using (see example formatting in the Picture 4.6):

- a) additional attributes add one or more supported attributes into barcode/QR syntax like
 [BARCODE|CODE=YOURCODE|ATT1=value1|...|ATTN=valueN|BARCODE]
 Example: [BARCODE|EAN13=789|SIZE=1.5|HEIGHT=0.5|BARCODE]

```
vertical-align: middle;
```

```
</style>
```

```
[BARCODE|EAN13=123|CLASS=barcodestyle|BARCODE]
```

Please refer to mPDF Book Manual barcode part for details http://mpdf1.com/manual/index.php?tid=407&searchstring=barcode.



Picture 4.6 Formatting barcodes and QR codes

4.4 Inserting labels

As it was described in chapter 3.3.3, labels can be inserted into templates via *Labels tab*. In order to insert any global related label, module related label or self-defined label just click on *Labels tab*, select from dropdown list any label and click on <u>Insert into template</u> button.

Properties	Other information	Labels	Product block	Header / Footer	Settings	Sharing		
Global language:	and						•	Insert into template
Module language:	A record number must be specified to delete the vtiger_account.						•	Insert into template
Self-defined labels:	Select	20 G					•	Insert into template

Picture 4.7 Labels tab

As can be seen in the picture below in green part related to pdf template in DetailView, global labels uses notation %G_*****% and module label uses %M_*****%. The self-defined labels use notation %C_*****%. Using labels provides an easy and flexible way to print/send/store documents in different languages. It is not necessary to create duplicate templates for another language, just use labels and select language before exporting document to pdf.



Picture 4.8 Inserting labels

If the global and module related labels are not sufficient for you, it is possible to define self-defined labels. In order to define self-defined please follow instructions described in the chapter 7.3.

4.5 Using a product blocks

We introduced tool for product block templates management. Using this tool you can simply add, edit, duplicate or delete product block templates. Please refer to chapter 7.4 for details.

You can find Product block tab in EditView which allows inserting, editing and creating of product block. How to create the product block template directly in the EditView is described in the chapter 4.5.2. Please refer to the next chapter to see how to insert and edit product block templates.

4.5.1 Insert and edit product block template

You can simply add the whole product block template into your template by:

- 1. Go to Product block tab.
- 2. Select product block template.
- 3. Click on Insert into template button.

	Other info	ormation Label	s Product l	block Header /	Footer Setting	s Sharing	
Product block template:		product block for an	ountex				
		Plassa calact	oup tax	sert into tempiate			
Product block:	2	product block for inc	lividual tax npl	ite			
*Common fields for Produc	cts & Services:	Record ID	oup tax	Insert	into template		
*Available fields for Produc	cts:	Product Name	💌 Ins	ert nto template			
*Available fields for Service	es:	Service Name	Insert i	nto template			
fields are placed into Product block	k. Product block will be	e shown for every product/serv	rice in PDF.				
			App	br Saue Cancel			
			Арр	save Cancer			
Body	н	leader	Footer				
2.509			100001	1.5			
-309			T OULD T	3.			
Pos	560	3_Qty%	Text	3. %G_LBL_LIST_PRICE%	%G_LBL_SUB_TOTAL%	%G_Discount%	%G_LBL_NET_PRICE%
Pos #PRODUCTBLOC_START#	%60	3_Qty%	Text	3. %G_LBL_LIST_PRICE%	%G_LBL_SUB_TOTAL%	%G_Discount%	%G_LBL_NET_PRICE%
Pos #PRODUCTBLOC_START# \$PRODUCTPOSITION\$ \$PRO	560 ODUCTQUANTITYS	3_Qty% \$ \$PRODUCTUSAGEUNIT:	Text \$ \$PRODUCTNAME\$	%G_LBL_LIST_PRICE%	%G_LBL_SUB_TOTAL% \$PRODUCTTOTAL\$	%G_Discount% \$PRODUCTDISCOUNT\$	%60_LBL_NET_PRICE% %PRODUCTSTOTALAFTERDISCOUNT\$
Pos #PRODUCTBLOC_START# \$PRODUCTPOSITION\$ \$PRI #PRODUCTBLOC_END#	SODUCTQUANTITY	S_QKy% \$ \$PRODUCTUSAGEUNIT	Text \$ \$PRODUCTNAME\$	3. %G_LBL_LIST_PRICE% \$PRODUCTLISTPRICE\$	%6G_LBL_SUB_TOTAL%	%G_Discount% \$PRODUCTDISCOUNT\$	%6G_LBL_NET_PRICE% %PRODUCTSTOTALAFTERDISCOUNT\$
Pos #PRODUCTBLOC_START# \$PRODUCTPOSITION\$ #PRODUCTBLOC_END# %G_LBL_TOTAL%	540 ODUCTQUANTITY	3_Qty% \$ \$PRODUCTUSAGEUNIT	Text \$ \$PRODUCTNAME\$	3. %G_LBL_LIST_PRICE%	%%G_LBL_SUB_TOTAL% \$PRODUCTTOTAL\$	%8_Discount% \$PRODUCTDISCOUNT\$	%60_LBL_NET_PRICE% \$PRODUCTSTOTALAFTERDISCOUNT\$ \$TOTALM/THOUTVAT\$
Pos #PRODUCTBLOC_START# \$PRODUCTBLOC_END# %PRODUCTBLOC_END# %o_LBL_TOTAL% %o_Direcont%	560 ODUCTQUANTITYS	3_Qty% \$ \$PRODUCTUSAGEUNIT	Text \$ \$PRODUCTNAME\$	3. %G_LBL_LIST_PRICE%	%%G_LBL_SUB_TOTAL% \$PRODUCTTOTAL\$	%8_Discount% \$PRODUCTDISCOUNT\$	%6G_LBL_NET_PRICE% \$PRODUCTSTOTALAFTERDISCOUNT\$ \$TOTALMITHOUTVAT\$ \$TOTALDISCOUNT\$
Pos #PRODUCTBLOC_START# \$PRODUCTBLOC_END# #PRODUCTBLOC_END# %G_LBL_NTOTAL% %G_DLBU.NET_TOTAL%	%C	3_Gty%	Text \$ \$PRODUCTNAME\$	WO_LBL_LIST_PRICE%	%G_LBL_SUB_TOTAL% \$PRODUCTTOTAL\$	%G_Discount% \$PRODUCTDISCOUNT\$	%4G_LBL_NET_PRICE% \$PRODUCTSTOTALAFTERDISCOUNT\$ \$TOTALMITHOUTVAT\$ \$TOTALDISCOUNT\$ \$TOTALAFTERDISCOUNT\$
Pos #PRODUCTBLOC_START# \$PRODUCTBLOC_END# %0_LBL_TOTAL% %0_Discount% %0_LBL_NET_TOTAL% %0_Tax%\$VATPERCENT\$ %	%¢ ODUCTQUANTITY %¢_LBL_LIST_OF	3_GIy% \$PRODUCTUSAGEUNIT \$PRODUCTUSAGEUNIT \$PRODUCTUSAGEUNIT \$	Text \$ \$PRODUCTNAME\$	440_LBL_LIST_PRICE%	MG_LBL_SUB_TOTAL%	%G_Discount% \$PRODUCTDISCOUNT\$	%G_LBL_NET_PRICE% \$PRODUCTSTOTALAFTERDISCOUNT\$ \$TOTALMITHOUTVAT\$ \$TOTALDISCOUNT\$ \$TOTALAFTERDISCOUNT\$ \$VAT\$
Pos PRODUCTBLOC_START# PRODUCTBLOC_END# %G_LBL_TOTAL% %G_LBL_TOTAL% %G_LBL_NET_TOTAL% %G_Tax% \$VATPERCENT\$ % Total with TAX	%C CODUCTQUANTITY CODUCTQUANTITY %Q_LBL_LIST_OF	S_Qty% \$ \$PRODUCTUSAGEUNIT \$ \$PRODUCTUSAGEUNIT \$ \$PRODUCTUSAGEUNIT \$ \$PRODUCTUSAGEUNIT \$ \$PRODUCTUSAGEUNIT \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	Text \$ \$PRODUCTNAME\$	SPRODUCTLISTPRICES	%G_LBL_SUB_TOTAL% \$PRODUCTTOTAL\$	%G_Discount% \$PRODUCTDISCOUNT\$	%G_LBL_NET_PRICE% \$PRODUCTSTOTALAFTERDISCOUNT\$ \$TOTALMITHOUTVAT\$ \$TOTALDISCOUNT\$ \$TOTALDISCOUNT\$ \$TOTALDISCOUNT\$ \$VAT\$ \$VAT\$
Pos PRODUCTBLOC_START# \$PRODUCTBLOC_START# \$PRODUCTBLOC_END# %G_LBL_TOTAL% %G_LBL_NET_TOTAL% %G_LBL_NET_TOTAL% %G_LBL_SHPPING_AND_HAN %G_LBL_SHPPING_AND_HAN	%C ODUCTQUANTITY %O_LBL_LIST_OF NDLING_CHARGES	S_Q6y% SPRODUCTUSAGEUNITI % \$TOTALAPTERDISCOUL %	Text \$ \$PRODUCTNAME\$	S- WG_LBL_LIST_PRICEW SPRODUCTLISTPRICES	%6_LBL_SUB_TOTAL%	%G_Discount% \$PRODUCTDISCOUNT\$	
Pos PRODUCTELOC_START# \$PRODUCTELOC_START# \$PRODUCTELOC_END# %G_LBL_TOTAL% %G_LBL_NET_TOTAL% %G_LBL_NET_TOTAL% %G_LBL_NET_TOTAL% %G_LBL_SHIPPING_AND_HAR %G_LBL_TAX_FOR_SHIPPING	%C DDUCTQUANTITY %6_LBL_LIST_OF NDLING_CHARGES 6_AND_HANDLING	S_Q996 \$ \$PRODUCTUSAGEUNIT \$ \$TOTALAFTERDISCOUP \$ \$ \$ \$ \$	Text \$ \$PRODUCTNAME\$ \$ T\$	S- WG_LBL_LIST_PRICEW SPRODUCTLISTPRICES	%G_LBL_SUB_TOTAL%	%6_Discount% \$PRODUCTDISCOUNT\$	\$FOTALIMITHOUTVATS \$TOTALIMITHOUTVATS \$TOTALDISCOUNTS \$TOTALDISCOUNTS \$TOTALAFTERDISCOUNTS \$TOTALAFTERDISCOUNTS \$TOTALIMITHVATS \$TOTALIMITHVATS \$SHTAXTOTALS
Pos PRODUCTELOC_START# PRODUCTELOC_START# PRODUCTELOC_END# %G_LBL_TOTAL% %G_LBL_NET_TOTAL% %G_LBL_NET_TOTAL% %G_LBL_SHIPPING_AND_HAN %G_LBL_SHIPPING_AND_HAN %G_LBL_TAX_FOR_SHIPPING %G_Adjuttnent%	%C ODUCTQUANTIITY %&_LBL_LIST_OF NDLING_CHARGES G_AND_HANDLING	S_QYM S_QYM S_PRODUCTUSAGEUNIT S_GYM STOTALAFTERDISCOUT S% %	Text \$ \$PRODUCTNAME\$ VT\$	S- MG_LBL_LIST_PRICEW SPRODUCTLISTPRICES	%G_LBL_SUB_TOTAL%	%63_Discount% \$PRODUCTDISCOUNT\$	\$6G_LBL_NET_PRICESS \$PRODUCTSTOTALAFTERDISCOUNTS \$TOTALDISCOUNTS \$TOTALDISCOUNTS \$TOTALAFTERDISCOUNTS \$TOTALMTHVATS \$TOTALMTHVATS \$SHTAXANOUNTS \$ADUUSTMENTS \$ADUUSTMENTS

Picture 4.9 Insert product block template

When the product block template is inserted you can modify it according to your needs (Picture 4.10). For example you can add new cells / rows / columns, change font, change the background color, etc. You can edit layout like a table. As can be seen in the picture, you can add some new variables / labels as well.

n											
Pos		5	6G_Qty%		Text		%G_LBL_LIS	T_PRICE%	%G_LBL_SUB_TOTAL%	%G_Discount%	%G_LBL_NET_PRICE%
#PRODUCTBLOC_STAR	Τ#										
\$PRODUCTPOSITION\$	\$PRODUCTQUA	NTIT	r\$ \$PRODUCTUS	AGE	EUNIT\$ \$PRODUCTNA	ME\$	\$PRODUCTL	STPRICE\$	\$PRODUCTTOTAL\$	\$PRODUCTDISCOUNT\$	\$PRODUCTSTOTALAFTERDISCOUNT\$
#PRODUCTBLOC_END#											
%G_LBL_TOTAL%											\$TOTALWITHOUTVAT\$
%G_Discount%		_									\$TOTALDISCOUNT\$
		ø	Cut								
%G_LBL_NET_TOTAL%		咰	Сору	1		-					\$TOTALAFTERDISCOUNT\$
%G_Tax% \$VATPERCEN	IT\$ % %G_LBL_L	(ii)	Paste	ł	SCOUNT\$						\$VAT\$
Total with TAX			Cell	• [\$TOTALWITHVAT\$
%G_LBL_SHIPPING_AN	D_HANDLING_CH		Rem	. 1							\$SHTAXAMOUNT\$
%G_LBL_TAX_FOR_SHI	PPING_AND_HA		ROW	1	Insert Row Befor	e T					\$SHTAXTOTAL\$
%G_Adjustment%			Column	1	Insert Row After						\$ADJUSTMENT\$
%G_LBL_GRAND_TOTAL	%(\$CURRENCY		Delete Table		Delete Rows	3	0				\$TOTAL\$
0			Table Propertie	•			0				
				- 1							





Picture 4.11 Edit product block template – insert new variables / formatting

4.5.2 Create new product block in EditView

In case that you need simple product block template and you don't want to save it as template, it is easy to create your own product block in EditView.

- 1. Go to *Product block tab* and insert product block start variable (#PRODUCTBLOC_START#) and product block end (#PRODUCTBLOC_END#).
- 2. Add all necessary product/service fields according to your needs between (#PRODUCTBLOC_START#) and (#PRODUCTBLOC_END#) and provide formatting if needed.

Properties	Other information	Labels	Product block	Header / Footer	S
Product block template:	Please sele	ct	Insert into tem	plate	
Product block:	Block end	Insert	into template		
*Common fields for Products & S	ervices: Record			Insert into template	
*Available fields for Products:	Product Na	me	Insert into temp	plate	
*Available fields for Services:	Service Nar	me	Insert into template		
Body	Header		Footer		
Body	Header		Footer		
#PRODUCTBLOC_START#					
<pre>\$PRODUCTS_PRODUCT_NO\$ \$</pre>	PRODUCTS_PRODUCTN	IAME\$			
#PRODUCTBLOC_END#					

Picture 4.12 Create product block

4.6 Using related blocks

In the below picture are shown *More Information tabs* related to four different modules. As you can see "More information" differs for particular modules. You can create related blocks for modules based on each more information module and use it inside pdf template. Please refer to next chapters to see how to create, insert, edit or delete related blocks.

Account Information	More Information		Contact Information	More Information	Campaign Information	More Information
	Contacts			Potentials		Contacts
V Account Information	Potentials		Contact Information	Activities	V Campaign Information	Leads
Account N	Quotes		First	Email	Campaign Nar	Potentials
Wei	Sales Order		Last	Trouble Tickets	Assigned	Activities
Ticker Sy	Invoice		Account I	Guotes	Campaign Ty	Accounts
Membe	Activities		Lead Sc	Purchase Order		Destdes
Employ	Email			Sales Order	Sales Order Information	More Information
Other E	Activity History		Depart	Products		Activities
Indu	Documents	n		Activity History	1.	Documents
	Trouble Tickets		Ass	Documents	Sales Order Information	Invoice
Email Opt	Products		Assistant P	Campaigns	Subje	Activity History
Assigne	Campaigns		Email Op	Invoice	Customer I	Vc SalesOrder Status Histor
Modified	Services		Refer	Services	Quote Nar	ne , o autoro
	Service Contracts		Created	Service Contracts		
V Address Information	Projects		Modified	Projects		
Billing Add	Assets	7				



4.6.1 Create the related block

As you can see in the picture below, you can simply insert, create, edit or delete related blocks using buttons in *Properties* tab. How to create related block will be shown on example based on "Organizations" module. Let's suppose that we would like to create simple pdf template based on module "Organizations", and we need to list all invoices for particular organization which were created within last 90 days. In order to do it:

- 1. Create new template based on Organizations module and put your variables/text into the body of the template.
- 2. Go to the *Properties tab* and click on Create button.
- 3. Edit block window will appear on the screen.



Picture 4.14 Start creation of the related block

As you can see in the next picture, 5 steps are necessary to create the related block. In this window also all related entity modules for primary module are shown. First step is to select one related module from the available list (1.). Please select "Invoice" and click on Next

Edit block - Mozilla Firefo	х Э., 1997 - Э., 1997 - Э	nellime searcher of	🖶 🖃 🖃
Edit block	1.		
1. Related Module	Related Module		
2. Select Columns			
3. Filters	Select Related Module:	 Contacts Opportunities 	
4. Sorting		C Quotes	
5. Block style		 Sales Order Invoice 	
		C Calendar	
		 Documents Trouble Tickets 	
		C Products	
		C Campaigns	
		 Services ServiceContracts 	
		O Project	
		C Assets	2.
		s Ba	nck Next> Cancel

Picture 4.15 Creation of the related block – step 1

Second step is to select the fields to show in generated pdf template. These fields can be selected from the related modules (1.). It is possible to change an order of the fields and delete it if necessary. Click Next> to continue (2.).



Picture 4.16 Creation of the related block – step 2

In step 3, we can specify the conditions to filter the results in the template. We can specify conditions in standard or advanced filters. The standard filters have fields like Date & Time fields whereas advanced filters have all the fields from the selected modules where the comparator and condition can be chosen based on type of the selected field.

dit block				
1. Related Module	Filters			
2. Select Columns	🤝 Standard Filters	\$		
3. Filters	Column:		Start Date:	End Date:
4. Sorting			2012-11-08	2013-02-05
5. Block style	Invoice Date	Last 90 Days	(1/1/1/- mm-dd)	(yyyy- mm-dd)
click here to select field	Advanced Filters	click here to select conditi	on	
				New Grou

Picture 4.17 Creation of the related block – step 3

Within step 4 define fields used for sorting (1.) and type of sorting (2.), i.e. ascending or descending sorting. You can define more fields for sorting. Continue to final step via button Next>.

🕑 Edit block - Mozilla Firefox		
Contraction depresentation of	ears provide and fill that we start the loss attack of the	Alientaip Brook Andread and and a 👘
Edit block		
1. Related Module	Sorting	
2. Select Columns	Sort by Invoice Date	Ascending
3. Filters	then byNone	Asc 9
4. Sorting	click here	choose ascending
5. Block style	to select field	/ descending
		< Back Next> Cancel

Picture 4.18 Creation of the related block – step 4

As can be seen in the next picture, related block in form of table is created. Please, write the Name (1.), in CKEditor area (2.) provide some layout/design changes if necessary and click the button to finish.

🕙 Edit block - Mozilla Firefox		
Contract of the second se	Lo-mmas natio-standarto-ado-admentational fordal-ocal mi	合
Edit block		
1. Related Module	Block style	
2. Select Columns 1.	Name: Invoice list	
3. Filters		
4. Sorting		
5. Block style		
	Styles Vormal V Font V Size V Av Av 😥 🕄	
	%R_INVOICE_Invoice %R_INVOICE_Total% %R_INVOICE_Invoice %R_INVOICE_Status%	
	#RELBLOCK_START#	ĵ.
	\$invoice_no\$ \$hdnGrandTotal\$ \$invoicedate\$ \$invoicestatus\$	
	#RELBLOCK_END#	ļ.
	body p	1.
	< Back Next Cancel	
javascript:void(0)	ii	

Picture 4.19 Creation of the related block – step 5

4.6.2 Insert related block

If the related block is created you can continue with editing your template and in order to insert related block provide following actions:

- 1. Click to editing area where would you like to have related block.
- 2. Using dropdown list select your related block.
- 3. Click on Insert into template button.
- 4. Related block is inserted. You can continue with editing of the related block if necessary.
- 5. Example of the final pdf document is shown below.

	Other information	Labels	Product block	Header / Footer	Settings	Shar	ring	
emplate name:	Organizations with li	st of invoices						
escription:	Simple organizations	s template, below i	list of invoices					
Aodule: 🖉	Organizations	Organiz	ation Name	 Insert into templat 	te			
telated modules:	Select module	•	Select • Insert i	into template				
Related blocks:	Invoice list	Insert into te	emplate Create	Edit Delete				
ListView block:	Please select	-	12					
			э.					
			Apply	Cancel				
Body	Header		Footer					
Source		Vậc vậc . 🐳	→ H 43; Ⅲ 4	2				
I U and X ₂ X ²	∃ ⊟ [信/値 99 %]		= 🛛 📼 = 🥥 !	Ω 信				
	Font 🔄 Size	- A. A	• 💮 🖄 💽					
tyles Normal			NO\$)					
tyles Normal	COUNTNAMES (\$ACCOUN	TS ACCOUNT I						
voice list for: \$ACCOUNTS_A rinted: ##DD.MM.YYYY##	COUNTNAME\$ (\$ACCOUN	ITS_ACCOUNT_	4.					
voice list for: \$ACCOUNTS_AT rinted: ##DD.MM.YYYY## %R_INVOICE_Invoice No% %F		ITS_ACCOUNT_	te% %R_INVOICE_Statu	15%				
woice list for: \$ACCOUNTS_A rrinted: ##DD.MM.YYYY## %R_INVOICE_Invoice No% %F #RELBLOCK1_START#	CCOUNTNAME\$ (\$ACCOUN INVOICE_Total% %R_INV(ITS_ACCOUNT_ DICE_Invoice Da	te% %R_INVOICE_Statu	15%	Invesion links	for IT Colu		(ACC11)
Normal Normal Viole list for \$ACCOUNTS A Vinted: ##DD MM.YYYY## 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4	CCOUNTNAME\$ (\$ACCOUN 	ITS_ACCOUNT_ DICE_Invoice Da Jate\$	te% %R_INVOICE_Statu \$invoicestatus\$	15%	Invoice list :	for: IT-Solu	itions4You s	. r.o. (ACC11)
Votes International Internatio	CCOUNTNAMES (\$ACCOUN	ITS_ACCOUNT_ DICE_Invoice Da date\$	te% %R_INVOICE_Statu \$invoicestatus\$	15% D	Invoice list Printed: 05.	for: IT-Solı 02.2013	utions4You s	. r.o. (ACC11)
View Normal voice list for: SACCOUNTS AI inited: ##DD MM.YYYY## RELBLOCK1_START# Inivoice_no\$ RELBLOCK1_END#	COUNTNAMES (\$ACCOUN INVOICE_Total% %R_INV inGrand Total\$ \$Invoiced	ITS_ACCOUNT_ DICE_Invoice Da date\$	4	15% ()	Invoice list : Printed: 05. Invoice No	for: IT-Solu 02.2013 Total	itions4You s	.r.o. (ACC11) Status
Notice list for \$ACCOUNTS A rinted: ##DD MM.YYYY## BRE_INVOICE_Invoice Not %F #RELBLOCK1_STANT# Shiveice_no\$ Shiveice_ND#	CCOUNTNAMES (\$ACCOUN UNVOICE_Total% %R_INV InGrandTotal\$ \$Invoiced	DICE_Invoice Da	4. te% %R_INVOICE_Statu \$invoicestatus\$	<u>s%</u>	Invoice list : Printed: 05. Invoice No INV6	for: IT-Solu 02.2013 Total 53761.000	Invoice Date 2012-12-21	.r.o. (ACC11) Status Paid

Picture 4.20 Insert related block

4.6.3 Edit related block

In order to edit already existing related block, just select it (1.) in the *Properties tab* and click on button Edit
Please notice that you can change only filters, sorting and formatting of the already existing related blocks.

Related modules:	Select mod	dule 💌 Select 💌	Insert into template	
Related blocks:	1. Invoice list	Insert into template	ate Edit Delete	
ListView block:	Please sele	ect 👻 Tasen And temptatur	2.	
		Apply	Save Cancel	
Body	Header Edit block - Mozilla I	Firefox		
	Contract disease	Knacholika (Providel-Parity endote -Parity)	REPORT H-DROUGH STATE	H
Invoice list for: \$ACCOUNTS Printed: ##DD.MM.YYYY##	Aq Edit block			
%R_INVOICE_Invoice No%	%R 1. Filters	Filters		
#RELBLOCK1_START#	2. Sorting	Show Standard Filters	3.	
\$invoice_no\$ #RELBLOCK1_END#	\$hd 3. Block style	Advanced Filters		
				New Group
			< Back Next	> Cancel

Picture 4.21 Edit related block

4.6.4 Delete related block

Please provide following simple steps in order to delete related block. Select the related block (*Properties tab*) using dropdown list (1.), click on button [Delete] (2) and finally confirm deletion.

ListView block:	Please select X	2
Body	Header	Are you sure to delete the related block Invoice list 2
Body	Header	Are you sure to delete the related block Invoice list 2

Picture 4.22 Delete related block
4.6.5 Using List Price within related blocks for Price books

The field "List Price" was introduced for using it within related blocks. In order to use it within price book pdf template you have to select this field during related block creation in the step 2 "Select Columns". (see picture below and also chapter 4.6.1). List Price field is represented by \$listprice\$ and corresponded label by %R_PRODUCTS_LBL_PB_LIST_PRICE%.

		Crea	ate relate	ed block	(step 2.)
1. Related Module	Select Colum	ns			
2. Select Columns	Available Fields			Selected Field	is
3. Fitters	GL ACC Modified	AL ACCOUNT Modified Time Last Modified By Pricing Information: Unit Price			<u> </u>
4. Sorting	Pricing Int Unit Pric				
5. Block style	Commis: Tax Cla:	sion Rate ss			
	List Pric <i>Stock Info</i> Usage L	e or mation: Jnit			
PDF Template				D	etailView
Header					
	PRICEBOOKS_CREATEDTIME_D. %R_PRODUCTS_Product Name% #RELBLOCK2_START# \$productname\$ #RELBLOCK2_END#	ATETIME\$ 6 %R_PRODUCTS_I \$unit_price\$	Unit Price% %R_F		B_LIST_PRICE%
Footer					
	Vtiger PB 2012-10-2	; PB2 Fi 22 06:29:18	inal PDF	file	
	Product	Name	Unit Price	List Price	
	Vtiger 5	Users Pack	699.00	799.000	
	Vtiger 10) Users Pack	1299.00	1399.000	
-	Vtiger 25	Users Pack	2999.00	3199.000	

Picture 4.23 Using List Price within related blocks for Price books

4.7 Using ListView block

You can use the ListView block in case you need to get only the list of records (with some details) of the selected module. Below picture shows simple example of invoices list and how to prepare it:

- 1. Go to EditView and in *Properties tab* check the ListView block check box.
- 2. Insert the "Block start".
- 3. Insert fields you would like to have in ListView block.
- 4. Insert the "Block end".
- 5. Save the template.
- 6. Final pdf document is shown below as well.

The PDF template using ListView block is not visible in DetailView of the particular module i.e. in the PDF Maker block, as well as you cannot mark it as "Default for DetailView" (see also 4.9.3).

Note: Each ListView block has to start with "Block start" (#LISTVIEWBLOCK_START#) and ends with "Block end" (#LISTVIEWBLOCK_END#).



Picture 4.24 ListView block

4.8 Mapping product block with vtiger form

Below picture shows how you can find and use variables during preparation of the pdf template. Although variables have same or similar name you cannot mix them if you would like to have correct pdf document. Please take it into account during preparation of the templates and see short description in Table 4-1 and Table 4-2.



Picture 4.25 Mapping product block with vtiger form

Name	Description
Currency	Euro, Dollar
Currency symbol	€,\$
Currency code	EUR, USD
Subtotal	Price without TAX before discount, by Tax Mode: group = Net
	Total
Total discount	Final Discount amount
Total discount (%)	Final Discount in %
Total without TAX	Total price without TAX after discount
ТАХ	Total TAX amount
TAX (%)	Total TAX in %
TAX block	This is useful for some countries, that need to have the detail
	amount of TAX
Total with TAX	Total price with TAX
Shipping & Handling taxes	Final taxes for Shipping & Handling
Shipping & Handling amount	Final amount for Shipping & Handling
Adjustment	Adjustment from vtiger form
Grand Total	Grand Total from vtiger form
Table 4-1 Mapping values for result pricer available	in Invoices, Quotes, Sales and Purchase Order

Name	Description
Record ID	Record ID
Product No / Service No	Number of product / service
Position	Number of position (1,2,3,)
Currency	Euro, Dollar
Currency code	EUR, USD
Currency symbol	€,\$
Name	Name and description of the product or service
Name of product/service	Only the name of the product or service
Description of product/service	Description of the product/service from module Product/Service
Comment for product/ service	Comment for products/service from Invoice/SO/PO/Q form
Quantity	Quantity defined in Invoice/SO/PO/Q
Unit	Unit of product/service from module Product/Service
List price	List Price from Invoice/SO/PO/Q
Total price	List price x Unit
Discount	Discount amount for each product/service
Discount (%)	Discount in % for each product/service
Total after discount	Total price after discount without TAX
ТАХ	TAX amount for each product/service
TAX(%)	TAX in % for each product/service
Total price with TAX	Total price with TAX for each product/service

Table 4-2 Mapping values for product block template item available in Invoices, Quotes, Sales Orders and Purchase Orders

4.9 Template settings

4.9.1 File name

In *Settings tab* of PDF Maker you can find "File name" definition. This setup gives you the opportunity to set the name of generated PDF files according to your needs. You can combine strings, modules variables and some standard variables like Template name, Current date. File name will be used by saving PDF file into Documents and by sending PDF as attachment too. Dropdown list for file name depends on primary module as can be seen on the below image.

	Prope	rties	Other inform	ation	Labels	Product block		Header / Footer	Settings	Sh
File	e name:		\$#TEMPLA	TE_NAME#\$\$#	#MM-DD-YYYY	#\$\$INVOICE_INVOICE_	<u>N</u> O\$		Invoice No	•
		r	Settings	Sh	r	Settings	Sh	r ş	Settings	Shai
		Select		-	Select		•	Select		-
1		Select		-	Select		-	Select		
	Common	Common Temp Curre Curre Curre	n File Informat plate name nt date (dd-mm-y nt date (mm-dd-y nt date (yyyy-mm	ion yyy) yyy) -dd)	Commo Tem Curre Curre Curre	n File Informati plate name ent date (dd-mm-y) ent date (mm-dd-y) ent date (yyyy-mm	ion yyy) yyy) •dd)	Common F Templat Current Current Current	File Information te name date (dd-mm-yyyy date (mm-dd-yyyy date (yyyy-mm-dd	
		Account	t Information		Invoice	Information		Product In	nformation	
	Module related	Acco Acco Phon Webs Fax Ticke Other Memi Email Emplo Other Owne Ratin	unt Name unt No e site r Symbol phone ber Of ber Of coyees r Email ership g		Subj Sale Cust Cont Due Purc Sale Excis Acco Statt Assig Crea Modi	ect ⇒ Order omer No act Name ce Date Date hase Order s Commission ⇒ Duty ount Name s gned To ted Time fied Time		Product Product Part Nu Product Manufa Product Sales S Sales S Support Support Website Vendor Mfr Part	Name No mber Active cturer Category tart Date nd Date Start Date Start Date Expiry Date Mame No Part No	

Picture 4.26 File name settings

4.9.2 Status

You can set status as active or inactive for each template. Please take into account that this can be set separately per logged user, it means this setting is not global. The inactive templates will not appear in the list of available templates in the pdf maker block. You can find status of existing templates in:

- a) ListView (Picture 4.27) "Status" column
- b) DetailView (Picture 4.28) Properties tab

I	Delete			Add temp	late PDF	Maker Manual
#	Select	Template name	Description	Order 🖬	Status	Action
1	C	Invoice (default for DetailView) for DetailView	Template for Invoice	1	Active	Edit Duplicate
2		SalesOrder Sales State	Template for SalesOrder	1	Active	Edit Duplicate
3		PurchaseOrder (default)	Template for PurchaseOrder	tue 1	Active	Edit Duplicate
4		Guotes for DetailView & ListView	Templates for Guotes	1	Active	Edit Duplicate
5		Organizations with list of invoices Organizations	Simple organizations template, below list of invoices	1	Active	Edit Duplicate
6		Invoice for special purpose (default for ListView) for ListView	Template for Invoice	1	Active	Edit Duplicate



Viewing "Invoice"				
Properties "Invoice"			Edit Duplicate Set as inactive	Unset as default Delete
Template name:	Invoice	Status of the	1	N
Description:	Template for Invoice	template is Active		
Module:	Invoice	template le rieure	Click to set	Click to unset
Status:	Active		as inactive	as default
Set as default:	for DetailView ✓ for ListVie	N 🖌		as asiant
PDF Template				
Header ##PAGE###PAGES## Te Body fC \$INVOICE ACCC	emplate is set as default or DetailView	emplate is set as default for ListView		

Picture 4.28 Status and setting of default in DetailView

To set PDF template as active / inactive you can use two approaches:

- 1. Using buttons Set as active (Set as inactive) in DetailView (Picture 4.28). Click the Set as inactive button to inactivate given template. If the template is Inactive, the button Set as active will be shown. To activate this template you must click on the Set as active button.
- 2. Using *Settings tab* in EditView select status from listbox (Picture 4.29)

Properties	Other information	Labels	Product block	Header / Footer	Settings	Sharing
File name:				Sele	ect	•
Page format:	A4 💌					
Page orientation:	Portrait 💌					
Ignored picklist values:						
Margins:	Top Select fro	m the list to cha	ange status) 2	Right (cm) 2		
Number format:	Decimar point		al point	ts (precision) 2	Thousands separ	ator
Status:	Active 💌		Check to s	set template as default		
Set as default:	for DetailView 🗔 f	or ListView 🔽	4	IOF LISTVIEW		
Set for Customer Portal:		Check to set ter for De	mplate as default tailView	1		



4.9.3 Set as default

The particular PDF Template can be set as default by a logged user, it means this setting is not global. This default template is specific to that user and to that module. It means that different users can set their own default templates for each module separately. It is possible to define template as default for DetailView and default for ListView separately. You can find status of existing templates in

- a) ListView (Picture 4.27) template default for DetailView is marked with text "(default for DetailView)", template default for ListView is marked with text "(default for ListView)". If the template is default for DetailView as well as for ListView, then in the template name column text "(default)" is written.
- b) DetailView (Picture 4.28) Properties tab
- c) PDF Maker block default template is highlighted and automatically selected in PDF Maker block. PDF template is also highlighted and selected in case that only one pdf template exists for module (see Picture 4.30).

PDFMaker	#	Select	Template name	Module 📥	PDFMaker
Contact RB	1		Contact RB	Contacts	Invoice
	2		Invoice	Invoice	Invoice for special purpose
v	3		Invoice for special purpose (default)	Invoice	

Picture 4.30 Default template in PDF Maker block

To set PDF template as default you can use two approaches:

- Using buttons Set as default (Unset as default) in DetailView (Picture 4.28). Click on button Set as default to set the template as default for DetailView as well as for ListView. If you click on button Unset as default, the template will be unset as default for DetailView and for ListView.
- 2. Using *Settings tab* in EditView check/uncheck the checkboxes to change this setting (Picture 4.29) separately for EditView and ListView.

Please take into account that templates using ListView block cannot be in parallel set as default for DetailView. The checkbox "for DetailView" in "Settings" tab is automatically inactive if you check checkbox "ListView block" in "Properties" tab (Picture 4.31)

		Properties	Other information	Labels	Product block	Header / Foote	er	Settings
		File name:					Select .	
Properties	Other	Page format:	A4 💌					
		Page orientation:	Portrait •					
*Template name:	L.	Ignored picklist values:						
Description:		Margins:	Top (cm) 2	Bottom (cm) 2	Left (cm) 2	Right (cm) 2		
*Module:	G	Number format:	Decimal point separa	tor Nu	imber of Decimal point	s (precision) 2	The	ousands separa
Related modules:	9	Status:	Active -					
Related blocks:	F	Set as default:	for DetailView 🔽 for	r List∀iew 🗌				
✓ ListView block:	Ple	ease select 💌 Insert i	into template	r Listview				

Picture 4.31 Setting default vs. ListView block

4.9.4 Set template for Customer Portal

The PDF Maker template can be set as default template for Customer Portal. In order to set it please go to the Settings tab and check the checkbox "Set for Customer Portal". You have to confirm the replacement of the standard customer portal template with your PDF Maker template. Please note that this setting is available only for modules/templates Invoice and Quotes.

Properties	Other information	Labels	Product block	Header / Footer	Settings	Sharing
ile name:				Sele	ect	•
age format:	A4 💌					
age orientation:	Portrait 💌					
nored picklist values:						
largins:	Top (cm) 2.0	Bottom (cm) 2	.0 Left (cm) 2.0	Right (cm) 2.0		
umber format:	Decimal point separ	rator , P	Number of Decimal poin	ts (precision) 2	Thousands sepa	rator
tatus:	Active			_		
et as default:	for DetailVie	Check to set to	emplate as default			
et for Customer Portal: t "Invoice"						
et for Customer Portal: t "Invoice" Properties	Other information	Labels	Product block	Header / Footer	Settings	Sharin
t "Invoice" Properties ile name:	Other information	Labels	Product block	Header / Footer	Settings	Sharin
t "Invoice" Properties ile name: age format:	Other information	Labels	Product block	Header / Footer	Settings	Sharin
t "Invoice" Properties ile name: age format: age orientation:	Other information	Labels Standard vTiger 1	Product block	Header / Footer	Settings	Sharin
t "Invoice" Properties ile name: age format: age orientation: gnored picklist values:	Other information	Labels Standard vTiger Are you sure?	Product block	Header / Footer Seid rith 'Invoice' as a Customer P	Settings ect	Sharin
t "Invoice" Properties ile name: age format: age orientation: gnored picklist values: fargins:	Other information	Labels Standard vTiger f Are you sure?	Product block	Header / Footer Sele rith "Invoice" as a Customer P	Settings ect	Sharing
t "Invoice" Properties Ile name: age format: age orientation: prored picklist values: targins: umber format:	Other information	Labels Standard vTiger 1 Are you sure?	Product block	Header / Footer Sek rith 'Invoice' as a Customer P	Settings ect ortal template. Cancel	Sharin *
it "Invoice" Properties Ile name: age format: age orientation: prored picklist values: largins: umber format: tatus:	Other information	Labels Standard vTiger 1 Are you sure?	Product block template will be replaced w	Header / Footer	Settings ect tortal template. Cancel	Sharing Tator
iet for Customer Portal: it "Invoice" Properties Properties ile name: Page orientation: gnored picklist values: Aargins: kumber format: istatus: istatus:	Other information	Labels Standard vTiger 1 Are you sure?	Product block	Header / Footer Sek with "Invoice" as a Customer P	Settings ect tortal template. Cancel	Sharing Trator

Picture 4.32 Setting the PDF template as template for Customer Portal

4.10 Advanced editing

4.10.1 Head and foot of the table

We would like to notice that some combinations of OS of your PC and vtiger used could cause that tables in PDF Maker are included into pdf template without tags <thead>, </thead>, <tfoot> and </tfoot>. These tags are necessary for correct displaying heads and foots on each page, showing subtotal values, etc. As you can see in the next picture, the correct order of the table's parts is head (<thead>, </thead>), foot (<tfoot>,</tfoot>) and body (,). Please add missing tags if necessary.



Picture 4.33 The structure of the table

4.10.2 Subtotal values

We introduced the variables for subtotal values. The main usage of the subtotal values is in invoices with several pages. In this case subtotal values can give you better overview of the invoice.

Restrictions of the subtotal values usage:

- can be used only in the foot of the tables, it means within tags <tfoot>, </tfoot>
- it is not allowed to use them together with tag <rowbreak />

Please refer to the following table with list of the variables for subtotal values and their description. Please note, that variables \$TOTALAFTERDISCOUNT_SUBTOTAL\$ and \$TOTALSUM_SUBTOTAL\$ are same in case you are using group tax.

Name	Description
\$TOTAL_SUBTOTAL\$	Sum of the "Subtotal", i.e. sum of the (List Price * Qty)
\$TOTALAFTERDISCOUNT_SUBTOTAL\$	Sum of the Net Price without TAX after Discount
\$TOTALSUM_SUBTOTAL\$	Sum of the Total Price (Net Price without TAX + TAX)
Table 4-3 Subtotal values	

In the following picture you can find example for individual tax. Please notice that subtotal values are counted from the beginning of the table (invoice) to the end of the particular page. So values are cumulative, i.e. they are not counted per page.



Picture 4.34 Subtotal values

4.10.3 <rowbreak /> in tables

The tag <rowbreak /> was developed to be used inside tables in order to allow dividing longer text into the several rows of the table if necessary. In the next picture you can find how to use <rowbreak />. In order to divide longer text in exact place, insert tag directly inside text. It means you have to edit your record. Please never use <rowbreak /> directly in the pdf template, because it wouldn't work. Tag <rowbreak /> is ignored if it is used outside the table and additionally is also not visible. If you use your text outside the table tag will be not seen in final document.



Picture 4.35 <rowbreak /> usage

4.10.4 <rowpagebreak /> in tables

The tag <rowpagebreak /> was developed to be used inside tables in order to allow dividing longer text into the several pages if necessary. In the following pictures you can find how to use <rowpagebreak /> and differences between usage <rowbreak /> and <rowpagebreak /> inside tables. In order to divide longer text in exact place, insert tag directly inside text. It means you have to edit your record. Please never use <rowpagebreak /> directly in the pdf template, because it wouldn't work. Tag <rowpagebreak /> is ignored if it is used outside the table and additionally is also not visible. If you use your text outside the table tag will be not seen in final document.



Picture 4.36 <rowpagebreak /> usage

Item Details	S.No	Product Code	Product Name	Quantity	Unit Price	Amount
Provide the part of description 1 is part of description 1 of part of description 1 is part of d	1		Product one 1 a part of exception 1 st part of description 2 registration 1 st part of description 1 st part of description 1 st part of description 2 registration 2 registrati	2,00	100,00	200,00
	Total					200,00
	Tax %					0,00
	Gran	d Total (E	UR)			200,00

Picture 4.37 <rowbreak /> usage

Difference between usage <rowpagebreak /> and <rowbreak /> is that <rowbreak /> divides long text into more blocks and <rowpagebreak /> divides long text into more pages. <rowbreak /> works similar like
 in *HTML code*.

If you want to use <rowpagebreak /> we recommend to set fixed size of table in pixels or percentage. In the following pictures you can see difference between usage dynamic and fixed size of table and how to set fixed size of table.



Dynamic size of table

Fixed size of table

Picture 4.38 Difference between dynamic and fixed size of table

To set fixed size of table please provide following steps:

- 1. Open your PDF template and edit it.
- 2. In CKEditor click right button of mouse in cell of table.
- 3. Choose **Cell -> Cell Properties** (Picture 4.39).
- 4. Set width in pixels or percent (Picture 4.40) it is up to you how to set width and click on **OK** button.
- 5. That steps repeat for all cells in table.

Body		Header	Footer		
Source 🔲 🔍 🔳 🦂		₩	I		
I U abe X ₂ X ²	E 🖷 🖷 🕫 🐝		 Ω # 		
les 🔻 Format 🔻	Tahoma 🔽 16	🖻 🗛 🗛 🖶 🕄 🗵			
			Quote no: \$QUOTES_QUOTE_NO	\$	
Luor	0		Quote Date: \$000TES MODIEU	DTIME¢	
				-01111E\$	
S.No		Product Code	Product Name	Quantity	Uni
	😽 Cut		\$PRODUCTS_IMAGENAM	\$	\$PRODUC
İ	💼 Сору		SPRODUCTS_IMAGENAM	<u>\$</u> {	
#PRODUCTBLOC_END#	👔 Paste				
%G I BL TOTAL%	Cell •	Insert Cell Before			
	k	insert our before			
	Row	Insert Cell After			
%G_Tax% \$VATPERCE	Row · Column ·	Insert Cell After Delete Cells Merce Cells			
%G_Tax% \$VATPERCE	Row Column Delete Table Table Properties	Insert Cell After Delete Cells Merge Cells Merge Right			
%G_Tax% \$VATPERCE	Column Column Delete Table Table Properties Kedit Div	Insert Cell After Delete Cells Merge Cells Merge Right Merge Down			
%G_Tax% \$VATPERCEI	Row Column Delete Table Table Properties	Insert Cell After Delete Cells Merge Cells Merge Right Merge Down Split Cell Horizontally	D		
%G_Tax% \$VATPERCEI %G_LBL_GRAND_ Terms & Cot	Row Column Column Delete Table Table Properties	Insert Cell After Delete Cells Merge Cells Merge Right Merge Down Split Cell Horizontally Split Cell Vertically	٥		



•
Cell Type Data 💌
Rows Span Columns Span
Background Color Choose
Border Color Choose
OK ⊩ Cancel ×

Picture 4.40 How to set fixed size of table step 2

5 PDF Maker block actions

The PDF Maker block (3.4) contains links to initiate several actions:

Export To PDF
 Send Email With PDF
 Edit and Export To PDF
 Save PDF into Documents
 PDF Product Page Break
 PDF Product Images
 Export To RTE

You can find description of above actions in the following sections. Please take into account that visibility of above links within PDF Maker block depends on user profile.

5.1 Export to PDF

The export of your documents/records to PDF files is the basic action of PDF Maker block.

- 1. Go to the detail view of given Module and on the right side of detail view, in the PDF Maker block, choose your PDF Template.
- 2. Click on 🖾 Export TO PDF link.
- 3. A popup window will appear on the screen. Please select whether you would like to open or save pdf file.
- 4. Click on to finish export to PDF file.

nvoice Information Mor	e Information			Edit Duplicate Delete 🔄 🚍 🗋
Invoice Information			3	
Subject	vtiger_invoice20	Sales Orde	SO_vtiger5usrp	PDFMaker
Customer No		Opening Invoice_INV1_10-05-2012.pdf	×	Invoice with Adjustment
Contact Name	Williams Linda	You have chosen to open		Invoice NULL custom date
Due Date	2012-03-26	T Invoice_INV1_10-05-2012.pdf		Invoice listview
Excise Duty		which is a: Adobe Acrobat Document (73,0 KE	B)	Basic Invoice
Account Name	X-CEED INC 99	What should Eirefox do with this file?		Export To PDF
Assigned To	Administrator	Open with Adeba Deader 0.2 (default)		Send Email With PDF
Modified Time	2012-05-07 22:1	C Save File		Edit and Export To PDF
Address Information		Do this gutomatically for files like this from n	10w on. 4	Save PDF into Documents
Billing Address	999 Baker Way		\angle	PDF Product Page Break
Billing PO Box			OK Cancel	
Billing City	San Jose	Shipping city		PDF Product Images
Billing State	CA	Shipping State	CA	Export To RTF
Billing Postal Code	99999	Shipping Postal Code	99999	
	110.0		110.4	

Picture 5.1 Export to PDF

5.2 Send email with PDF

PDF Maker allows you to send your pdf documents via email in few easy steps:

- 1. Go to the detail view of given Module and on the right side of detail view, in the PDF Maker block, choose your PDF Template.
- 2. Click on 🖾 Send Email With PDF link.
- 3. A popup window "Select Email IDs" will appear on the screen. Please select recipient(s).
- 4. Click on Select button.
- 5. A popup window "Compose Mail" will appear on the screen with already attached pdf file. Please add subject and text according to your needs. You can add additional recipients if necessary as well.
- 6. Click on **Send** button to send email with attached file(s).

[INV1] vtiger_invoice201 - Invoice Invoice Information More Inform	Select the Email Ds to which the mail should be sent Email sopko@tts4you.sk Other Email	3.	Edit Duplicate Delete
Subject Vilg	4.	D_vtiger5usrp	PDFMaker
Customer No	Select Cancel	V1	Help - labels
Contact Name Willia		0/00/00/00/00/00/00/00/00/00/00/00/00/0	Invoice with Adjustment 2
Compose Mail - Mozilla Firefox			Invoice sharing
Compose E-Mail		select contact	US English Export To PDF
*To: X-CEED INC 99 <sopko@its4you.sk>,</sopko@its4you.sk>		Accounts 💌 🛖 🗻	Send Email With PDF
Cc :		INV1.pdf	Edit and Export To PDF
Boc: *Subject:		attachment	Save PDF into Docum
Attachment : Files Maximum 6	Browse 6		PDF Product Page Bre
Sele	ct Email Template Save Send Cancel		PDF Product Images
B I U abe X ₂ X ² 1 = E ∈ 4	E 2 3 8 🙈 🍂 🏱 🖲 Source 🗌	G. 🗉	Export To RTF
Styles Format Font	Size 🔄	۱.	Tools

Picture 5.2 Send Email with PDF – Compose E-Mail

Please refer also to our EMAIL Maker which allows you to create your own email templates (<u>EMAIL Maker</u> <u>demo</u> link).

5.3 Edit and Export to PDF

From time to time it is necessary to edit your document before print or save. For example, you can change post address in one document but don't want to change record in database because it is temporary necessity, or as shown in the example below just add text "(COPY)" into the caption of the invoice. In that case you can choose Related Export TO PDE action item which gives you possibility to change not only layout of the document/template but in addition any text. In order to edit and export PDF file:

- 1. Go to the detail view of given Module and on the right side of detail view, in the PDF Maker block, choose your PDF Template.
- 2. Click on 🖺 Edit and Export To PDF link.
- 3. A popup window with template will appear in the screen. You are able now to modify your document now.
- 4. Click on **Export To PDF** to see the final pdf file. As can be seen in the picture you can also save your pdf file into documents.

.eads	Accounts	Contacts	Potentials	Quotes	Sales Order	Invoice	Price Books	Documents	Calendar	
ales > li	nvoice	+ 2		0 🖪 🗩	ē	ŧ †		~		
t	INV1] vtiger	r_invoice201	- Invoice In	formation Up	odated 2 days ag	o (07 May 2012)	2			
	Invoice Info	ormation	More Informatio	n		/	3.		Edit	Duplicate Delete 🔄 🚍 🕨
🕑 PD	F Maker - vtige	er CRM 5 - Com	mercial Open S	ource CRM - Mo	zilla Firefox				FLOX	
	and the	No.		IL INTERACTOR				And the second		
Ter	mplate: Basic	Invoice		-	4				-	PDFMaker
			E	xport To PDF	Save PDF into	Documents				Invoice with Adjustment Invoice NULL custom date
										Basic Invoice Invoice sharing
	Body	He	ader	Footer						
	Source	Q 🗉 🗸	1 11 11 18	🗎 👌 🌾	A§¢ • ↔	AA 48. 🗉			_	Export to PDF
E	B I ∐ abe	X ₂ X ²	E 🗄 🤃 🖷	; 99 'tivs	2 3 ■		Ω 🖷			Send Email With PDF
S	tyles 💌	Normal	Font	- 8 -	A:* A*	1				Edit and Export To PDF
		No. T	NIX/4 //	CODV)						Save PDF into Documents
	INVOIC	e no: 1	INVI (I	LUPT						PDF Product Page Break
>	K-CEED INC 9	99 av			vtiger					PDF Product Images
9	99999 San Jo	ose			40-41-42 600 042 0 India	, Sivasundar A Thennai	partments, Fl	lat D-II, Shastri	Street, Vela	Export To RTF
	-				titula				►.a	

Picture 5.3 Edit and export to PDF

5.4 Save PDF into Documents

You can save the template or merged templates into the module Documents using following steps:

- 1. Go to the detail view of given Module and on the right side of detail view, in the PDF Maker block, choose your PDF Template.
- 2. Click on 🖾 Save PDF into Documents link. A popup window will appear on the screen.
- 3. In the part "Documents" please write the title of the document and select the storage folder. You can also add a note.
- 4. In the part "Related To", you can select contact or organization to which this document will be related. This document is than visible under *More Information tab -> Documents* (Picture 5.4)
- 5. Click on <u>Save</u> button to save the pdf file into Documents.



Picture 5.4 Save PDF into Documents

5.5 PDF Product Page Break

Product blocks are available for some modules (Invoice, SO, PO, Q). PDF Product Page Break action allows you to setup additional settings according to your needs. You can define:

- A position of the page break. The page break will be inserted after each selected product (Picture 5.5 blue line)
- A repetition of the table's header on the next page (Picture 5.5 red line)
- A subtotal value at the end of end of the page (before page break) (Picture 5.5 green line)



Picture 5.5 Product page break settings

Next picture shows final pdf documents of the same invoice without (left side) and with (right side) product page break settings. As can be seen, in case of not defined settings PDF Maker correctly divided invoice after fourth product, i.e. one row related to product is not divided between two pages.





5.6 PDF Product Images

PDF Product Images action allows you to define some settings related to product images:

- used for product templates (see chapter 5.6.1)
- used inside product blocks (see chapter 5.6.2)

5.6.1 PDF Product Images in product templates

The link $\mathbb{D} \xrightarrow{\text{PDF Product Images}}$ is useful in case you are using more images for one product and you would like to select which image has to be used within your pdf exported files. Let's suppose that variable \$PRODUCTS_IMAGENAME\$ is used in the template. In order to select which image will be used please provide following steps:

- 1. Click on DF Product Images link.
- 2. PDF Product Images window will appear on the screen.
- 3. Select the picture and click on **Save** button.



Picture 5.7 PDF Product Images in product templates

Depending on your selection 4 different situations can happen:

- a) If more pictures are available only selected picture will be used.
- b) If only one picture is available it is used automatically.
- c) If picture is not available then no changes will be visible in the final document.
- d) In case you don't want to use picture you are able to switch it off.

5.6.2 PDF Product Images in product blocks

The PDF Product Images also allows defining images which will be used in final exported pdf files within product blocks.

- 1. Start editing of your pdf template. Go to the *Product block tab,* from "Available fields for Products" select "Product Image" and click on Insert into template button.
- 2. As can be seen in image below, it is required to insert the variable \$PRODUCTS_IMAGENAME\$ between #PRODUCTBLOC_START# end #PRODUCTBLOC_END#
- 3. Click on **Save** button to save your pdf template.

Properties	Other i	nformation	Labels	Pro	duct block	Hea	ader / Footer	
Product block template:		product blog	ck for individu	ial tax 💌	Insert into tem	plate		
Product block:		Block end	🔹 Inse	ert into temp	olate			
*Common fields for Products	s & Services:	Record ID				Ins	sert into templat	te
*Available fields for Products	s:	Product Ima	age	•	Insert into temp	olate		
*Available fields for Services	:	Service Na	ne	🖌 Inse	ert into template			
					3			
Booky	1.	Header		Foot	Apply Sav	ne Ca	ancel	
Body	1.	Header		Foot	Apply San	ne Ca	ancel	
Body Pos	1.	Header		Foot Text	Apply Sav	RICE%	ancel %G_Subtotal%	3
Body Pos PPRODUCTBLOC_START#		Header	AGEUNIT\$ \$PRO	Foot Text	3 Apply Sav er %G_LBL_LIST_P	RICE% \$P	ancel %G_Subtotal% PRODUCTTOTAL\$	\$PR
Body Pos *PRODUCTBLOC_START# \$PRODUCTS_IMAGENAME\$	1. 3 00 YGUANTIT 2.	Header	AGEUNIT\$ \$PROD	Foot Text DUCTNAME\$	3 Apply Sav er %G_LBL_LIST_P	RICE% SPRICES SP	wG_Subtotal%	\$PR
Body Pos Pos ProDUCTBLOC_START# PRODUCTS_IMAGENAME\$ PRODUCTBLOC_END# Subtotals		Header	AGEUNIT\$ \$PRO	Foot Text DUCTNAME\$	Apply Sav er %G_LBL_LIST_P \$PRODUCTLIST	RICE% 5	ancel %G_Subtotal% PRODUCTTOTAL\$	\$PR

Picture 5.8 PDF Product images

Let's assume that your pdf template including product image variable is correctly prepared and saved. In order to apply pdf product images settings:

- 1. Go to the detail view of given Module (for example Invoice) and on the right side of detail view, in the PDF Maker block, choose your PDF Template.
- 2. Click on Reproduct Images link.
- 3. A popup window "PDF Product images" will appear on the screen. It displays all available pictures for each product from the selected record (for example invoice). You can select which picture will be used in final pdf document, as well as its size. Depending on your selection 4 different situations can happen:
 - a) If more pictures are available only selected picture will be used.
 - b) If only one picture is available it is used automatically.
 - c) If picture is not available the cell in the pdf document remains empty.
 - d) In case you don't want to use picture you are able to switch it off.

You can also set a width or height for the generated images. If you leave one of the parameter fields empty, the size of image will be proportional. If you leave both parameter fields empty, the image will be displayed in its original size.

- 4. Click on **Save** button to save your setting.
- 5. Now, pdf product images settings are saved and will be used for additional actions, like export to pdf, send email with pdf etc.

PDF document	w In	ww.vtiger.co voice Date:	om 2012-04-05	5				
Invoice No: INV19								
Pos / Image HEADERI 1 2 2 2 4 4 TOTALAFTERDISCOUNT_SUBTOTAL 1 1 1 2 2 4 4 1 1 1 2 2 4 1 4 1 1 1 1 1 1 1 1 1 1 1 1 1	Qty 00 Each 00 Each 00 Each 00 Each 00 Each 00 Each 10 10 10 10 10 10 10 10 10 10 10 10 10 1	Text Sharp - Plai Paper Fax A Brother Ink Jet Cartridge Cartridge Coupboard A Cd-R CD Recordable	_withimage	PDF Produ Sharp - Plain C O C C Brother Ink Double Pane C Cd-R CD Res	in Paper Fax 150 × a Jet Cartridge 100 × c Jet Cartridge 100 × c Jet See-thru Clipboard	3.	5	DFMaker Invoice with Adjustment Invoice with productionsy Invoice listview Basic Invoice US English Export To PDE Send Email With PDF Edit and Export To PDF Save PDF into Documents Save PDF into Documents PDF Product Images PDF PDF PDF PDF PDF PDF PDF PDF PDF PDF
			deta	ailview	Shipping Country USA			

Picture 5.9 PDF Product images settings

5.7 Export to RTF

PDF Maker also supports export to RTF.

- 1. Go to the detail view of given Module and on the right side of detail view, in the PDF Maker block, choose your PDF Template.
- 2. Click on 🖾 Export To RTF link.
- 3. A popup window "Opening *.rtf" will appear on the screen.
- 4. Click button to open/save the rtf file.

Important note: Please take into account that export to RTF is only additional feature of the PDF Maker and is not fully supported. There are some well known problems (e.g. export pictures, advanced formatting etc.) which could cause wrong export.

Sales Order	SO_vtiger5usrp	PDFMaker
Invoice No	2 V1	Invision with Adjustment 2
Invoice Date Dpening Invoice_IN¥1_23-05-2012.rtf	2012-04-05	Invoice with product image: Invoice sharing Invoice listview
You have chosen to open		Basic Invoice
Invoice_IN¥1_23-05-2012.rtf		US English
which is a: Rich Text Format from: http://		Export To PDF
What should Firefox do with this file?		Send Email With PDF
Open with Microsoft Office Word (default Save File)	Edit and Export To PDF
Do this <u>a</u> utomatically for files like this from n	ow on.	Save PDF into Documents
	4	PDF Product Page Break
0	Cancel	PDF Product Images
Shipping Postal Code	<u>aaaaa</u>	Export To RTF - 2.
Shipping Country	USA	

Picture 5.10 Export to rtf

6 Additional features

6.1 Mass export and merging templates

In chapters 5.1 and 5.7 was described how to export documents via PDF Maker block. There is additional possibility of the export to pdf or rtf via ListView. In addition, ListView allows you mass export and merging templates. To do mass export in ListView please provide following steps:

- 1. Inside ListView, select one or more document.
- 2. Click on PDF Export
- 3. PDF Maker batch export window will appear on the screen.
- 4. Select the pdf template.
- 5. Click on Export To PDF or Export To RTF



Picture 6.1 Mass export

The merging of the templates allows you to print one or more documents using more templates at once. Next picture shows the merging of the templates.



Picture 6.2 Merging templates

If you combine mass export and merging templates you will obtain final pdf document as is shown in the next picture.



Picture 6.3 Mass export combined with merging templates

6.1.1 Sorting within mass export

The order of the records exported in the pdf file within mass export depends on sorting used in the ListView. So if you change sorting of the records in the ListView then the final PDF file will correspond this sorting, i.e. records will be ordered as sorted in the ListView (Picture 6.4).

	Invoice No	Subject 🔻	s	ales Order	Status	Total	
₹	INV12	SO_vtiger555		0_vtiger	AutoCreated	€1,190.00	
◄	INV33 🗲	vliger user packs	V	iger user packs	AutoCreated	€5,696.00	-
2	INV15	vtiger user packs	v	iger user packs	AutoCreated	€4,997.00	
	INV3	vtiger5usrp_invoice71134	S	0_vt100usrpk	Approved	€8,050.00	
	Invoice No 💌	Subject		Sales Order	Status	Total	1
N	INV12	SO_vtiger555		SO_vtiger	AutoCreated	€1,190.00	
•	INV15	vilger user packs		vilger user packs	AutoCreated	64,997.00	→ `
	INV3	vtiger5usrp_invoice71134		SO_vt100usrpk	Approved	€8,050.00	
2	INV33	vtiger user packs		vtiger user packs	AutoCreated	€5,696.00	
	Invoice No	Subject	s	ales Order	Status	Total 🔺	
	INV3	vtiger5usrp_invoice71134	S	O_vt100usrpk	Approved	€8,050.00	
•	INV33 🗲	vliger üser packs	V	iger user packs	AutoCreated	es,696.00	→ '
•	IN∀15	vtiger user packs	vi	iger user packs	AutoCreated	€4,997.00	
◄	INV12	SO_vtiger555	S	0_vtiger	AutoCreated	€1,190.00	

Picture 6.4 Sorting within mass export

6.2 Export and import templates

Export and import of the PDF templates makes it easy to work with PDF Maker templates by migration process or moving templates from development to productive installation.

In order to export PDF templates to external sources in PDF Maker tool do following steps:

- 1. In the PDF Maker ListView page select one or more templates which would you like to export.
- 2. Click on 🗔 toolbar icon.
- 3. In the File Download pop-up dialog select "Save File".
- 4. Click to save the templates in *.xml file format.

Tool	s > PD	F Maker 🛛 🖶 🔎	ii 🔕 🖪	
D	elete			import 2. export emplate PDF Maker Manual
#	Select	Template name	Module	Description
1		SalesOrder	Sales Order	Template for SalesOrder
2	•	PurchaseOrder	Purchase Order	Opening export.xml
3		Quotes -	Quotes	You have chosen to open
4		Accounts	Accounts	export.xml which is a: XML Document
5		Invoice with Adjustment	Invoice	from: http://
6	N	Invoice listview	Invoice 3.	What should Firefox do with this file?
7		Invoice related	Invoice	G Save File
8		Invoice editable preview (default)	Invoice	Do this automatically for files like this from now on.
9		Invoice NULL custom date	Invoice	
10		Contact NULL custom date	Contacts	OK Cancel
11		Invoice VAT block	Invoice	

Picture 6.5 Export of the templates

To import PDF templates from external sources click on the Import toolbar icon \square (see Picture 6.5 point 2.). After click the new import page will appear on the screen.

ools > PDF Maker	1				
Impo	rt PDF Templates				
	o start import, browse to	locate the .XML file and click on the N	ext button to Continue.		
	File I	Location :		Browse	
					Next > Cancel

Picture 6.6 Import pdf templates page

In the Import pdf templates page, browse the PDF Maker template-related data in *.xml format and then click the Next> button. It will take a few seconds to complete the import. The imported templates can be found in PDF Maker ListView page.

6.3 Sharing

Using *Sharing tab* you can define template owner and how to share your template between you and other users or groups. You can setup sharing for different entities & members. In order to share your template:

- 1. Select "Share" from the list.
- 2. Select "Entity" from the list. Available entities are: groups, roles, roles & subordinates, users.
- 3. Select member of entity
- 4. Click with to add it to "Selected Members"
- 5. Click view to remove selected member from "Selected Members"



Picture 6.7 Sharing

6.4 Custom functions

If you need a special treatment of vtiger data in your template, you can use custom (your own) functions. There is a folder *"functions"* under *[vTigerROOT]/modules/PDFMaker,* where you can place your own .php file with functions which would you like to use. This file will be included automatically. Inside this folder is file *"*its4you.php", which contains our functions. These functions are listed in the Table 6-1 and are provided for you for free. Do not modify this file, because by next version it will be overwritten. If you would like to use your own functions, please create your own file/files, it means create new .php file under *[vTigerROOT]/modules/PDFMaker/functions* and place here your functions. In order to insert custom function into template provide following:

- 1. Go to EditView, and in *Other information tab* select custom function from selectbox "Custom functions". You can choose one of our functions (its4you_*), or your own function.
- Click Insert into template button. It adds function in form [CUSTOMFUNCTION|functionname|param1|param2|...|CUSTOMFUNCTION].
- 3. Finally you have to define parameters of the function as shown in the Picture 6.8.



[CUSTOMFUNCTION|its4you_if|**\$TOTALWITHVAT\$**|>|500|**Present included for free!**||CUSTOMFUNCTION]

Invo	oice_IN¥1_23-05-201	2-11.pdf - Adobe I	Reader			- 🗆 ×
File Ec	fit View Document	Tools Window Hel	p /			×
	💩 • 🚱 4	🕨 🔷 🚺 / 2	🔊 🖲 🚺 🕶	Find		
•				Invoice Da	te: 2012-04	⊧-05
	Pr	esent incl	uded for free!			
se	Po	s Qty	Text		List Price EUR	Discou
Ø	9 27 × 11 60 m	1,00 Each	Sharp - Plain Paper Fax		2200,00	200,

Picture 6.8 Custom functions

In the above example function with 5 parameters was used, i.e. [CUSTOMFUNCTION|functionname|param1|param2|param3|param4|param5|CUSTOMFUNCTION]. It is possible to use functions without parameters as well. In this case use just notation [CUSTOMFUNCTION|functionname|CUSTOMFUNCTION].

Important note: It is not allowed to use one custom function inside another one, i.e. to use custom function as parameter of another custom function.

Following table contains short description of our its4you_* functions which you can use in your pdf templates.

Name	Description
its4you_if	[CUSTOMFUNCTION its4you_if param1 comparator param2 whatToReturn1 whatTo Return2 CUSTOMFUNCTION]
	This function executes if-else statement based on given parameters:
	param1 first parameter of comparison
	comparator comparison sign - one of ==,!=,<,>,<=,>=
	param2 second parameter of comparison
	whatToReturn1 value returned when comparison succeeded
	whatToReturn2 value returned when comparison didn't succeed
its4you_getTemplateId	[CUSTOMFUNCTION its4you_getTemplateId CUSTOMFUNCTION]
	This function returns id of current template.
its4you_getContactImage	[CUSTOMFUNCTION its4you_getContactImage id width height CUSTOMFUNCTION]
	This function returns image of contact.
	id - contact id
	width - width of returned image (10%, 100px)
	height - height of returned image (10%, 100px)
its4you_sum	[CUSTOMFUNCTION its4you_sum arg1 arg2 CUSTOMFUNCTION]
	This function returns sum of input values: arg1+arg2++argN. Function is inserted with
	two arguments by default but you can edit it and add more arguments.
its4you_deduct	[CUSTOMFUNCTION its4you_deduct arg1 arg2 CUSTOMFUNCTION]
	This function returns deducted value arg1-arg2argN (all following values are
	deducted from the first one). Function is inserted with two arguments by default but
	you can edit it and add more arguments.
its4you_multiplication	[CUSTOMFUNCTION its4you_multiplication arg1 arg2 CUSTOMFUNCTION]
	This function returns multiplication of all input values: arg1*arg2**argN. Function is
	inserted with two arguments by default but you can edit it and add more arguments.
its4you_divide	[CUSTOMFUNCTION its4you_divide arg1 arg2 CUSTOMFUNCTION]
	This function returns divided value arg1/arg2//argN. Function is inserted with two
	arguments by default but you can edit it and add more arguments.
its4you_formatNumberToPDF	[CUSTOMFUNCTION its4you_formatNumberToPDF value CUSTOMFUNCTION]
	This function returns formatted value and is used by other functions.
	value – int
its4you_formatNumberFromPDF	[CUSTOMFUNCTION its4you_formatNumberFromPDF value CUSTOMFUNCTION]
	This function returns converted value into integer and is used by other functions.
	value - int

Table 6-1 its4you functions

6.5 Calendar

PDF Maker is also supported for module Calendar. The PDF export is possible from DetailView as well as from ListView. Please take into account that the export from ListView is supported only inside "All Events & Todos" tab.

Search	ed Search	Searc	ch for] In	Status		•]	Search N	w		
A B	0	DE	F G	н	I J	KL	M	N	0	P	R	s	S T
Calendar	All Eve	ents & Todos											
		-											
Showing Rei	cords 1 - 20 of 2 Change Own	ier PDF E	xport			Filters :	All 💌 Cre	ate Filter I	Edit Del	ete			
Showing Rei Delete	cords 1 - 20 of 2 Change Own	22 PDF Es Type	xport Subject		Re	Filters :	All 💌 Cre	ate Filter Start Date	Edit Del	ete	Date		Assigne
Showing Rei	cords 1 - 20 of 2 Change Own	22 PDF Es Type	subject		Re	Filters :	All 💌 Cre	ster Filter Start Date	Edit Del B	ete End	Date		Assigne
Showing Ref	Change Own	22 PDF E Type Datis	Subject This Carlierer		Re	Filters : lated To	All 💌 Cre	start Filter 1 Start Dati 101 24 200	Edit Del	ete End cit.2 cit.2	Date 4.3000		Assigne

Picture 6.9 PDF Export in Calendar

The fields related to module Calendar are divided into four groups: *Calendar, Task Information, Custom Information* and *Event Information*. Picture 6.10 shows which fields are common for events and tasks, task related fields and event related fields. In connection to *Task and Event Information* fields it is necessary to mention that:

- the variable \$CALENDAR_DUE_DATE\$ is common for fields "Due Date" and "End Date"; after save of the pdf template only "End Date" is visible
- "Status" is common name of the two fields but is related to different variables; for tasks it is \$CALENDAR_TASKSTATUS\$ and for events it is \$CALENDAR_EVENTSTATUS\$
- "Send Reminder" is event field although it is located in group Task Information



Picture 6.10 Event & Task fields

6.6 Descriptions 4You, Terms and Conditions 4You in PDF Maker

The Descriptions 4You (Desc4You) and Terms and Conditions 4You (T&C4You) are vTiger extensions which allow you to create well formatted descriptions or terms and conditions according to your needs. Desc4You and T&C4You were already integrated into PDF Maker. Please refer to our web page or manuals for details about these extensions.

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 6.11 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 (Picture 6.12). The same behavior is for "Terms & Conditions" and "Terms & Conditions 4You".



Picture 6.12 Description vs. Descriptions 4You

7 Settings

The PDF Maker settings can be initiated from ListView using button $\boxed{}$ as you can see in the picture below (Picture 7.1). In the Settings you can find:

- Extensions download extensions for the PDF Maker
- Profiles manage user-specific PDF Maker access to different roles
- Self-defined labels manage your own labels
- Product block templates manage your own product block templates
- My preferences manage your global PDF Maker preferences
- Upgrade initiate upgrade of the PDF Maker
- Debugging switch debugging on/off and display system information
- License settings manage all settings related to your license
- Juninstall PDF Maker completely remove PDF Maker

00	ls > P	DF Ma	ker 📑	2 0 5	9			Click to initiat	e
1	Delete						/	Add template PDF Maker N	lanual
#	Select	Templat	e name	Module	D	escription		Order Status Action	
1		Invoice		Invoice	Te	emplate for Invoice		1 Active Edit C	Juplicat
2		Sal							_
3		Pun	Mod	ule Manager > PDFMa	ker				
4		Que	C Manage	e module behavior inside vtiger CRM	1				
			' % p	lownload extensions for the DF Maker.	- Contraction of the second se	Manage user-specific PDF Maker access to different Roles.		Manage your own labels and make your PDF templates completely language independent.	
			P	roduct block templates	8	My preferences		Upgrade	
			M E M	flanage your own product block emplates.	• ()	Manage your global PDF Maker preferences.	Č%	Upgrade PDFMaker	
				ebugging	E	License settings		Uninstall PDFMaker	
			d s	witch the PDFMaker ebugging ON/OFF. Display ystem information.		Manage all settings related to your license.	I	Remove PDFMaker completely from your vTiger.	
			s s	witch the PDFMaker ebugging ON/OFF. Display ystem information.		Manage all settings related to your license.		Remove PDF from your vTr	⁻ Maker completely iger.

Picture 7.1 PDF Maker settings

7.1 Extensions

7.1.1 Customer Portal

Allows using one of the PDF Maker templates as a standard Customer Portal template for modules Invoice and Quotes. Please refer to chapter 4.9.4 to see how to set up PDF Maker template for Customer Portal.

INSTALLATION NOTES: If you have standard vTiger and Customer Portal installation without any customizations of source code or database, please unzip the extension files to the root directory of vTiger and Customer Portal. Otherwise, follow the custom installation process described in Customer Portal.txt

7.1.2 Workflow

PDF Maker Workflow extension is a new package which provides features, which enhance usability of standard workflow of vTiger in cooperation with our PDF Maker. It allows you to create completely new task "Save Document from PDF Maker" for any workflow and it extends functionality of already existing task "Send mail".

"Save Document from PDF Maker" task brings you the possibility to automatically create and save Documents from PDF Maker templates for module you create workflow for. Thus, you are not burdened with manually generating and saving Invoices, Quotes, Sales Orders, Tickets,... as PDF for your customers, for example.

Edit an existing workflow	or create a one				
Summary				Save	as Template Save Cancel
* Description	Attach pdf when xml rig	pht			
Module	Invoice				
When to run the workflow					
Only on the first save.					
 Until the first time the condition is Every time the record is saved. 	Create Task		×		
Every time a record is modified.	Create a new task of type	Send Email			
Conditions		Send Email Invoke Custom Function Create Todo			New Condition
lasks		Create Event SMS Task			New Task
		Save document from PDFMaker		Statue	Tools
Tack				Julius	10015

Picture 7.2 Edit Workflow

All you need to do is to create new Workflow for chosen module and create a new Task "Save Document from PDF Maker".

Within tab *Task Operations* you can select the PDF template which will be used. In addition we've already provided the possibility to select language for your PDF templates.

ask Operations	
*Document title	
Document description	
Folder name	Default 💌
PDF Template	Invoice with product images 💌 US English 💌

Picture 7.3 Task Operations tab for workflow

7.2 Profiles

You may define PDF Maker privileges for all profiles. You may select Create/Edit, View, Delete and Export to RTF privileges. Just use checkboxes and click on **Save** button to save changes.

Manage user-specific PDF Maker ac	cess to different Roles.			
fine PDF Maker privilegi	es for all profiles			Save
Profiles	Create/Edit	View	Delete	Export To RTF
Profiles Administrator	Create/Edit	View V	Delete 🔽	Export To RTF
Profiles Administrator Sales Profile	Create/Edit	View V	Delete V	Export To RTF
Profiles Administrator Sales Profile	CreateEdit	View IV	Delete V V	Export To RTF
Profiles Administrator Sales Profile Support Profile	CreateEdit	View V V	Delete V V	Export To RTF

Picture 7.4 Manage profiles

7.3 Self-defined labels

If the global and module related labels are not sufficient for you, it is possible to define self-defined labels. In order to define self-defined please use following steps:

- 1. Click on Add button.
- 2. Define label key C_*****.
- 3. Define value for your current language.
- 4. Click on Save button.
- 5. In order to define values for other installed languages click on "Other values" link.
- 6. Click "Edit" link for particular language, define label value and click on **Save** button.

You can also find here button Delete which allows you to delete unnecessary labels.

D	efine own labels available for a	all users.				4.
elet	e				1.	Add Save Cance
	Label key		Current language value (U	IS English)		Other languages value
	c_greeting_1 2.	3.	Best Regards			5. Other values
elet	e		C_greeting_1		×	Add Save Cance
			Label language	Label value		
			ES Mexico			
			PT Brasil			
			DE Deutsch	Mit freundlichen Grüßen Save r Cancel	Edit	
			HU Magyar	6.		
			British English			
			NL-Dutch			
			ES Spanish			

Picture 7.5 How to define self-defined labels

7.4 Product block templates

As can be seen in the picture below, you can simply add, edit, duplicate or delete product block templates. If you want to edit/duplicate already created product block template just click on link "Edit" / "Duplicate". In order to delete product block template it is necessary to check the checkbox related to product block template and click on button Delete.

De	fine own product block template	es available for all users.			(Add
1-1	Template name	Body				Action
		Pos	%G_Qty%	Text	%G_LBL_LIST_PRI	
		#PRODUCTBLOC_START#				
		\$PRODUCTPOSITION\$ \$PR	ODUCTQUANTITYS SPRODUCTUSAGE	JNITS SPRODUCTNAM	AES SPRODUCTLISTPR	
		#PRODUCTBLOC_END#				
		%G_LBL_TOTAL%				
		%G_Discount%				
-	product block for individual tax	%0_LBL_NET_TOTAL%				
		%G_Tax% \$VATPERCENT\$ 1	% % @_LBL_LIST_OF % \$TOTALAFTERDIS	COUNT\$		********
		Total with TAX				
		%G_LBL_SHIPPING_AND_H	ANDLING_CHARGES%			
		%G_LBL_TAX_FOR_SHIPPIN	IG_AND_HANDLING%			

Picture 7.6 Product block templates management

When you click on button following window will appear on your screen (). In order to create and save your own product block template please provide following steps:

- 1. Define product block template name.
- Insert product block template start (#PRODUCTBLOC_START#) and product block template end (#PRODUCTBLOC_END#).
- 3. Add all necessary product/service fields according to your needs between (#PRODUCTBLOC_START#) and (#PRODUCTBLOC_END#) and provide formatting if needed.
- 4. Click on Save button.

		•	4. <u>Save</u>
Properties	Labels		_
Template name:	1.	My own product block template for invoice	
Product block:	2.	Block end Insert into template	
'Common fields for Produ	cts & Services:	Product No. Service No	Insert into template
'Available fields for Produ	cts:	Produc Name 🗾 Insert	t into template
'Available fields for Servic	es:	Service Name	template 3.
fields are placed into Product bloc	c. Product block will be	nown for every product/service in PDF.	
Source 🖬 🗋 💁			
B $I \ \underline{U}$ abe $X_2 \ X^2$		≝ " % ≣ ? ≣ 8 A P	
Styles 🔄 Normal	- Font	Size 🔽 🗛 🖌 🖨 🖏 🖸	2
	-	3	
ALC: NOT THE REPORT OF THE PARTY OF THE PART	<u></u>	¥ 3.	
A RODOCIDEOC_DIART			
\$PS_NO\$ \$PRODUCTS_F	RODUCTNAME\$		
*PS_NO\$ \$PRODUCTS_F *PRODUCTBLOC_END#		1	
<pre>#PRODUCTBLOC_END#</pre>	RODUCTNAMES	1	



7.5 My preferences

Within "My preferences" you can change global PDF Maker settings. In the current version of PDF Maker there is only one parameter related to upgrade notification settings described in the chapter 1. Just use checkbox and click on **Save** button to save changes.

Mana	age your global PDF Maker preferences.	> wy preference	5
🔁 Defin	≥ your global PDF Maker sett	ings.	Save Cance
🔁 Defin	e your global PDF Maker sett	ings.	Save
Defin Notification	e your global PDF Maker sett settings	ings.	Save

Picture 7.8 My preferences

7.6 Upgrade PDF Maker

The upgrade of PDF Maker can be started using 😨 Upgrade link in the module manager. Please browse the package using button Browse... and click on button Upgrade.

Managa m	adule hebevior incide vider CPM	
wanaye m		
Coloct the Backar	ao Filo	
Select the Packag	je rile	
* File location:	H:\JTS4You\PDFMaker_135_3.zip	Browse
	vtiger module is packaged as a zip file.	

Picture 7.9 Upgrade of the PDF Maker – step 1
The upgrade continues with following window. Please verify the upgrade details parsed from the zip file. Please check that you accepted the license agreement and click Yes to proceed or No to cancel.

Manage modu	le behavior inside vtiger CRM			
erify Upgrade Deta	is			
Module Name	PDFMaker			
Module Directory	modules/PDFMaker			
Version	540.35.3 [Installed Version 540.35.1]			
Req. vtiger version	5.4.0			
License	 Module : PDF Maker Version : 1.35.3 Vtiger : 5.4.0 Author : IT-Solutions4You s.r.o - www.its4you.sk Supported browsers : Internet Explorer 7 or higher, Mozilla Firefox 3.0 or higher LICENSE The PDF Maker License will be referred to as "The license" in the remainder of this 			

Picture 7.10 Upgrade of PDF Maker – step 2

Click on **Finish** to complete the module upgrade.

Updating	module	
nvoking vtl	b_handler for module.preupdateSTART	
Migrating t	540.35.2 STARTED	
SQL: ALTE	R TABLE `vtiger_pdfmaker_version` MODIFY version varchar(30) NOT NULL; DONE	
Migrating t	540.35.2 DONE	
SQL: ALTE	R TABLE "vtiger pdfmaker relblockcol" ADD "sortseguence" TINYINT NOT NULL DEFAULT "D"	
Migrating t	/ 540.35.3 DONE	
SQL: INSE	RT INTO vtiger_pdfmaker_usersettings SELECT id, 1 FROM vtiger_users WHERE is_admin='on', DONE	
Deleting lin Adding Lin	(S DONE (HEADERSCRIPT, RDEMokarActions IS) DONE	
Updating v	rsion to 540.35.3 DONE	
nvoking vtl	b_handler for module.postupdateSTART	
Adding Lin	(HEADERSCRIPT - PDFMakerJS) DONE	

Picture 7.11 Finish upgrade

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

5	Settings > Module Manager > Upgrade	
C.S	Manage module behavior inside vtiger CRM	
Upgra	ade Failure	
Canno	ot upgrade! Installed Version 540.35.3 matches Package Version	
		in the

Picture 7.12 Upgrade failure

7.7 Debugging

The debugging was developed in order to decrease the support time necessary for solving your problems. In many cases wrong settings on customer side is responsible for not correct working of the PDF Maker. The debugging provides some basic information for support team and minimum (recommended) values. You can find following buttons in the debugging:

- **Con** click on this button if you need to enable debugging
- Delete delete content of Smarty/templates_c
- **Export** export "Other debugging info" part into the html file

Note: We would like to kindly ask you, please always attach the export of "Other debugging info" into trouble tickets in case of necessary support. Thank you, your ITS4You support team.

Debugging PHP Inform	nation		
Actions			
Switch debugging ON/OFF	On		
Delete Smarty/templates_c/*.*	Delete		
Export debugging information	Export		
Other debugging info	Current values	Minimum (recommended) values	Status
memory_limit	Original value: 64M Changed value: 256M	129MB (256MB)	1
max_input_vars	100000	1001 (5000)	1
max_execution_time	30000	61 (600)	1
suhosin	Disabled request_max_vars: 15000 post_max_vars: 15000	request_max_vars: 1001 post_max_vars: 1001	~
	utiger: 5.4.0 DDF Maker: 540.37.0 mDDF: 6 DHD: 5.3.3.7+squeeze11	3	

Picture 7.13 Debugging

7.8 License settings

In case that some problem occurs with license key or in case you need to reinstall PDF Maker you have to deactivate and reactivate license key. To deactivate license key please provide following steps:

- 1. Click on Deactivate license button.
- 2. Confirm deactivation using _____ button in next window.
- 3. You are informed about successful deactivation of the license. Just click on .

Manage all settir	anager ngs related	> PDFMaker > Licen:	se setti	ngs		
Manage all settings related to your license.						
License settings				1.		
Licen	nse key	keykeykeykeykeykey		Reactivate license	e Deactivate license	
Manage a D)o you rea	ly want to deactivate your license	e key? el	Reactivate license	e Deactivate license	
Manage a License setting Module Manage all setting	bo you real	2. ОК Cance PDFMaker > License	e key? el	Reactivate license	e Deactivate license	
Manage a C License setting Module Manage al setting Manage al	bo you real anager ngs relater License kr	ly want to deactivate your license 2 Cance > PDFMaker > Licen Ito your license. ey has been deactivated success	e key? el se setti	Reactivate license	e Deactivate license	

Picture 7.14 Deactivate license

After deactivation of license you can list your pdf templates but you cannot edit or use them (see Picture 7.15). Also ListViews of other modules don't contain buttons/links to work with templates. PDF Maker blocks are not visible in the DetailViews either.

ļ,	elete				Add template	PDF M	aker Manual
#	Select	Template name	Module	Description	Order	Status	Action
1	r	Invoice (default)	Invoice	Template for Invoice	1	Active	Edit Duplicate
2	rt I	SalesOrder	Sales Order	Template for SalesOrder	1	Active	Edit I Duplicate
	s > PD	F Maker	- 2 - 8 2			L	
> ool:	s > PD	FMaker	200			PDF M	aker Manual
>	s > PD Select	F Maker	Module	Description		PDF M	aker Manual Orde
> ool: #	s > PD Select	F Maker	Module Invoice	Description Template for Invoice		PDF M	aker Manual

Picture 7.15 PDF Maker ListView before and after license deactivation

To activate license you have to provide following steps:

- 1. Insert the license key and click on button Activate license if you are activating license after previous deactivation.
- 2. If license key is correct you will be informed about successful activation. Just click on button.

Module Manage all	e Manager > PDFMaker > License settings Il settings related to your license.	
Manage a License setting:	all settings related to your license. Is License key keykeykeykeykeykeykeyeye Activate license 1.	
Module	e Manager > PDFMaker > License settings	
Manage all	Il settings related to your license.	
Manage License setting	You have successfuly (re)activated your PDF Maker.	
	2. OK Reactivate license Deactivate license	e

Picture 7.16 PDF Maker license activation

7.9 Uninstall PDF Maker

The uninstallation of PDF Maker is fully automatic. Within uninstallation also PDF Maker license is deactivated and PDF Maker related directories are deleted. For uninstallation provide following steps:

- 1. Click on button Uninstall PDFMaker
- 2. Please confirm uninstallation via button \square in dialog box.
- 3. The uninstallation process is started and provided as shown in the picture below.

Remove PDFMaker completely from your vTiger.
Remove PDFMaker completely from your vTiger.
Uninstall PDFMaker
Uninstall PDFMaker 1.
Module Manager > DDEMaker > Uninctall DDEMaker
Are you sure to completely remove PDr waker from your Vilger and deactivate your PDr waker license?
2 Cancel
Uninstall PDFMaker
Uninstall PDFMaker
929
Search
viigoi
PDF MAKER EMAIL Maker Business Case Invoice Calendar Leads
Deleting Link (DETAILVIEWWIDGET - PDFMaker) DONE Deleting Link (LISTVIEWBASIC - PDF Export - getPDFListViewPopup2(this,'\$MODULE\$);) DONE Deleting Link (DETAILVIEWWIDGET - PDFMaker) DONE Deleting Link (USTVIEWBASIC - PDF Export - getPDFListViewPopup2(this,'\$MODULE\$);) DONE Deleting Link (USTVIEWBASIC - PDF Maker) DONE Deleting Link (USTVIEWBASIC - PDF Export - getPDFListViewPopup2(this,'\$MODULE\$);) DONE Deleting Link (USTVIEWBASIC - PDF Export - getPDFListViewPopup2(this,'\$MODULE\$);) DONE Deleting Link (DETAILVIEWWIDGET - PDFMaker) DONE
↓ ↓ 3 .
↓ ↓ ↓ 3.
(mysql): DROP TABLE IF EXISTS vtiger_pdfmaker_sharing
(mysql): DROP TABLE IF EXISTS vtiger_pdfmaker_sharing (mysql): DROP TABLE IF EXISTS vtiger_pdfmaker_usersettings
(mysql): DROP TABLE IF EXISTS vtiger_pdfmaker_sharing (mysql): DROP TABLE IF EXISTS vtiger_pdfmaker_usersettings (mysql): DROP TABLE IF EXISTS vtiger_pdfmaker_userstatus

Picture 7.17 Uninstall PDF Maker

8 Tips & tricks

8.1 How to define background image

It is possible to define background image for PDF template as shown in the picture below. Just click on source and insert following code (see Picture 8.1):

```
<style type="text/css">
body {background-image: url(http://PATH_TO_IMAGE/picture.name);
background-repeat:repeat-y;}
</style>
```

You can define background image repeat property via "background-repeat: value; " by values:

- repeat default value i.e. not necessary to define
- repeat-x the background image will be repeated only horizontally
- repeat-y the background image will be repeated only vertically (example below)
- no-repeat the background-image will not be repeated



Picture 8.1 Background image

9 FAQs

Q: If we purchase the product now, then we will receive the updates too?

ITS4You: Yes, our customers can download the latest version of PDF Maker for current version of vtiger CRM from our downloading page for free. We inform our customers about new version of PDF Maker per Email and vtiger forum.

Q: How can I upgrade PDF Maker to latest version ?

ITS4You: Please follow the instructions described in the chapter 7.6.

Q: Can I have a trial version of PDF Maker first?

ITS4You: The trial version is not available, but you can use our demo to try it. You can download a FREE version too.

Q: What is the difference between the FREE and PAID version?

ITS4You: The main difference is that FREE version allows you to create just one PDF template per primary module. Please find all differences in the following page <u>http://www.its4you.sk/en-pdfmaker/pdfmaker-compare.html</u>.

Q: How to migrate from vtiger 5.x [old] to vtiger CRM 5.y [new] version with installed PDF Maker extension? **ITS4You:** Provide following steps:

- 1. Deactivate license in PDF Maker module manager -> License settings (see also chapter 7.8), or in older versions using button in the ListView.
- 2. Provide migration of vtiger to new location. After migration our extension is disabled.
- 3. Go to Setting->Module manager and choose Custom Modules tab. Find our PDF Maker extension and enable it.
- 4. If necessary download our compatible release version from our download center.
- 5. Upgrade our extension as described in the chapter 7.6.

Q: What to do if PDF Maker generates broken or corrupted files?

ITS4You: There may be various reasons:

- 1. Too low memory limit try to increase it to 256M in config.inc.php. Make sure that your hosting partner allows you to do it.
- 2. set_magic_quotes_runtime is turned on, turn it off (in php.ini)
- 3. mb_function_overload is not 0, set it to 0 (in php.ini)

Q: When I export to pdf the export fail and I get a blank page in the browser. How to avoid this problem? **ITS4You:** Please, change the memory of PHP to minimal 256M.

Q: How to set the background image for the pdf template?

ITS4You: Add following code at the beginning of body (in source mode), see also chapter 8.1:

```
<style type="text/css">
body {background-image: url(http://path_to_the_image/image.name)}
</style>
```

Q: Can I use custom fields?

ITS4You: PDF Maker allows you to use all standard and all custom fields created with Layout editor.

Q: How to convert HTML code from text area?

ITS4You: You can make it manually with our custom function: [CUSTOMFUNCTION|html_entity_decode|vtiger_field|CUSTOMFUNCTION]

Q: The PDF templates don't appear in the right side.?

ITS4You: Please take into account that PDF Maker block is not visible at all in DetailView it template for particular module doesn't exist. But if you don't see PDF Maker block in DetailView and you are sure that you have already created at least one PDF template for particular module, then there is a problem with vtiger source file (wrong installation, not overwritten vtiger core file or something failed during migration). To correct firstly try to delete all files from smarty/templates_c/ and reload your page.

If this doesn't work, please compare all files included in: modules/pdfmaker/torewrite with files from root of vtiger directory. All our changes must be implemented in vtiger source code.

Q: Can I use a css class into the pdf template?

ITS4You: Yes, it's possible in HTML Source mode of FCKEditor or CKEditor. There are 2 ways how to define css style:

1. Inline: Write on the top of your template (HTML Source mode) your style definition, like this:

```
<STYLE TYPE="text/css" >
.cellborder
{ border-left: 1px solid #000000;
   border-right: 3px solid #000000; }
</STYLE>
```

2. External file. You can include your style (.css) file from the web. Write on the top of your template (HTML Source mode) your style definition, like this:

```
<link href="http://pdfmaker.vtigercrm.sk/modules/PDFMaker/style/style1.css"
media="all" rel="stylesheet" type="text/css" />
```

In your template you can use defined class like:

```
    Some Text
```

List of supported css values: <u>http://mpdf1.com/manual/index.php?tid=34</u> HTML attributes: <u>http://mpdf1.com/manual/index.php?tid=257</u>

Q: PDF maker table borders in created PDF files are bold / ugly and looks completely different from how it looks in CKEditor?

ITS4You: Switch CKEditor to HTML source code and change the table style by adding style="border-collapse:collapse;" e.g. , or you can also use and use style="border-top: 1px;" etc.

Q: There is a problem with table background colors?

ITS4You: We use mpdf framework to convert HTML source into PDF file. The mpdf supports hexadecimal format for colors. Please change your format color e.g. rgb(255, 255, 255); into color:#000000.

Q: How to use more fonts in PDF Maker?

ITS4You: We use mPDF framework as HTML to PDF convertor. mPDF supports True type fonts, reading and embedding directly from the .ttf font files. How to easy add new fonts:

- 1. Upload the True type font file to the fonts directory (/PDFMaker/mpdf/ttfonts)
- 2. Define the font file details in the configuration file (/PDFMaker/mpdf/config_fonts.php)
- 3. Access the font by specifying it in your HTML code as the CSS font-family
- 4. To use the font with specific languages, you need also to edit the configuration file (/PDFMaker/mpdf/config_cp.php)
- 5. Define the font type in the FCKEditor configuration file (fck_config.js)

More info about this: <u>http://mpdf1.com/manual/index.php?tid=453&searchstring=fonts</u>

Q: How to implement PDF Maker with module Accounting?

ITS4You: You have to change file Smarty/templates/modules/Accounting/DetailView.tpl, it means add this code in line ~ 672

```
{* ITS4YOU-CR PDFMaker *}
{include file="modules/PDFMaker/InventoryPdfActions.tpl"}
{* ITS4YOU-END *}
```

Q: Does PDF Maker support Product Bundles?

ITS4You: Yes in generated .pdf file there is product bundles showed. Use \$PRODUCTNAME\$ in your template. You can also use other variables from Product/Services (see also chapter 4.8):

- Name Name and description of product/service
- Name of product/service Only the name of product/service
- Description of product/service Description of product/service from module Product/Service
- Comment for product/ service Comment for products/service from Invoice/SO/PO/Q form
- PDF Configurator description Descriptions field from PDF Configurator extension (crm-now)

Q: How to proceed in following problem? In product block with pdfmaker I could not get product description from quote! Inside a quote I can personalize product description (and add a comment). In addition I need to use description of product/service also coming from quote/invoice/so and not only coming from product module.

ITS4You: There are more variables for Product description:

- \$PRODUCTDESCRIPTION\$ Description from Product or Service defined in Products/Services description
- \$PRODUCTEDITDESCRIPTION\$ Comment from Product /Service defined by Invoice/SO/PO/Q
- \$PRODUCTS_DESCRIPTION\$ Description only from module Product
- \$SERVICES_DESCRIPTION\$- Description only from module Service
- Use \$PRODUCTEDITDESCRIPTION\$ for description/comments from Invoice/SO/PO/Q

Change log

16.1.2015: **1.38.x**

<rowpagebreak /> option available

30.10.2013: **1.37.0**

• minor improvements and bug fixes

12.09.2013: **1.36.x**

- PDF files saved into Documents can be assigned to contact or organization product images selection in product templates
- possibility to select language for pdf templates used within workflow
- mass export also into rtf format
- additional profile settings for Export to RTF
- added debugging info new column with min/recommended values

03.07.2013: 1.35.1 - 1.35.3

- ordering for mass export
- product images selection in product templates
- sorting within related blocks
- List Price in the related blocks
- debugging mode
- uninstallation of the PDF Maker

28.9.2012: **1.35.0**

- automatic notification about new PDF Maker and mPDF updates
- inserting of the QR codes
- tool for self-defined labels management (dictionary)
- an advanced header / footer settings
- tool for product block templates management
- an advanced related blocks management
- pdf template can be separately defined as default for ListView and DetailView
- variables for subtotal values in tables
- a new <rowbreak /> tag for long descriptions/text
- supported under module Calendar
- support of Descriptions 4You extension

31.5.2012: **1.34.0**

- own scheme for profile privileges (independent from Settings of vtiger)
- template sharing
- module and field permissions are taken into account when creating/editing a template
- refined related modules (variable names are changed)
- all custom functions are listed in custom function picklist
- counter in Listview blocks and related blocks \$CRIDX\$
- refined VAT block
- custom sorting of templates
- automatic header of product block on new page (using <thead> around table header) and subtotals (using <tfoot> and one of variables \$TOTALAFTERDISCOUNT_SUBTOTAL\$, \$TOTAL_SUBTOTAL\$, \$TOTALSUM_SUBTOTAL\$)
- you can choose to not print header on first page, not print footer on last page, and print footer only on last page
- bug fixes

13.3.2012: **1.33.0**

- added Setting section (click on icon Settings under menu)
- customer portal support (download the zip package from Settings section, unzip it and copy into vtiger)
- Terms and Conditions 4 You support
- mpdf 5.3
- bug fixes (workflow, installation links, conversion of related entity name in related blocks, <thead> and tags)

9.12.2011: **1.32**

- added LISTVIEW BLOCK (more entries from listview into one template)
- added "Delete" button into template DetailView
- bugs fixed (related table, vatblock, products_unit_price ...)

11.11.2011: **1.31**

- PDFMaker is also available for vTiger version 5.3.0
- Added Basic version
- installation is fully compatible with module manager

13.7.2011: **1.30**

- Related list block makes it possible to create and insert into template tables, which contains data from related modules
- RTF export (beta) great thanks to Vicus eBusines Solutions for cooperation
- added new fonts (Verdana, Tahoma, Trebuchet MS, Lucida Sans Unicode, Georgia, DejaVu Sans, Comic Sans MS,...)
- fix: Related Module Accounts and Contacts was added in Trouble Ticket Module
- fix: Leads salutation added
- fix: mpdf style rgb() for color definition

12.5.2011: **1.29**

- Apply button was added, save template and remains in Edit mode
- Contact image variable, included the photo from the Contact Photo (image).
- added new variables to Company and User information field
- Edit Template before Export to PDF for overwritable templates for business letters
- added new Descriptions field, which is compatible with PDF Configurator extension
- bugs fixed (active/inactive, page break)

22.03.2011: **1.28**

- standard upper menu was added to PDF Maker module
- templates export and import possibility
- active / inactive template setting for user
- default template setting for user
- multiselectbox support
- minor bugs fixed

31.1.2011: **1.27**

- mass export to pdf from listview
- minor bugs fixed

05.01.2011: **1.26**

- vtiger permissions support for PDF Maker
- mpdf v.5 => encoding setting removed
- custom filename setting

1.25

- added custom functions
- Workflow management

1.24

- reactivate button added for reactivation PDF Maker license in case some problem with license key occurs while generating PDF files
- function eval bug fixed
- show header and subtotal after product page break
- show product images in product block
- added new field in each module Record ID which represents crmid of the module

1.23

- functionality of adding product page break
- minor bugs

1.22

- testing if fopen is enabled else testing cURL
- added brazilian/portuguese language file for PDFMaker

1.21

- sorting in listview
- checking if there is at least one template selected in detailview
- mb_string check
- saving PDF as an entity of Documents module
- InvetoryPDF as an object
- some items from product block selectbox were renamed, reordered and some were deleted
- multi terms and conditions support
- trouble tickets and faq comments
- module Document enabled
- added German language file for PDFMaker
- added Mexican language file for PDFMaker

1.20

- new script for html to pdf generation mPDF
- compatibility with CKEditor
- new fields in header, footer
- layout of editview of template
- functionality of merging two or more templates into one pdf file
- chmod during the installation is disabled
- insert barcode into template
- functionality of predefined email addresses in module Accounts
- selectbox of encoding in Settings