

### EMAIL MAKER FOR VTIGER CRM

#### Introduction

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

The Email Maker benefits are:

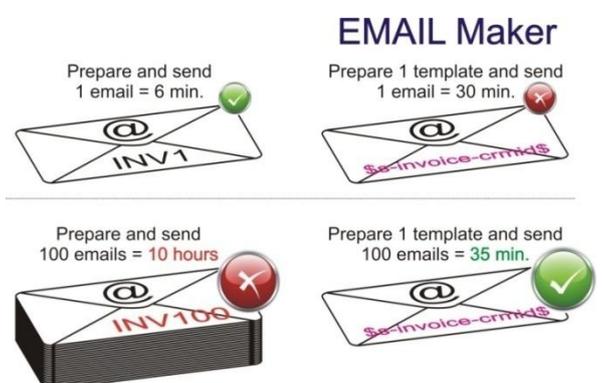
- supported mostly inside all modules
- unlimited number of email templates within one module
- simple addition, edit, duplication or deletion of the email templates
- advanced and more creative editing of emails using inserting images, tables, product blocks related blocks or listview blocks and many more

#### Who needs EMAIL Maker?

The target group of EMAIL Maker users are people sending emails daily (i.e. invoices, info about products, quotes, orders etc.) In addition it is expected that people would like to send more sophisticated and nice looking emails including images, tables or product related blocks, etc. Let's see how the EMAIL Maker can save your business time on the following use case.

**Use case:** "It is necessary to send invoice attached to email. In addition it would be nice to add into text of the email some information related to invoice e.g. invoice ID, sum to be paid, date of invoice, info that we are sending a present for free because order was higher than 500 Euro, etc."

Let's suppose that you spend just 6 minutes with that email, so you can continue with rest 99 invoices/emails?! OR you can prepare email template and anytime you need just to use it and send tens of emails within few clicks.



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## License agreement

- The EMAIL Maker License will be referred to as "The license" in the remainder of this text.
- This irrevocable, perpetual license covers all versions 600.xx of EMAIL Maker.
- This license gives the holder right to install EMAIL 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 EMAIL 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 EMAIL Maker.
- The license holder may not re-distribute the library or versions thereof to third party without prior written permission of the copyright holder.
- EMAIL 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 EMAIL Maker.

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

## Terms and conditions

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

- Credit Card: delivered immediately
- PayPal: delivered immediately
- Bank transfer: delivered in 2 - 5 days

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

## Privacy policy

During installation it is necessary to exchange following information:

- vtigerCRM version (e.g. 6.0.0)
- EMAIL Maker version (e.g. 600.1.8)
- Date and time
- Domain in md5 coding format (e.g. 916b25c201a77a6721003c0030977f3b)
- Action provided by you (INSTALL, REACTIVATE, DEACTIVATE)

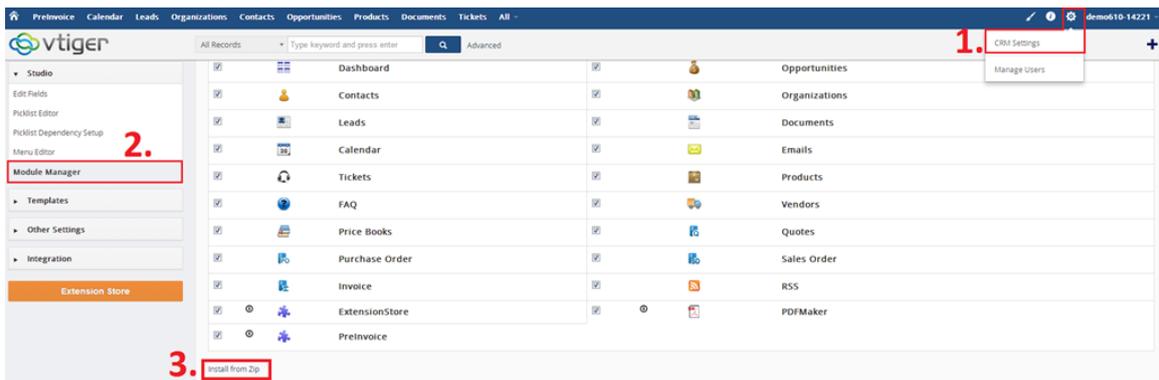
# 1 How to install EMAIL Maker

Please provide following steps in order to install EMAIL Maker:

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

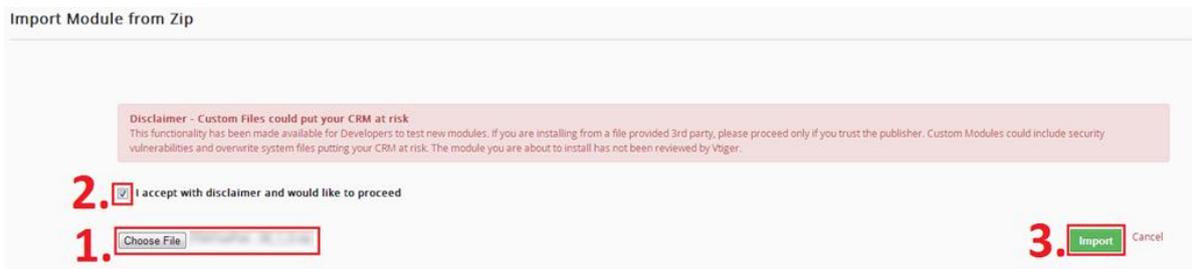
- vtigerCRM version (e.g. 6.0.0)
- EMAIL Maker version (e.g. 600.1.8)
- Date and time
- Domain in md5 coding format (e.g. 916b25c201a77a6721003c0030977f3b)
- Action provided by you (INSTALL, REACTIVATE, DEACTIVATE)

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



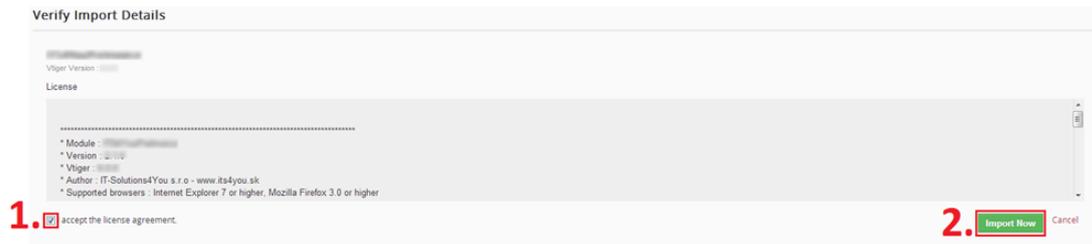
Picture 1.1 Installation of EMAIL Maker – step 1

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



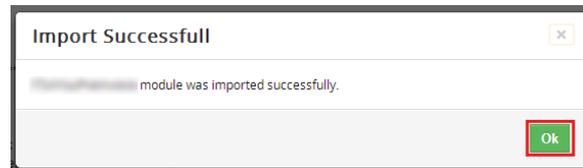
Picture 1.2 Installation of EMAIL Maker – step 2

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



Picture 1.3 Installation of EMAIL Maker – step 3

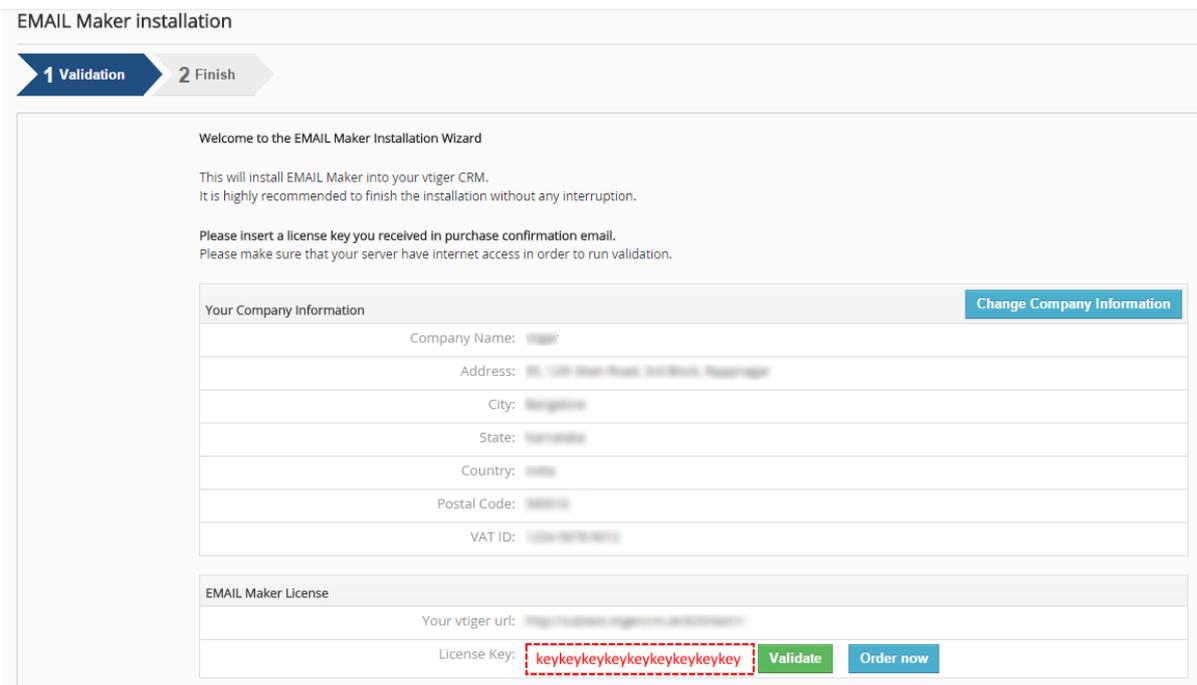
- Click on **Ok** button to complete the module import.



Picture 1.4 Installation of EMAIL Maker – step 4

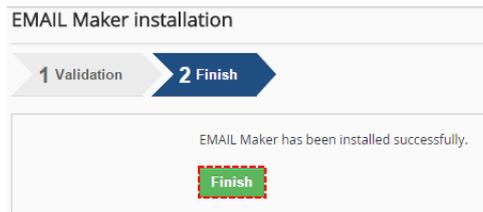
In order to finish installation, please provide following validation steps.

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



Picture 1.5 Validation step 1

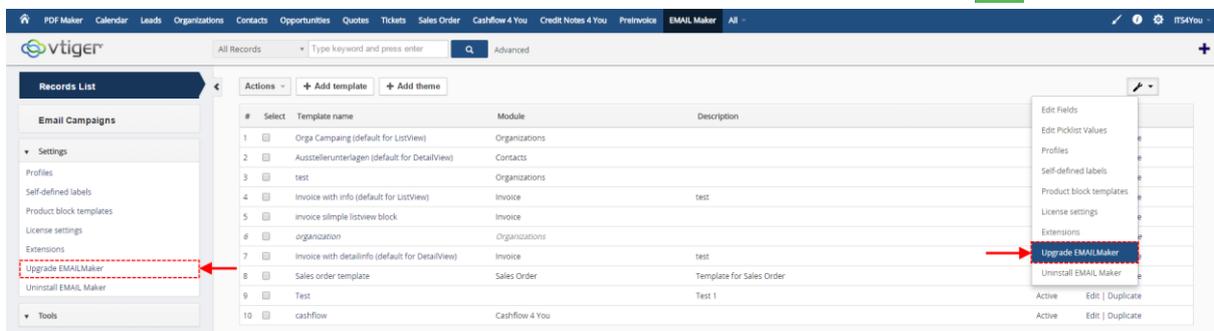
2. If EMAIL Maker is installed successfully you will see following screen. Click on **Finish** button.



Picture 1.6 Validation step 2 – Finish installation

## 1.1 How to upgrade EMAIL Maker

The upgrade of the EMAIL Maker is initiated in the same way as EMAIL Maker installation or click on *Upgrade* link in ListView of EMAIL Maker (Picture 1.7). So please refer to above installation part for details how to initiate the import of the module from the file. As can be seen on the Picture 1.8 you will be notified that the EMAIL Maker module already exists. The upgrade will start immediately when you click on **Update Now** button. After upgrade the notification about successful upgrade is shown and click **Ok** on button.



Picture 1.7 Upgrade of the EMAIL Maker

### Import Module from Zip

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

2.  I accept with disclaimer and would like to proceed

1.  ITS4You .....00\_1\_0.zip

3.  Cancel

Picture 1.8 Upgrade of the EMAIL Maker

### Verify Import Details

**CustomFiles Exists**

Vtiger Version : 6.0.0

License

```

* Module : CustomFiles
* Version : 6.0.0
* Vtiger : 6.0.0
* Author : IT-Solutions4You s.r.o - www.its4you.sk
* Supported browsers : Internet Explorer 7 or higher, Mozilla Firefox 3.0 or higher
    
```

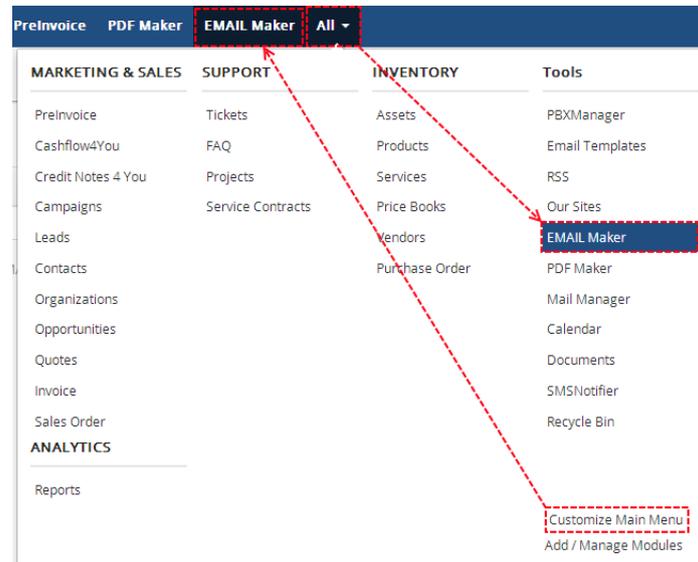
4.  Cancel

Picture 1.9 Upgrade of the EMAIL Maker

## 2 How to start EMAIL Maker

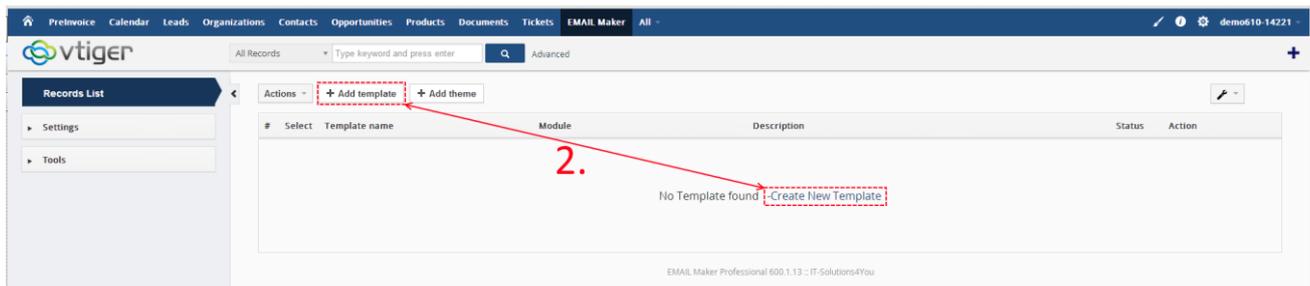
In order to start the EMAIL Maker tool please provide following steps:

1. In vtiger CRM menu (Picture 2.1), please go to *All -> Tools* and click on **EMAIL Maker**. As shown in the picture you can place short link directly into vtiger Main Menu using **Customize Main Menu** link.



Picture 2.1 Start EMAIL Maker

2. The screenshot below (Picture 2.2) shows EMAIL Maker ListView which is lunched after previous step. As can be seen in the picture below, there are no any email templates created yet. In order to add new template you can click button **+ Add template** or link **Create New Template**.



Picture 2.2 Add template in ListView

How to create and edit email templates please refer to the chapter 4. Next chapter describes the whole work area of the EMAIL Maker.

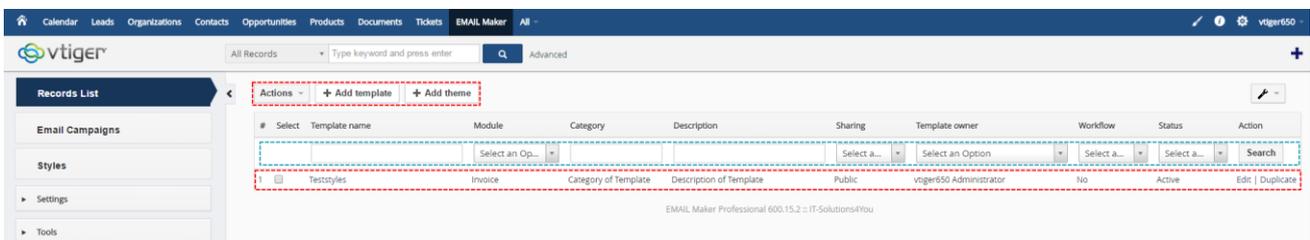
### 3 Work area

The Work Area of the EMAIL Maker consists of:

- [ListView](#) – used for common tasks like add, delete, duplicate template, import and export templates and access to others tools
- [DetailView](#) – shows already created email template in details
- [EditView](#) – allows the preparation of the new email template or editing existing templates
- [EMAIL Maker block](#) – used for sending emails directly from the DetailView of particular module

#### 3.1 ListView

The common tasks like add/delete/duplicate template, import/export templates or start editing have to be initiated via EMAIL Maker ListView. Go to *All -> Tools* and click on [EMAIL Maker](#) link and EMAIL Maker ListView will appear on your screen.



Picture 3.1 EMAIL Maker ListView

The main part of the EMAIL Maker ListView consists of the list of the email templates, which gives you information about a template name, a primary module, category of template, a short description, sharing info, template owner, info of using in workflow(s) 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 email templates directly from the ListView. Also there is option to search your template.

There are three buttons above the list of email templates:

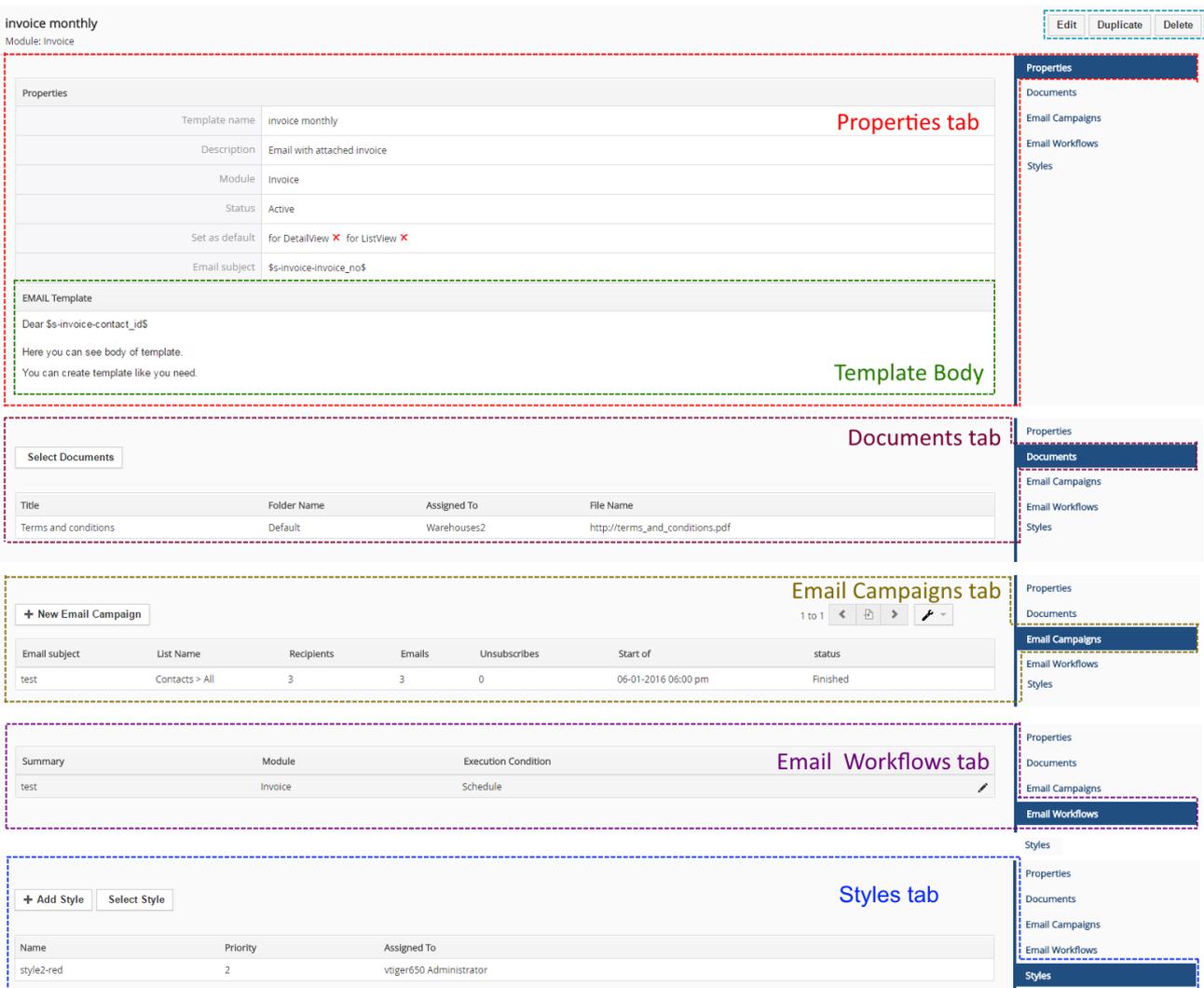
- **Actions** contains actions for deletion, import or export of the templates
- **+ Add template** is used to add new template
- **+ Add theme** allows you to add new template theme

Note: How to import or export email template is described in the chapter 6.1.

### 3.2 DetailView

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

- Properties tab
  - gives basic information of the email template
  - contains the email template body
- Documents tab – button **Select Documents** allows you to add documents to the email template as attachment. This functionality is not available in EditView; before sending email you will be able to delete this attachment or add additional attachments as well
- Email Campaigns – here you can find information in which Campaign(s) was used this Template
- Email Workflows – here you can see in which worklow(s) this Template is used
- Styles – if you use Styles4You extension here you can find your added styles
- Group of buttons
  - **Edit** – switches to EditView and start editing
  - **Duplicate** – creates duplicate of the template and start editing
  - **Delete** – allows you to delete template

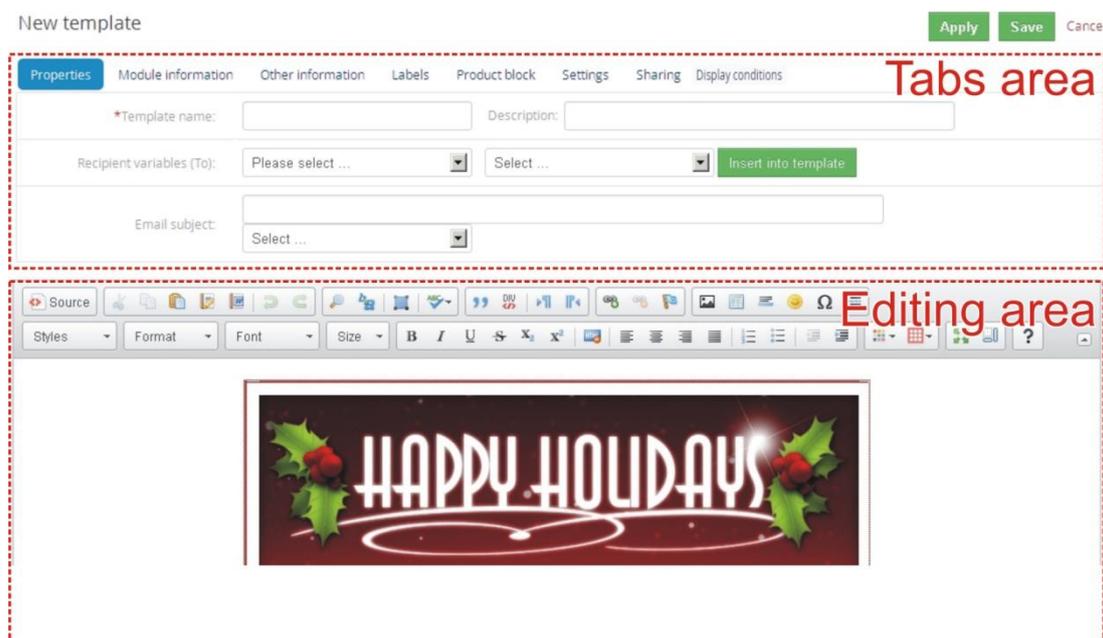


Picture 3.2 DetailView

### 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 and to set up properties, sharing and other common settings of the email template. Tabs area consists of following tabs, which are described in the following subchapters:
  - [Properties](#)
  - [Module information](#)
  - [Other information](#)
  - [Labels](#)
  - [Product block](#)
  - [Settings](#)
  - [Sharing](#)
  - [Display conditions](#)
- 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 in the above part of Editing area. Please refer to the chapter 4 for the details related to editing.



Picture 3.3 EditView

### 3.3.1 Properties

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

Picture 3.4 Properties tab

Name	Description
Template name	The name of the template. It is mandatory field for template creation.
Description	The description of the email template.
Recipient variables (To)	Variables related to recipient.
Email subject	The subject of the email. You can use simple text, predefined common fields or fields related to primary module if exists.

Table 3-1 Properties tab

Note: If you fill description of template. In selectbox of templates you will see this description after mouseover (Picture 3.5).

Picture 3.5 Description after mouseover

### 3.3.2 Module information

The EMAIL template can be common for all modules or based on one primary module. To define that the *Module information* tab is used.

Picture 3.6 Module information tab

Name	Description
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 module.
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	Allows adding ListView block. For details please refer to chapter 4.7.

Table 3-2 Module information tab

### 3.3.3 Other information

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

Picture 3.7 Other information tab

Name	Description
Company and User information	Comprises mainly group of fields from Company information, Assigned to User, Logged in User, Modified by User and Created by User.
Terms and Conditions	Terms and Conditions.
Current date	Current date in several formats.
Custom functions	Custom functions. For details please refer to chapter 6.2.

Table 3-3 Other information tab

### 3.3.4 Labels

Labels tab consists of Global language and Module language part. Labels are very useful especially in case you need to send emails in two or more languages. Please refer to chapter 4.9 to see details.

Properties	Module information	Other information	Labels	Product block	Settings	Sharing	Display conditions
Global language:	Before Event		▼	Insert into template			
Module language:	Add Contact		▼	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.

Table 3-4 Labels tab

### 3.3.5 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	Module information	Other information	Labels	Product block	Settings	Sharing	Display conditions
Product block template:	Please select ...		▼	Insert into template			
Product block:	Please select ...		▼	Insert into template			
*Common fields for Products & Services:	Record ID		▼	Insert into template			
*Available fields for Products:	Product Name		▼	Insert into template			
*Available fields for Services:	Service Name		▼	Insert into template			

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

Picture 3.9 Product block tab

Name	Description
Product block template	Insert predefined 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 & Services	Fields common for products & services. You can find same fields for products and services separately as well, but it is recommended to prefer common fields in the templates.
Available fields for Products	Fields for products.
Available fields for Services	Fields for services.

Table 3-5 Product block 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.

Picture 3.10 Settings tab

Name	Description
Category	Category of the email template. You can define categories according to your needs directly from this field.
Default from	Select here default sender of the email template. This value can be set separately for each logged user.
Ignored picklist values	Define picklist values which will be ignored in the final email like None, none, keine etc. Entered values have to be separated with comma.
Status	Active / Inactive. Please refer to chapter 4.10.2 for details.
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)
Set as default	Set/unset as default for DetailView and ListView. For details please refer to chapter 4.10.3.

Table 3-6 Settings tab

### 3.3.7 Sharing

The *Sharing tab* changes depend on whether email template is shared (Picture 3.11) or public/private (Picture 3.12). 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.

Picture 3.11 Sharing tab

Properties   Module information   Other information   Labels   Product block   Settings   **Sharing**   Display conditions

Template owner:	Administrator ▼
Sharing:	Private ▼

Picture 3.12 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

### 3.3.8 Display conditions

*Display conditions* tab allows set conditions when template is shown or hidden. If you want to show template without ban, leave conditions empty. There is option to show template if conditions are true or hide templates if conditions are true. You can set it by choosing Yes if/No if in *Displayed* tab. In *Conditions* tab you can choose if you want that all conditions must be met or At least one of the conditions must be met. You can add or delete conditions.

Properties   Module information   Other information   Labels   Product block   Settings   Sharing   **Display conditions**

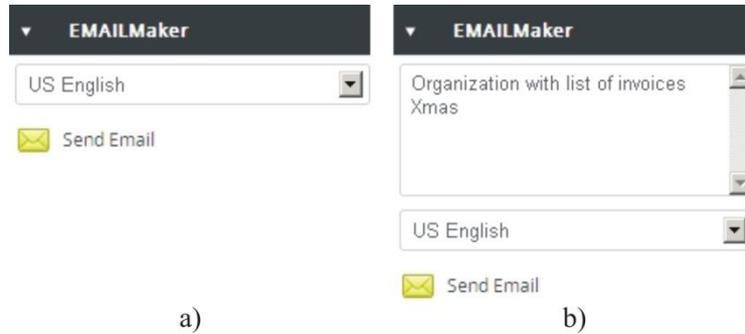
Displayed:	Yes ▼ if:
Conditions:	<p><b>All Conditions</b> (All conditions must be met)</p> <p>Select Field ▼   none ▼   <input type="text"/>   </p> <p>Add Condition</p>
	<p><b>Any Conditions</b> (At least one of the conditions must be met)</p> <p>Select Field ▼   none ▼   <input type="text"/>   </p> <p>Add Condition</p>

Picture 3.13 Display conditions

### 3.4 Email Maker block

The EMAIL 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 left side you can find the block. The EMAIL Maker block is used to send emails for particular record. Two forms of EMAIL maker block can be seen in the screen:

- a) EMAIL Maker block without email template
- b) Standard layout of the EMAIL Maker block



Picture 3.14 EMAIL Maker block

How to send emails via EMAIL Maker block is described in the chapter 5.

## 4 Editing email templates

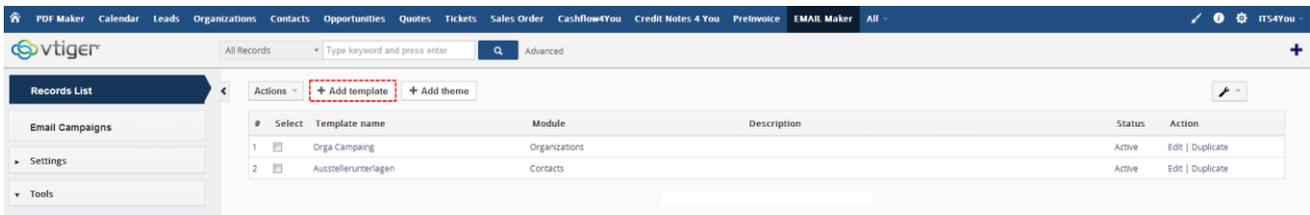
The editing of the email templates in the EMAIL Maker is easy and is provided inside editing area in EditView. Before you start creation of the new template, you have to decide whether the new email template will be based on primary module or not. So two kinds of email templates exists:

- **Primary module email templates** – inside template you can combine primary module fields, related module fields, the fields from “Recipient variables (To)”, your text, images, tables, products block templates, related blocks, listview blocks, all fields from Other information tab, etc.
- **Common templates** – templates can be used in all modules. Inside common templates is not recommended to use primary module fields, related module fields, products block templates, related blocks or listview blocks. The reason is that values for such fields should be not available for particular modules and therefore the email will contain just notations of the fields e.g. \$s-products-productname\$ but not real expected values.

Following chapters describe how to create and edit your email templates.

### 4.1 Create new email template

As was already described in the chapter 2, you can initiate creation of the new email template via button **+ Add template** in the ListView. In case you have no templates at all, also link [Create New Template](#) can be used.



Picture 4.1 Add new email template

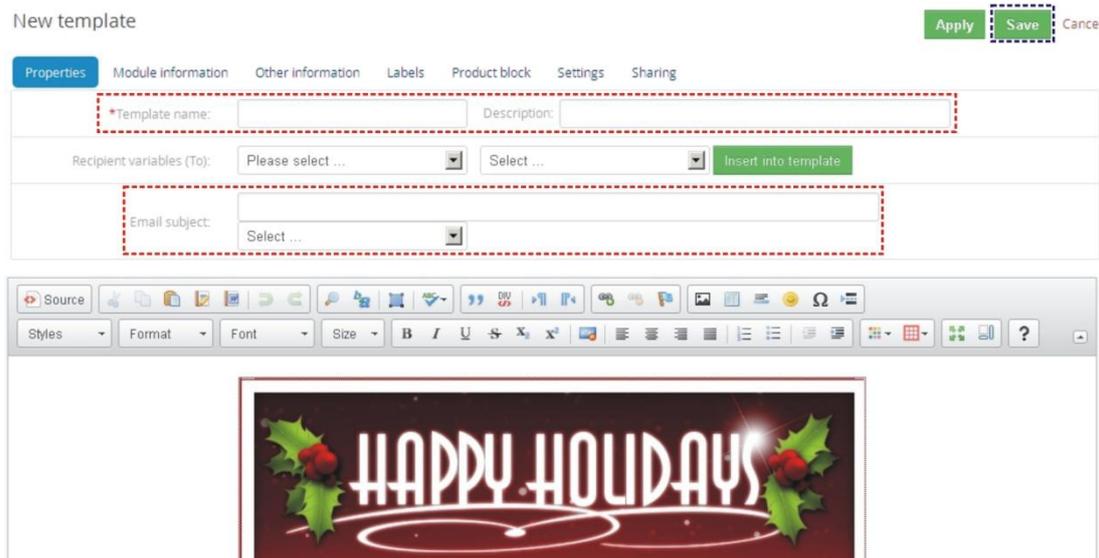
The list of email themes will appear on the screen. These themes don't contain module related fields; it means that they are available for any module. In order to continue, please select one theme according to your needs.



Picture 4.2 Email themes

**Important note: The email themes can be used only for new email templates. It means you cannot apply new theme on already saved email templates.**

After selection of the email theme you will be redirected to EditView (Picture 4.3 see also chapter 3.3). For new template it is necessary to define “*Template name*”. Although “*Description*” is not required, it is recommended to describe here main purpose and properties of the template for future edit or re-usage. The subject of the email is not necessary to be defined within template but please notice that subject will be required before sending emails.



The screenshot shows the 'New template' creation interface. At the top right, there are 'Apply', 'Save', and 'Cancel' buttons. The 'Save' button is highlighted with a dashed red border. Below the buttons is a tabbed interface with 'Properties' selected. The 'Properties' tab contains the following fields:

- 'Template name': A text input field with a red dashed border.
- 'Description': A text input field.
- 'Recipient variables (To)': Two dropdown menus and an 'Insert into template' button.
- 'Email subject': A dropdown menu with a red dashed border.

Below the form is a CK Editor toolbar with various icons for text formatting and editing. At the bottom of the editor is a preview image of a 'HAPPY HOLIDAYS' banner with a red background and white text.

Picture 4.3 New template creation

Please continue here with editing template by using CK Editor, inserting images, tables, product blocks, related blocks or listview blocks according to your needs. CK Editor 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.

**Important note: If you change the primary module the all inputs will be deleted and you can lose your work. This deletion helps to avoid using fields in template which are not from primary or related module.**

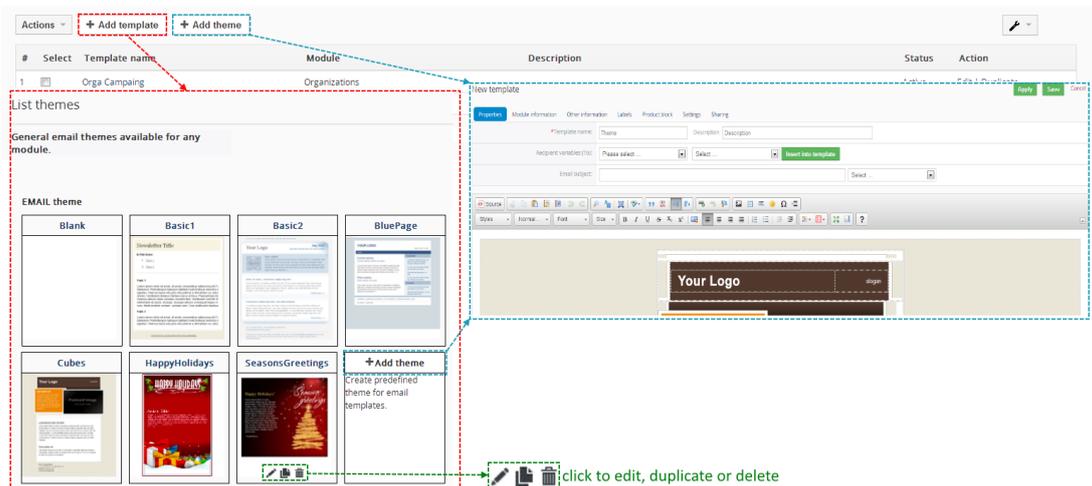
When you finish please save the email template using button .

Please refer to following chapters related to details about editing email templates and using available fields or blocks in your email templates.

## 4.2 Add theme

The creation of the EMAIL Maker template consists of email theme selection. Although you can start with blank template, it is also possible to select one of predefined themes or create your own EMAIL Maker theme. In order to create new theme click on **+ Add theme** in the ListView, or click on **+ Add template** and then select

**+ Add theme**. In the window *List themes* you can edit, duplicate or delete your own templates using icons 



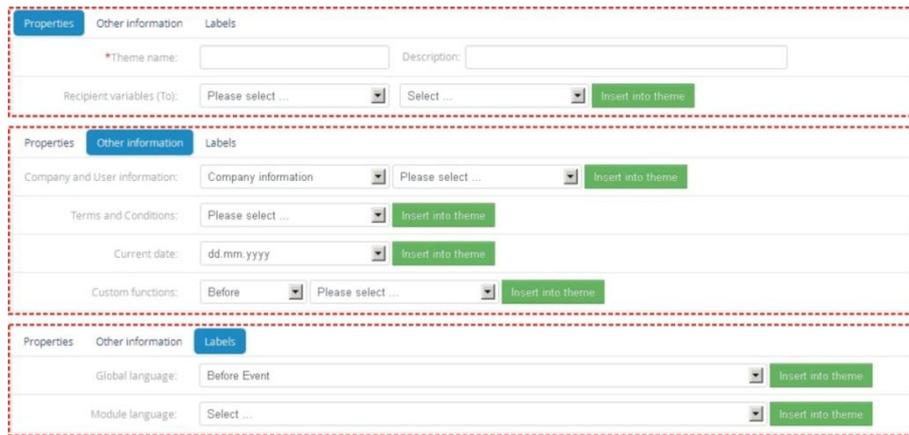
Picture 4.4 How to create new email theme

The intention of the using themes is to have same email design i.e. background logo, greetings, type of font etc. and it doesn't matter for which purpose/module the mail is sent.

In addition the email themes save your time for creation of the new email template. You don't need to start creation from the blank template but simply reuse already done steps.

Please note that the email themes are common for all email templates, i.e. they don't contain module related fields. Therefore the EditView of email theme consists only of following tabs (see picture on the next page):

- Properties (please refer to 3.3.1 for details regarding fields)
- Other information (please refer to 3.3.3 for details regarding fields)
- Labels (please refer to 3.3.4 for details regarding fields)



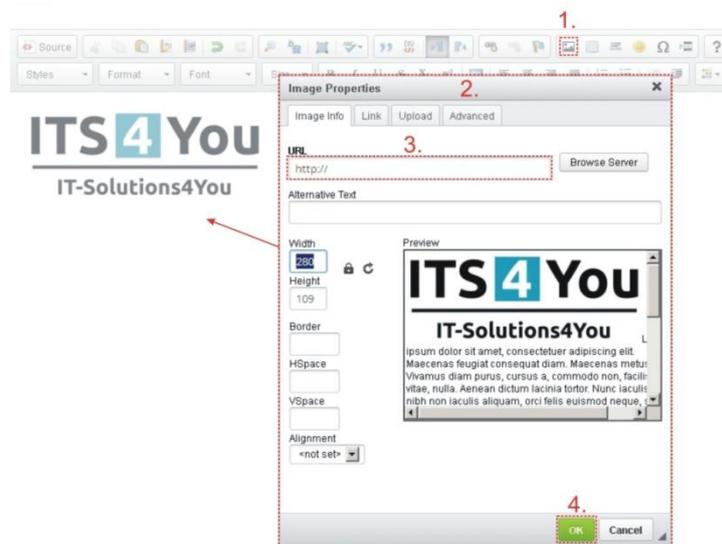
Picture 4.5 Add theme EditView tabs

Using above mentioned tabs and related fields, images, tables, etc. you can simply create your own theme. This theme can be reused anytime for your new email templates.

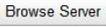
### 4.3 Inserting images

Images can improve the design of your email templates. CKEditor is used inside the EMAIL Maker and it allows you to add images into your email templates in an easy and intuitive way. So, if you would like to insert image please provide following steps:

1. Press the image button  on the toolbar.



Picture 4.6 Insert image

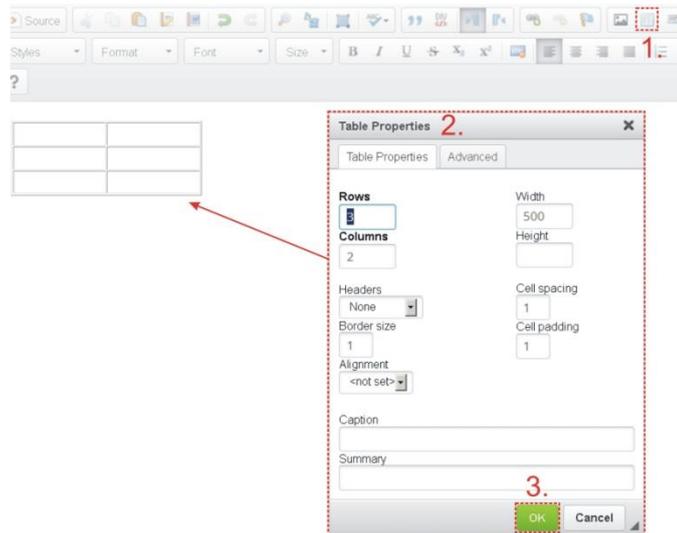
2. A pop-up window called "Image Properties" will appear. It includes four tabs that group image options.
3. Define the URL address of the image. You may also use button  in order to browse the files. Set up other properties of the image.
4. Click  to add image into template.

For more info visit following site: [http://docs.cksource.com/CKEditor\\_3.x/Users\\_Guide/Rich\\_Text/Images](http://docs.cksource.com/CKEditor_3.x/Users_Guide/Rich_Text/Images)

## 4.4 Creating tables

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

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



Picture 4.7 Creating tables

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

After that the table is inserted into the template and you can write some text, insert 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.

For more info visit following site: [http://docs.cksource.com/CKEditor\\_3.x/Users\\_Guide/Rich\\_Text/Tables](http://docs.cksource.com/CKEditor_3.x/Users_Guide/Rich_Text/Tables)

## 4.5 Using a product blocks

The product blocks are simple but powerful parts of your email templates. They are used to display all products/services from modules Invoices, Quotes, Sales Order and Purchase Order in your emails regardless of the number of products/services for particular record. Below you can find simple example where invoice contains three products which are automatically seen in the final mail. You don't need to create template for three rows in the table, just define start and stop of the product block and product fields according to your needs. Next chapter describes how to create your own product block. In addition, we also introduced some default product block templates as well as tool for managing them (7.2).

The screenshot displays the 'Compose Email' interface for invoice 'INV 1'. It shows the 'EditView of email template' with a table structure for product details. The 'Preinvoice Information' section includes an 'Item Details' table:

*Item Name	Quantity
Product one	1
Programming	12

The 'Product block' preview shows a table with columns: Pos, Quantity, Text, List Price, Sub Total, Discount. The table content is as follows:

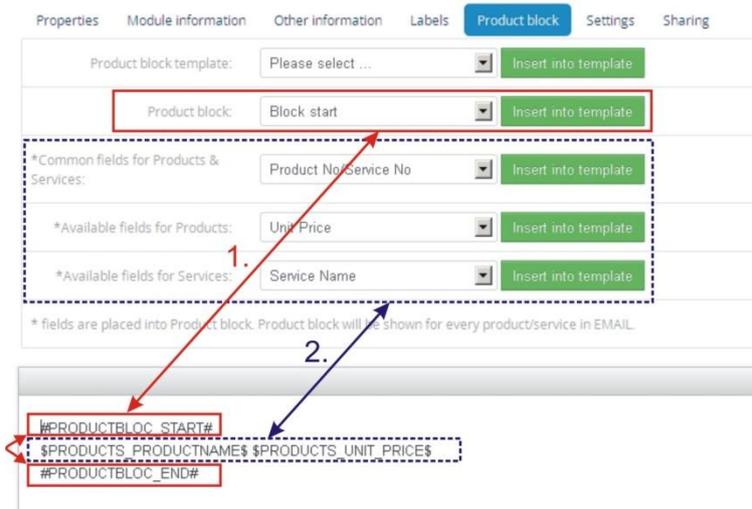
Pos	Quantity	Text	List Price	Sub Total	Discount
1	1	Product one	124	124	
2	12	Hours Programming	45	540	
Total					
Discount					

Picture 4.8 Product block usage

### 4.5.1 Create new product block

You can find *Product block* tab in EditView which allows inserting, editing and creating of product blocks. In case that product block templates are not sufficient for you, it is easy to create your own product block:

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.



Picture 4.9 Create product block

#### 4.5.2 Create separate Block for Products and for Services

Since 600.11.0 release is possible to create separate Block for Products and for Services. To create separate Block please provide following steps:

1. Go to Product block tab and insert product block start variable (#PRODUCTBLOC\_PRODUCTS\_START# or #PRODUCTBLOC\_SERVICES\_START#) and product block end (#PRODUCTBLOC\_PRODUCTS\_END# or #PRODUCTBLOC\_SERVICES\_END#).
2. Add all necessary product/service fields according to your needs between (#PRODUCTBLOC\_PRODUCTS\_START# or #PRODUCTBLOC\_SERVICES\_START#) and (#PRODUCTBLOC\_PRODUCTS\_END# or #PRODUCTBLOC\_SERVICES\_END#) and provide formatting if needed.

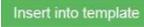
Pos	%Qty%	Text	%_LBL_LIST_PRICE%	%_Discount%	%_LBL_NET_PRICE%
<b>Block of Products</b>					
#PRODUCTBLOC_PRODUCTS_START#					
\$PRODUCTPOSITIONS	\$PRODUCTQUANTITIES	\$PRODUCTUSAGEUNITS	\$PRODUCTNAMES	\$PRODUCTLISTPRICES	\$PRODUCTTOTALS
#PRODUCTBLOC_PRODUCTS_END#					
<b>Block of Services</b>					
#PRODUCTBLOC_SERVICES_START#					
\$PRODUCTPOSITIONS	\$PRODUCTQUANTITIES	\$PRODUCTUSAGEUNITS	\$PRODUCTNAMES	\$PRODUCTLISTPRICES	\$PRODUCTTOTALS
#PRODUCTBLOC_SERVICES_END#					
%_LBL_TOTAL%					\$TOTALWITHOUTVATS
%_Discount%					\$TOTALDISCOUNTS

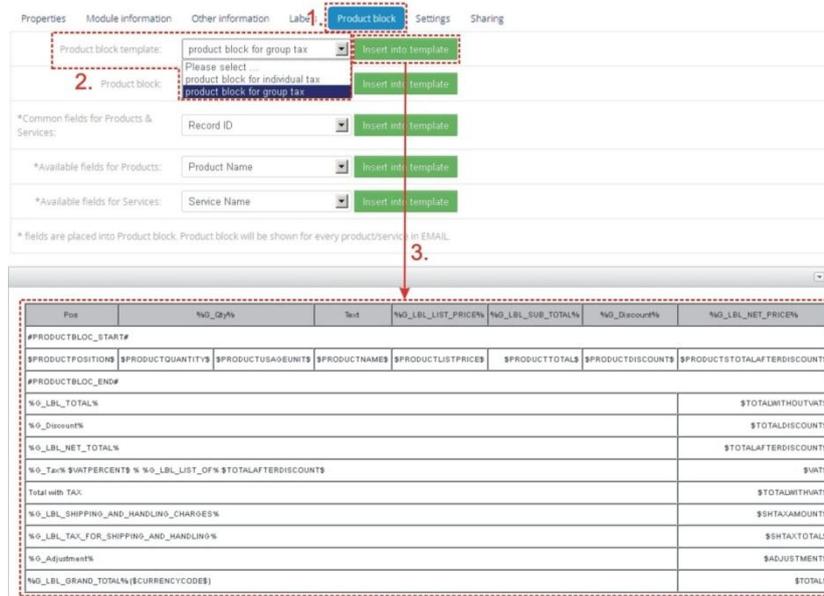
Pos	Quantity	Text	List Price	Discount	Net Price
<b>Block of Products</b>					
1	100.00	product1	10.00	1,000.00	1,000.00
2	250.00	product2	20.00	5,000.00	5,000.00
<b>Block of Services</b>					
3	1.00	service2	20.00	20.00	20.00
4	1.00	service1	10.00	10.00	10.00
Total					6,030.00
Discount					0.00

Picture 4.10 Separate Blocks

### 4.5.3 Insert and edit product block template

There are already created product block templates which you can insert from product block tam and later edit if needed. These templates are available only for modules Invoices, Quotes, Sales Order and Purchase Order that displays product block. The product block templates created within product block tool (7.2) can be added in the same way. 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 button .



Picture 4.11 Insert product block template

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

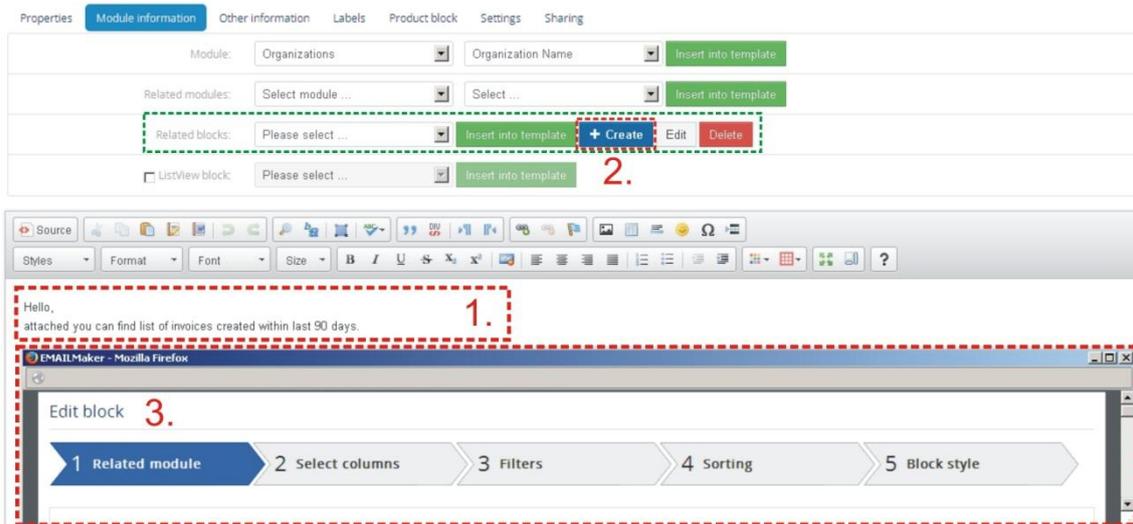
## 4.6 Using related blocks

You can create related blocks for modules based on each more information module and use it inside email template. Please refer to next chapters to see how to create, insert and edit related blocks.

### 4.6.1 Create and insert related block

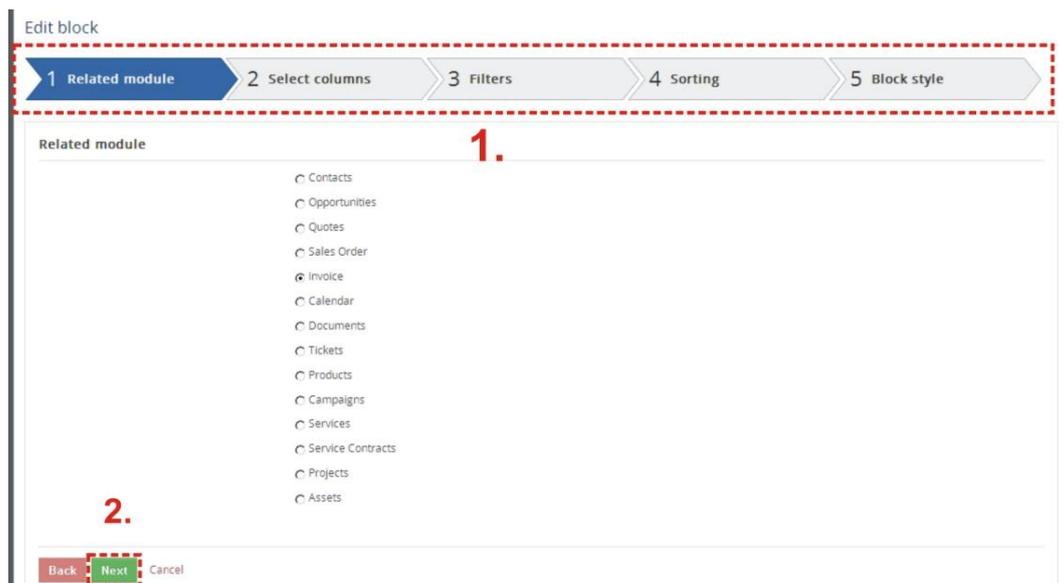
How to create and insert related block will be shown on example based on “Organizations” module. Let’s suppose that we would like to create simple email template based on module “Organizations”, and we need to list all invoices for particular organization which were created within last 90 days. In order 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  button.
3. Edit block window will appear on the screen.



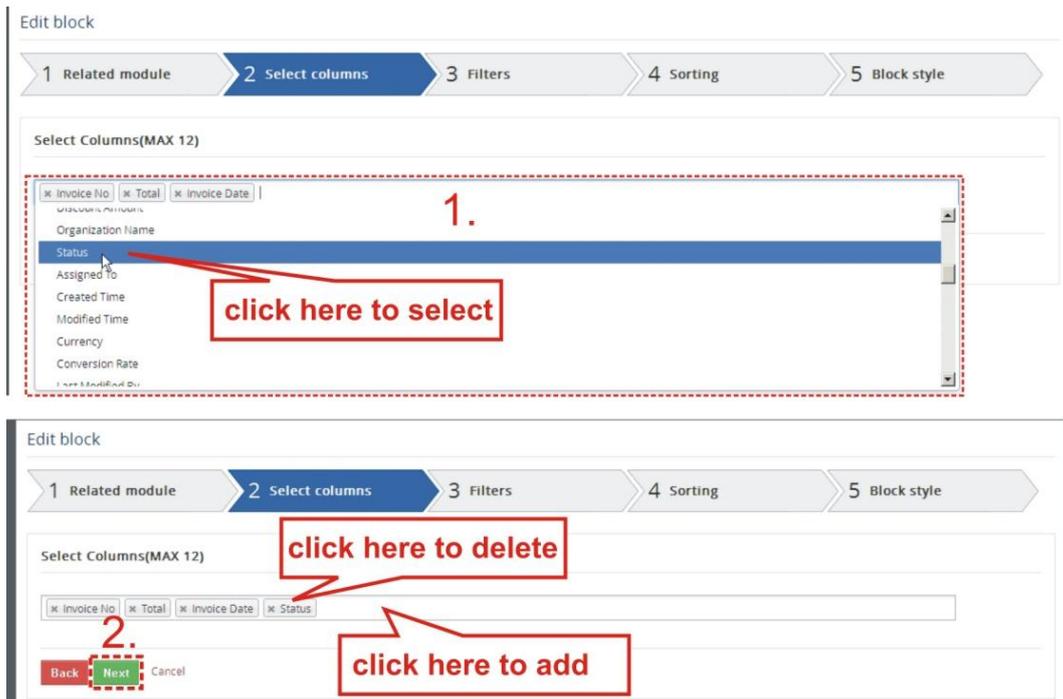
Picture 4.12 Start creation of the related block

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** button.



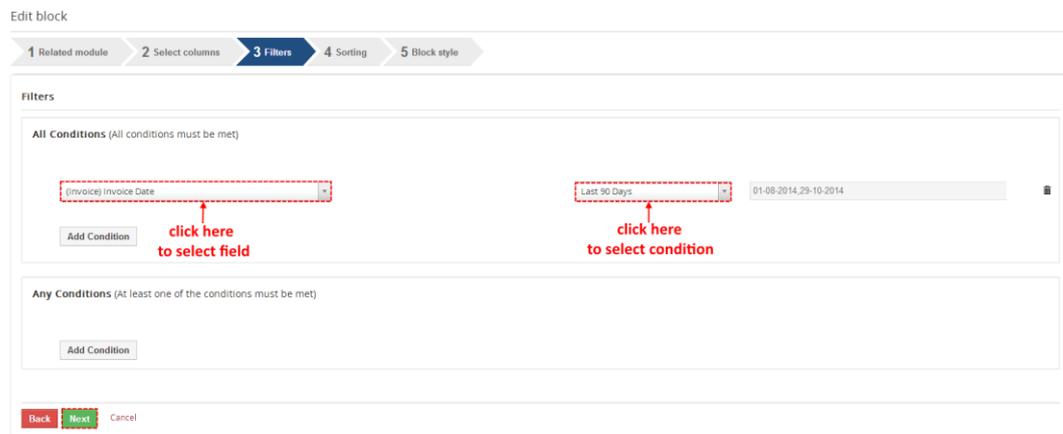
Picture 4.13 Creation of the related block – step 1

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.).



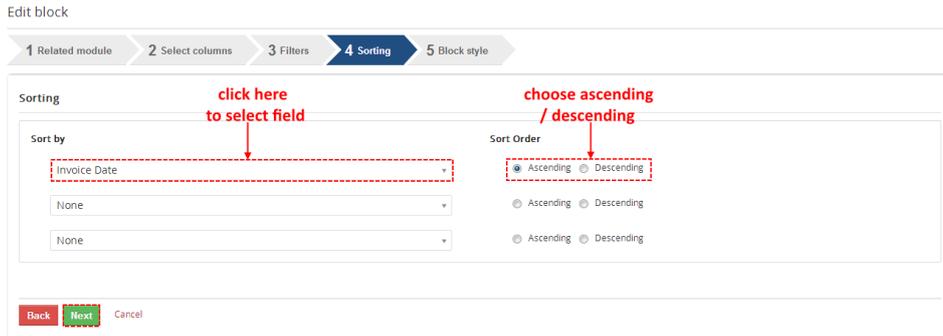
Picture 4.14 Creation of the related block – step 2

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.



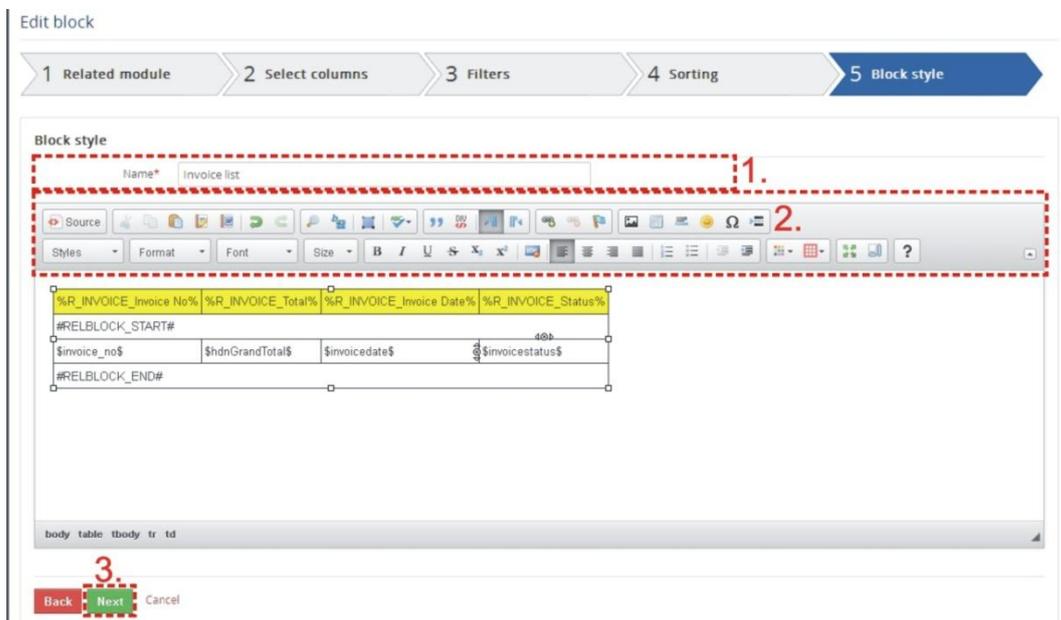
Picture 4.15 Creation of the related block – step 3

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**.



Picture 4.16 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 **Next** button to finish.

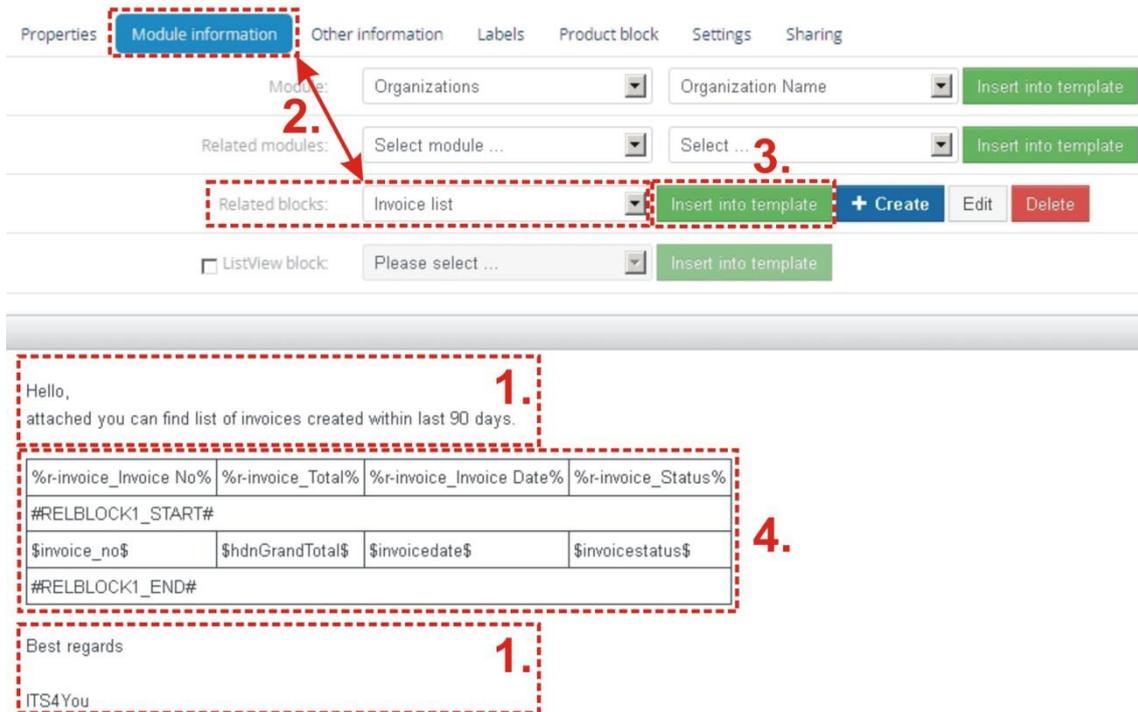


Picture 4.17 Creation of the related block – step 5

#### 4.6.2 Insert related block

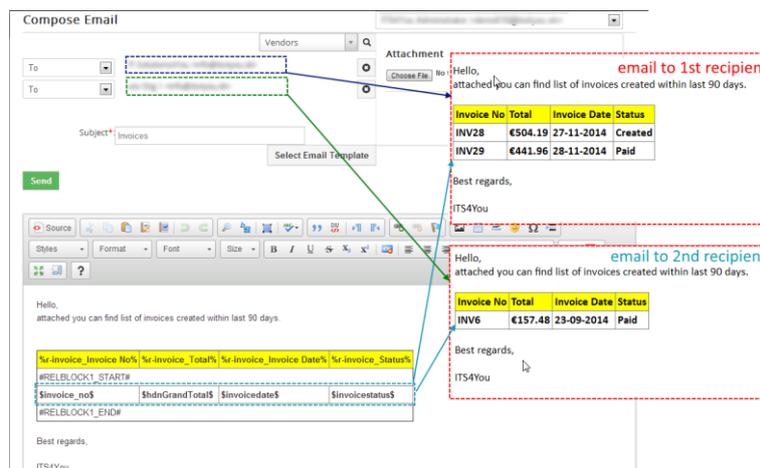
If the related block is created you can continue with editing your template and in order to insert related block provide following actions:

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.



Picture 4.18 Insert related block

Example of the email in *Compose Email* window and received mails shows next picture.



Picture 4.19 Related block in Compose Email

## 4.7 Using ListView block

In case you need to send via email the output of the several records within one mail you can use ListView block. Within this block you can simply set which fields of the records you would like to send. Please refer to below picture which shows simple example of the email consists of list of invoices and related few fields (invoice number, invoice date, status etc.) and how to prepare it. Firstly in the Email Maker EditView (Picture 4.20):

1. Go to *Module information* tab and select the “Block start” and click **Insert into template**.
2. Insert fields you would like to have in ListView block (`$$-invoice-invoice_no$$.`).
3. Insert “Block end” using button **Insert into template**.

Provide additional edit steps and save the template. When the template is ready you can use it within ListView (ONLY!) to prepare mail using following steps:

1. Go to ListView of particular module and select 1 to N records.
2. Click on **Actions** and select Send Emails with EMAIL Maker.
3. Select ListView block template (language, recipients) and click on **Select**.
4. The Compose E-Mail window is shown as well with ListView block to be sent.

Note: Each ListView block has to start with “Block start” (`#LISTVIEWBLOCK_START#`) and ends with “Block end” (`#LISTVIEWBLOCK_END#`). ListView block template can be set as default only for ListView; for DetailView it is not applicable.

The screenshot illustrates the process of creating and using a ListView block in the Email Maker. It is divided into several key areas:

- Table View:** Shows a list of invoices with columns for ID, Date, and Status. A red box labeled '1.' highlights the 'Send Emails with EMAIL Maker' action in the 'Actions' menu.
- Edit Window:** Titled 'Edit "invoice simple listview block"', it shows the configuration for the block. A red box labeled '2.' points to the 'Block start' field, and another red box labeled '3.' points to the 'Block end' field. Green annotations '1./3.' and '2.' indicate the steps for inserting the start and end markers and fields.
- Compose Email:** Shows the email composition screen. A red box labeled '4.' highlights the 'Send' button. The email body contains a list of invoices and a 'Best regards, ITS4You' signature.
- Final Email:** A preview of the final email, showing the list of invoices: INV5 Created, INV13 Paid, INV5 Created, INV6 23-09-2014 Paid, INV12 06-10-2014, and INV11 Paid.

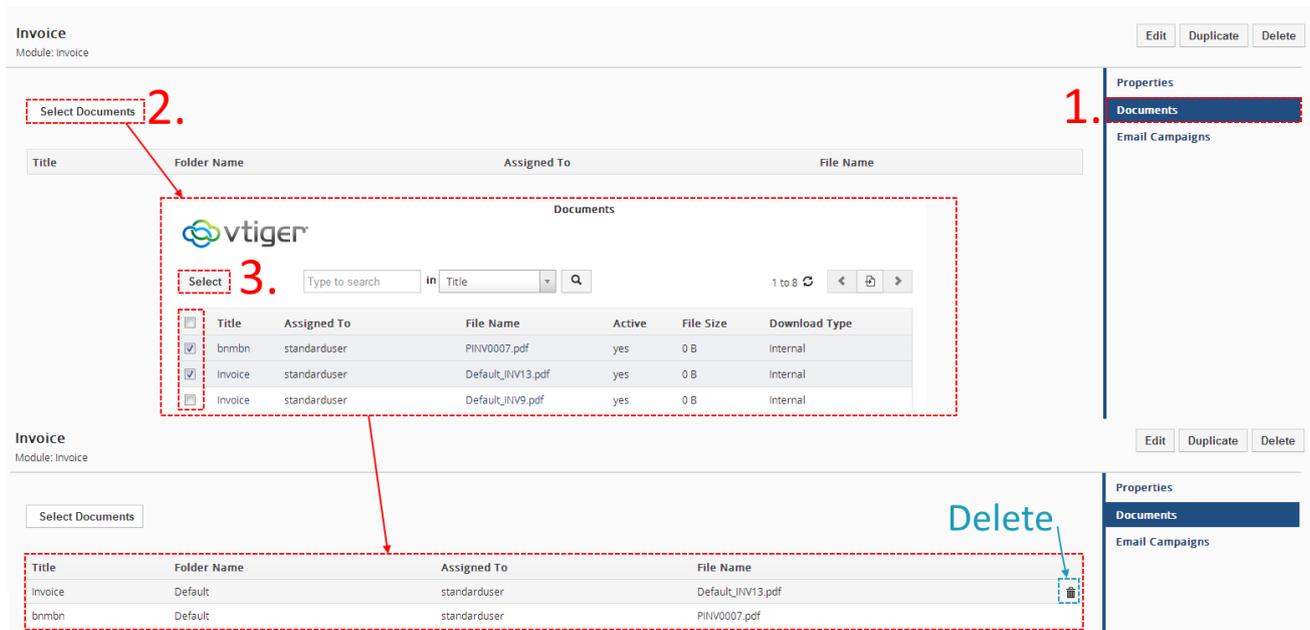
Picture 4.20 ListView block

## 4.8 Attach documents into templates

The email template can contain attached documents. This feature is useful in case you often need to attach additional documents into your emails. It could save your time or avoid to forget attach important documents.

1. Go to DetailView of the email template and select *Documents* tab.
2. Click on **Select Documents**.
3. Select one or more documents and confirm selection by button **Select**.

In case you want to delete the attached document just click on icon  (Picture 4.21).



The screenshot displays the 'Invoice' module interface. The top panel shows the 'Documents' selection screen with a table of documents and a 'Select' button. The bottom panel shows the 'Documents' tab selected in the 'Properties' sidebar, with a table of attached documents and a 'Delete' button. Red dashed boxes and arrows highlight the 'Select Documents' button, the 'Select' button, and the 'Delete' button.

**Documents Selection Table:**

Title	Assigned To	File Name	Active	File Size	Download Type
brmbn	standarduser	PINV0007.pdf	yes	0 B	Internal
Invoice	standarduser	Default_INV13.pdf	yes	0 B	Internal
Invoice	standarduser	Default_INV9.pdf	yes	0 B	Internal

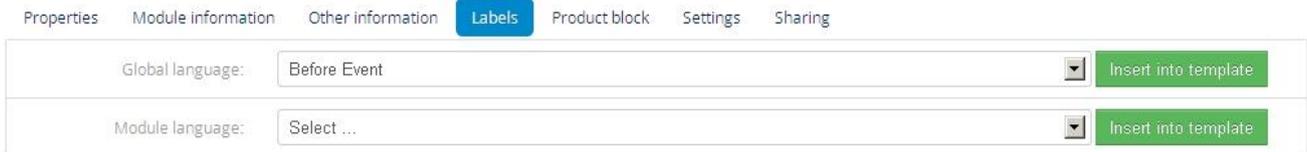
**Attached Documents Table:**

Title	Folder Name	Assigned To	File Name
Invoice	Default	standarduser	Default_INV13.pdf
brmbn	Default	standarduser	PINV0007.pdf

Picture 4.21 How to attach documents into email template

## 4.9 Inserting labels

The intention of the labels is saving time and effort for creating email templates. Using labels provides an easy and flexible way to send emails / or just parts of emails in different languages without necessity to create separate email template per each language. As it was described in chapter 3.3.4, labels can be inserted into templates via Labels tab. In order to insert any global related label or module related label just click on Labels tab, select from dropdown list any label and click on **Insert into template** button.



Picture 4.22 Labels tab

Please refer to example below used for sending invoice information. Instead of having two (or more) templates the labels are used as much as possible. For example the label %G\_Phone% used in template will be replaced in final mail in german language as “Telefon” and in final mail in English language as “Phone” automatically based on your language selection. So it is not necessary to create duplicate templates for another language, just use labels and select language before *Compose email* window. The global labels use notation %G\_\*\*\*\*\*% and module labels use %M\_\*\*\*\*\*%.

Language selection

US English

- US English
- ES Mexico
- Swedish
- British English
- ES Spanish
- NL-Dutch
- PT-Brasil
- HU-Magyar

US English

- Arabic
- Język Polski
- IT-Italian
- Russian
- Romana
- Pack de langue français
- DE-Deutsch
- SK-Slovenčina

Example for "US English" selected

**BIOMED**

**vtiger f**  
 95, 12th Main Road, 3rd Block, Rajajinagar  
 560010 Bangalore  
 India  
 Telefon +91 9243602352  
 Telefax +91 9243602352  
 www.vtiger.com  
 Invoice Date: 27-11-2014

Example for "DE Deutsch" selected

**BIOMED**

**vtiger f**  
 95, 12th Main Road, 3rd Block, Rajajinagar  
 560010 Bangalore  
 India  
 Telefon +91 9243602352  
 Telefax +91 9243602352  
 www.vtiger.com  
 Rechnungsdatum: 27-11-2014

Invoice No: INV28

Pos	Quantity	Text	List Price	Sub Total	Discount	Net Price without TAX	Tax (%)	Tax (EUR)	Total
1	1,00	WithLogo	0,00	0,00	0,00	0,00	27,00	0,00	0,00
2	1,00	Pieces HDD 1500 GB	49,00	49,00	0,00	49,00	27,00	13,23	62,23

Rechnungsnr: INV28

Pos	Menge	Text	Listenpreis	Zwischensumme	Ermäßigung	Preis without TAX	MwSt. (%)	MwSt. (EUR)	Gesamtsumme
1	1,00	WithLogo	0,00	0,00	0,00	0,00	27,00	0,00	0,00

template in DetailView

%M\_Invoice Date% \$INVOICE\_INVOICEDATES

%G\_Invoice No% \$INVOICE\_INVOICE\_NO\$

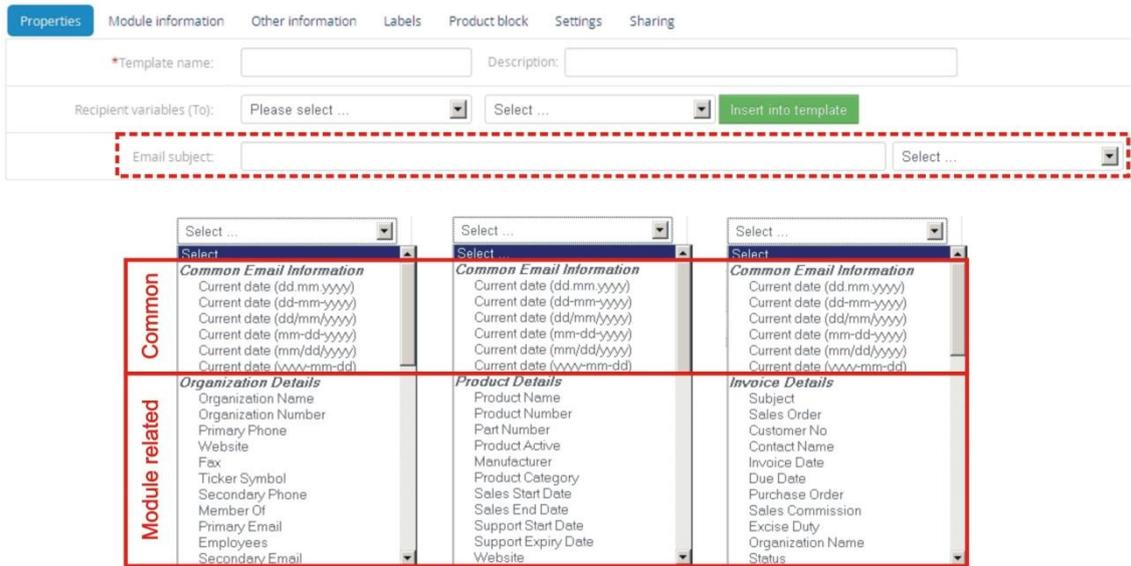
Pos	%G_Qty%	Text	%G_LBL_LIST_PRICE%	%G_Subtotal%	%G_Discount%	%G_LBL_NET_PRICE% without TAX	%G_Tax% (%)	%G_Tax% (\$CURRENCYCODES)	%M_Total%
-----	---------	------	--------------------	--------------	--------------	-------------------------------	-------------	---------------------------	-----------

Picture 4.23 Inserting labels

## 4.10 Template settings

### 4.10.1 Email subject

In *Properties* tab of EMAIL Maker you can find “Email subject” definition. This setup gives you the opportunity to set the email subject according to your needs. You can combine strings, module variables and some standard variables like Current date. Dropdown list for email subject depends on primary module as can be seen below.



Picture 4.24 Email subject settings

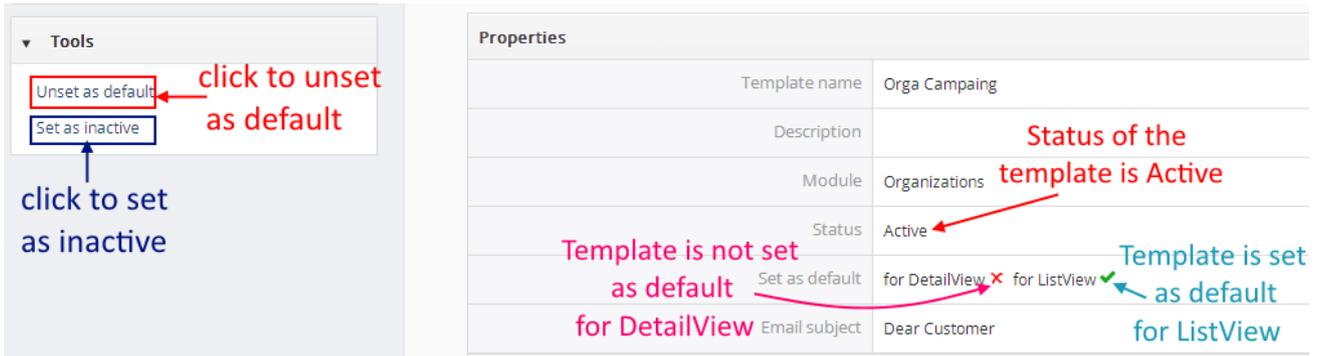
### 4.10.2 Status

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:

- Listview (Picture 4.25) – “Status” column
- DetailView (Picture 4.26) – *Properties* tab

#	Select	Template name	Module	Description	Status	Action
1	<input type="checkbox"/>	Orga Campaing (default)			Active	Edit   Duplicate
2	<input type="checkbox"/>	Ausstellerunterlagen (default for DetailView)			Active	Edit   Duplicate
3	<input type="checkbox"/>	test	Organizations		Active	Edit   Duplicate
4	<input type="checkbox"/>	Invoice (default for ListView)		test	Active	Edit   Duplicate
5	<input type="checkbox"/>	invoice simple listview block	Invoice		Active	Edit   Duplicate
6	<input type="checkbox"/>	organization	Organizations		Inactive	Edit   Duplicate

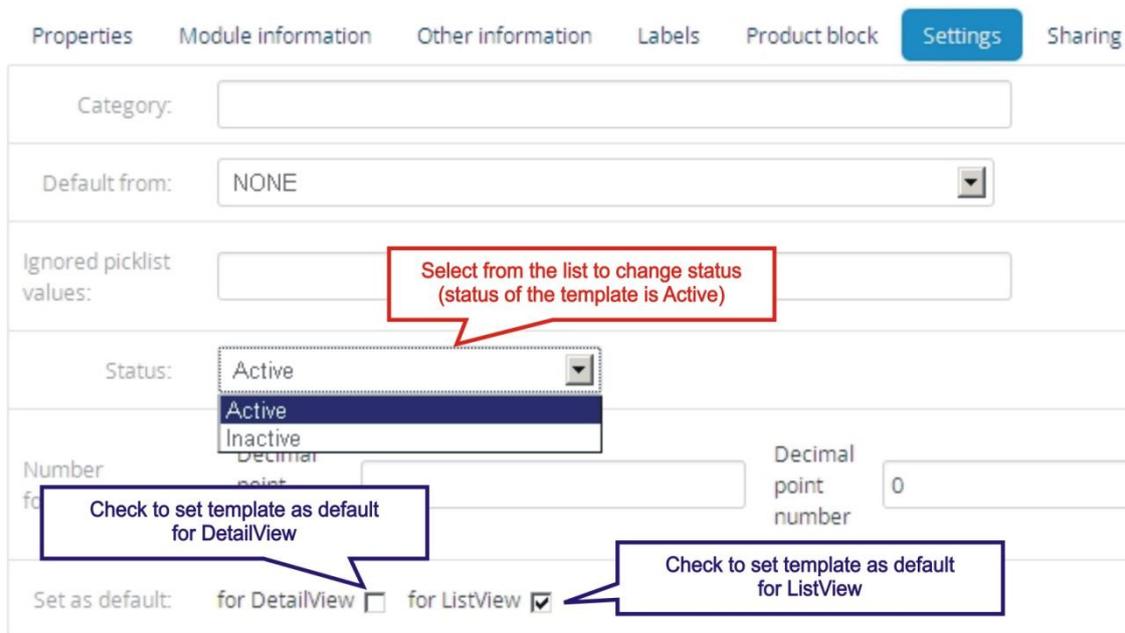
Picture 4.25 Status and setting of default in ListView



Picture 4.26 Status and setting of default in DetailView

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

1. Using Tools and links “Set as inactive” (“Set as active”) in DetailView (Picture 4.26). Click on “Set as inactive” to inactivate given template. If the template is Inactive, the link “Set as active” will be shown. To activate this template you must click on “Set as active” link.
2. Using *Settings tab* in EditView – select status from listbox (Picture 4.27)



Picture 4.27 Setting of status and “set as default” using Settings tab

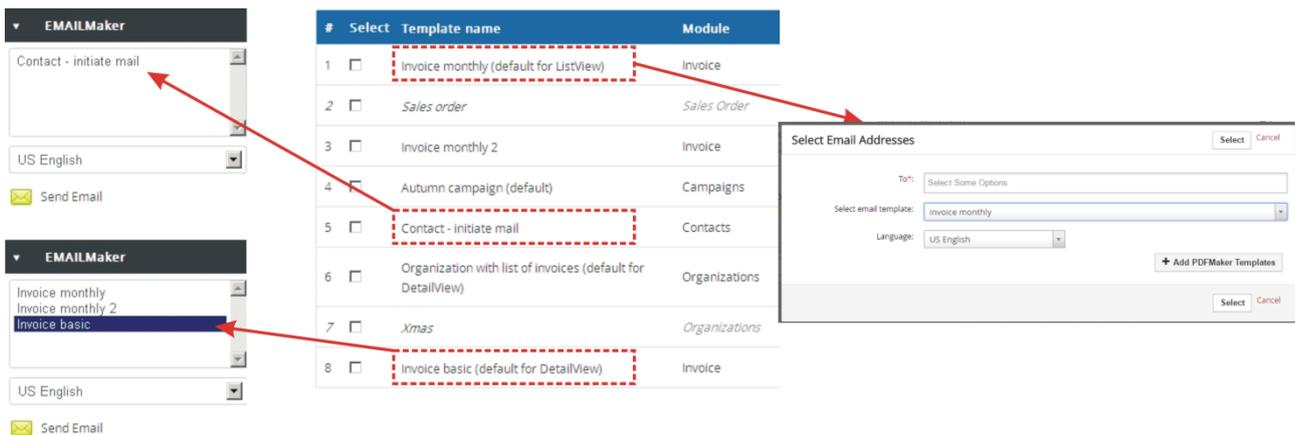
### 4.10.3 Set as default

The particular EMAIL 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 4.25) – 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 4.26) – *Properties tab*

The behavior of default templates is shown in the below picture:

- template default for ListView is automatically selected in *Select Email Addresses window*
- template default for DetailView is automatically selected in EMAIL Maker block
- the template is not automatically selected if not set as default, neither in case only one template exists



Picture 4.28 Default template visibility

## 5 Sending emails

In the following picture you can see how to send email using EMAIL Maker:

### ListView:

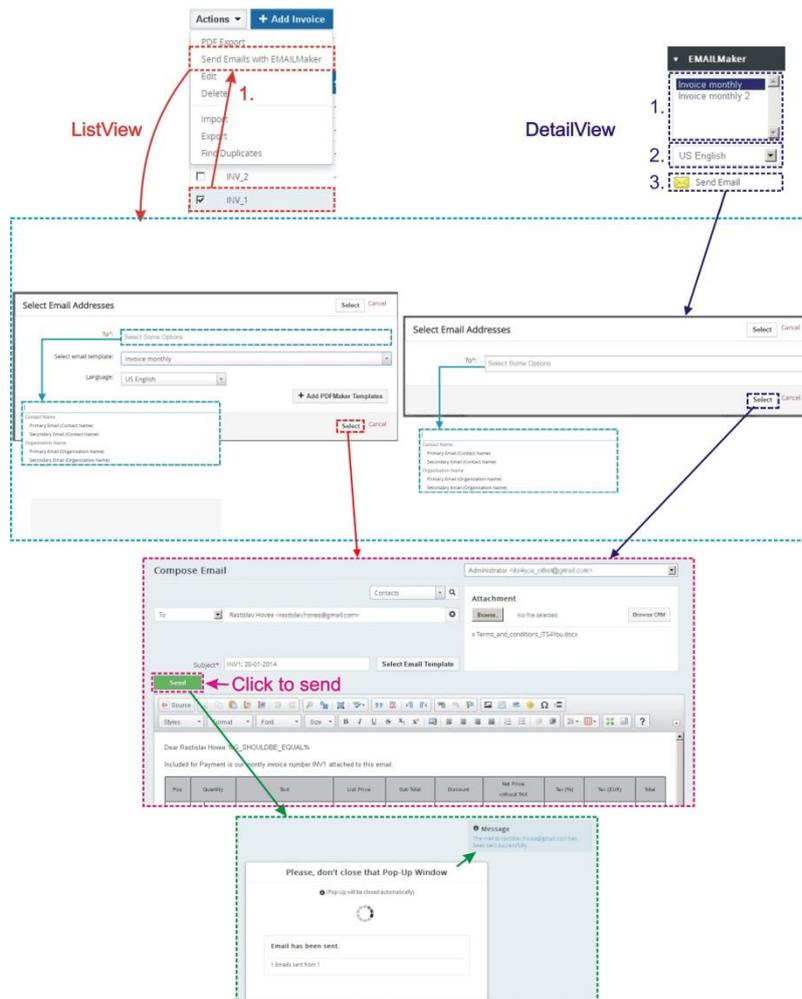
1. Select one or more records and click on *Send Emails with EMAIL Maker* from *Actions*.
2. Select EMAIL Template.
3. Select language to be used.
4. Select Email address/es.
5. Click on **Select** button.

### DetailView:

1. Select EMAIL template in the EMAIL Maker block.
2. Select language to be used.
3. Click on link  *Send Email*.
4. Select EMAIL address/es.
5. Click on **Select** button.

The process of sending emails continues with window “Compose E-Mail”. Click on button **Send** to send email. At the end you are informed about un/successful sending of the email. Please refer to following chapters for details about each step.

Please note that you can be directly navigated to *Compose Email* window when you click on  *Send Email* or *Send Emails with EMAILMaker*. It depends on several conditions (primary module, availability of email addresses or templates, etc.). Please refer to next chapter for details.



Picture 5.1 How to send email

## 5.1 Select Email Addresses

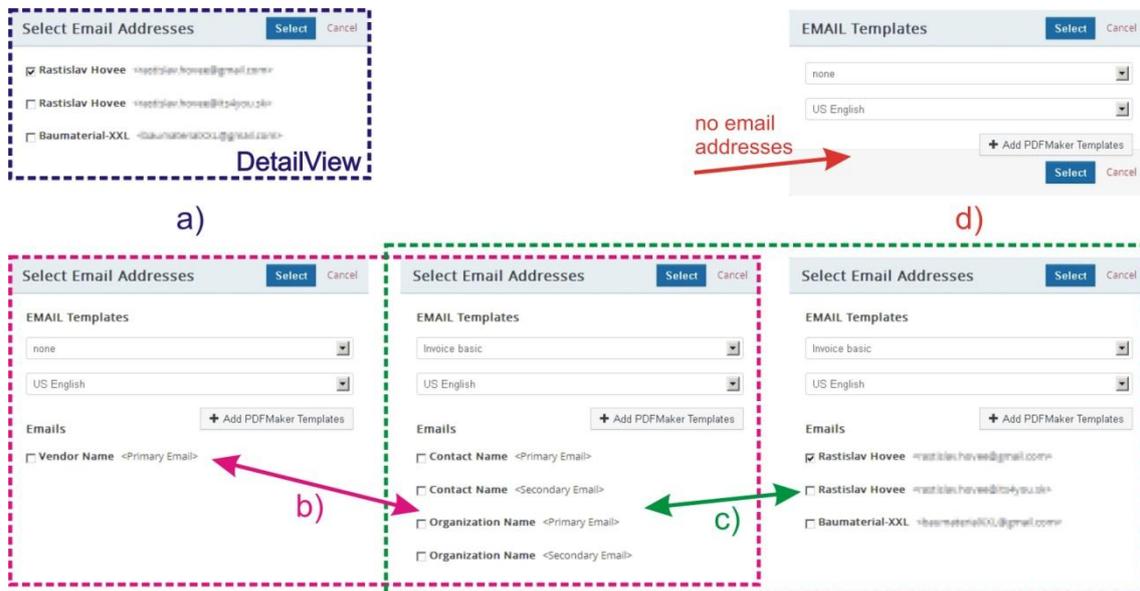
The *Select Email Addresses* window is first (ListView) or second (DetailView) window which is used to select email template, email recipients or PDF template (only if available). Please provide your selection and continue with button **Select** in order to send email(s).

As you can see in the below picture, the *Select Email Addresses* window has several forms:

- In the DetailView window doesn't contain EMAIL Template part because it is assumed that template is selected within EMAIL Maker block or you would like to write email without using any template.
- In the ListView, part related to Emails offers to select email address/es depending on used module.
- Select Email Addresses* window differs also within same module in ListView. It depends whether one or more records were selected. The concrete email address/es are shown in case that only one record was selected.
- Some modules (Documents, Price Books etc.) have no connection to any email, so you can find here only selection of email template.

In addition to listed situations, it is also possible that window *Select Email Addresses* will be skipped, for example:

- if for particular record the email address doesn't exist
- there is exactly only one email address per selected record – so it is clear which one will be used

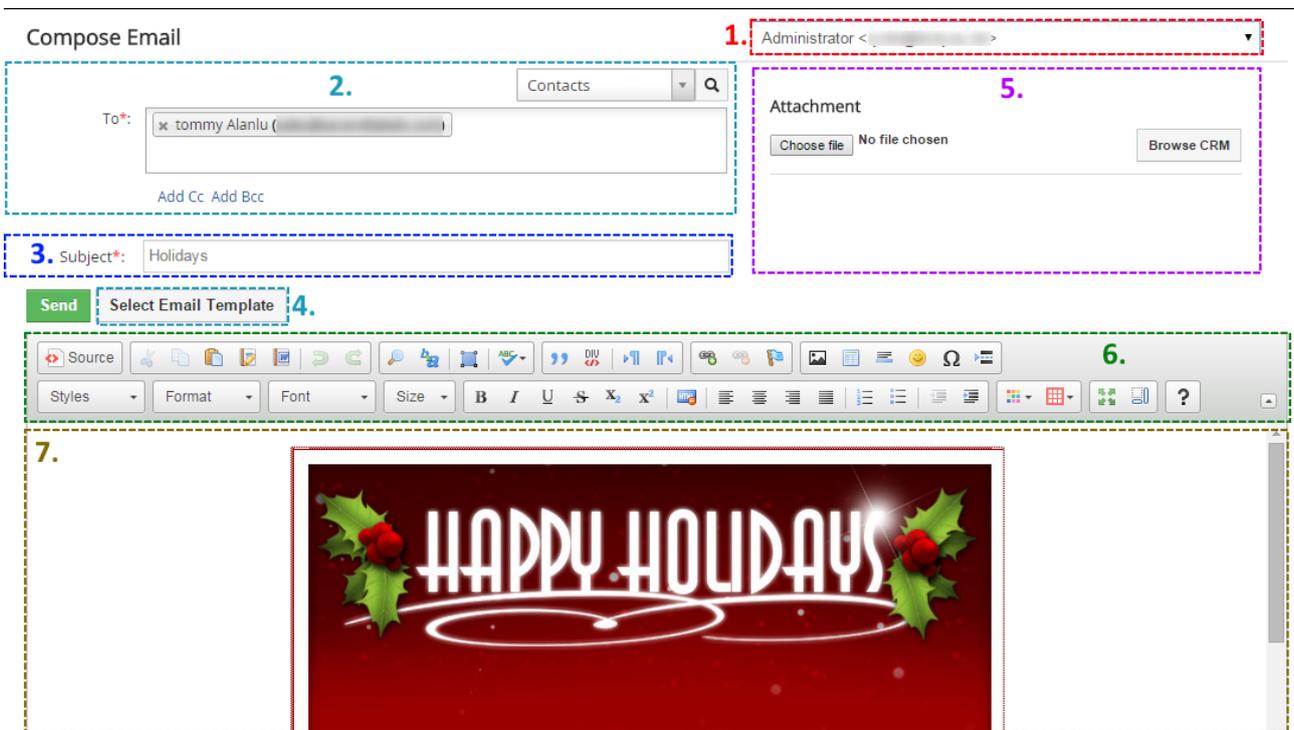


Picture 5.2 Select Email IDs

## 5.2 Compose E-Mail

For successful sending of the email(s) it is enough to click on button **Send** in the *Compose E-Mail* window in case that email template and recipients were already selected in the previous *Select Email IDs* window. But as you can see in the picture below you can provide a lot of actions before sending of the email(s):

1. Change your/sender mail
2. Add additional "To", "Cc" and "Bcc" recipients or remove recipients.
3. Change subject of the email.
4. Change or select email template
5. Add/remove attachments.
6. Additional edit of the email or email template.
7. Preview of the email or email template.



Picture 5.3 Compose E-Mail window

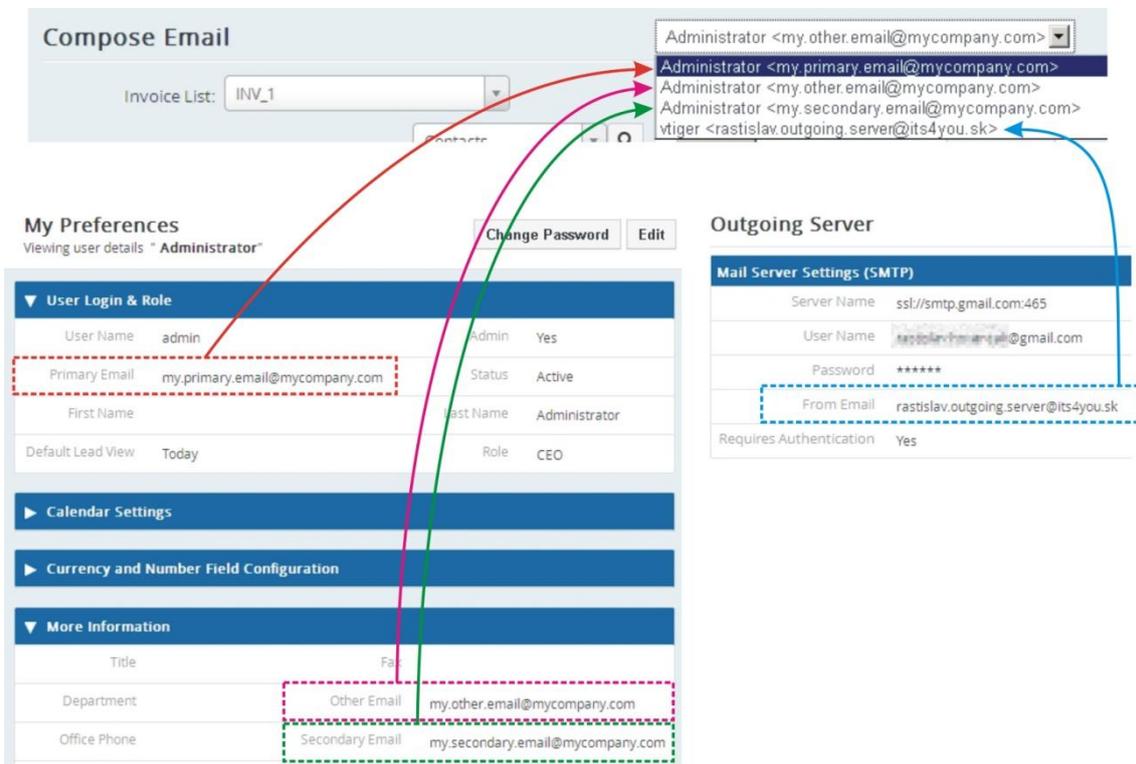
Some of above actions are described in the following chapters in details.

### 5.2.1 Emails sent from

Within your vtiger you can define several email addresses. These addresses can be used as addresses of the email sender.

You can simply change the email address of the sender within “Compose E-Mail” window. It can be done using selectbox. Depending on your preferences and settings, you can select from the email addresses defined in (see Picture 5.4):

- My Preferences / User Login & Role / Primary Email
- My Preferences / More Information / Other Email
- My Preferences / More Information / Secondary Email
- Settings / Outgoing Server / From Email

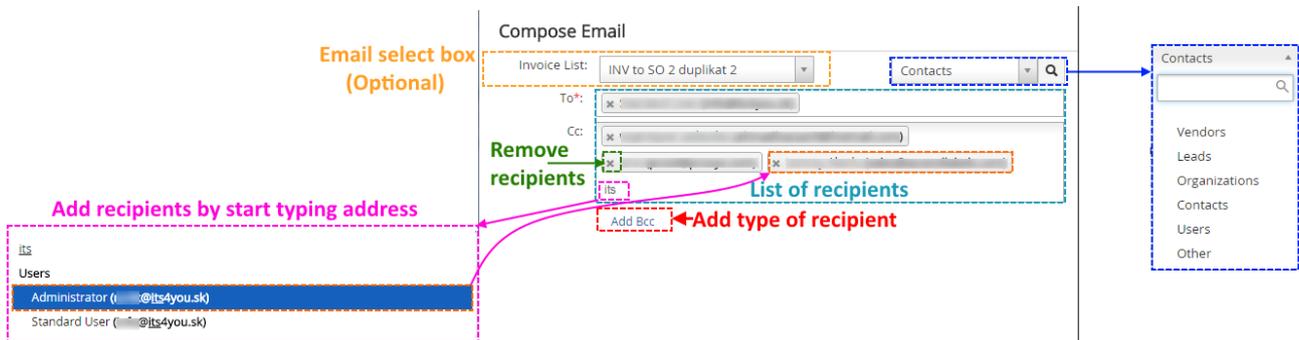


Picture 5.4 Emails sent from selection

## 5.2.2 Recipients To, Cc, Bcc

Within this chapter is described one of the main parts of Compose Email window related to email recipients. As described in the picture below you can provide here following actions:

- add recipients – you can select the recipients from module Contacts, Organizations, Vendors, Leads, Users or you can type any email address using selection “Other” or simply you can add recipients by start typing email address (3 and more characters)
- remove recipients (emails)
- add next type of recipients – Cc, Bcc
- there can be also email select box located in the above part for modules like Invoices, Products, Purchase orders, Sales orders, Quotes ...



Picture 5.5 Actions related to recipients

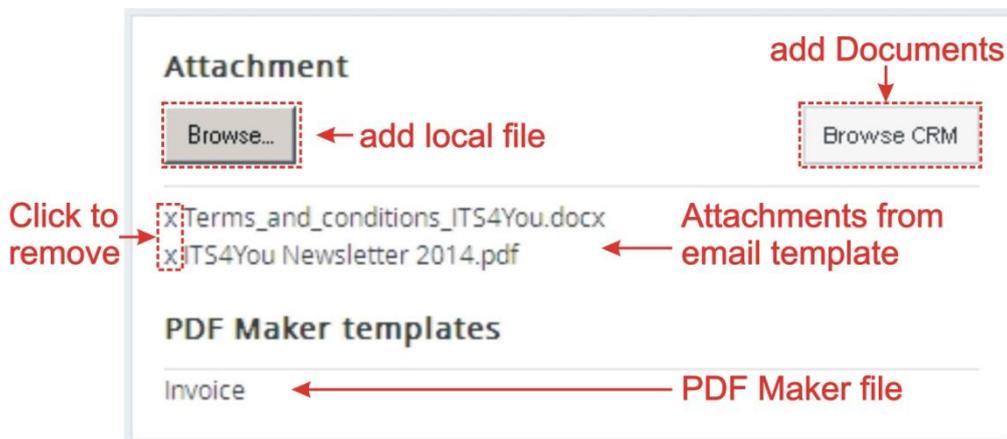
Please take into account that behavior of using To, Cc and Bcc differs in case of sending emails from ListView of the particular module in case more than one record was selected:

- For modules like Contacts, Organizations, Vendors, Leads ...
  - At least one recipient has to be defined as *To*
  - In case you would like to send email also to Cc, Bcc recipient only for one selected record please use sending from DetailView of the module
- For modules like Invoices, Products, Purchase orders, Sales orders, Quotes ...
  - At least one recipient has to be defined as *To* for each selected record (INV\_01, INV\_02)
  - It is possible to define *Cc*, *Bcc* recipient for each particular *To*, it means *Cc*, *Bcc* recipients are better controlled

### 5.2.3 Attachments

Three ways how to attach the attachments into emails are currently supported in the Email Maker (Picture 5.6):

1. The attachments inserted directly into email template (see chapter 4.8 for details).
2. The attachments inserted within Compose E-Mail window:
  - a. The document/file from the module “Documents” can be added using .
  - b. Any local file can be added using .
3. PDF Maker templates (available only for users using also PDF Maker). Please refer to chapter 6.4 for details.



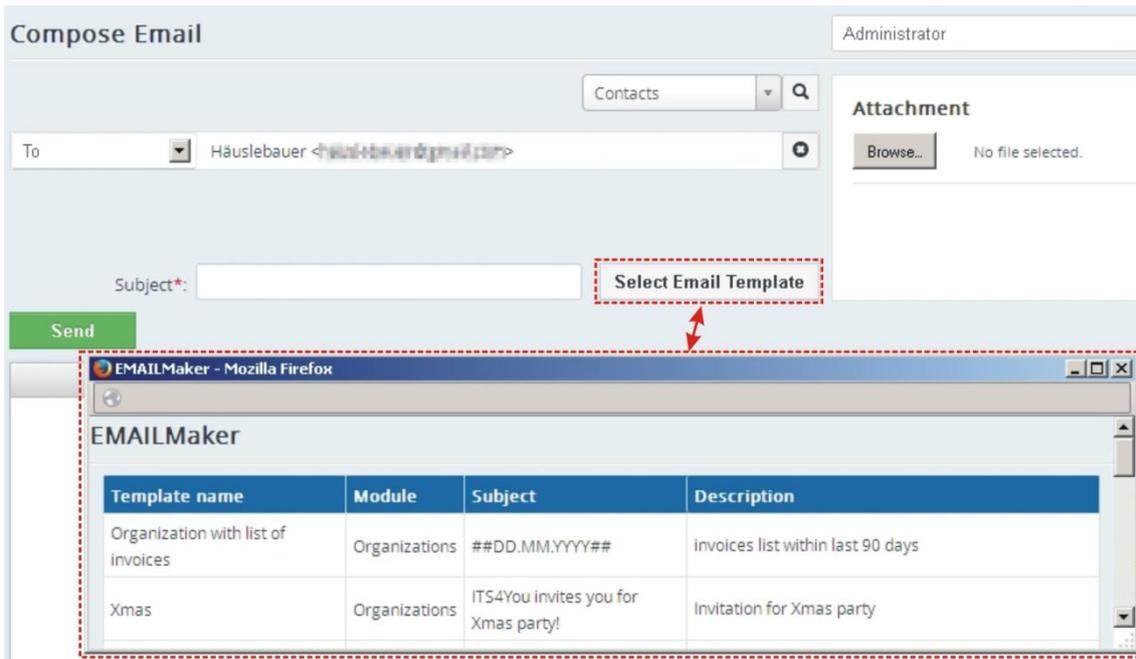
Picture 5.6 Compose E-Mail – part Attachment

In order to delete any attachment please click on “X” before attachment (see picture).

### 5.2.4 Select Email Template

The Compose E-Mail window contains button . You can select email template from ListView within window *Select Email IDs* or from DetailView within *EMAIL Maker block*. Button  can be used in the following situations:

- in case you forgot to select email template from *Select Email IDs* window or *EMAIL Maker block*
- you would like to use different template but don't want to close *Compose E-Mail* window
- you initiated sending emails outside EMAIL Maker tool (so you were not able to select email template), e.g. using PDF Maker tool



Picture 5.7 Select Email Template

When you click on  "Email Templates List" window will appear on the screen. You can select template name to be used. Inside this window also information of primary module and description is available. Please note that only module related templates or common templates are visible and can be used for sending emails.

### 5.3 Email Campaigns

The new option of EMAIL Maker is make **Email Campaign**. It allows to you to send mails automatically without your intervention.

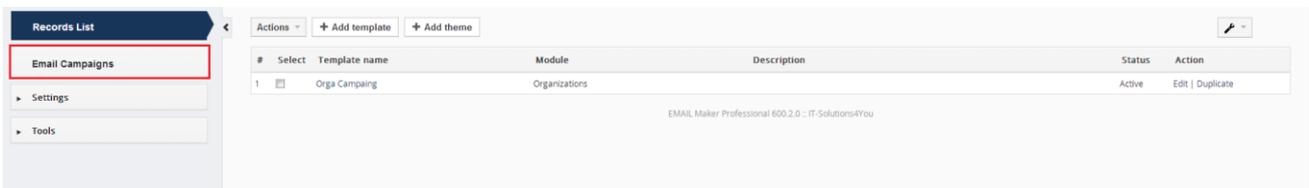
**Please note that this will work only with EMAIL Maker Professional.**

**Email Campaigns functionality needs to correct working have implement workflow of Email Maker and correct setting of vtiger cron.**

**More about standard vtiger cron you can read here:**

<https://wiki.vtiger.com/index.php/Cron>

To access to Email Campaign please click on **Email Campaign**:



Picture 5.8 Access to Email Campaign

Here you can see all your created Campaigns. Status informs you about progress of sending emails.



Picture 5.9 Email Campaigns

To create new Campaigns please provide following steps:

- First step is to click on **+ New Email Campaign** button (Picture 5.9).
- In the next window, you have to fill **Email Subject**, **From Email** and **Email language**, you can also fill **From Name** and **Description** (From Name and From Mail are filled automatically). Then please click on **Next** button.

Picture 5.10 Create Campaign

- Now, choose module, filter (e.g Organizations and All) and Column (Primary Email, Secondary email). For each supported modules (Contacts, Vendors, Lead, Organizations) you are able to create own filters. For more info about creating filters please see:

[https://wiki.vtiger.com/vtiger6/index.php/Creating\\_Custom\\_Filters](https://wiki.vtiger.com/vtiger6/index.php/Creating_Custom_Filters)

Picture 5.11 Create Campaign

- In the next step, choose a template for module you have created before. For creating templates please see (4.1 Create new email template).

Picture 5.12 Choose your template for Campaign

- Now, set a **Start of** and you can also set a Limits (maximum count of sent emails per hour) if you have limited count of sending mails by your mail server.

Picture 5.13 Additional Parameters

- Here you can see Summary of your Campaign. You can preview your Campaign by [Send Example Email](#) button (send test email of your Campaign) or use save button to finish your Campaign.

Properties	
Email subject	Email Campaign
From Name	ITS4You
From Email	info@its4you.sk
Email language	US English
Template name	testcontact
Description	Description
List Name	Contacts > All
Number of recipients	7
Column	Primary Email
Start of	06-08-2016 12:00 am
Limits (maximum count of sent emails per hour)	

Picture 5.14 Summary of Email Campaign/Preview/Send

Your Campaign is created. As you can see on following picture your Campaign Status is **Not started** now.

Properties	
Email subject	TestITS4YOU
From Name	ITS4You Administrator
From Email	demo610@its4you.sk
Template name	Orga Campaign
Description	Description
List Name	Organizations > All
Status	Not started
Start of	25-09-2014 12:00 am
Limits (maximum count of sent emails per hour)	10

Picture 5.15 Created Campaign

When your Campaign is done, you can see in DetailView of your Campaign that status is **Finished** and you can find more info about Campaign (**Sent emails, Unsubscribes, Without email address**).

test campaign 1  
Module: Contacts > All

Properties			
Email subject	test campaign 1	List Name	Contacts > All
From Name	Admin Administrator	Column	Primary Email
From Email	admin@its4you.sk	Status	Finished
Email language	DE Deutsch	Start of	2015-03-10 12:00 am
Template name	Contact	Limits (maximum count of sent emails per hour)	0
Description			

Total entries in selected filter: 5000		Opened emails count	
sent emails	5000	Total opens	2000
Unsubscribes	0	Unique opens	1500

Picture 5.16 DetailView of Campaign

Since EMAILMaker version **600.13.0** there is new functionality **Recipients List** available. Recipients List you can find in DetailView of Campaign. You can see here Recipient, Email, Subject, Data Sent, Time Sent, Status Access Count as well as which emails was sent and which emails will be sent because you set maximum count of emails per hour.

test  
Module: Contacts > All

Edit Delete

1 to 20

Recipient	Email	Subject	Date Sent	Time Sent	Status	Access Count
test	admin@its4you.sk	test	30-05-2016	10:00 PM	SENT	1
test	admin@its4you.sk	test	30-05-2016	10:00 PM	SENT	1
test	admin@its4you.sk	test	30-05-2016	10:00 PM	SENT	1
test Tester1	test1@its4you.sk	test	30-05-2016	10:00 PM	SENT	1
test Tester2	test2@its4you.sk	test	30-05-2016	10:00 PM	SENT	1
test Tester3	test3@its4you.sk	test	30-05-2016	10:00 PM	SENT	1
test Tester4	test4@its4you.sk	test	30-05-2016	10:00 PM	SENT	1
test Tester5	test5@its4you.sk	test	30-05-2016	10:00 PM	SENT	1
test Tester6	test6@its4you.sk	test	30-05-2016	10:00 PM	SENT	1
test Tester7	test7@its4you.sk	test	30-05-2016	10:00 PM	SENT	1
testwithemail	peter.mochnal@its4you.sk					
testcontact2	info@its4you.sk					

Will be sent later because you set maximum count of emails per hour

Picture 5.17 Recipients List

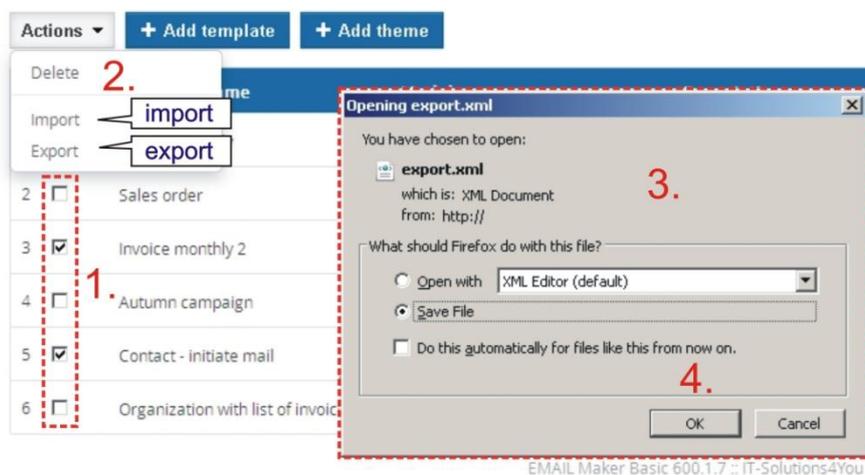
## 6 Additional features

### 6.1 Export and import templates

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

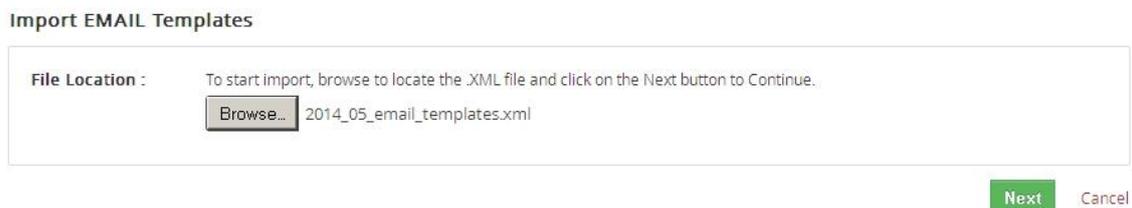
In order to export EMAIL templates to external sources in EMAIL Maker tool do following steps:

1. In the EMAIL Maker ListView page select one or more templates which would you like to export.
2. Click on **Actions** and “Export”.
3. In the File Download pop-up dialog select “Save File”.
4. Click **OK** to save the templates in \*.xml file format.



Picture 6.1 Export of the templates

To import email templates from external sources click on **Actions** and “Import” (see Picture 6.1 point 2.). After click the new import page will appear on the screen.



Picture 6.2 Import EMAIL templates page

In the Import pdf templates page, browse the EMAIL 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 the EMAIL Maker ListView page.

## 6.2 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/EMAILMaker/resources`, 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/EMAILMaker/resources/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“. As example in the picture below *its4you\_if* is selected.
2. Click button **Insert into template**. It adds function in form `[CUSTOMFUNCTION|functionname|param1|param2|...|CUSTOMFUNCTION]` or `[CUSTOMFUNCTION_AFTER|functionname|param1|param2|...|CUSTOMFUNCTION]`.
3. Finally you have to define function name and parameters of the function as shown in the picture below.

As you can see in the Picture 6.3 the final text of the sent email depends on result of the custom function.

Picture 6.3 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 for your email templates.

Name	Description
its4you_if	<i>[CUSTOMFUNCTION its4you_if param1 comparator param2 whatToReturn1 whatToReturn2 CUSTOMFUNCTION]</i> This function executes if-else statement based on given parameters: <b>param1</b> first parameter of comparison <b>comparator</b> comparison sign - one of ==, !=, <, >, <=, >= <b>param2</b> second parameter of comparison <b>whatToReturn1</b> value returned when comparison succeeded <b>whatToReturn2</b> value returned when comparison didn't succeed
its4you_getTemplateId	<i>[CUSTOMFUNCTION its4you_getTemplateId CUSTOMFUNCTION]</i> This function returns id of current template.
its4you_getContactImage	<i>[CUSTOMFUNCTION its4you_getContactImage id width height CUSTOMFUNCTION]</i> Please note that function has to be executed after sending email. So please use notation <i>CUSTOMFUNCTION_AFTER</i> This function returns image of contact. <b>id</b> – as parameter use <b>\$s-contacts-crmid\$</b> <b>width</b> - width of returned image (10%, 100px) <b>height</b> - height of returned image (10%, 100px)
its4you_sum	<i>[CUSTOMFUNCTION its4you_sum arg1 arg2 CUSTOMFUNCTION]</i> 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	<i>[CUSTOMFUNCTION its4you_deduct arg1 arg2 CUSTOMFUNCTION]</i> This function returns deducted value arg1-arg2-...-argN (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	<i>[CUSTOMFUNCTION its4you_multiplication arg1 arg2 CUSTOMFUNCTION]</i> 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	<i>[CUSTOMFUNCTION its4you_divide arg1 arg2 CUSTOMFUNCTION]</i> 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	<i>[CUSTOMFUNCTION its4you_formatNumberToPDF value CUSTOMFUNCTION]</i> This function returns formatted value and is used by other functions. <b>value</b> – int
its4you_formatNumberFromPDF	<i>[CUSTOMFUNCTION its4you_formatNumberFromPDF value CUSTOMFUNCTION]</i> This function returns converted value into integer and is used by other functions. <b>value</b> - int

Table 6-1 its4you functions

### 6.2.1 “AFTER” custom functions

As you can see in the picture below, the custom functions are divided into two groups:

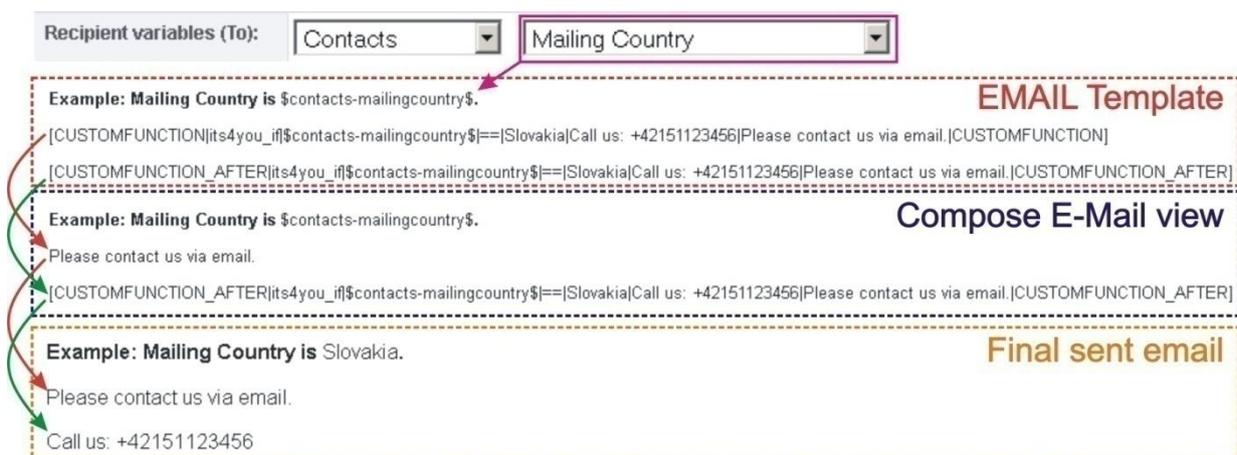
- BEFORE - [CUSTOMFUNCTION|functionname|param1|...|paramN|CUSTOMFUNCTION]
  - custom function is executed before sending email
  - the result of the custom function is visible i.e. inside Compose E-Mail window in case of one recipient was selected
- AFTER - [CUSTOMFUNCTION\_AFTER|functionname|param1|...|paramN|CUSTOMFUNCTION\_AFTER]
  - custom function is executed after click on button Send in Compose E-Mail window
  - the result of the custom function is not visible before sending email, i.e. you have to check outgoing emails to see result if you needed



Picture 6.4 Custom function groups

The “After custom functions” were developed due to fields “Recipient variables (To)”. The reason is that although email recipients are selected in ListView there is still possibility to add additional “To:” recipients within “Compose E-Mail window”. In case that you would like to use fields “Recipient variables (To)” in your email templates as parameters of custom function, the custom function has to be executed after click on button Send in “Compose E-Mail window”. The explanation is also seen in the following picture where “Mailing Country” from “Recipient variables (To)” is used in CUSTOMFUNCTION as well as CUSTOMFUNCTION\_AFTER. Wrong result of CUSTOMFUNCTION is shown in Compose E-Mail view and therefore also in final sent email.

**Important note: Always use CUSTOFUNCTION\_AFTER for fields “Recipient variables (To)”.**



Picture 6.5 Differences of before/after custom functions for “Recipient variables (To)” fields

From before/after custom function point of view, there is no difference in final sent email for other than “Recipient variables (To)” fields i.e. primary module fields, related modules fields etc. It means it is also correct if the CUSTOMFUNCTION\_AFTER is used for other fields. The only one disadvantage is that in Compose E-Mail window you cannot see the result of the custom function.

The screenshot shows the 'Compose E-Mail' window with 'Related modules' set to 'Contacts' and 'Mailing Country'. It illustrates three stages of email rendering:

- EMAIL Template:** Shows the raw code: `[CUSTOMFUNCTION|its4you_if|r-contactid-contacts-mailingcountry$|=Slovakia|Call us: +42151123456|Please contact us via email.|CUSTOMFUNCTION]` and `[CUSTOMFUNCTION_AFTER|its4you_if|r-contactid-contacts-mailingcountry$|=Slovakia|Call us: +42151123456|Please contact us via email.|CUSTOMFUNCTION_AFTER]`.
- Compose E-Mail view:** Shows the rendered text: `Example: Mailing Country is Slovakia.` followed by `Call us: +42151123456` and `[CUSTOMFUNCTION_AFTER|its4you_if|Slovakia|=Slovakia|Call us: +42151123456|Please contact us via email.|CUSTOMFUNCTION_AFTER]`.
- Final sent email:** Shows the final rendered text: `Example: Mailing Country is Slovakia.` followed by `Call us: +42151123456` and `Call us: +42151123456`.

Picture 6.6 Differences of before/after custom functions for “Non-Recipient variables (To)” fields

### 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 `>>` to add it to “Selected Members”
5. Click `<<` to remove selected member from “Selected Members”

The screenshot shows the 'Sharing' configuration interface. At the top, the 'Template owner' is set to 'Administrator'. A callout box points to a dropdown arrow with the text 'click here to change owner'. Below this, a 'Share' dropdown is highlighted with a red box and labeled '1.'. The interface is divided into two main sections: 'Available Entities & Members' and 'Selected Members'. In the 'Available Entities & Members' section, the 'Entity' is set to 'Groups' (highlighted with a red box and labeled '2.'). Below this, a list of members is shown: 'Group::Team Selling', 'Group::Marketing Group', and 'Group::Support Group'. The 'Group::Team Selling' member is highlighted with a red dashed box and labeled '3.'. In the 'Selected Members' section, the 'Group::Team Selling' member is listed. A red dashed box around the '>>' button is labeled '4.', and a red dashed box around the '<<' button is labeled '5.'. A 'Sharing' button is visible at the top right.

Picture 6.7 Sharing

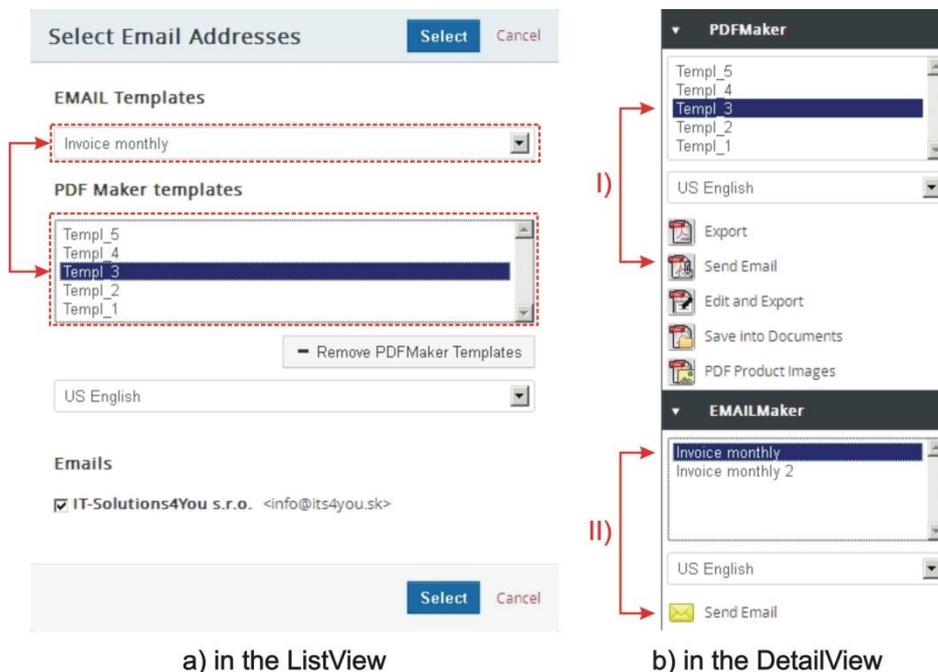
## 6.4 Support of the PDF Maker

The PDF Maker extension tool designed for vtiger CRM powerful and flexible tool which allows users of vtiger CRM to create own pdf templates. The PDF Maker and EMAIL Maker are supported each other. It means that:

- a) from ListView you can send emails based on EMAIL Maker templates including PDF files created by PDF Maker as attachment by simple selection of both templates in the Select EMAIL IDs window (see also chapters 5.1 and 5.2.3). Just click on button  in order to use PDF Maker template.
- b) from DetailView you can also use both EMAIL Maker and PDF Maker templates in one email. There are two approaches (the first approach is faster and simple)
  - I) Select the PDF Maker template in PDF Maker block and continue with  Send Email ; then in Compose E-Mail window click on  in order to use EMAIL Maker template for your email (see chapter 5.2.4).
  - II) In case you already created and stored PDF file please select the EMAIL Maker template from EMAIL Maker block and continue to Compose E-Mail window where you can attach PDF file by  (see chapter 5.2.3).

For details about PDF Maker tool please refer to

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



Picture 6.8 Support of the PDF Maker

## 6.5 Support of Workflow

You are able to create Workflow with sending email from EMAIL Maker. It is easy and comfortable to create a template and set Workflow.

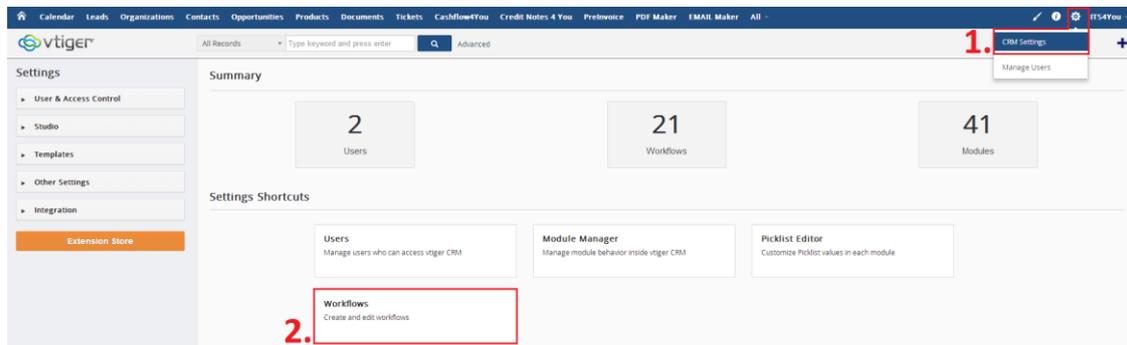
More info about Workflows you can find: <https://wiki.vtiger.com/vtiger6/index.php/Workflows>

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

**Workflow is providing by vtiger cron. Make sure that your cron is configured.  
More about standard vtiger cron you can read here:  
<https://wiki.vtiger.com/index.php/Cron>**

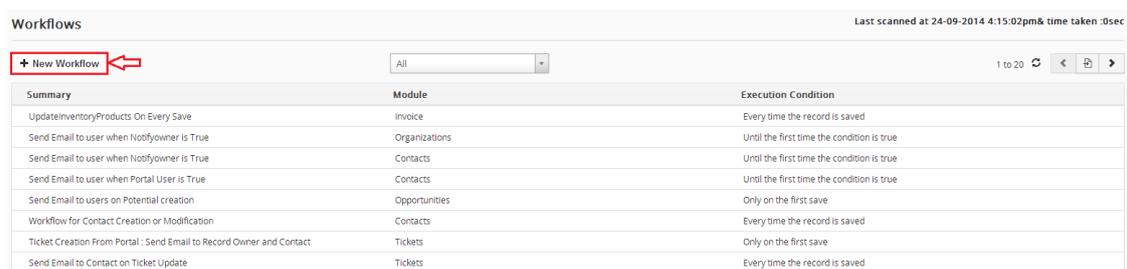
To create Workflow for EMAIL Maker please provide following steps:

- Go to the **CRM Settings -> Workflows**



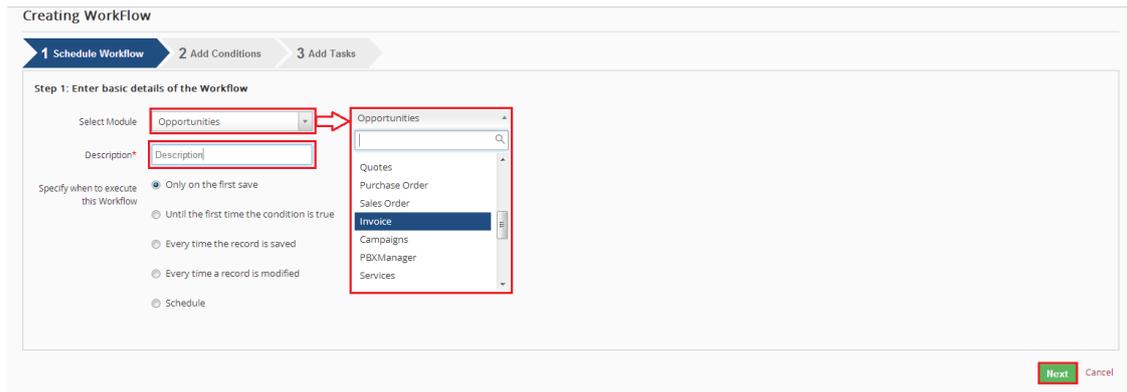
Picture 6.9 Create Workflow

- Click on **+ New Workflow** button



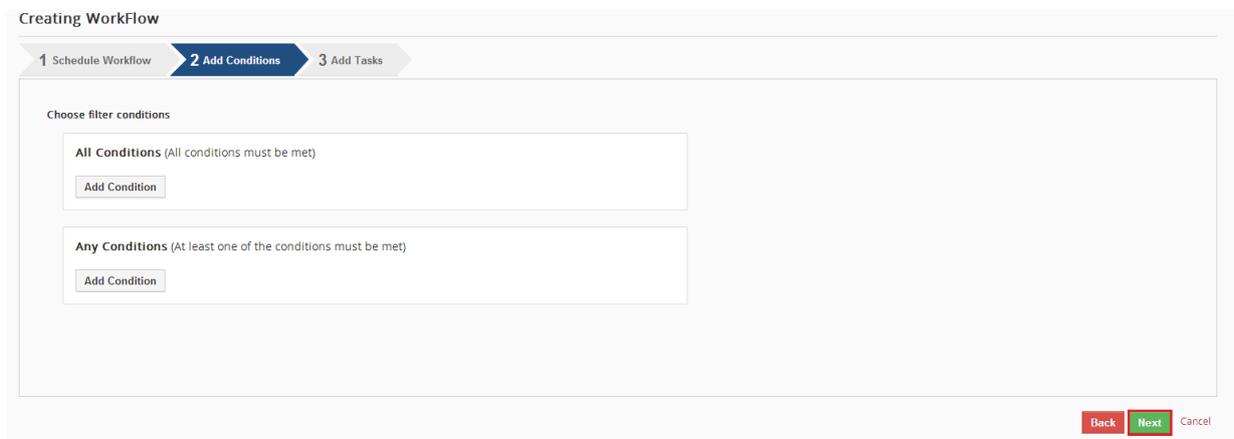
Picture 6.10 Add new Workflow

- Please select Module (you must have a template for chosen module), type Description and specify when to execute this Workflow



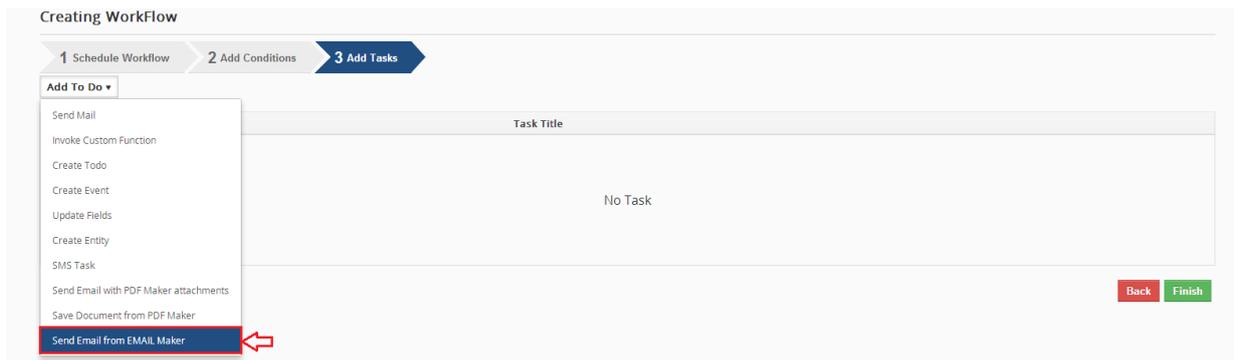
Picture 6.11 First step to set Workflow

- If you want, next window offers to you to set the conditionals for your Workflow



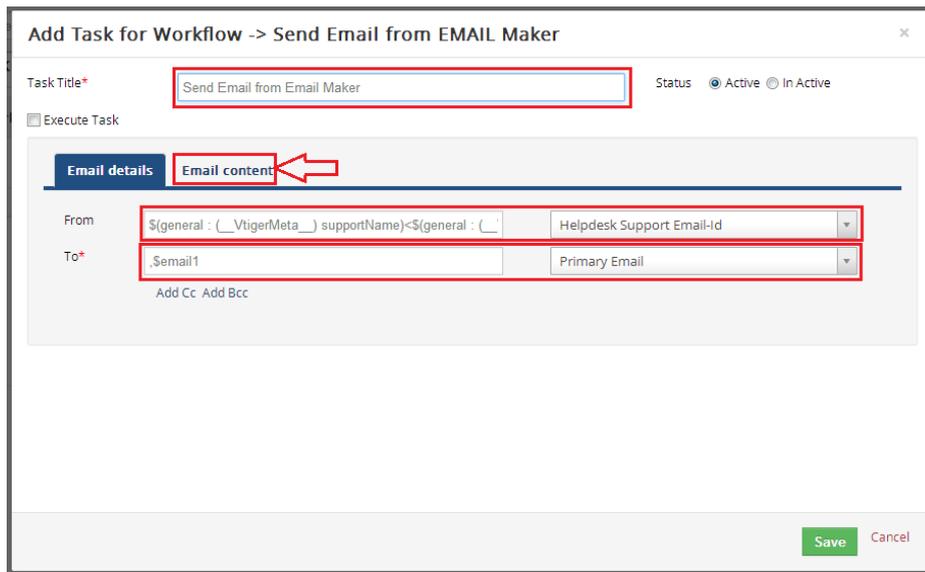
Picture 6.12 Set conditions of Workflow

- Now please click on **Add To Do** button and choose **Send Email from EMAIL Maker**



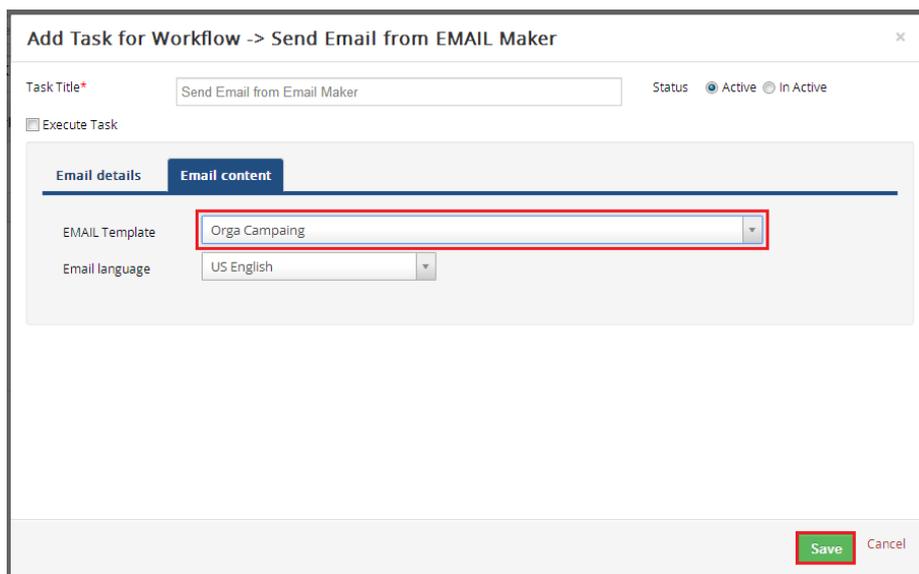
Picture 6.13 Add To Do

- In this window you are able to set your Email. Please type **Task Title**, you can enter **From** and you need to fill **To**. Then please click on **Email content**.



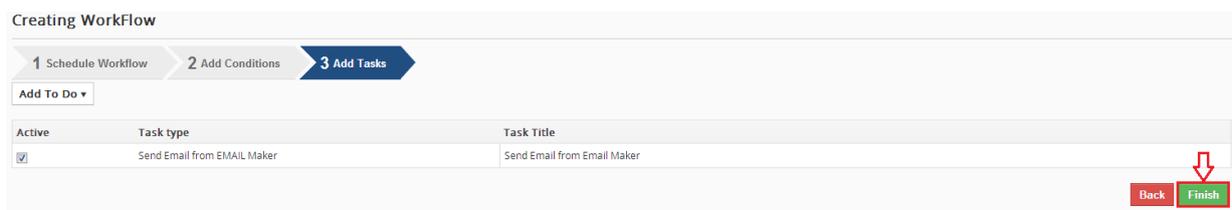
Picture 6.14 Add Task for Workflow

- Choose your template for chosen module and click on **Save** button



Picture 6.15 Choose your Template

- Finally, please click on **Finish** button to finalize your Workflow



Picture 6.16 Finalize of your Wokflow

- Here is your Workflow located

**Workflows** Last scanned at 24-09-2014 4:30:03pm & time taken :0sec

[+ New Workflow](#) All 21 to 24

Summary	Module	Execution Condition
Send Email to Organization on Ticket Update	Tickets	Every time the record is saved
Ticket Creation From CRM : Send Email to Organization	Tickets	Only on the first save
Ticket Creation From CRM : Send Email to Contact	Tickets	Only on the first save
Description	Organizations	Only on the first save

**Picture 6.17 Location of your Workflow**

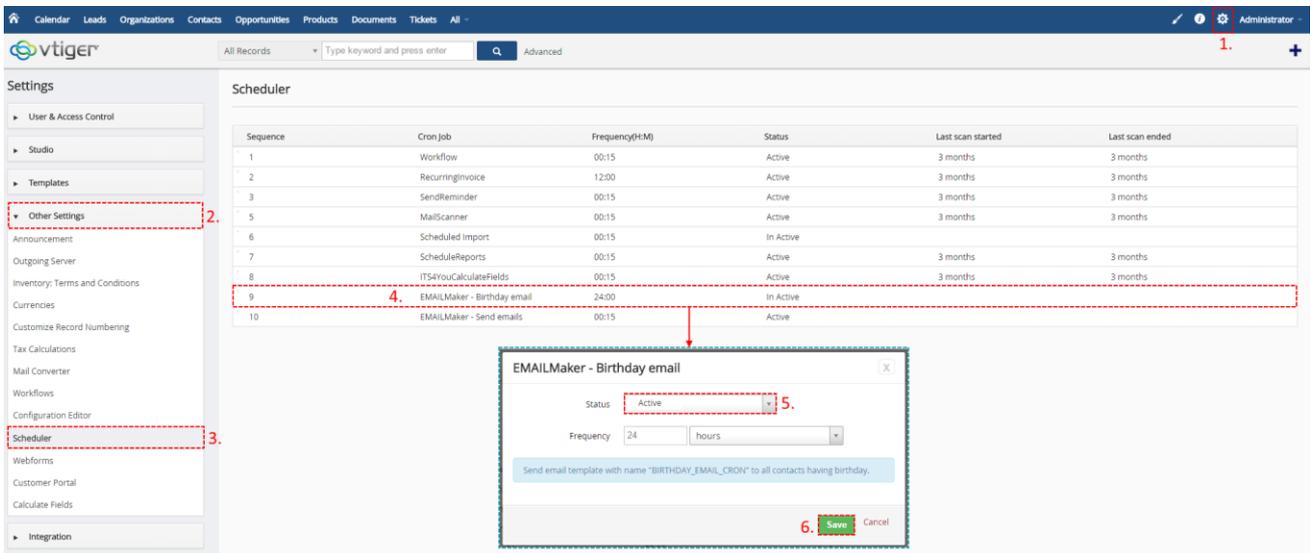
## 6.6 Birthday Email cron

Since Email Maker 600.6.5 version, there is Birthday Email cron available. It allows send congratulatory email to all contacts which is birthday today. For activate this functionality please edit template BIRTHDAY\_EMAIL\_CRON as you wish (Picture 6.18) and then activate Scheduler: CRM Settings-> Other Settings -> Scheduler and activate Email Maker – Birthday email (Picture 6.19).



#	Select	Template name	Module	Description	Status	Action
	<input type="checkbox"/>	Accounts	Organizations	Showing description after mouseover	Active	Edit   Duplicate
	<input type="checkbox"/>	Product	Products		Active	Edit   Duplicate
	<input type="checkbox"/>	BIRTHDAY_EMAIL_CRON	Contacts		Active	Edit   Duplicate
	<input type="checkbox"/>	paypal	Invoice		Active	Edit   Duplicate
	<input type="checkbox"/>	org tickets	Organizations		Active	Edit   Duplicate
	<input type="checkbox"/>	unsubscribe	Contacts		Active	Edit   Duplicate

Picture 6.18 BIRTHDAY\_EMAIL\_CRON template



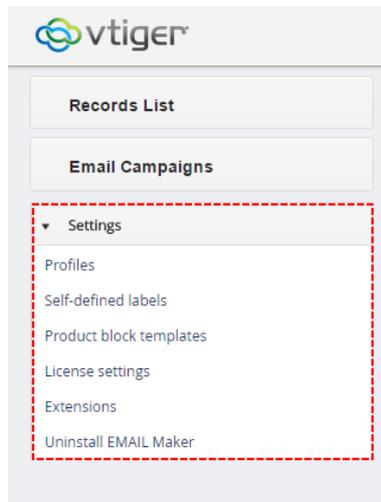
The screenshot shows the vtiger Scheduler configuration interface. On the left, the 'Settings' sidebar has 'Other Settings' highlighted with a red dashed box and the number '2'. The main 'Scheduler' table lists various cron jobs, with the 'EMAILMaker - Birthday email' job (Sequence 9) highlighted with a red dashed box and the number '4'. A modal window titled 'EMAILMaker - Birthday email' is open, showing the 'Status' dropdown menu set to 'Active' (5) and the 'Save' button highlighted with a red dashed box and the number '6'. The modal also shows the frequency set to '24 hours' and a description: 'Send email template with name "BIRTHDAY\_EMAIL\_CRON" to all contacts having birthday.'

Picture 6.19 Activate Birthday Email cron

## 7 Settings

The EMAIL Maker settings are accessible directly from the ListView and consist of (Picture 7.1):

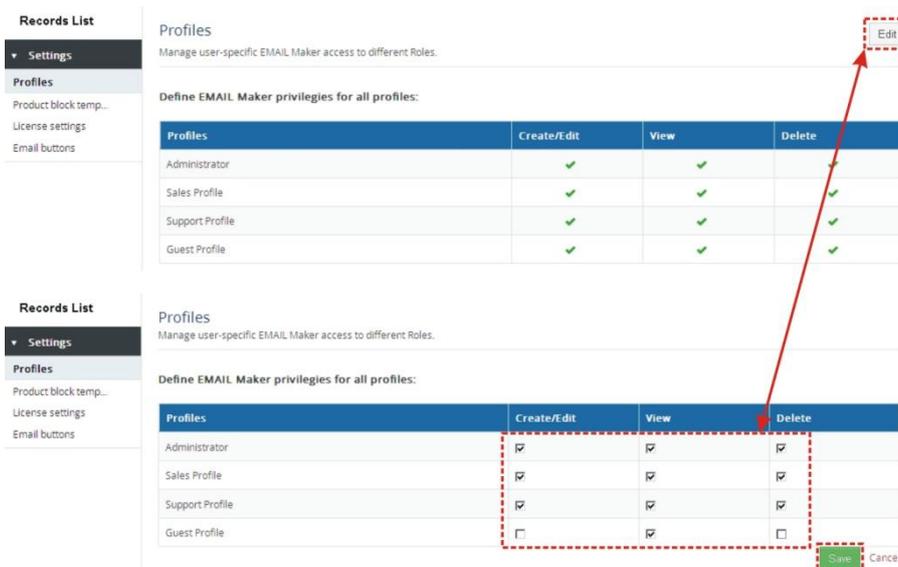
- [Profiles](#) – manage user-specific Email Maker access to different roles
- [Self-defined labels](#) – manage your own labels
- [Product block templates](#) – manage your own product block templates
- [License settings](#) – manage all settings related to your license
- [Extensions](#) – extensions for EMAIL Maker
- [Uninstall Email Maker](#) – remove EMAIL Maker completely from your vtiger



Picture 7.1 EMAIL Maker settings

### 7.1 Manage profiles

You may define EMAIL Maker privileges for all profiles. Click on  to edit privileges. You may select Create/Edit, View and Delete privileges. Click  to save changes.



Picture 7.2 Manage profiles

## 7.2 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 step:

1. Click on **+ Add** button.
2. Define label key C\_\*\*\*\*\* and value for your current language. Click on **Save** button.
3. In order to define values for other installed languages click on "Other values" link.
4. Define label value for additional languages and click on **Save** button.

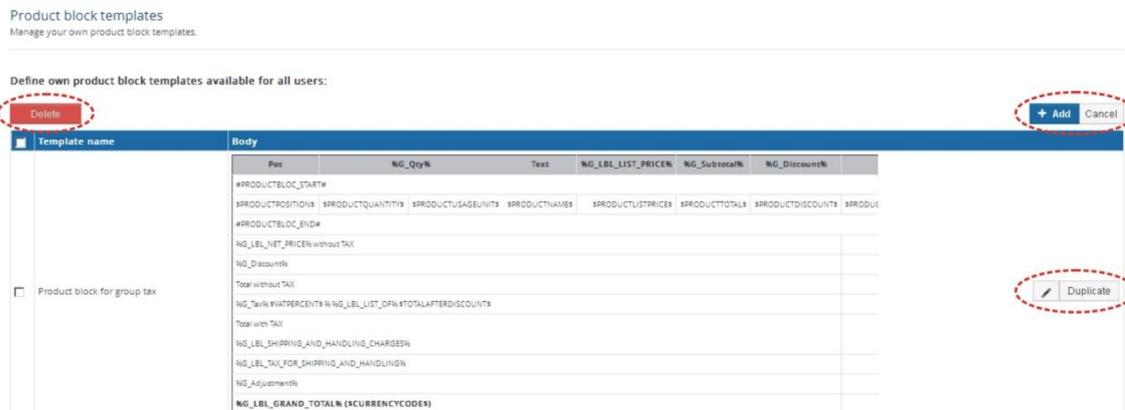
You can also find here **Delete** button which allows you to delete unnecessary labels.

The screenshot displays the 'Self-defined labels' management interface. At the top, it says 'Manage your own labels and make your PDF templates completely language independent.' Below this, a section titled 'Define own labels available for all users:' contains a table with columns for 'Label key' and 'Current language value (US English)'. The table lists a label with key 'C\_greeting\_1' and value 'Kind regards'. To the right of the table is a '+ Add' button (labeled '1.') and a 'Cancel' button. Below the table, there are two modal windows. The first, 'Add new custom label (US English)', has input fields for 'Label key' (containing 'C\_greeting\_1') and 'Label value' (containing 'Kind regards'), with a 'Save' button (labeled '2.') and a 'Cancel' button. The second modal, 'C\_greeting\_1', shows 'Other languages values' (labeled '3.') with input fields for 'ES Mexico', 'Swedish', 'DE Deutsch' (containing 'mit freundlichen Grüßen'), and 'SK Slovenčina', with a 'Save' button (labeled '4.') and a 'Cancel' button. A red arrow points from the '+ Add' button to the first modal, and another red arrow points from the 'Other values' link to the second modal.

### 7.3 How to define self-defined labels

## 7.3 Product block templates

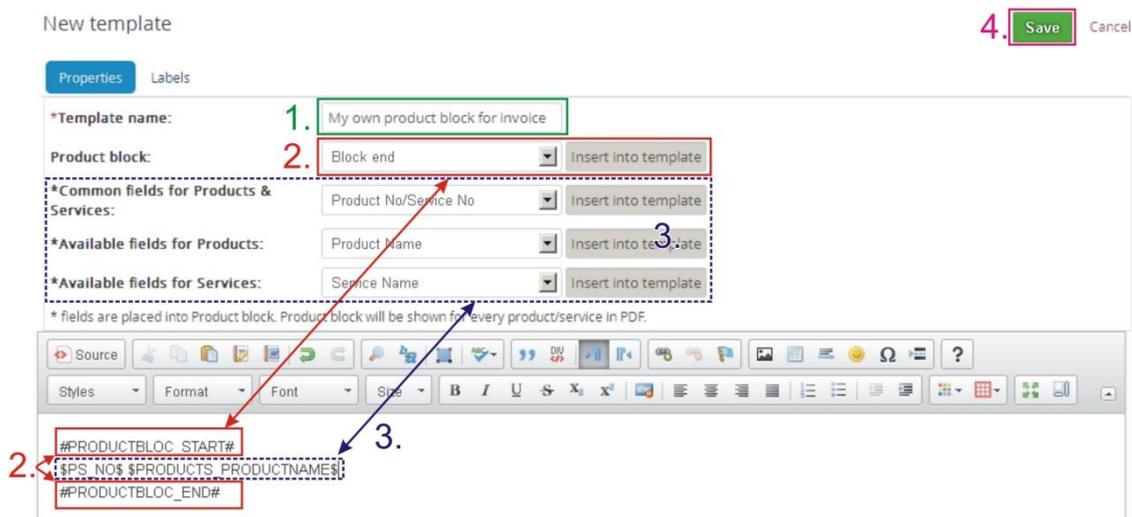
As can be seen in the picture below, you can simply add - **+ Add**, edit - , duplicate - **Duplicate** or delete - **Delete** product block templates. In order to delete product block template it is necessary to check the checkbox related to product block template firstly and then click on button **Delete**.



Picture 7.4 Product block templates management

When you click on button **+ Add** following window will appear on your screen (Picture 7.5). In order to create and save your own product block template please provide following steps:

1. Define product block template name.
2. 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.



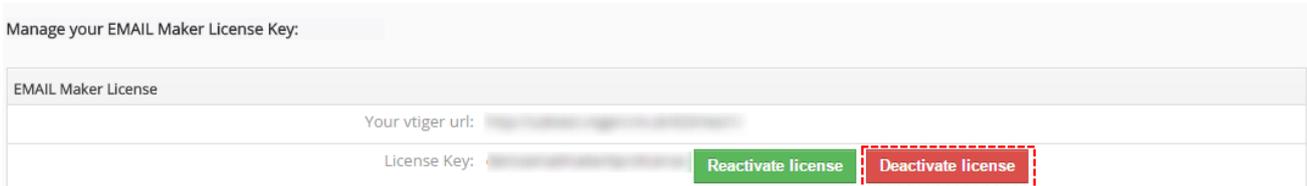
Picture 7.5 Create new product block template

## 7.4 License settings

### 7.4.1 Deactivate license

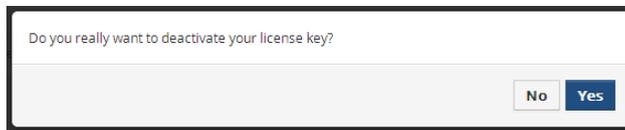
If you want to deactivate your license please provide following step:

1. Click on **Deactivate license** button



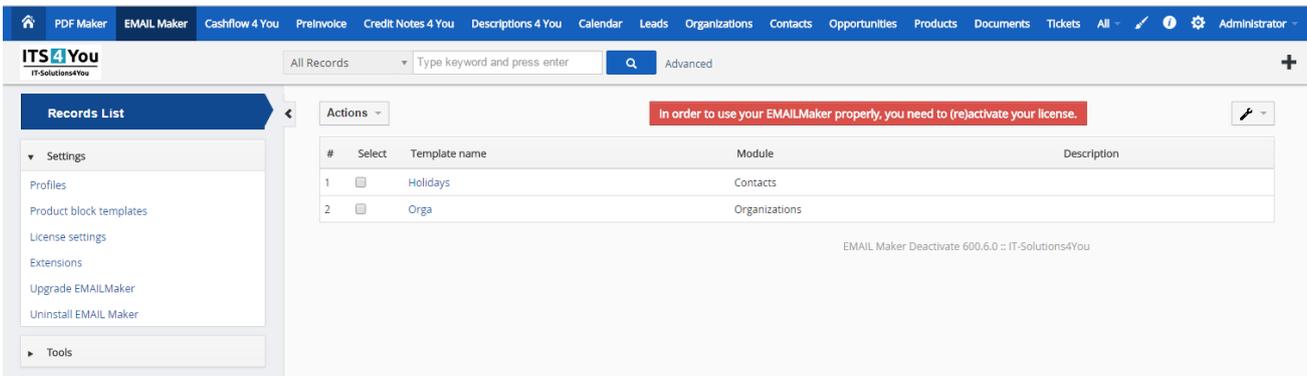
Picture 7.6 Deactivate Email Maker

2. Confirm deactivation using **Yes** button

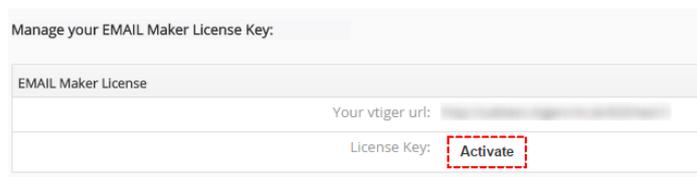


Picture 7.7 Deactivate Email Maker

After deactivation of license you can list or export your email templates, but you cannot add, edit, delete or use them. The Actions link to work with templates is not visible in the ListView and DetailView and EMAIL Maker block is not visible either. To use Email Maker again properly, you need to activate license key. Please, click on **In order to use your EMAILMaker properly, you need to (re)activate your license.** and provide activate step.



Picture 7.8 Deactivated Email Maker



Picture 7.9 Activate Email Maker

## 7.4.2 Reactivate license

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

1. Click on **Reactivate license**

Manage your EMAIL Maker License Key:

EMAIL Maker License	
Your vtiger url:	<input type="text"/>
License Key:	<input type="text"/> <b>Reactivate license</b> <b>Deactivate license</b>

Picture 7.10 Reactivate license

2. Confirm with **Save**

Reactivate license ✕

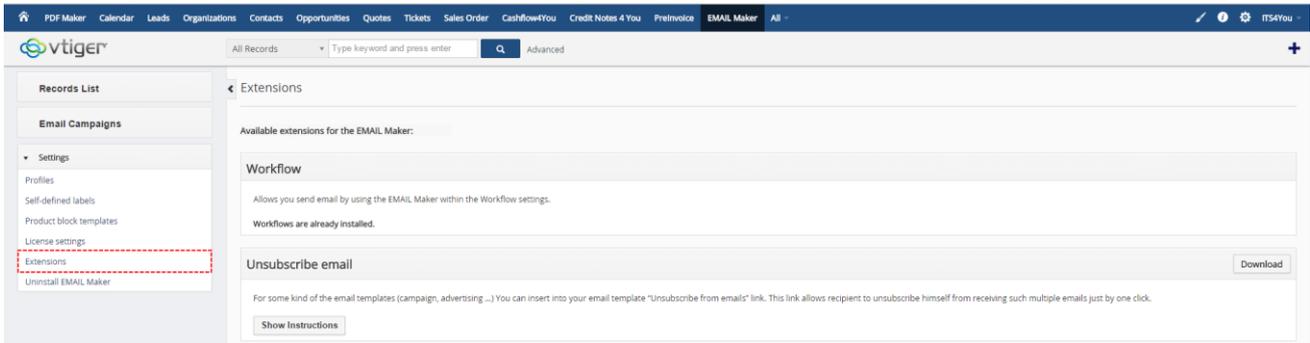
License Key

**Save** Cancel

Picture 7.11 Reactivate license

## 7.5 Extensions

Here you can find extensions for EMAIL Maker. There are Workflow and Unsubscribe email extensions now.



### 7.5.1 Workflow

Allows you send email by using EMAIL Maker within the Workflow settings. For more info please check chapter [Support of Workflow](#).

### 7.5.2 Unsubscribe email



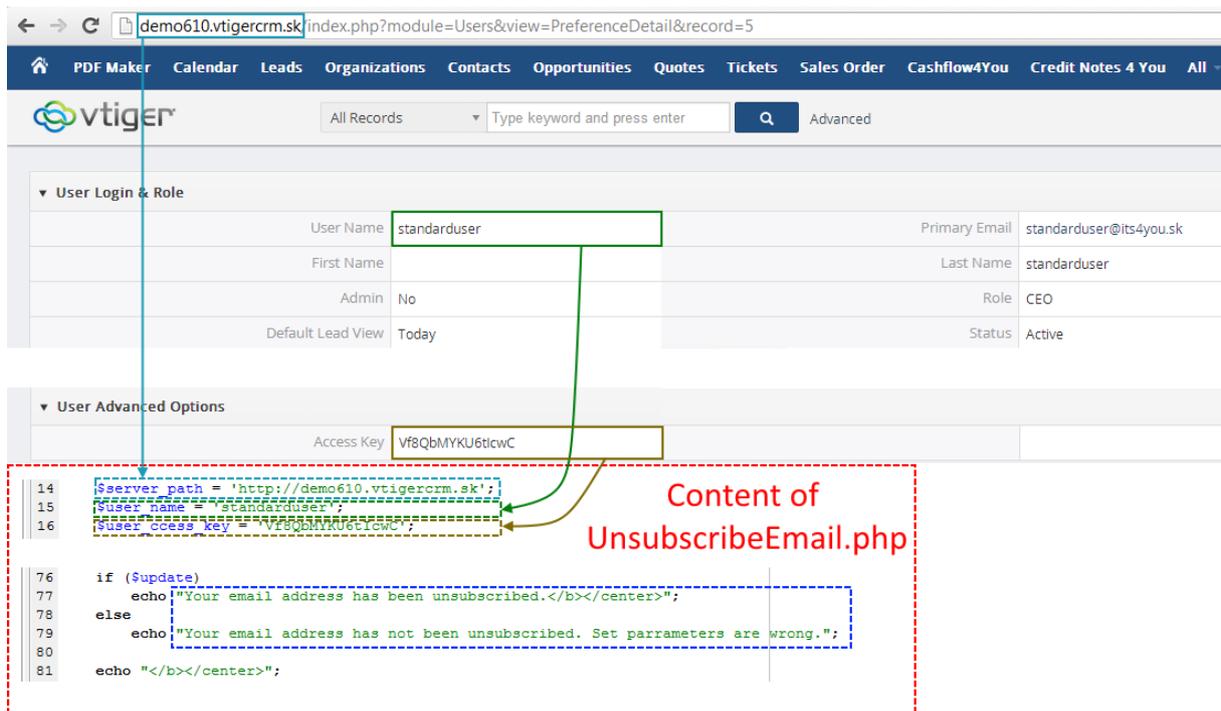
Picture 7.12 Unsubscribe email

You can use UnsubscibeEmail.php within your webpage or vice versa you can edit UnsubscibeEmail.php according to your needs. For info of define please click on [Show Instructions](#) button or provide following steps:

Inside UnsubscibeEmail.php is necessary to define (Picture 7.11):

- \$server\_path – this is your vtiger URL. If you are using “vtiger On Demand” you’ll find it in your browser’s address bar
- \$user\_name – this is the username you use to login to the vtiger CRM, see also “My Preferences”
- \$user\_access\_key – the access key can be retrieved by logging into your vtiger CRM account, going to “My Preferences”
- Sentence shown after successful unsubscribing (row 77)
- Sentence shown when email address has not been unsubscribed (row 79)

Note: Since Email Maker version **600.7.0** there is Unsubscribe email available also for **Leads** module.

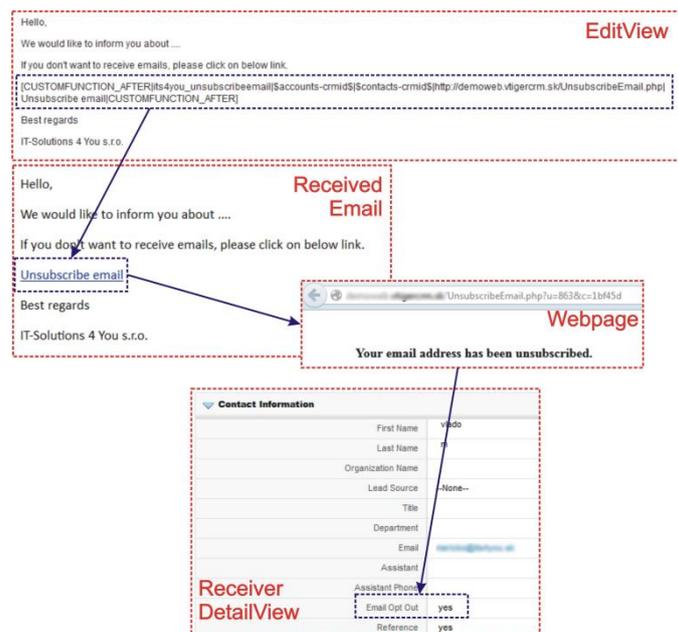


Picture 7.13 Edit of UnsubscribeEmail.php

The final step is to put custom function its4you\_unsubscribeemail into your template. There are just two parameters which you need to modify inside custom function [CUSTOMFUNCTION\_AFTER] its4you\_unsubscribeemail|\$accounts-crmid|\$contacts-crmid|\$URL\_ADDRESS|Unsubscribe email|CUSTOMFUNCTION\_AFTER]:

- parameter 3 – URL\_ADDRESS – url address of your unsubscribe email web page
- parameter 4 – Text of the unsubscribe link

Next picture shows process of unsubscribing contact which leads to change his “Email Opt Out” to “yes”.



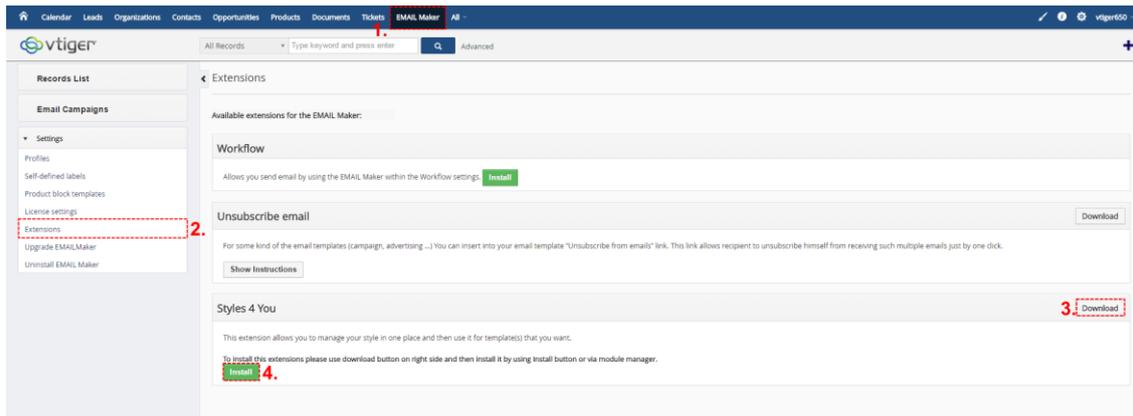
Picture 7.14 Process of unsubscribing from emails

### 7.5.3 Styles4You

Styles4You extension allows to you manage your CSS styles and assigned it to templates.

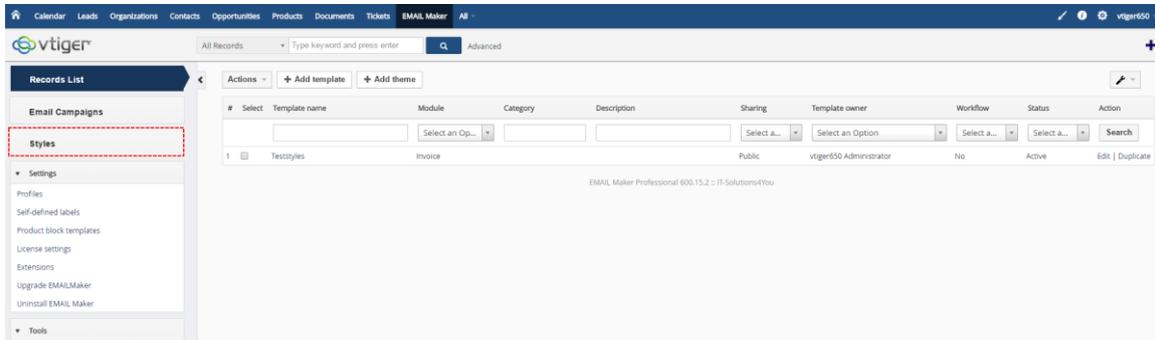
To install Styles4You please provide following steps:

1. Open EMAIL Maker
2. In Settings part choose Extensions
3. Download zip file by Download button
4. Install Styles4You via module manager or Install button



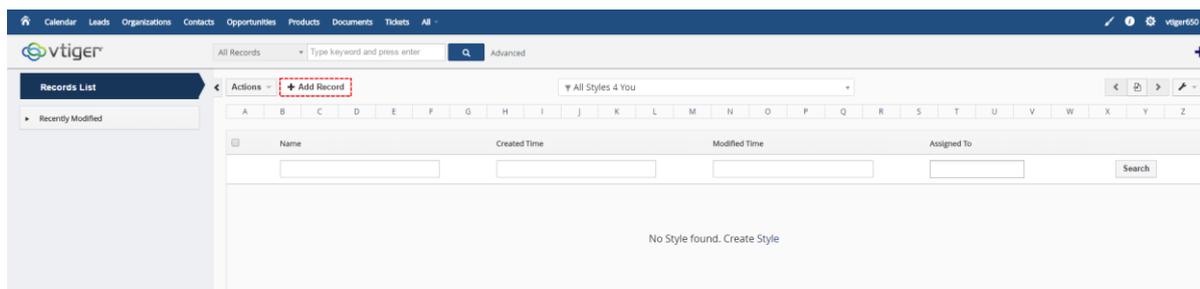
Picture 7.15 How to install Styles4You

Now Styles4You is installed into EMAIL Maker. To see your styles click on Styles in EMAIL Maker.



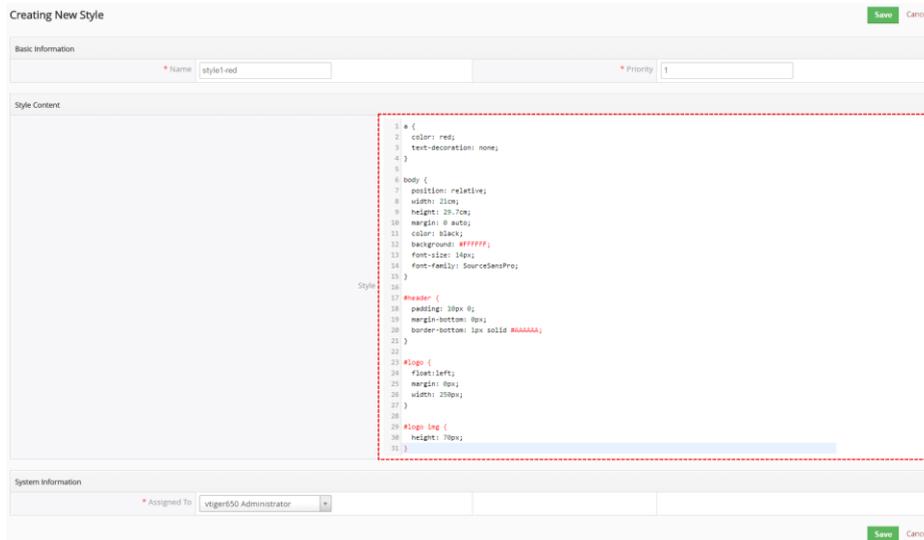
Picture 7.16 Styles4You

Here you can also add, edit and delete your styles. To add style please click on **+ Add Record** button.



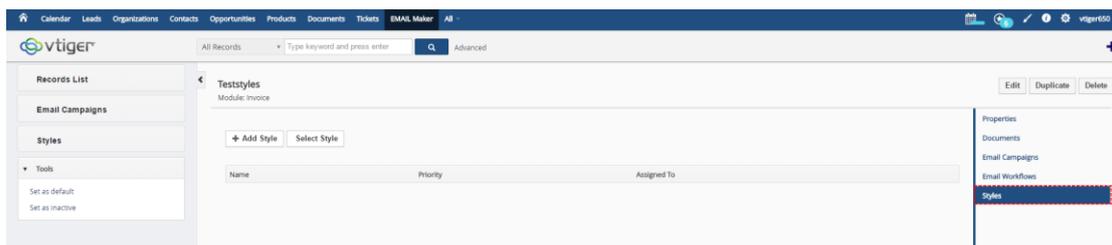
Picture 7.17 How to add new style

Fill name, choose priority and insert your style. Priority is used when you add more style to one template. EMAIL Maker takes CSS with smaller number.



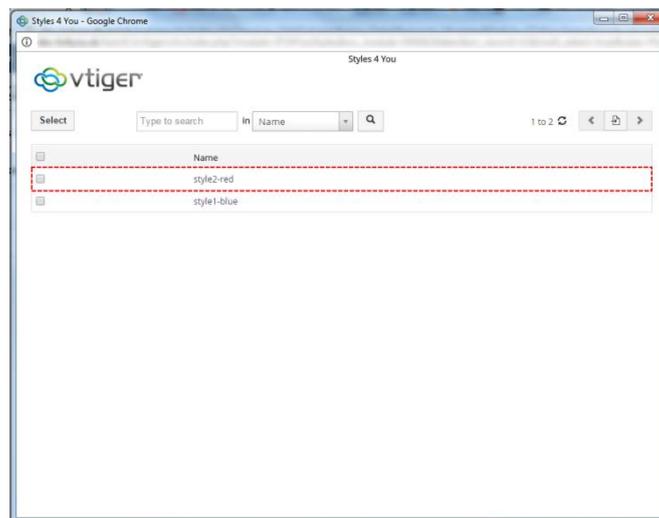
Picture 7.18 How to create Style4You

To add your styles to template please open your template and click on Styles.



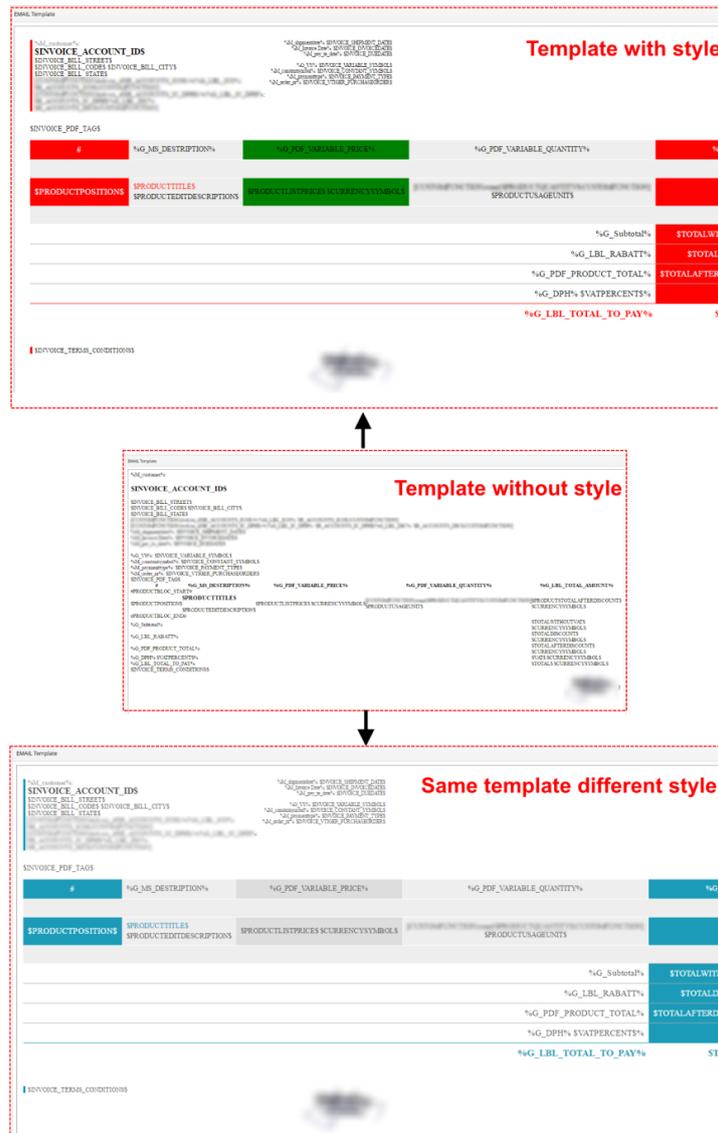
Picture 7.19 How to add style to template

Now, click on **Select Style** button to select style or **+ Add Style** to create new style.



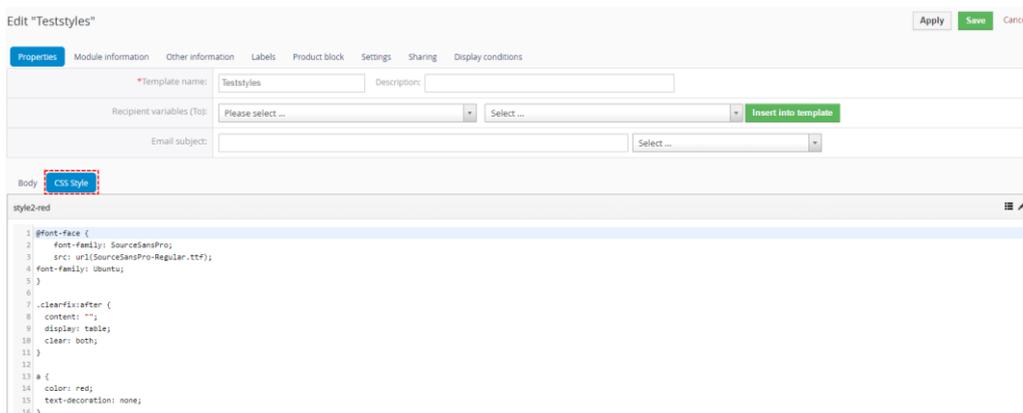
Picture 7.20 Select styles

Now, your style has been added to your template.



Picture 7.21 Styles4You

Style used in your template you can also find in EditView of template in CSS Style part.

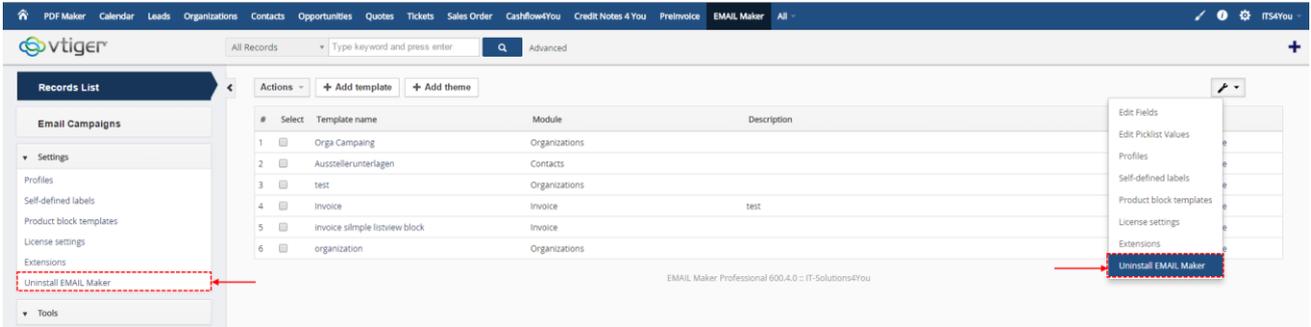


Picture 7.22 Style in EditView of template

## 7.6 Uninstall

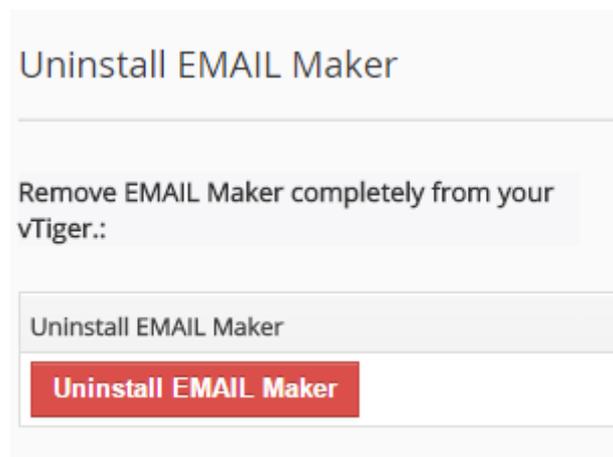
Since EMAIL Maker version 600.3.0 there is available option to remove EMAIL Maker from you vtiger. To uninstall please provide following steps:

- Go to the ListView of EMAIL Maker and choose option **Uninstall Email Maker**



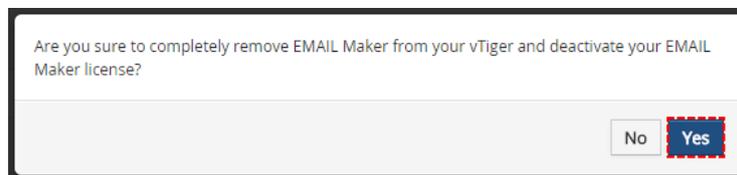
7.23 Uninstall EMAIL Maker – step 1

- Click on **Uninstall EMAIL Maker** button



7.24 Uninstall EMAIL Maker – step 2

- Confirm uninstall with **Yes** button



7.25 Uninstall EMAIL Maker – step 3

Now, EMAIL Maker is removed from your vTiger and your license is deactivated. To use EMAIL Maker again you need to provide installation and validation steps (see chapter How to install EMAIL Maker).

## Change log of Email Maker

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October 2016: **600.15.0 – 600.15.2**

- [Styles4You](#)
  - new variable “Modified by User”, “Created by User” available (Other information)
  - minor improvements and bug fixes
- 

July 2016: **600.14.0 – 600.14.1**

- Sharing and Owner in ListView
  - Seaching in ListView
  - Category of template shown also in Workflow
  - minor improvements
  - bug fixes
- 

June 2016: **600.12.0 – 600.13.0**

- Email choosing change to multiselectbox before compose window
  - Increased size of Subject
  - French translation of Email Maker
  - Subject and Workflow in ListView (Picture 3.1 EMAIL Maker ListView)
  - **Recipient List of Email Campaign.** (Picture 5.17 Recipients List)
  - minor improvements and bug fixes
  - Email Campaigns tab and Email Workflows tab in DetailView of template (Picture 3.2 DetailView)
  - **Preview of Email Campaign** (Picture 5.14 Summary of Email Campaign/Preview/Send)
- 

April 2016: **600.11.3**

- “Select all records” issue fixed
- 

April 2016: **600.11.0 – 600.11.2**

- Template owner is who creates the Template
  - Showing fields from MultiCompany 4 You
  - Fixed Issue of fields from *Available fields for Products and Available fields for Services*
  - Fixed showing Currency Fields
  - **Option to create separate Blocks for Products and for Services**
  - Fixed Issue with Pop-Up Window
  - Faster loading Edit and Create Email Template pages
- 

October – December 2015: **600.10.1 – 600.10.4**

- Minor improvements
  - Translation of Multipicklist values
  - Option to add **Site\_URL** into template by using **\$siteurl\$** variable
  - Birthday email cron and Status Sent fixed
  - Fixed workflow with attachment
  - VAT BLOCK shown also with 0%
- 

August 2015: **600.10.0**

- Option to use conditions to display template (Display conditions)
- 

July 2015: **600.9.0**

- minor improvements and bug fixes
  - correction of translation
  - fixed privileges for Detail/Edit/Delete
-

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June 2015: **600.8.0**

- compatibility with Vtiger 6.3

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May 2015: **600.7.0**

- bug fixes
- Unsubscribe email available for Leads

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April 2015: **600.6.4 – 600.6.6**

- Bug fixes
- Showing description after mouseover (Picture 3.5)
- Birthday Email Cron (chapter Birthday Email cron)

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20<sup>th</sup> March 2015: **600.6.0**

- Available option to add custom Company Info into template
- New way of licensing (chapter License settings)
- Improved option to add to,cc,bcc recipients (chapter Recipients To, Cc, Bcc)
- Bug fixes
- Compatibility with Vtiger 6.2

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19<sup>th</sup> December 2014: **600.5.1**

- upgrade option

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December 2014: **600.5.0**

- fixed sorting in related blocks
- license activation in vtiger 6.1 fixed

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October 2014: **600.4.0**

- Unsubscribe function (chapter Unsubscribe email)
- Bug fixes

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November 2014: **600.3.0**

- available option to Uninstall EMAIL Maker (chapter Uninstall)

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30<sup>th</sup> September 2014: **600.2.0**

- Email Maker Professional version available
  - Option to create Email Campaign (EMAIL Maker Pro)
  - Support of Workflow for Email Maker (EMAIL Maker Pro)

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6<sup>th</sup> June 2014: **600.1.11**

- minor improvements and bug fixes

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April - June 2014: **600.1.2 – 600.1.10**

- minor improvements and bug fixes related to movement of the EMAIL Maker to vtiger 6

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22<sup>th</sup> April 2014: **600.1.0**

- first initiate version for vtiger 6 based on main functionalities of EMAIL Maker for vtiger 5.x

## Change log of Manual for Email Maker

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November 2016: manual based on EMAIL Maker version **600.15.2**

- new chapter: Styles4You
- updated chapters: ListView, DetailView

June 2016: manual based on EMAIL Maker version **600.13.0**

- updated chapters: Email Campaigns
- updated pictures: Picture 3.1 EMAIL Maker ListView, Picture 3.2 DetailView, Picture 4.28 Default template visibility, Picture 5.1 How to send email
- new pictures: Picture 5.17 Recipients List

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April 2016: manual based on EMAIL Maker version **600.11.2**

- new chapters: 4.5.2 Create separate Block for Products and for Services
- updated chapters: 5.3 Email Campaigns, 6.5 Support of Workflow

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August 2015: manual based on EMAIL Maker version **600.10.0**

- updated chapters: Properties, Unsubscribe email, Email Campaigns
- new chapters: Birthday Email cron, Display conditions

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20<sup>th</sup> March 2015:

- updated chapters: Sending emails, How to install EMAIL Maker, License settings

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19<sup>th</sup> December 2014: manual based on EMAIL Maker version **600.5.1**

- updated chapter: How to upgrade EMAIL Maker

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November 2014: manual based on EMAIL Maker version **600.4.0**

- new chapters: [7.2 Self-defined labels](#), [7.5 Extensions](#), [7.6 Uninstall](#)

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30<sup>th</sup> September 2014: **600.2.0**

- new chapters: What's new? [5.3 Email Campaigns](#), [6.5 Support of Workflow](#)

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18<sup>th</sup> June 2014: based on **600.1.11**

- first initiate version for vtiger 6