

## PDF MAKER FOR VTIGER CRM

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### Introduction

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

The PDF Maker benefits are:

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

### What's new?

Here is the list of the main new features, improvements and layouts provided since PDF Maker Professional version **600.17.0** available for Vtiger CRM version 6:

- Template for Header/Footer

Since version **600.18.0** the main new features are:

- Watermark functionality
- Lock PDF file with Password

Please refer also to chapters **Change log of PDF Maker** and **Change log of Manual for PDF Maker** at the end of this manual.

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## License agreement

- The PDF Maker License will be referred to as "The license" in the remainder of this text.
- This irrevocable, perpetual license covers all versions 2.xx of PDF Maker.
- This license gives the holder right to install PDF Maker on ONE productive Vtiger CRM installation and ONE develop Vtiger CRM installation for unlimited users.
- The license holder is allowed to make modifications to the PDF Maker sources but in no event will the original copyright holders of this library be held responsible for action or actions resulting from any modifications of the source.
- The license holder is not required to publicize or otherwise make available any software used in conjunction with PDF Maker.
- The license holder may not re-distribute the library or versions thereof to third party without prior written permission of the copyright holder.
- PDF Maker License does not allow the library to be redistributed as part of another product.
- The license may be transferred to another Vtiger CRM installation only with prior written permission.
- The wording of this license may change without notice for future versions of PDF Maker.

It is strongly required to deactivate the license before moving of installation of PDF 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 PDF Maker and your license key as well.

## Private policy

During installation it is necessary to exchange following information:

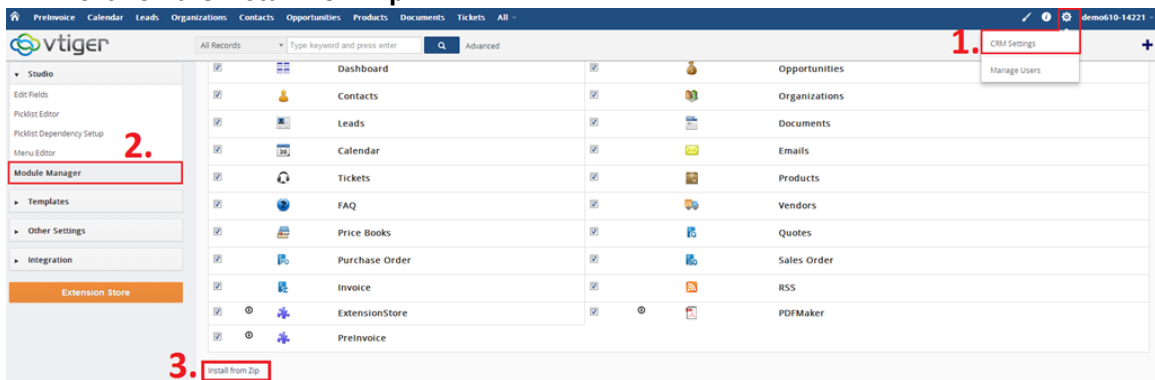
- vtigerCRM version (e.g. 6.0.0)
- PDF Maker version (e.g. 600.2.0)
- Date and time
- Domain in md5 coding format (e.g. 916b25c201a77a6721003c0030977f3b)
- Action provided by you (INSTALL, REACTIVATE, DEACTIVATE)

# 1 How to install PDF Maker

Please provide following steps in order to install PDF Maker:

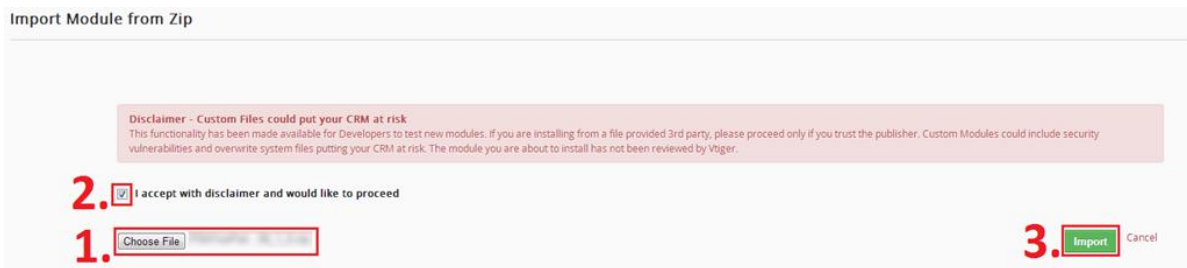
It is highly recommended to finish the installation without any interruption. For successful installation we need to exchange information (see previous chapter for details).

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



Picture 1.1 Installation of PDF Maker – step 1

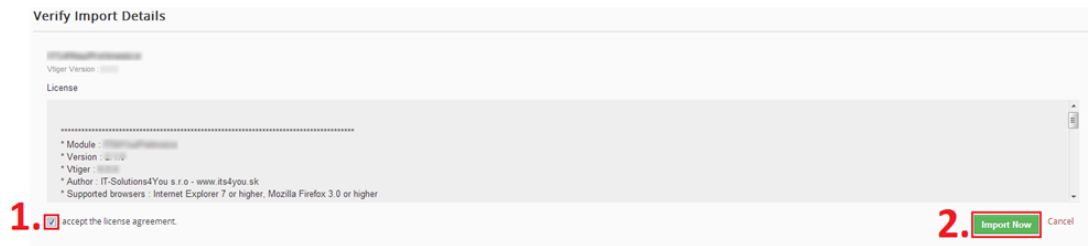
2. Select the .zip (package) file that you downloaded from our shop. Please check that you accepted the disclaimer and would like to proceed. Click on the **Import** button.



Picture 1.2 Installation of PDF Maker – step 2

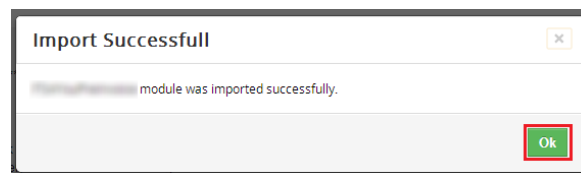
**Note:** If you have after this step error message: **Sorry! Attempt to access restricted file**. Please check if folder **test/vlib** has correct write permission for browser (apache, www-data).

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



Picture 1.3 Installation of PDF Maker – step 3

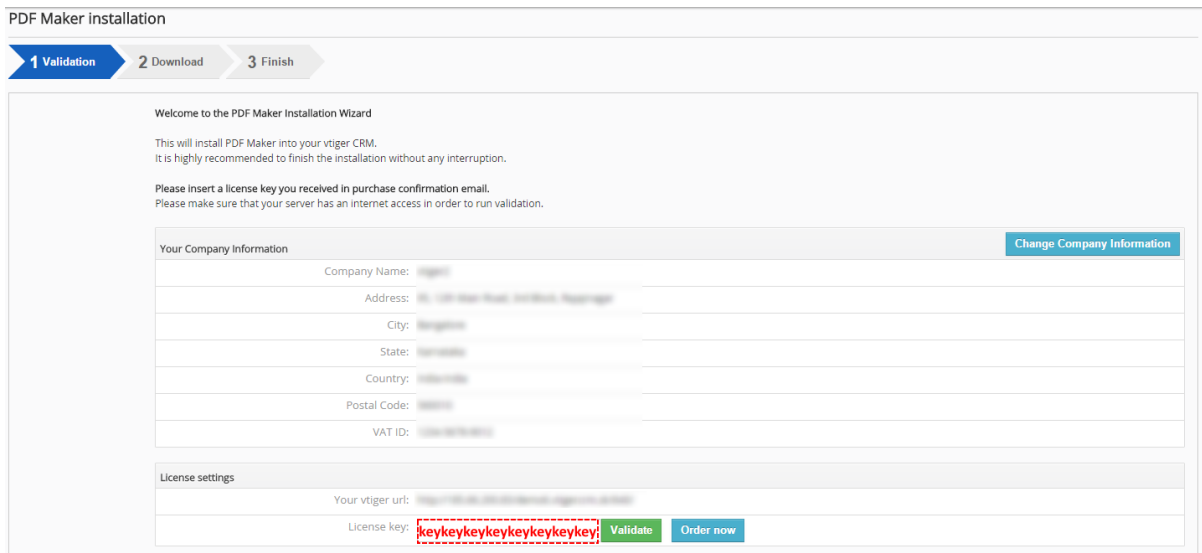
4. Click on **Ok** button to complete the module import.



Picture 1.4 Installation of PDF Maker – step 4

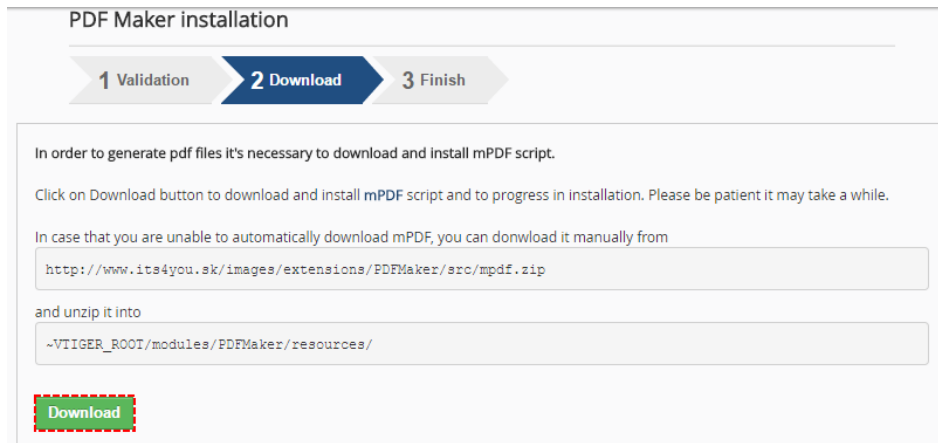
In order to finish installation, please provide following validation steps.

1. PDF Maker Validation Step. Please 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 **Change Company Information** on button.



Picture 1.5 Validation step 1

2. PDF Maker Download. Click on **Download** button to download and install mPDF script.



Picture 1.6 Validation step 2

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



Picture 1.7 Validation step 3 – Finish installation

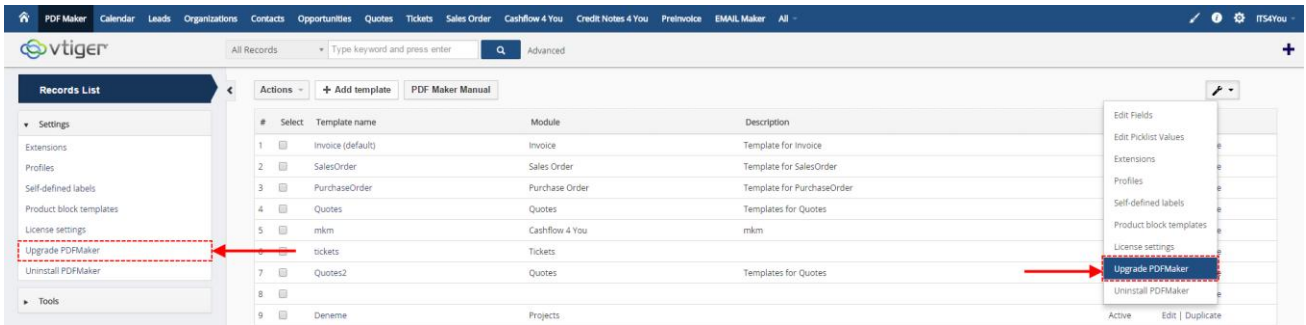


## 1.1 How to upgrade PDF Maker

The upgrade of the PDF Maker is initiated in the same way as PDF maker installation or click on *Upgrade* link in ListView of PDF Maker (Picture 1.8). 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 1.10 you will be notified that

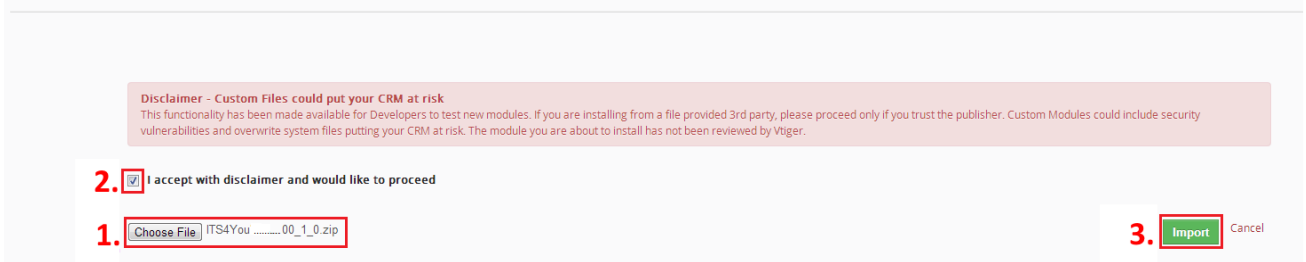
**Update Now**

the PDF Maker module already exists. The upgrade will start immediately when you **Ok** click on the button. After upgrade the notification about successful upgrade is shown and click on button.



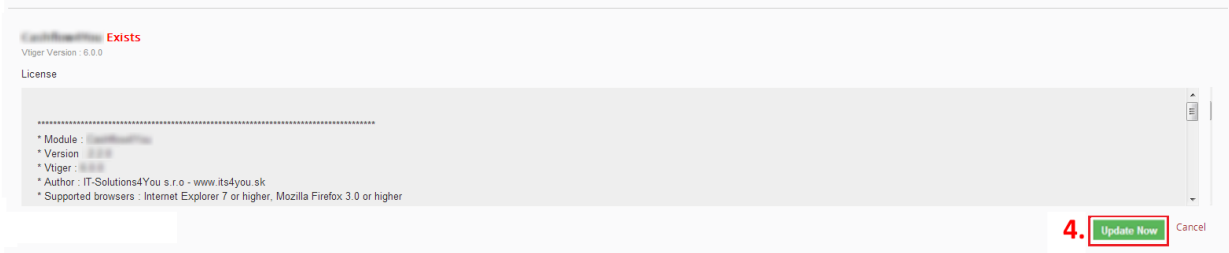
Picture 1.8 Upgrade of the PDF Maker

### Import Module from Zip



Picture 1.9 Upgrade of the PDF Maker

### Verify Import Details



Picture 1.10 Upgrade of the PDF Maker

## 2 Quick start

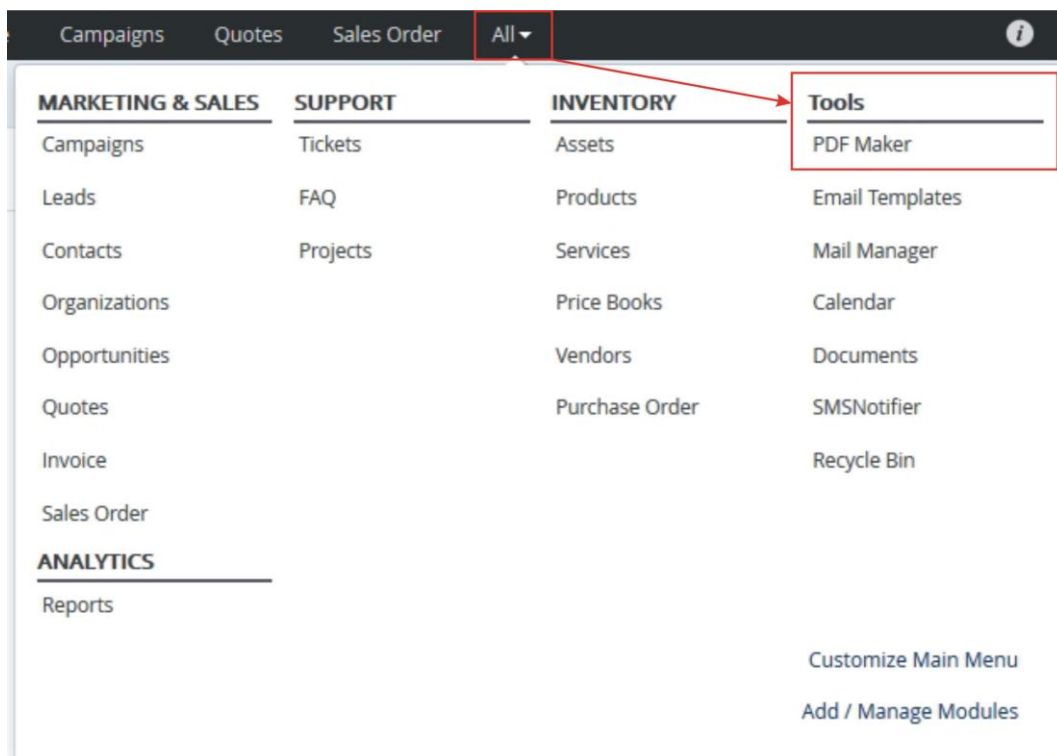
In the following section you can find short description how to create your first simple PDF template for Vtiger CRM using PDF Maker.

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

### 2.1 Create the simple PDF template

In order to create the PDF template you have to start the PDF Maker tool which can be after installation located under the *All* and *Tools* as seen below on the picture.

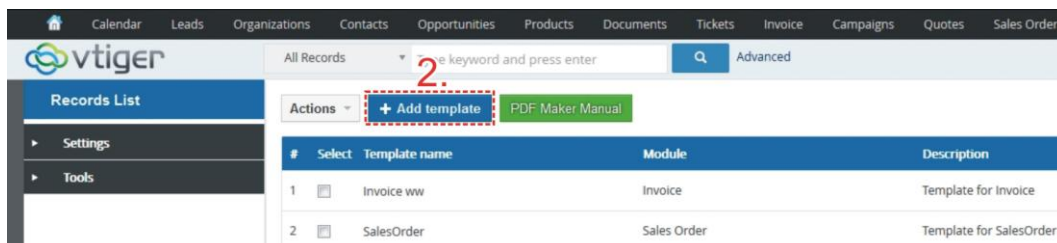
1. In Vtiger CRM menu (Picture 2.1), please go to *All* -> *Tools* and click on PDF Maker.



Picture 2.1 Start PDF Maker

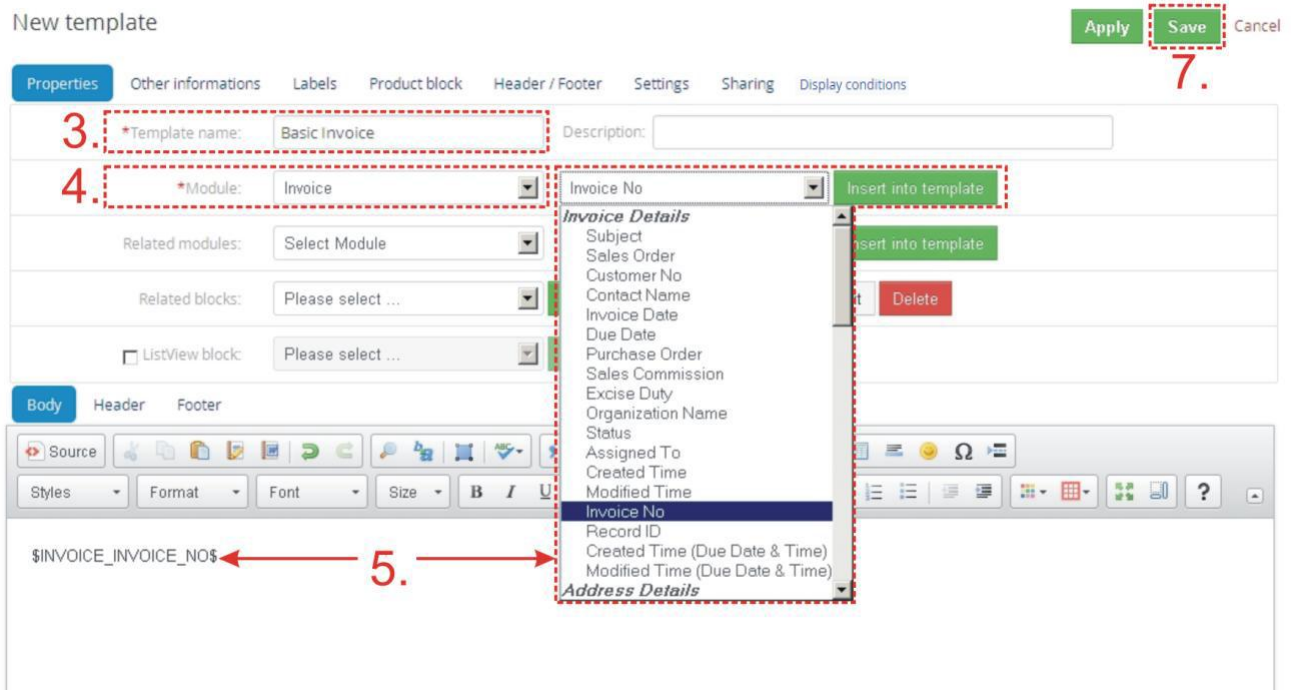
2. The screenshot below (Picture 2.2) shows PDF Maker ListView. You can click to add new template.

[+ Add template](#)



Picture 2.2 Add template in the ListView

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



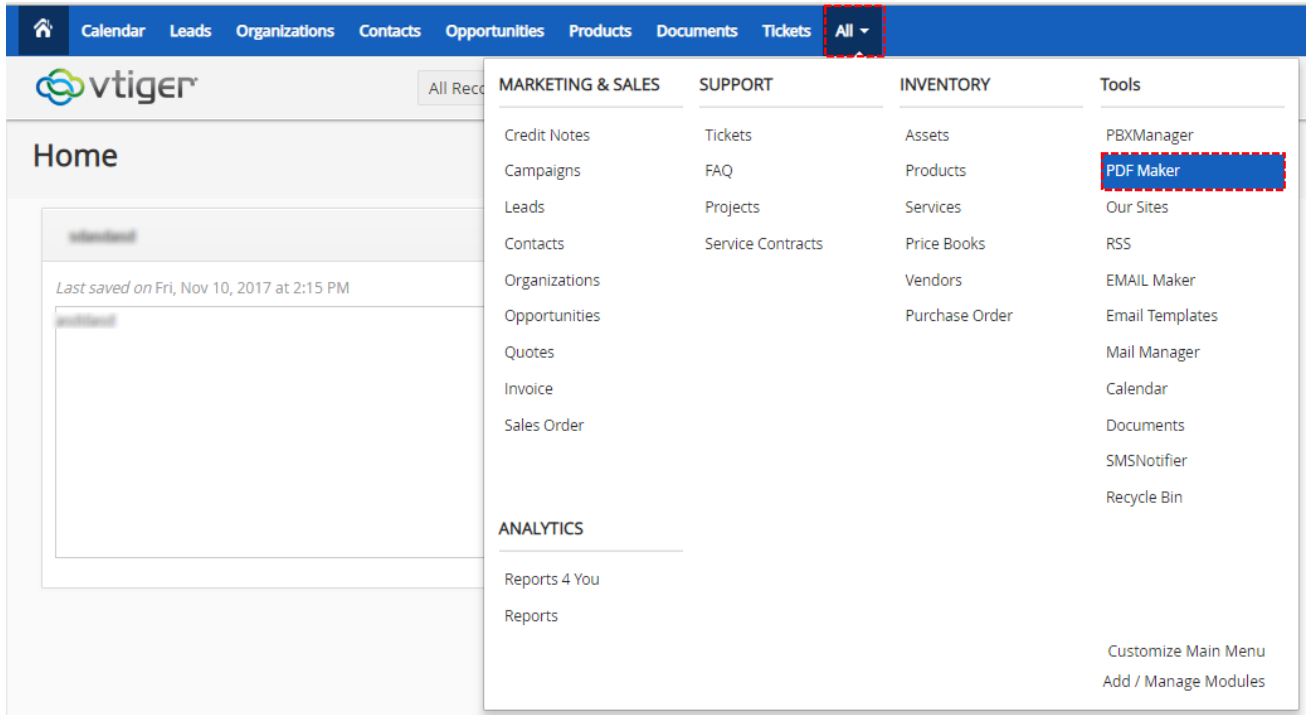
Picture 2.3 Creation of the template in EditView

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

## 2.2 Create the simple Header/Footer template

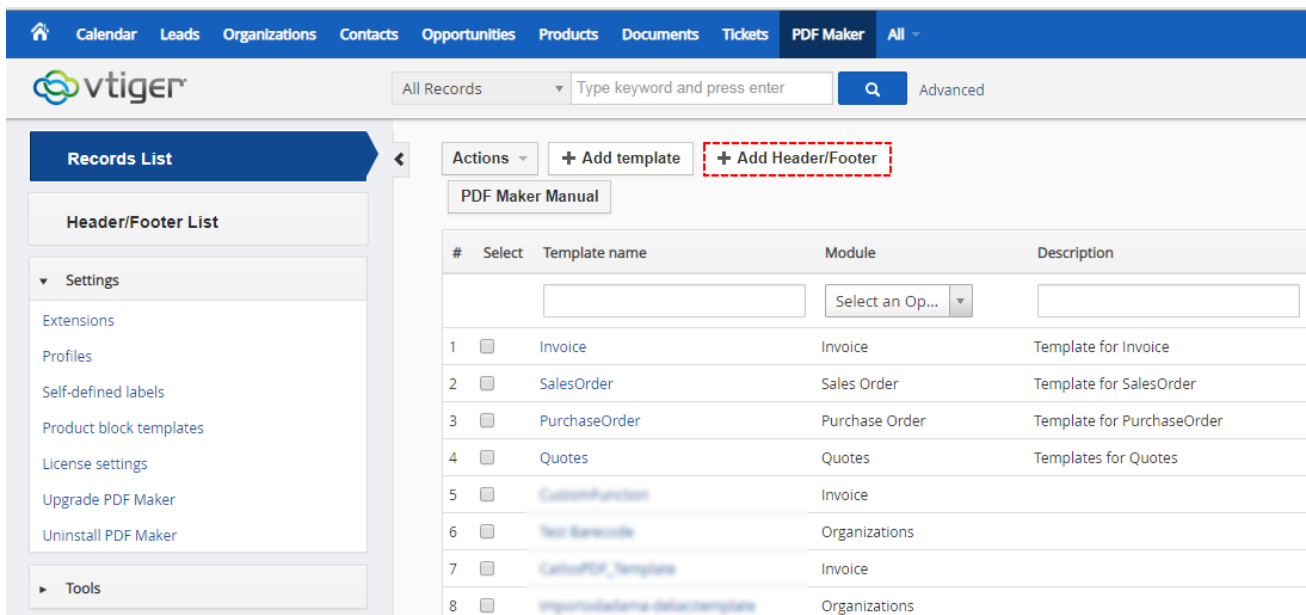
In order to edit/create the Header/Footer template you have to start the PDF Maker tool which can be after installation located under the *All* and *Tools* as seen below on the picture.

1. In Vtiger CRM menu, please go to *All* -> *Tools* and click on PDF Maker.



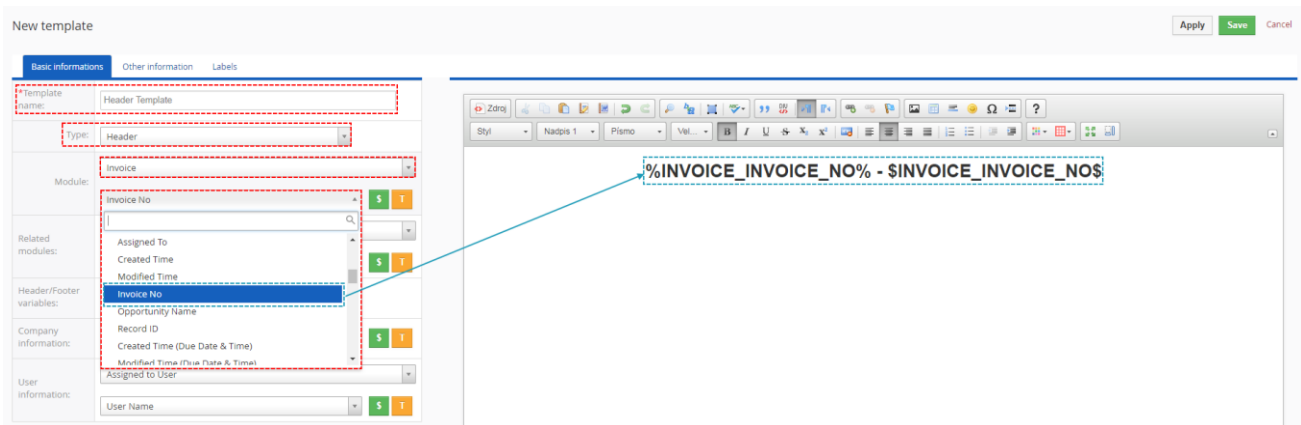
Picture 2.4 Location of PDF Maker module – PDF Maker Vtiger 6

2. The screenshot below shows PDF Maker ListView. You can click on **+ Add Header/Footer** button to add new Header/Footer template.



Picture 2.5 Add Header/Footer template – PDF Maker Vtiger 6

3. In the EditView, go to Properties tab and define the template name.



Picture 2.6 Creation of the Header/Footer template in EditView – PDF Maker Vtiger 6

4. Select the type of template from the list (i.e. Header).
5. Choose the module from the list (i.e. Invoice) if you want.
6. Choose one of the all available fields from the selected module (i.e. Invoice No – if module is selected) or create universal template without module's variables and click on the **\$** button to insert it into template.
7. Repeat the steps 6. and 7. to finish your Header/Footer template according to your needs.
8. Finally click on the **Save** button.

For more info about creation of your Header/Footer templates, click [here](#).

How to use your Header/Footer template in PDF template you can read [here](#).


## 2.3 Generate the PDF file

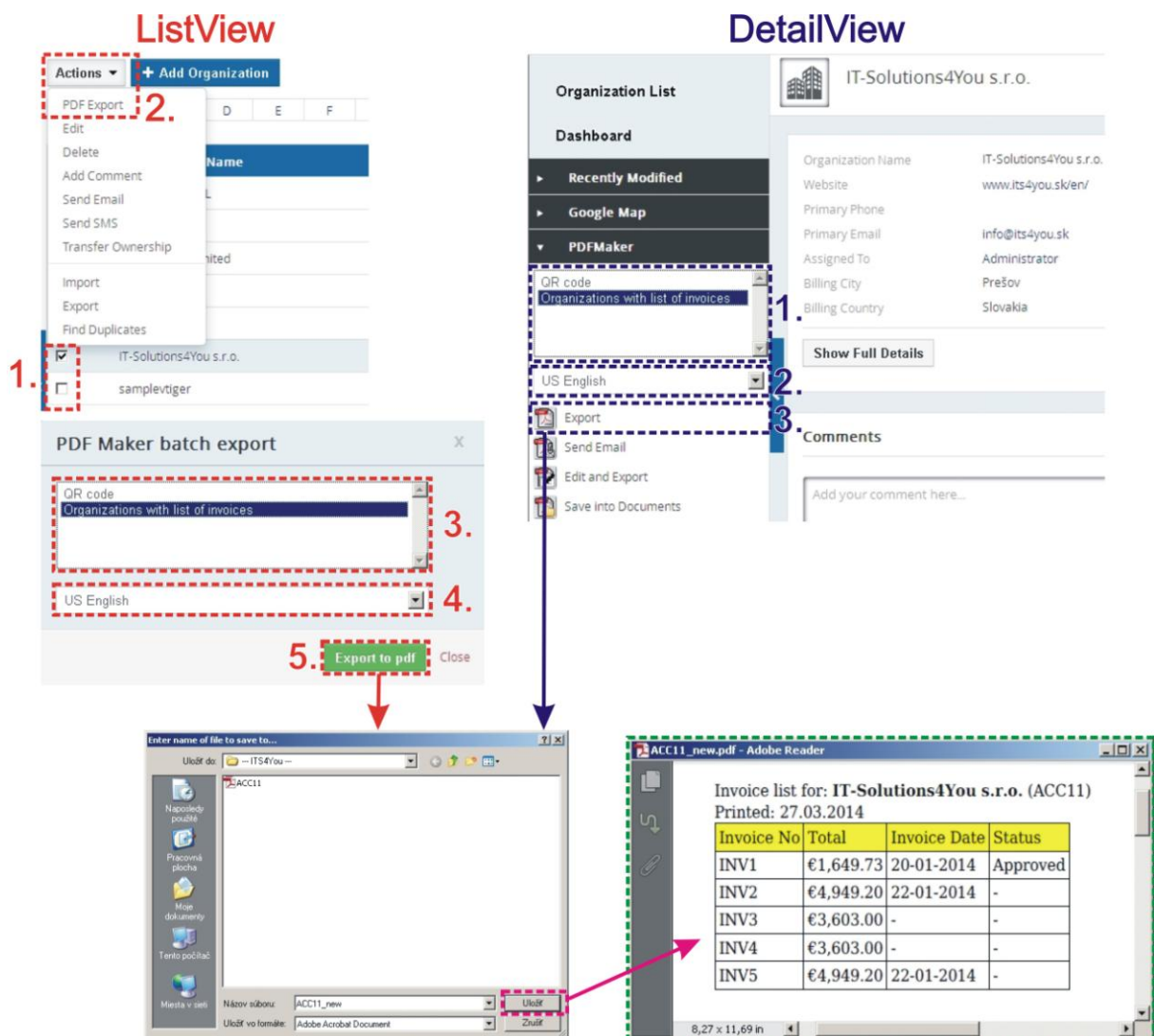
In the following picture you can see how to generate PDF file in the ListView or DetailView using PDF Maker:

### ListView

1. Select record(s).
2. Click on button  and select "PDF Export".
3. Select the PDF template(s).
4. Select the language.
5. Click on button .
6. Dialog box will appear on the screen depending on your web browser. The PDF file is generated.

### DetailView

1. Select the PDF template(s).
2. Select the language.
3. Click on link  Export.
4. Dialog box will appear on the screen depending on your web browser. The PDF file is generated.



Picture 2.7 Generate the PDF file

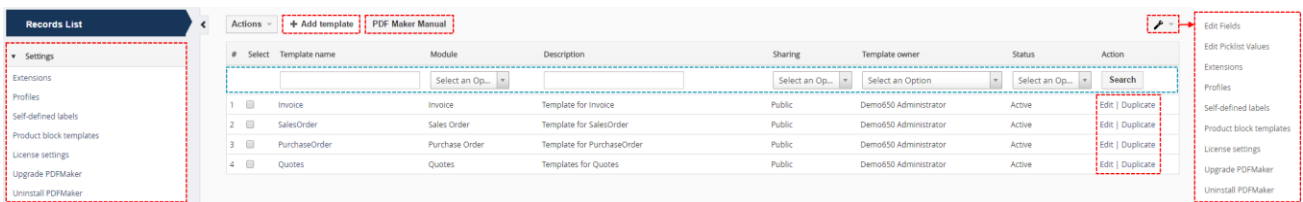
### 3 Work area

The Work Area of PDF Maker consists of:

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

#### 3.1 ListView

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



Picture 3.1 ListView

The main part of the PDF Maker ListView consists of list of the PDF templates, which gives you information about a template name, a primary module, a short description, sharing, template owners and its status. Also you can use search option to filtering templates. In the list you can also select one or more templates and consequently delete or export the selected group of templates using button **Actions**. It is possible to use links in the "Action" column in order to edit or duplicate already created PDF templates directly from the ListView. *Settings* section contains of tabs: Extensions, Profiles, Self-defined labels, Product block templates, License setting, Upgrade and Uninstall PDF Maker.

There is group of buttons in the above part:

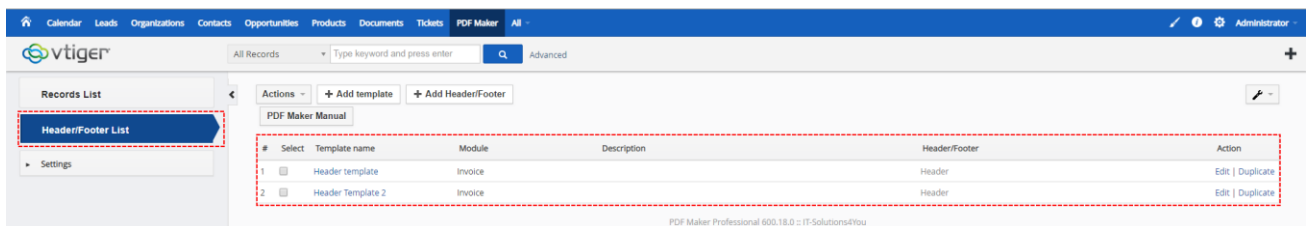
- **Actions** contains actions for delete, import and export of the PDF templates
- **+ Add template** is used to add new template
- **PDF Maker Manual** is link to this document

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

### 3.2 ListView of Header/Footer

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

The main part of the PDF Maker ListView consists of list of the Header/Footer templates, which gives you information about a template name, a primary module, a short description and type of template. In the list you can also select one or more templates and consequently delete or export the selected group of templates using button **Actions**. As shown in the picture, it is also possible to edit or duplicate already created PDF templates directly from the ListView.



Picture 3.2 ListView of Headers/Footers – PDF Maker Vtiger 6

There is group of buttons in the above part:

**Actions** contains actions for delete, import and export of the Header/Footer templates

**+ Add template** is used to add new PDF template

**+ Add Header/Footer** is used to add new Header/Footer template

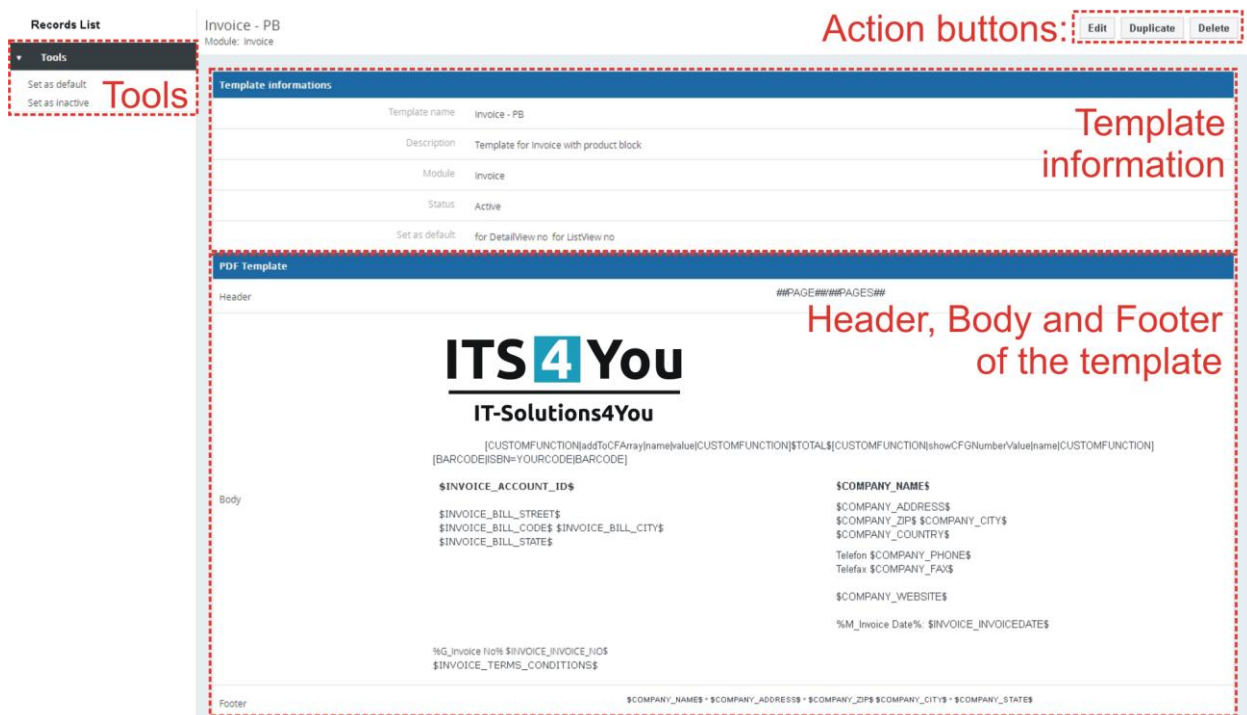
**Settings** is settings part of PDF Maker. You can find here Extensions, Profiles, Self-defined labels, Product block templates, License setting, Upgrade PDF Maker and option to Uninstall PDF Make



### 3.3 DetailView

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

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

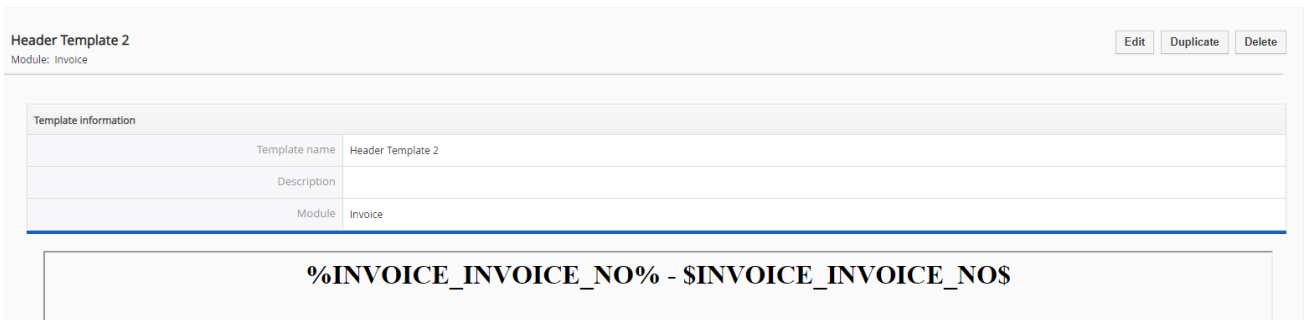


Picture 3.3 DetailView

### 3.4 DetailView of Header/Footer

From ListView of Header/Footer you can open any Header/Footer template in DetailView. The DetailView consists of:

- Template information part – gives basic information of the template
- Header/footer template itself which consist of Header, Body and Footer part.
- Group of action buttons
  - [Edit] – switch to EditView and start editing
  - [Delete] – allows you to delete template
  - [Duplicate] – create duplicate of the template and start editing



Header Template 2  
Module: Invoice

Edit Duplicate Delete

Template Information	
Template name	Header Template 2
Description	
Module	Invoice

**%INVOICE\_INVOICE\_NO% - \$INVOICE\_INVOICE\_NOS**

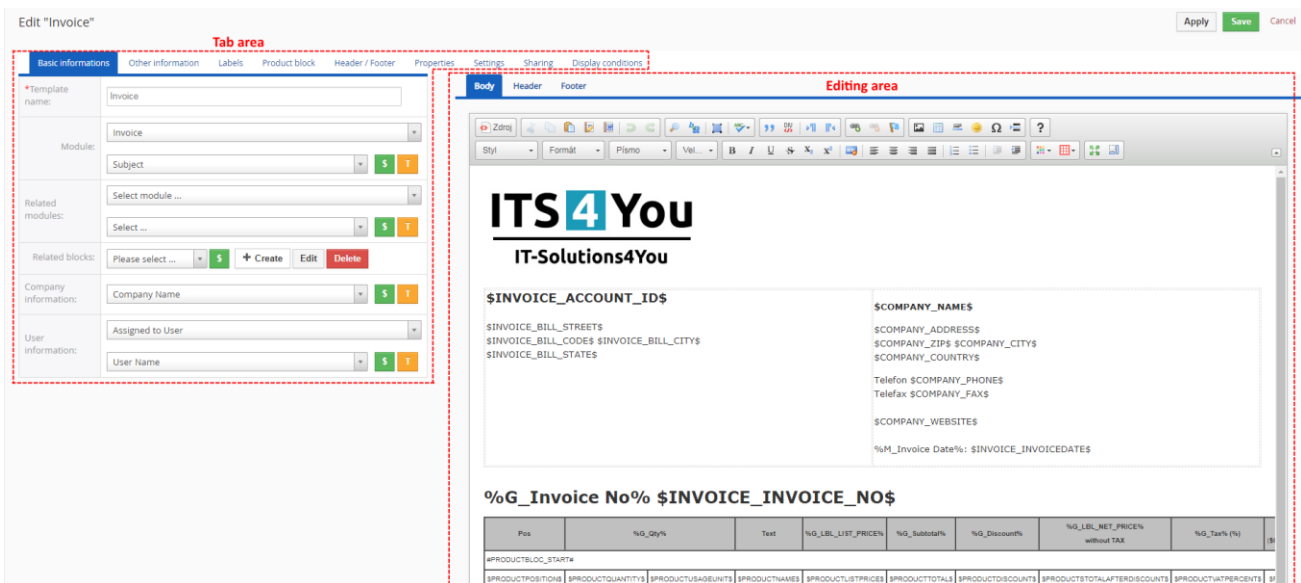
Picture 3.4 DetailView of Headers/Footers – PDF Maker Vtiger 6

### 3.5 EditView

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

- Tabs area – allows user to insert into template different kind of values, fields, labels and to set up properties, sharing and other common settings of the PDF template. Tabs area consists of following tabs, which are described in the following subchapters:
  - Basic informations
  - Other informations
  - Labels
  - Product block
  - Header/Footer
  - Properties
  - 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 inside three tabs (Body, Header and Footer) in the above part of Editing area. Please refer to the chapter 4 for the details related to editing.

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



Picture 3.5 EditView of PDF Maker for Vtiger 6

### 3.5.1 Basic informations

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

Picture 3.6 Basic information tab

Name	Description
Template name	The name of the template. It is mandatory field for template creation.
Module	Template will be based and available only for one selected module and its fields.
Related modules	If exists related module(s) to selected module, it is possible here to select and use fields from any related modules.
Related blocks	Related block(s) to selected module, with buttons to insert, create, edit or delete related block. For details please refer to chapter 4.6.
Company information	Comprises group of fields from Company information.
User information	Assigned to User, Logged in User, Modified by User and Created by User information

Table 3-1 Basic information tab

### 3.5.2 Other information

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

Picture 3.7 Other information tab


Name	Description
ListView block	In case you need PDF file which consists of the several records and some related fields you can use ListView block.
Terms and Conditions	Terms and Conditions.
Current date	Current date in several formats.
Barcodes, QR code	Several types of Barcodes and QR code. For details please refer to chapter 4.3. and attached document under  .
Custom functions	Custom functions. For details please refer to chapter 6.4.

Table 3-2 Other informations tab

### 3.5.3 Labels

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

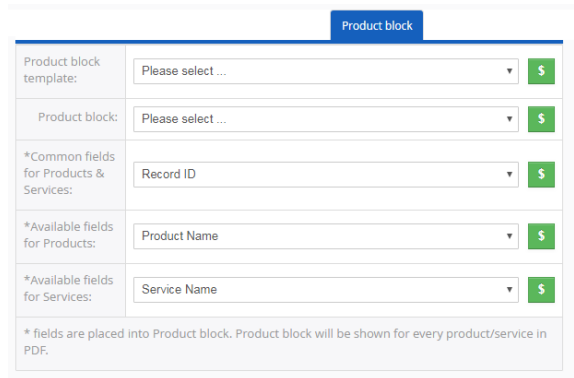
Picture 3.8 Labels tab

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

Table 3-3 Labels tab

### 3.5.4 Product block

The product block tab allows inserting product block template and editing it. In addition, you can create your own product block using “Block start”, “Block end” and fields for products and services. How to insert, edit and create product block is described in chapter 4.5.



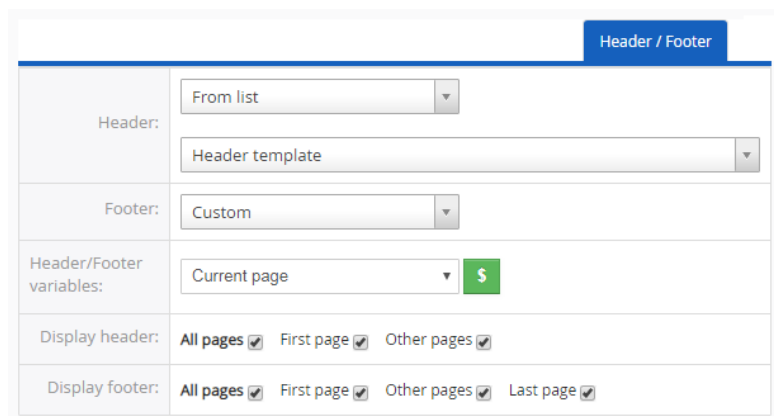
Picture 3.9 Product block tab

Name	Description
Product block template	Insert predefined and created product block templates. For details please refer to chapter 4.5.
Product block	Block start, Block end. Each product block has to start with “Block start” and ends with “Block end”
Common fields for Products & 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 3-4 Product block tab

### 3.5.5 Header / Footer

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



Picture 3.10 Header / Footer tab

Name	Description
Header	Allows you use custom or select from your Header templates
Footer	Allows you use custom or select from your Footer templates
Header / Footer variables	“Current page”, “Total pages” and “Page/pages”.
Display header	Allows defining how to display the header of the PDF document.
Display footer	Allows defining how to display the footer of the PDF document.

Table 3-5 Header / Footer tab

If you use Custom Header or Footer then to export is taken Header or Footer from PDF Template. If you Select From list and choose your Header or Footer template then this template is added to PDF file in process of export.

[How it works you can find also here](#)

### 3.5.6 Properties

The *Properties* tab allows defining page settings, number format and new **Watermark** functionality.

Picture 3.11 Properties tab

Name	Description
Page format	A3, A4, A5, A6, Letter, Legal or Custom. Custom page format allows to define width and height of the page in mm. Maximum values are 2000 mm x 2000 mm and minimum values are 100mm x 100mm
Page orientation	Portrait or landscape
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)
Margins	Margins in cm. Maximum value is 9.9 cm and minimum value is 0 cm.
Watermark	Allows you set text or image like watermark. Text should be static or based on module or related modules variables. Read more: <a href="#">Watermark</a>

Table 3-6 Properties tab

### 3.5.7 Settings

The Settings tab allows defining file name, new functionality **PDF Password**, description, page settings and other settings from usage of template point of view.

Picture 3.12 Settings tab

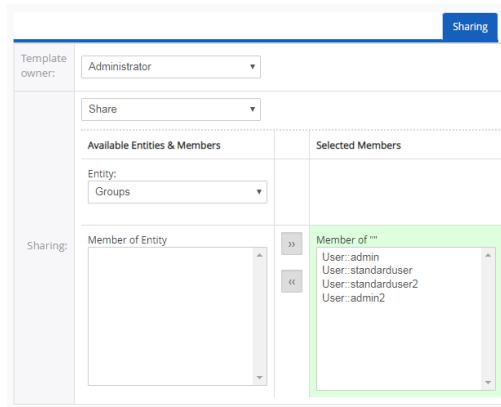
Name	Description
File name	File name in different formats. Please refer to chapter 4.9.1 for details.
PDF Password	Allows you lock PDF file with static password or password created by values from module or related modules. Read more: <a href="#">PDF Password</a>
Description	The description of the PDF template.
Ignored picklist values	Define picklist values which will be ignored in the final PDF document like None, none, keine etc. Entered values have to be separated with comma.
Status	Active / Inactive
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 4.9.3.
Set for Customer Portal	Set/unset for customer portal. For details please refer to chapters 4.9.4 and 7.1.1.

Table 3-7 Settings tab

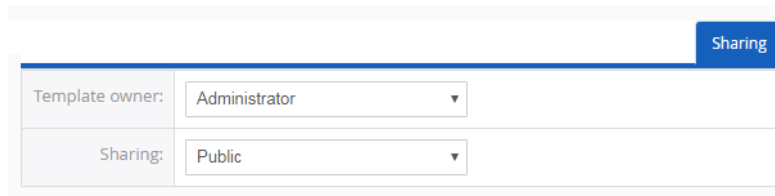


### 3.5.8 Sharing

The *Sharing tab* changes depend on whether PDF template is shared (Picture 3.13) or public/private (Picture 3.14). 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 3.13 Sharing tab



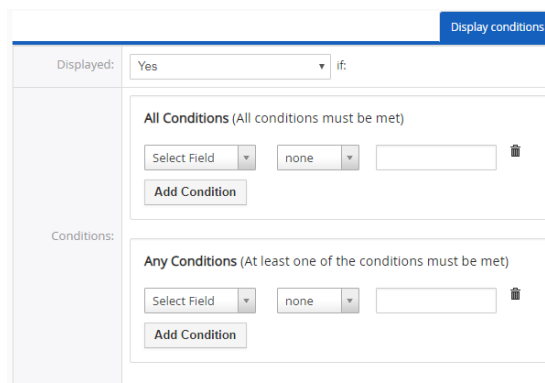
Picture 3.14 Sharing tab for private/public template

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

Table 3-8 Sharing tab

### 3.5.9 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.



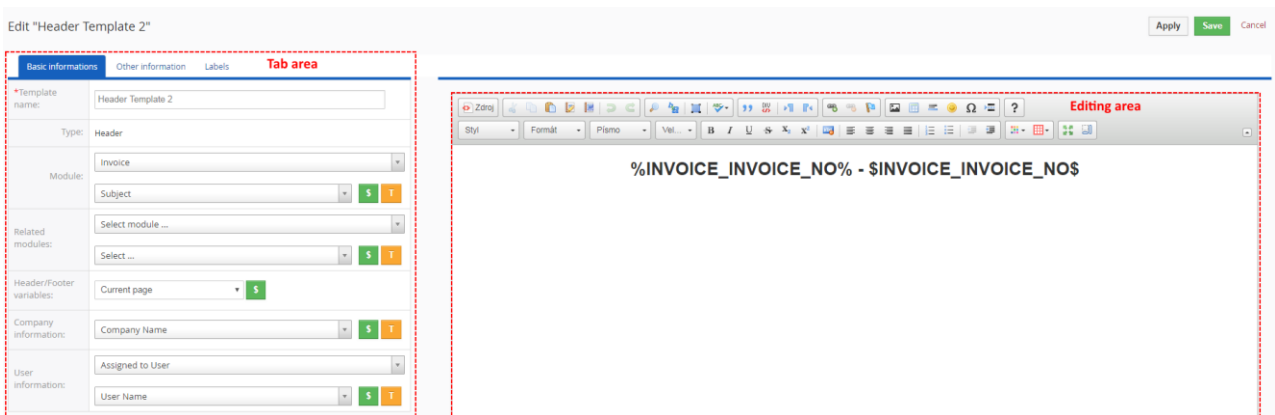
Picture 3.15 Display conditions tab

### 3.6 EditView of Header/Footer

Since PDF Maker 600.17.0 version there is useful option to create Header/Footer templates and then use it for PDF template. This function should save your time when you need make changes in all Header or Footer of PDF template.

The EditView of Header/Footer shown in the picture below is divided into two areas:

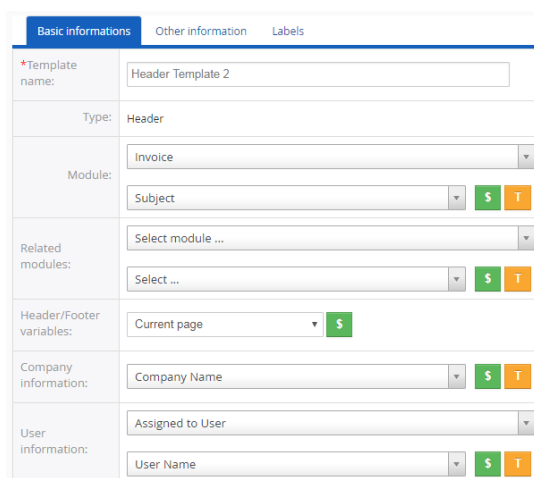
- Tabs area – allows user to insert into template different kind of values, fields and labels and to set up properties, and other common settings of the PDF template. Tabs area consists of following tabs which are described in the following subchapters:
  - Basic information
  - Other informations
  - Labels
- 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.



Picture 3.16 EditView of Header/Footer – PDF Maker Vtiger 6

#### 3.6.1 Basic informations of Header/Footer

The main purpose of the *Basic informations tab* is to define template name and type of template (Header or Footer).



Picture 3.17 Basic information tab of Header/Footer template

Name	Description
Template name*	The name of the template. It is mandatory field for template creation.
Type	Type of template. Header or Footer template
Module	You can select module if want add module fields. If you do not choose module template will be available for all PDF templates.
Related modules	If you select module and if exists related module(s) to selected module, it is possible here to select and use fields from any related modules.
Header/Footer variables	Current page, All pages, Page/pages
Company information	Comprises group of fields from Company information.
User information	Assigned to User, Logged in User, Modified by User and Created by User information

Table 3-9 Basic information of Header/Footer template

### 3.6.2 Other Informations of Header/Footer

As shown below Other information tab contains several fields. There are ListView block option, Terms and Conditions, Current date, Barcodes, QR code and Custom functions.

Picture 3.18 Basic information of Header/Footer template

Name	Description
Terms and Conditions	Terms and Conditions
Current date	Current date in several formats
Barcodes, QR code	Several types of Barcodes and QR code
Custom functions	If you need a special treatment of Vtiger data in your template, you can use custom (or your own) functions

Table 3-10 Other Informations of Header/Footer

### 3.6.3 Labels of Header/Footer

Labels tab consists of Global language, Module language (if module is selected) and Self-defined labels part. Labels are very useful especially in case you need to print/save documents in two or more languages.

Picture 3.19 Labels of Header/Footer

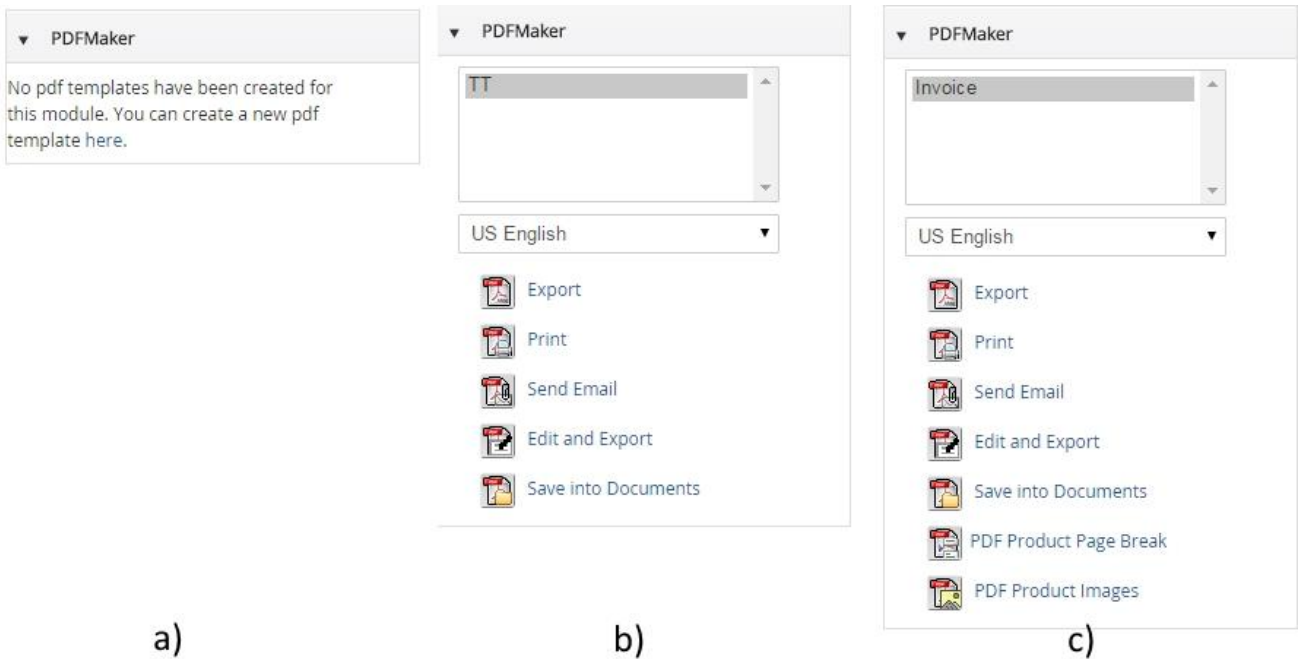
<b>Name</b>	<b>Description</b>
Global language	Global labels
Module language	Labels related only to selected module
Self-defined labels	Labels defined by user

**Table 3-11 Labels of Header/Footer**

### 3.7 PDF Maker block

The PDF Maker block can be found inside the specific module. In the module ListView it is necessary to click on any record to see details and on the right side, you can find the block. Depends on type of module and whether template already exists for selected module following forms of PDF maker block can be seen in the screen (after PDF Maker installation, the PDF Maker block is visible only for modules with at least one already created PDF template) :

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



Picture 3.20 PDF Maker block

## 4 Editing

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

- Primary module PDF templates – inside template you can combine primary module fields, related module fields, 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 exported PDF file will contain just notations of the fields e.g. `$$$-products-productname$$$` but not real expected values.

As can be seen in the picture below, in order to have useful PDF template you can combine: your own text, module fields or related module fields, images, tables, barcodes, labels, products block templates, related blocks, etc... Just click inside the editing area below the *Body/Header/Footer tabs* and start typing your text. You can continue with adding additional fields. *Body/Header/Footer tabs* allows you to change formatting of your text and other inserted fields using a lot of toolbars. Just select the text/field and click on any icon of the tool like font, color, bold, italic, alignment etc.

The screenshot shows the PDF Maker's editing interface. At the top, there are tabs for 'Body', 'Header', and 'Footer'. Below the tabs is a toolbar with various icons for text formatting and insertion. The main editing area contains a template for 'ITS4You' with the following elements and annotations:


- ITS4You logo:** An annotation 'image' points to the logo.
- Company and user info:** A callout box labeled 'Company and user inf. field' points to a section containing fields like `$$$COMPANY_NAME$$$`, `$$$COMPANY_ADDRESS$$$`, `$$$COMPANY_ZIP$$$`, `$$$COMPANY_CITY$$$`, `$$$COMPANY_COUNTRY$$$`, `$$$COMPANY_PHONE$$$`, `$$$COMPANY_FAX$$$`, `$$$COMPANY_WEBSITE$$$`, `$$$M_Invoice Date$$$`, and `$$$G_Date Sent$$$`. A callout 'table' points to the address fields, and 'Current date' points to the date field.
- Global and module labels:** Callouts 'global label' and 'module label' point to `$$$G_Phone$$$` and `$$$M_Invoice Date$$$` respectively.
- Module and related module fields:** Callouts 'module field' and 'related module field' point to `$$$INVOICE_ACCOUNT_ID$$$` and `$$$R_SALESORDERID_SALESORDER_NO$$$` respectively.
- Product block template:** A callout 'product block template' points to the header of a table: `$$$G_Invoice No$$$: $$$INVOICE_INVOICE_NO$$$`.
- Table:** A table with columns: Pos, %G\_Qty%, Text, %G\_LBL\_LIST\_PRICE% \$CURRENCYCODE\$, %G\_LBL\_NET\_PRICE%, %G\_LBL\_NET\_PRICE% \$CURRENCYCODE\$. The table contains product data and summary rows. Annotations include 'Text' pointing to a row, 'product block' pointing to a row, and 'Terms and conditions' pointing to the summary row.
- Summary and terms:** Summary rows include `TOTALAFTERDISCOUNT_SUBTOTAL $$$TOTALAFTERDISCOUNT_SUBTOTAL$$$`, `TOTAL_SUBTOTAL $$$TOTAL_SUBTOTAL$$$`, and `TOTALSUM $$$TOTALSUM_SUBTOTAL$$$`. A callout 'Terms and conditions' points to `$$$INVOICE_TERMS_CONDITIONS$$$`.

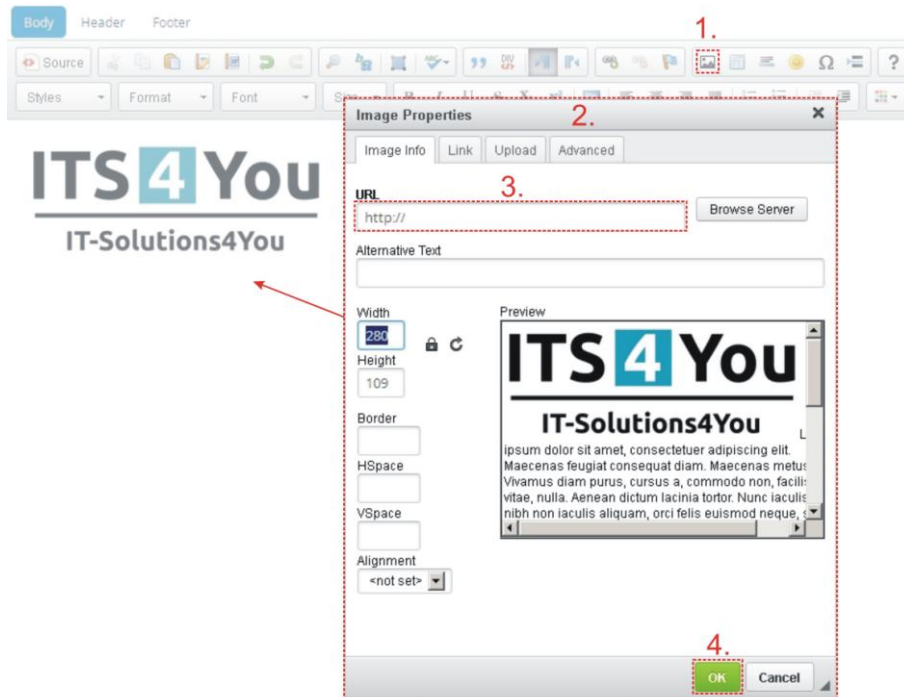
Picture 4.1 Editing

## 4.1 Inserting images

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

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

1. Press the  button on the toolbar.




Picture 4.2 Insert image

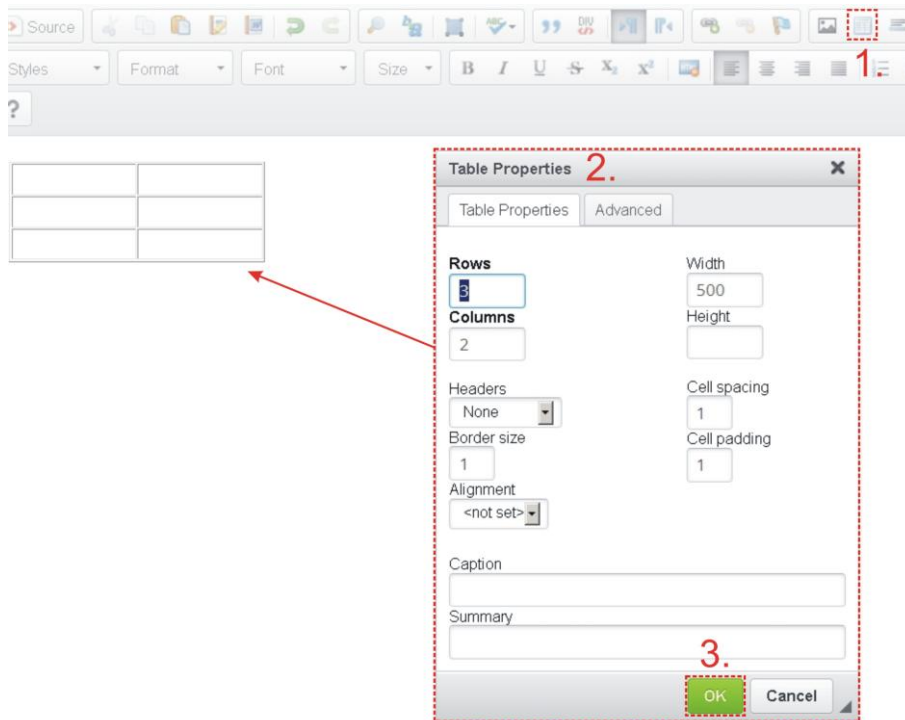
2. A pop-up window called "Image Properties" will appear. It includes four tabs that group image options.
3. Define the URL address of the image. You may also use the  in order to browse the files. Set up other properties of the image.
4. Click  to add image into Templates.

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)


## 4.2 Creating tables

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

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



Picture 4.3 Creating tables

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


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

Please refer also to the chapter 4.10.1 for more details.

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

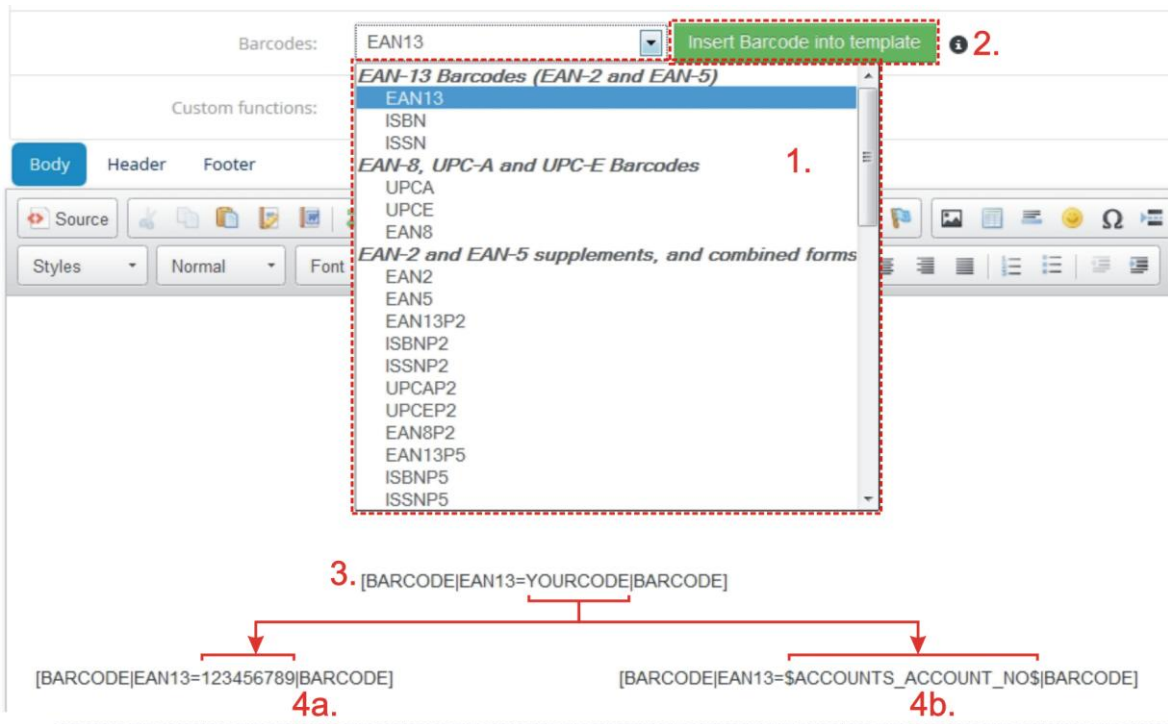


### 4.3 Inserting barcodes and QR codes

There is a “Barcodes, QR code” field in the *Other information tab*. Barcodes are divided into group. Detailed description of the barcodes can be found in the attached document (just click on ).

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

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

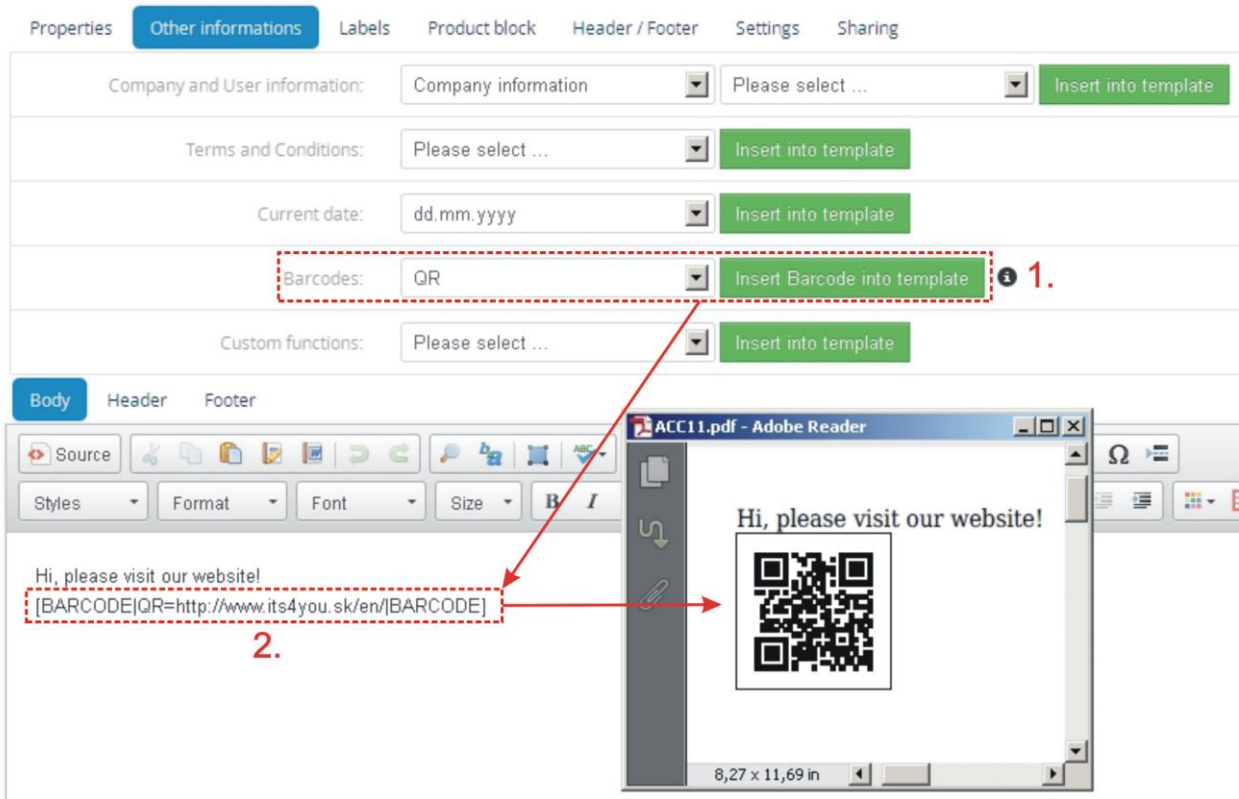


Picture 4.4 Barcode selection

How to insert QR code shows next picture:

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

Edit "QR code"



Picture 4.5 How to insert QR code

### 4.3.1 Formatting barcodes and QR codes

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

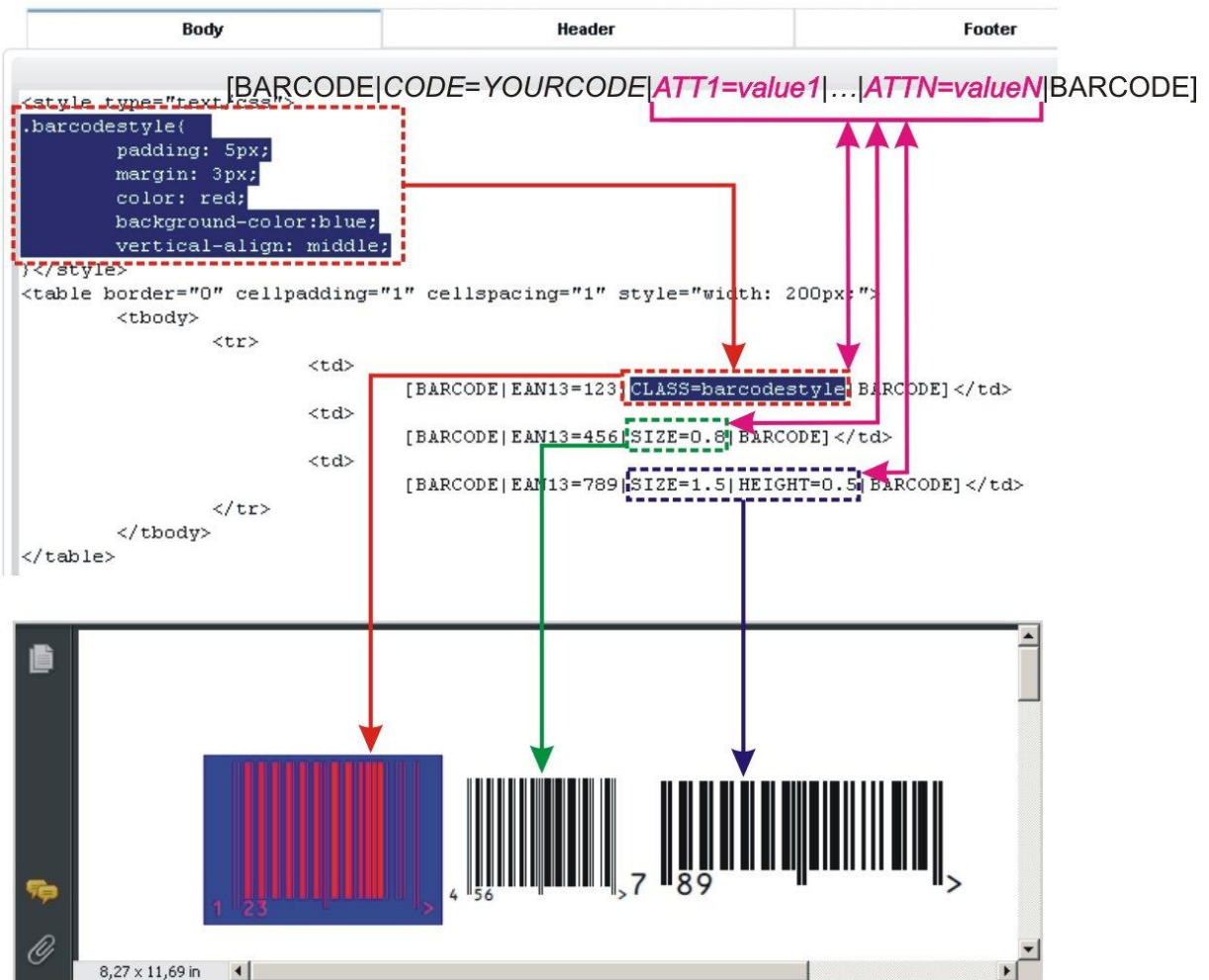
- a) additional attributes – add one or more supported attributes into barcode/QR syntax like [BARCODE|CODE=YOURCODE|ATT1=value1|...|ATTN=valueN|BARCODE]
- b) Cascading Style Sheets (CSS) – define CSS style within PDF template and put it into barcode/QR syntax like [BARCODE|CODE=YOURCODE|CLASS=name\_of\_style|BARCODE]

Example:

```
<style type="text/css">
    .barcodestyle{
        padding: 5px;
        margin: 3px;
        color: red;
        background-color:blue;
        vertical-align: middle;
    }</style>
[BARCODE|EAN13=123|CLASS=barcodestyle|BARCODE]
```

Please refer to mPDF Book Manual barcode part for details

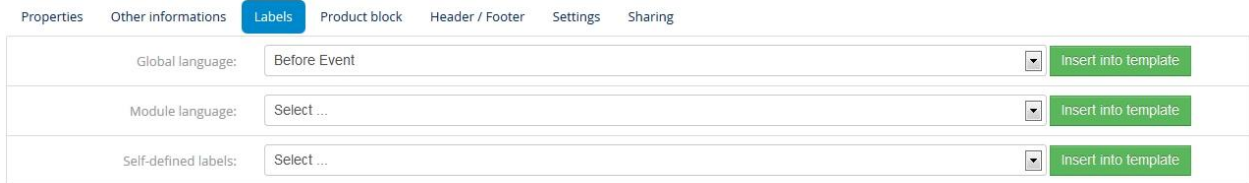
<http://mpdf1.com/manual/index.php?tid=407&searchstring=barcode>.



Picture 4.6 Formatting barcodes and QR codes

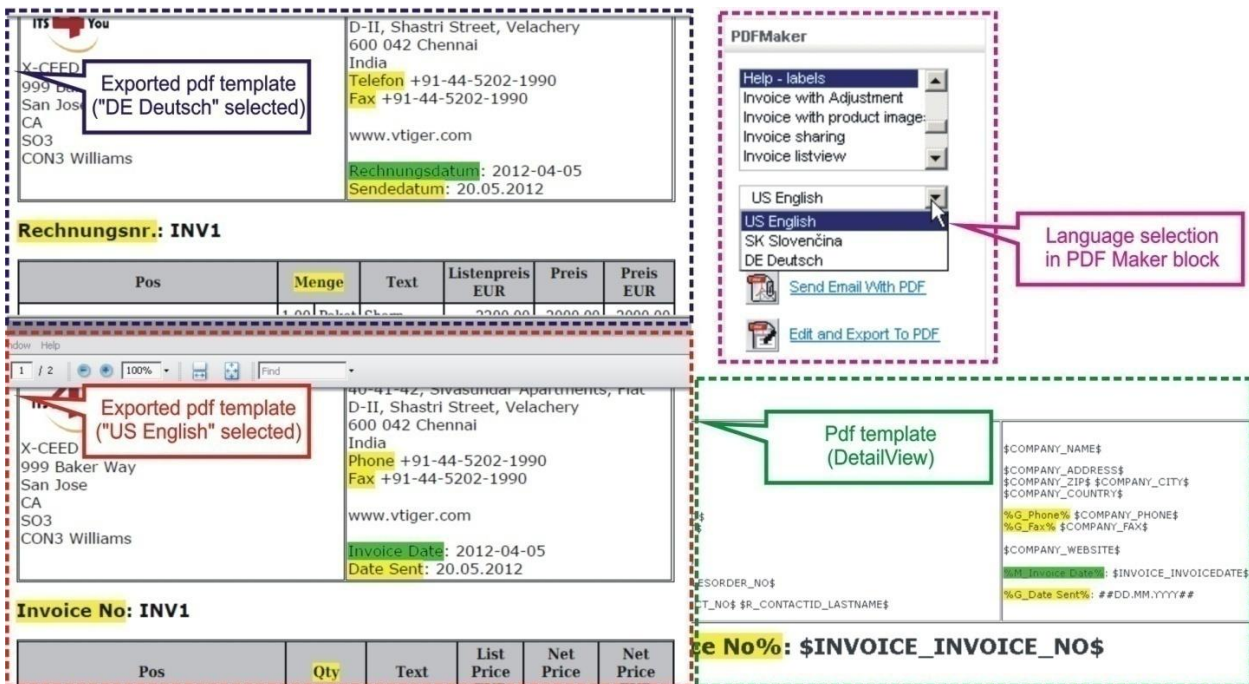
## 4.4 Inserting labels

The intention of the labels is saving time and effort for creating PDF templates. Using labels provides an easy and flexible way to prepare PDF files / or just parts of PDF files in different languages without necessity to create separate PDF template per each language. As it was described in chapter 3.5.3, labels can be inserted into templates via Labels tab. In order to insert any global related label, module related label or self-defined label just click on Labels tab, select from dropdown list any label and click on **Insert into template** button.



Picture 4.7 Labels tab

Please refer to example below used for invoice PDF template. Instead of having two (or more) templates the labels are used as much as possible. For example the label %G\_Phone% used in the template will be replaced in final PDF file in german language as “Telefon” and in final PDF file 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 exporting into PDF. The global labels use notation %G\_\*\*\*\*%, module labels use %M\_\*\*\*\*% and self-defined labels use notation %C\_\*\*\*\*%.

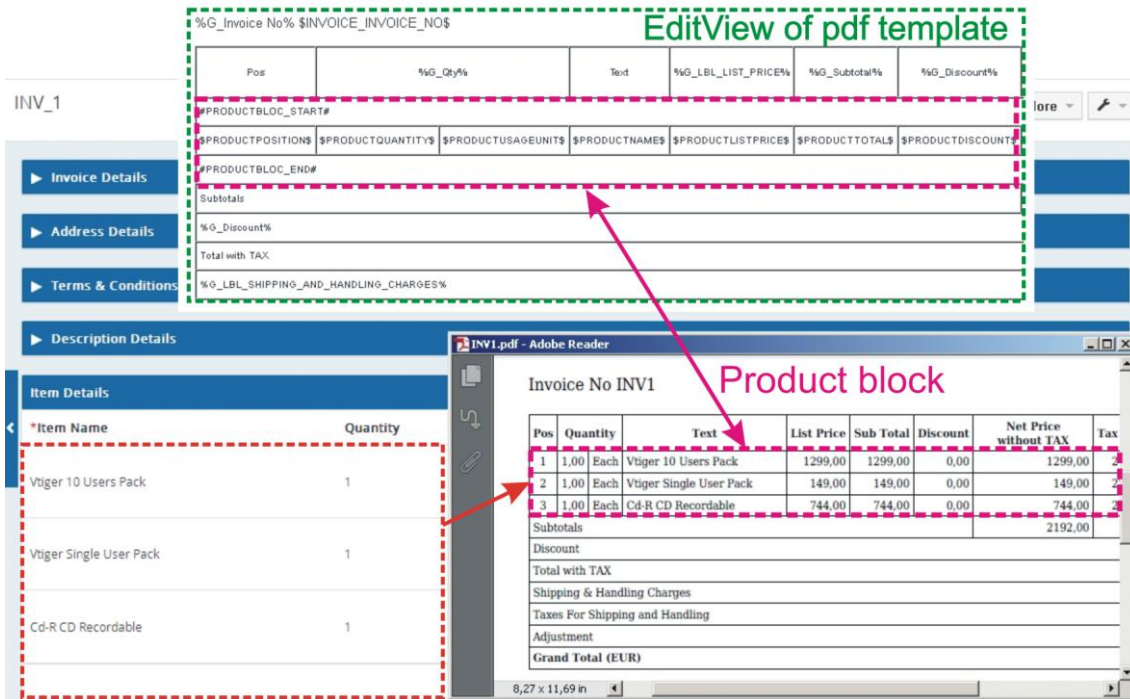


Picture 4.8 Inserting labels

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

## 4.5 Using a product blocks

The product blocks are simple but powerful parts of your PDF templates. They are used to display all products/services from modules Invoices, Quotes, Sales Order and Purchase Order in your PDF files 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 PDF exported file. 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 (7.4).

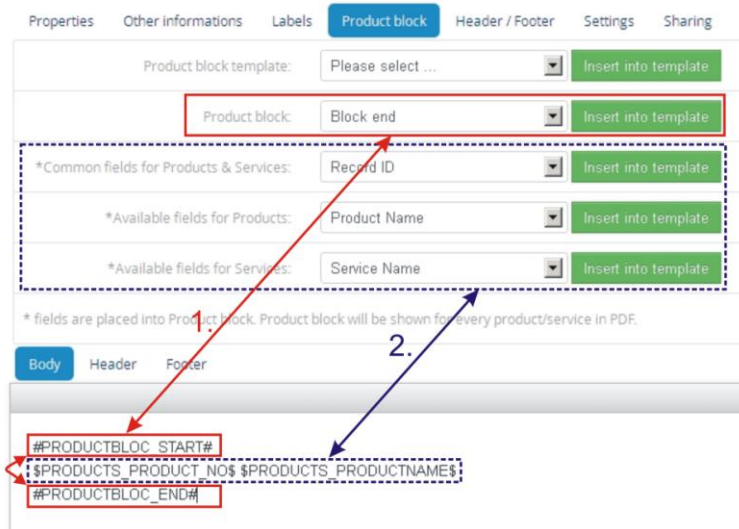


Picture 4.9 Product block usage

### 4.5.1 Create new product block in EditView

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.

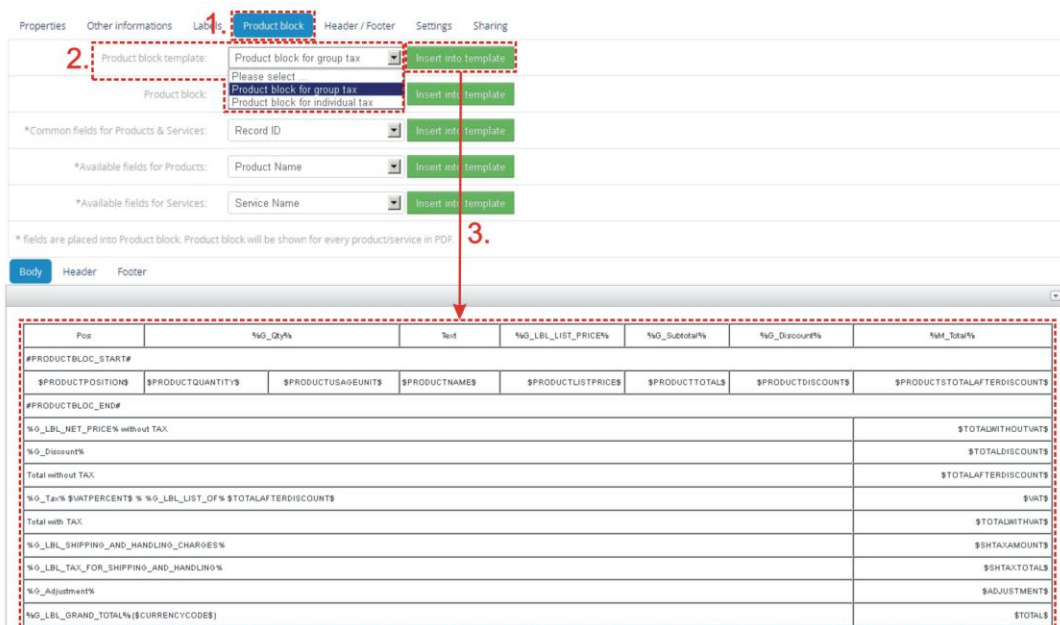


Picture 4.10 Create product block

### 4.5.2 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 (7.4) 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 Insert into template 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.

### 4.5.3 Separate Block for Products and for Services

Since release 600.12.0 you are able 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	%Q_Qty%	Text	%G_LBL_LIST_PRICE%	%Q_Discount%	%G_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#					
%G_LBL_TOTAL%					STOTALWITHOUTVAT\$
%Q_Discount%					STOTALDISCOUNT\$

The screenshot shows a software interface with a table containing product and service data. The table is divided into two sections: 'Block of Products' and 'Block of Services'. The 'Block of Products' section contains two rows of data, and the 'Block of Services' section contains two rows of data. The table also includes a 'Total' row and a 'Discount' row. The interface includes a menu bar with options like 'Source', 'Styles', 'Format', 'Font', and 'Size', and a toolbar with various icons.

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 4.12 - Separate Block for Products and for Services

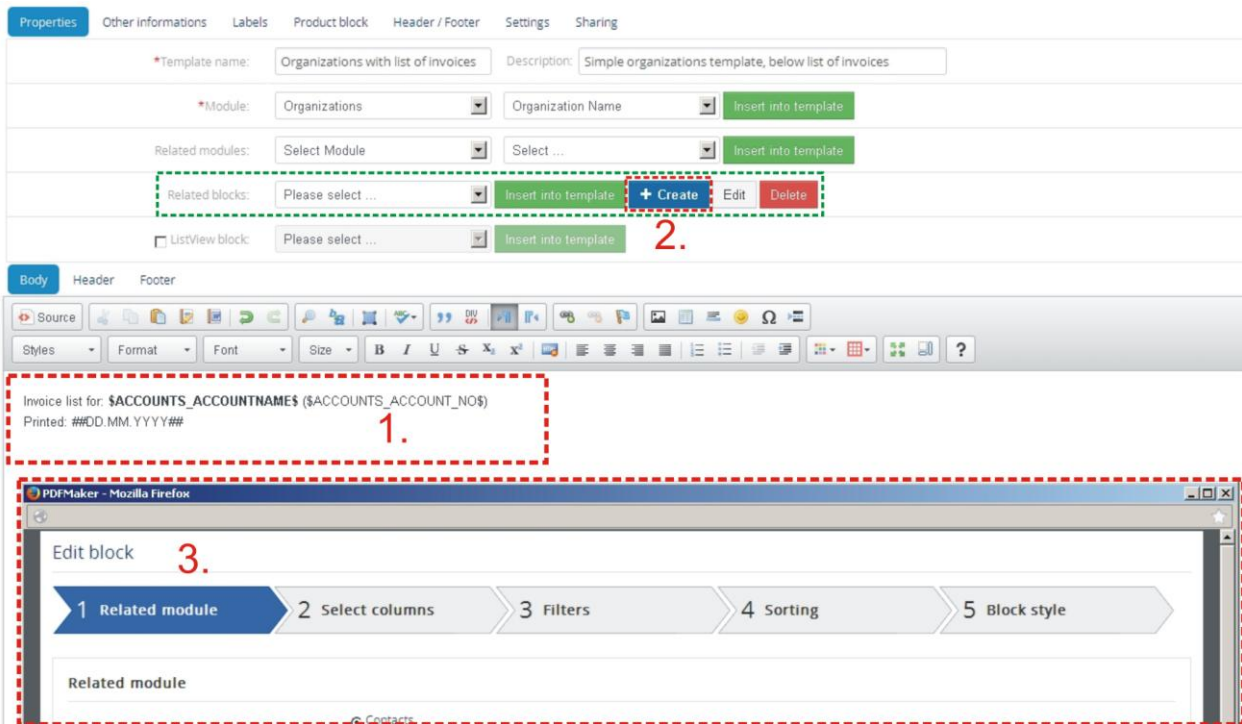
## 4.6 Using related blocks

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

### 4.6.1 Create the related block

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

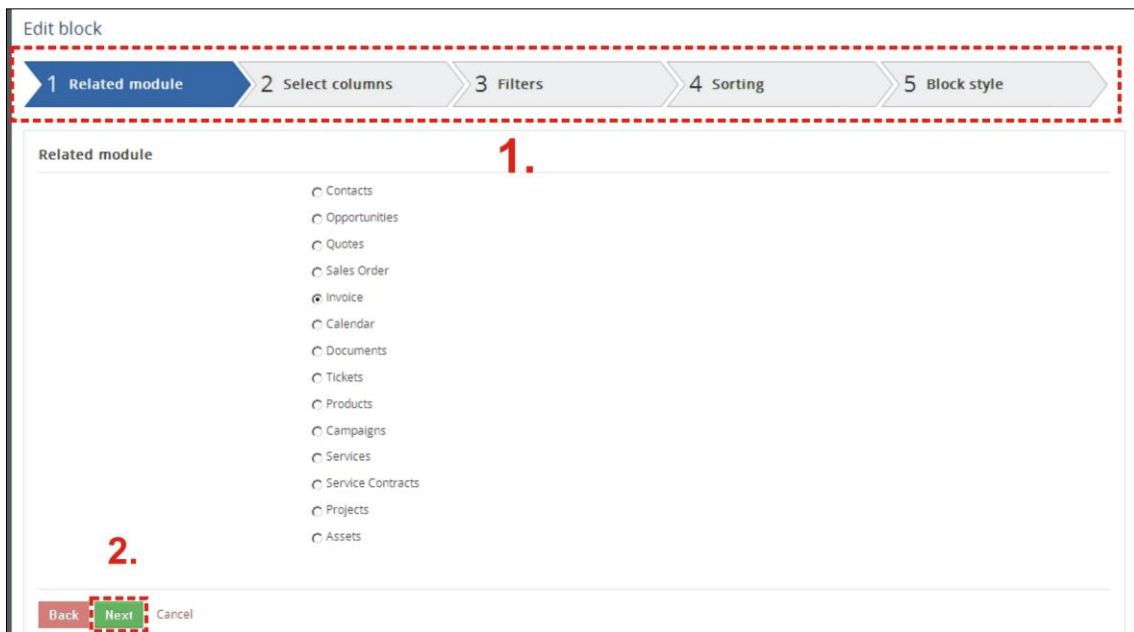
1. Create new template based on Organizations module and put your variables/text into the body of the template.
2. Go to the *Properties tab* and click on **+ Create** button.
3. Edit block window will appear on the screen.



Picture 4.13 Start creation of the related block

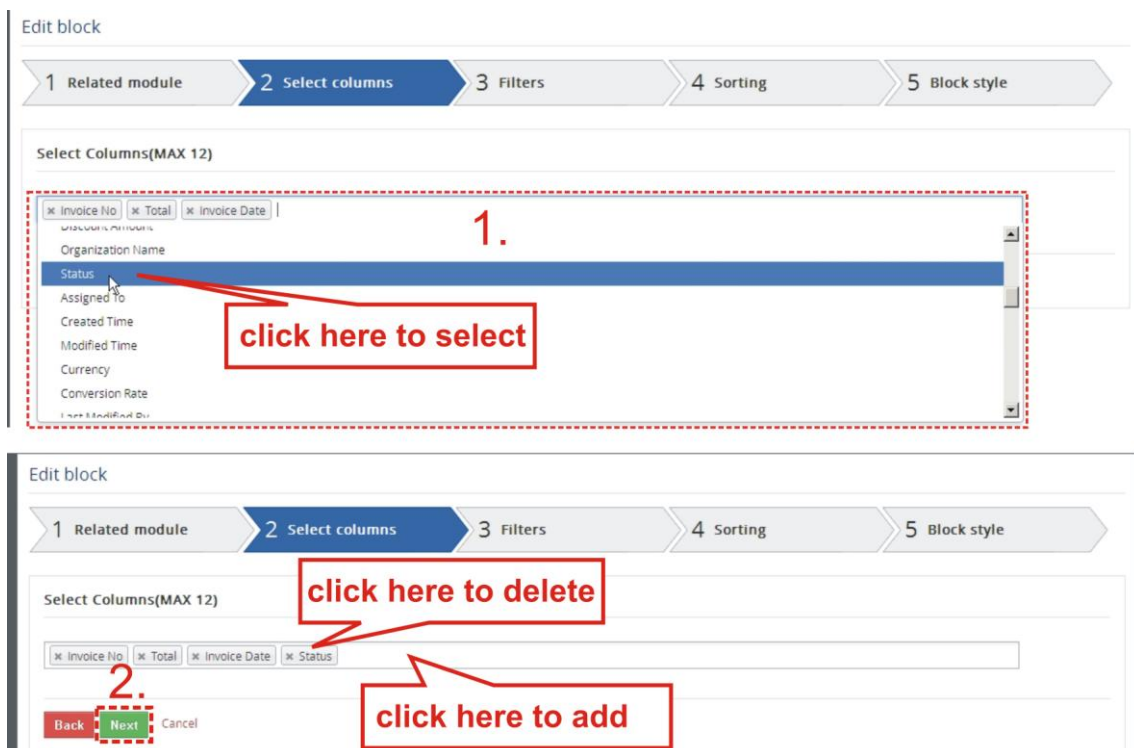


As you can see in the next picture, 5 steps are necessary to create the related block. In this window also all related entity modules for primary module are shown. First step is to select one related module from the available list (1.). Please select “Invoice” and click on **Next** button.



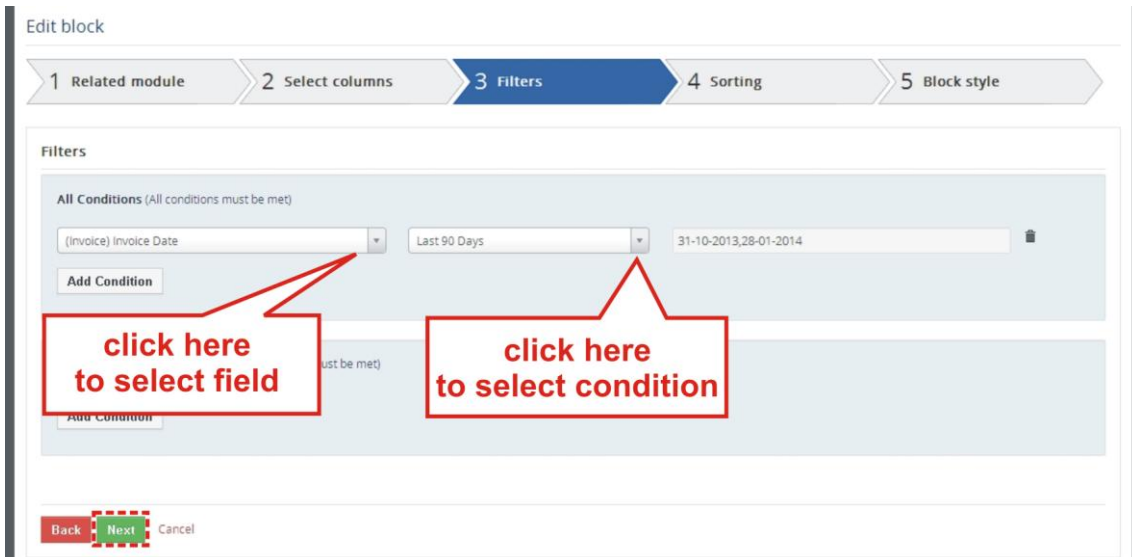
Picture 4.14 Creation of the related block – step 1

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.).



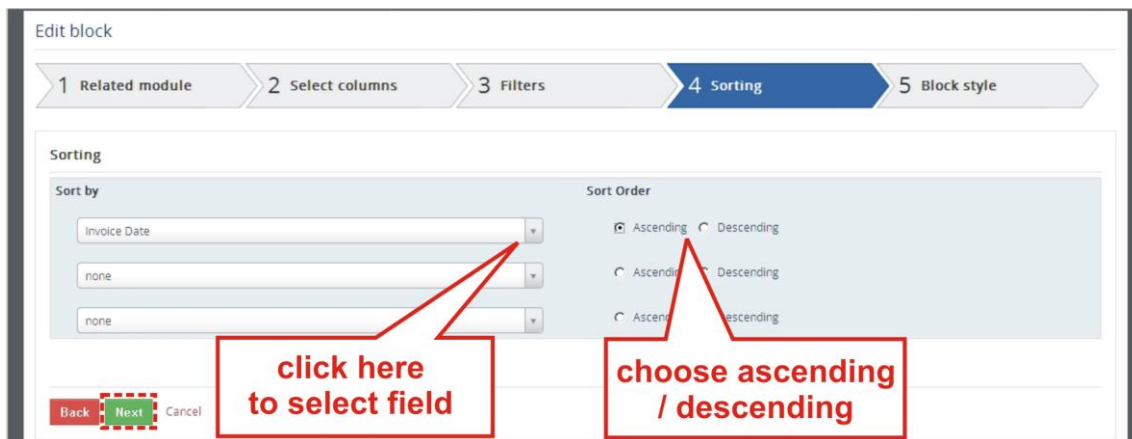
Picture 4.15 Creation of the related block – step 2

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.



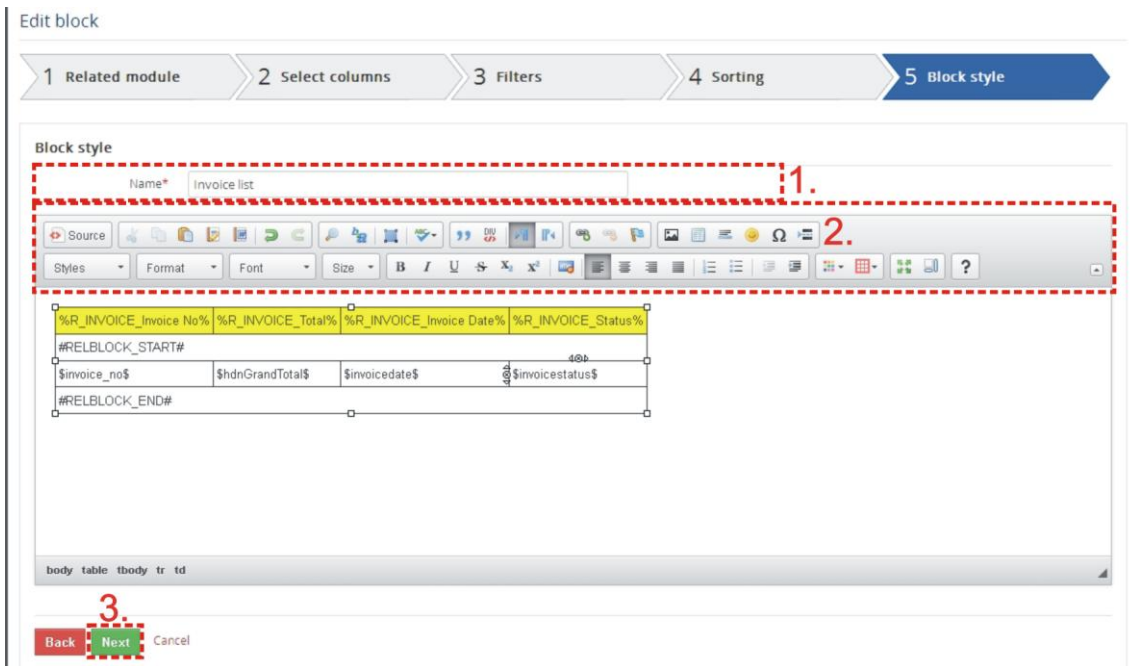
Picture 4.16 Creation of the related block – step 3

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 4.17 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 4.18 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. In order to insert related block provide following actions:

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

The screenshot illustrates the process of inserting a related block into a template. The interface is divided into several sections:


- Properties Tab:** Contains fields for template name, description, module, organization name, related module, related blocks, and listview block. The 'Related blocks' dropdown is set to 'Invoice list', and the 'Insert into template' button is highlighted with a red dashed box and labeled '3.'. A red arrow points from this button to the 'Properties' tab header, labeled '2.'. The 'Properties' tab header is also highlighted with a red dashed box and labeled '1.'.
- Code Editor:** Shows the template code with a red dashed box around the table definition, labeled '4.'. The code includes the following table definition:

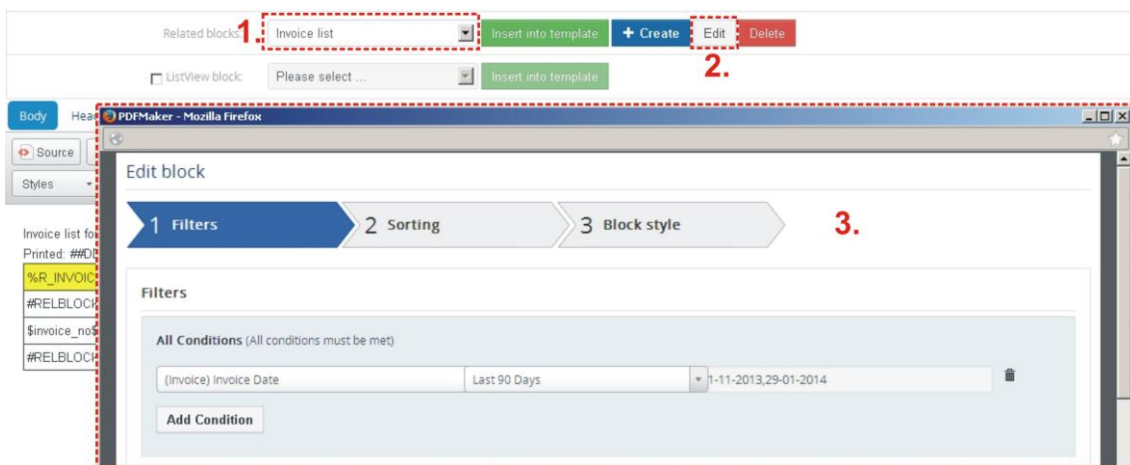
```
Invoice list for: $ACCOUNTS_ACCOUNTNAMES ($ACCOUNTS_ACCOUNT_NO$)
Printed: ##DD MM YYYY##
%R_INVOICE_Invoice No% %R_INVOICE_Total% %R_INVOICE_Invoice Date% %R_INVOICE_Status%
#RELBLOCK1_START#
$invoice_no$ $hdnGrandTotal$ $invoiceDate$ $invoiceStatus$
#RELBLOCK1_END#
```
- PDF Preview:** Shows the final PDF document with the inserted table, labeled '5.'. The table data is as follows:

Invoice No	Total	Invoice Date	Status
INV6	53761.000	2012-12-21	Paid
INV10	56000.000	2013-01-28	AutoCreated

Picture 4.19 Insert related block


### 4.6.3 Edit related block

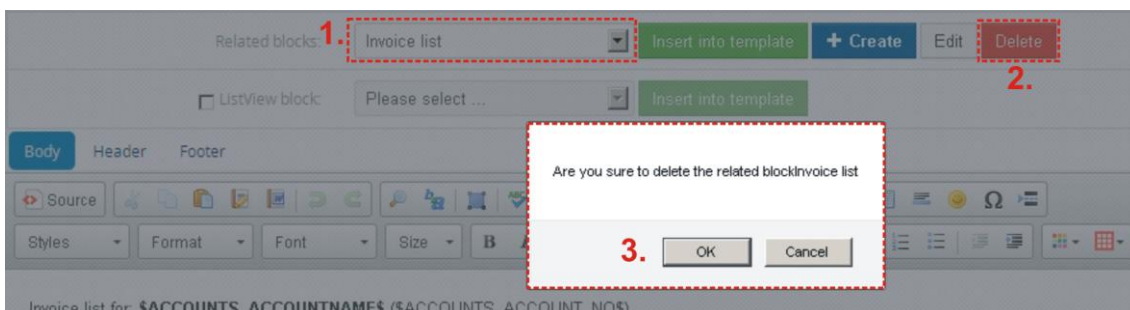
In order to edit already existing related block, just select it (1.) in the *Properties tab* and click on button . Please notice that you can change only filters, sorting and formatting of the already existing related blocks.



Picture 4.20 Edit related block

### 4.6.4 Delete related block

Please provide following simple steps in order to delete related block. Select the related block (*Properties tab*) using dropdown list (1.), click on button  (2) and finally confirm deletion (3).



Picture 4.21 Delete related block

## 4.7 Using ListView block

In case you need PDF file which consists of the several records and some related fields you can use ListView block. Within this block you can simply set which fields of the records you would like to have. Please refer to below picture which shows simple example of the PDF file consists of the list of invoices and related few fields (invoice number, invoice date, status etc.) and how to prepare it. Firstly in the PDF Maker EditView (Picture 4.22):

1. Go to *Properties* 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 PDF file using following steps:

1. Go to ListView of particular module and select 1 to N records.
2. Click on **Actions** and select PDF Export.
3. Select ListView block template (language) and click on **Export to pdf**.
4. Final PDF file with correspondent ListView block is created.

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 a ListView block template and exporting it to PDF. The main window is titled "Edit 'ListView block of invoices'" and has several tabs: Properties, Other informations, Labels, Product block, Header / Footer, Settings, and Sharing. The Properties tab is selected, showing fields for Template name, Module, Subject, Related module, and Related blocks. A dropdown menu for "ListView block" is open, showing options like "Block start", "Block end", and "Counter". A table of invoice records is visible, with columns for invoice number, date, and status. The "PDF Maker batch export" dialog is open, showing the selected template and language. The final PDF output is shown in a viewer window.

1. Go to *Properties* 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**.

4. Final PDF file with correspondent ListView block is created.

Picture 4.22 ListView block

## 4.8 Mapping product block with Vtiger form

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

Item Name	Qty in Stock	Qty	List Price	Total	Net Price
Vtiger Single User Pack	49870.000	1.000	149.000	149	
			(-) Discount :	0.00	
			Total After Discount :	149	
			(+) Tax :	65.56	214.56
Vtiger 5 Users Pack	78907.000	3.000	699.000	2,097	
			(-) Discount :	104.85	
			Total After Discount :	1,992.15	
			(+) Tax :	79.696	2,071.836
			<b>Net Total</b>	<b>2,286.400</b>	
			(-) Discount	228.64	
			(+) Shipping & Handling Charges	50.000	
			(+) Taxes For Shipping and Handling	5.5	
			<b>Adjustment</b>	<b>100.000</b>	
			<b>Grand Total</b>	<b>2,213.260</b>	

Picture 4.23 Mapping product block with Vtiger form

Name	Description
Currency	Euro, Dollar
Currency symbol	€, \$
Currency code	EUR, USD
Subtotal	Price without TAX before discount, by Tax Mode: group = Net Total
Total discount	Final Discount amount
Total discount (%)	Final Discount in %
Total without TAX	Total price without TAX after discount
TAX	Total TAX amount
TAX (%)	Total TAX in %
TAX block	This is useful for some countries, that need to have the detail amount of TAX
Total with TAX	Total price with TAX
Shipping & Handling taxes	Final taxes for Shipping & Handling
Shipping & Handling amount	Final amount for Shipping & Handling
Adjustment	Adjustment from Vtiger form
Grand Total	Grand Total from Vtiger form

Table 4-1 Mapping values for result prices available in Invoices, Quotes, Sales and Purchase Order

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

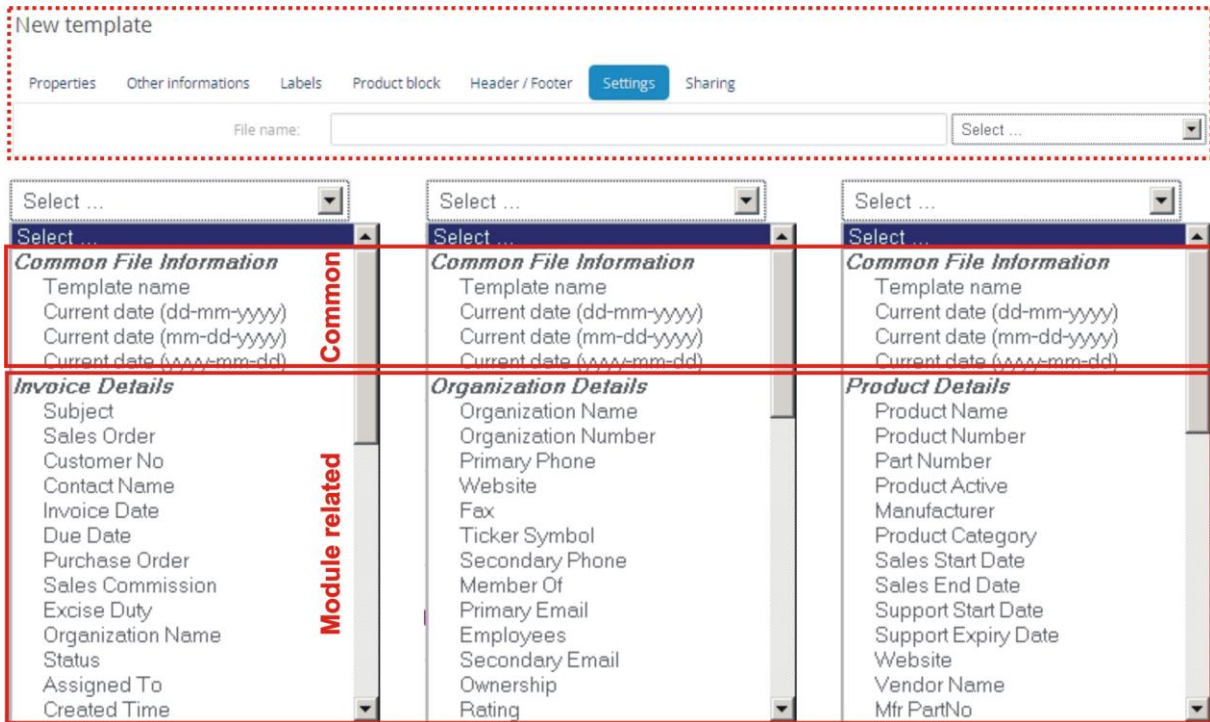
Table 4-2 Mapping values for product block template item available in Invoices, Quotes, Sales Orders and Purchase Orders



## 4.9 Template settings

### 4.9.1 File name

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



Picture 4.24 File name settings

## 4.9.2 Status

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

- ListView (Picture 4.25) – “Status” column
- DetailView (Picture 4.26) – *Template informations*

#	Select	Template name	Module	Description	Status	Action
1	<input type="checkbox"/>	Invoice (default for ListView)	Invoice	Template for Invoice	Active	Edit   Duplicate
2	<input type="checkbox"/>	SalesOrder	Sales Order	Template for SalesOrder	Active	Edit   Duplicate
3	<input type="checkbox"/>	PurchaseOrder (default)	Purchase Order	Template for PurchaseOrder	Active	Edit   Duplicate
4	<input type="checkbox"/>	Quotes	Quotes	Templates for Quotes	Inactive	Edit   Duplicate
5	<input type="checkbox"/>	QR code (default for ListView)	QR code	Template for QR code	Active	Edit   Duplicate
6	<input type="checkbox"/>	Organizations with list of invoices	Organizations	Simple organizations template, below list of invoices	Active	Edit   Duplicate
7	<input type="checkbox"/>	Simple product block	Invoice		Inactive	Edit   Duplicate
8	<input type="checkbox"/>	ListView block of invoices	Invoice		Active	Edit   Duplicate

Picture 4.25 Status and setting of default in ListView

Records List

QR code  
Module: Organizations

Tools

Unset as default

Set as inactive

Template informations

Template name	QR code
Description	
Module	Organizations
Status	Active
Set as default	for DetailView <input type="checkbox"/> for ListView <input checked="" type="checkbox"/>

PDF Template

Header

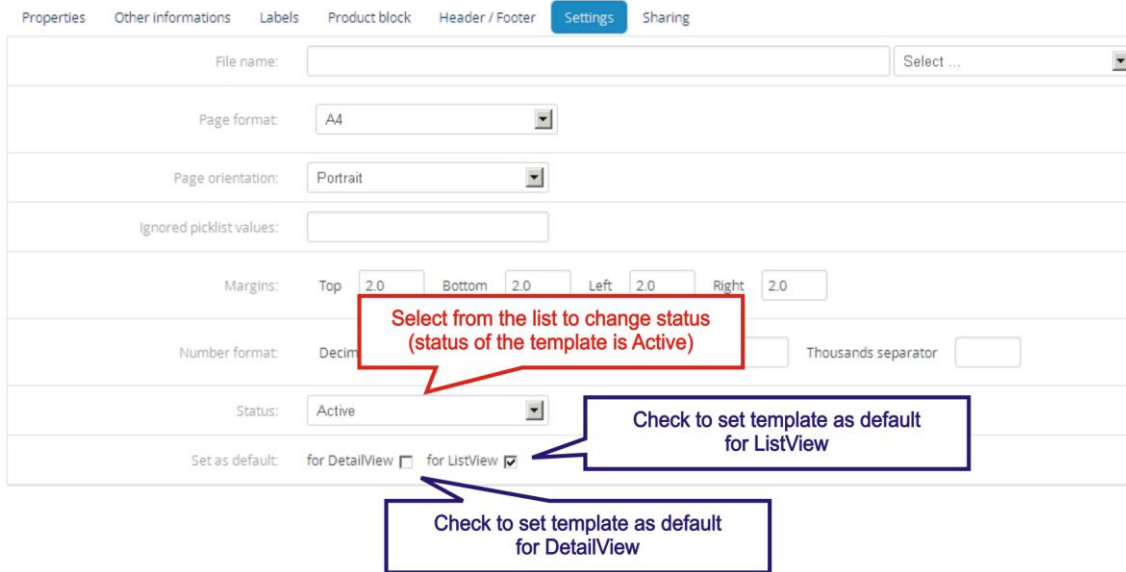
Body

Footer

Picture 4.26 Status and setting of default in DetailView

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

- 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.
- Using *Settings tab* in EditView – select status from listbox (Picture 4.27)

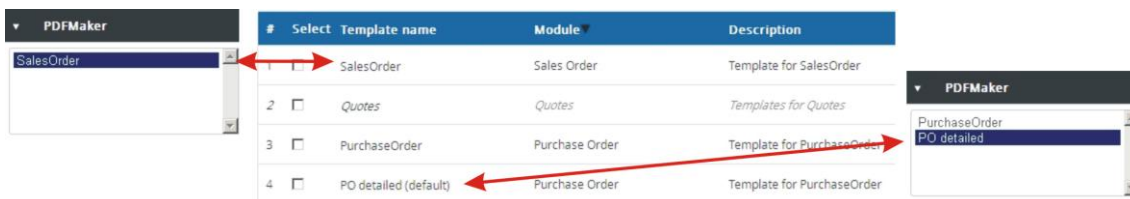


Picture 4.27 Setting of status and “set as default” using Settings tab

### 4.9.3 Set as default

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

- ListView (Picture 4.25) – the 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.
- DetailView (Picture 4.26) – *Properties tab*
- PDF Maker block – the default template is highlighted and automatically selected in PDF Maker block. PDF template is also highlighted and selected in case that only one PDF template exists for module (see Picture 4.28).

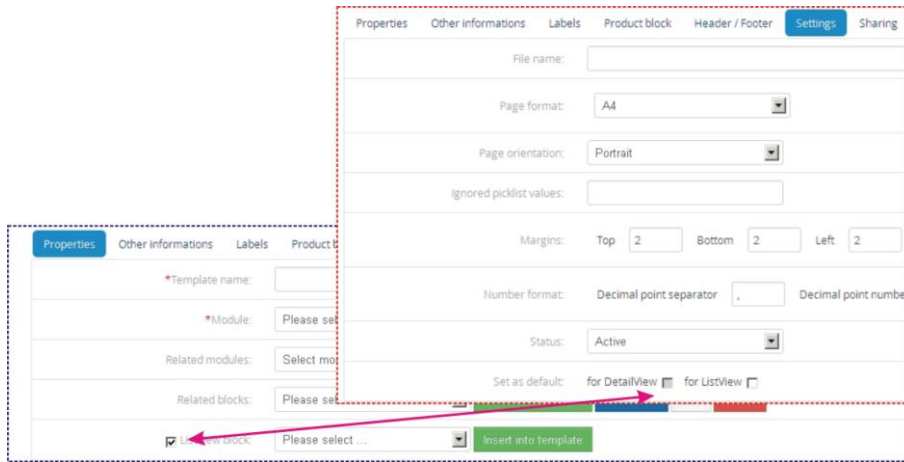


Picture 4.28 The default template in the PDF Maker block

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

- Using Tools links “Set as default” and “Unset as default” in the DetailView (Picture 4.26). Click on “Set as default” to set the template as default for DetailView as well as for ListView. If you click on “Unset as default”, the template will be unset as default for DetailView and for ListView.
- Using *Settings tab* in EditView – check/uncheck the checkboxes to change this setting (Picture 4.27) separately for EditView and ListView.

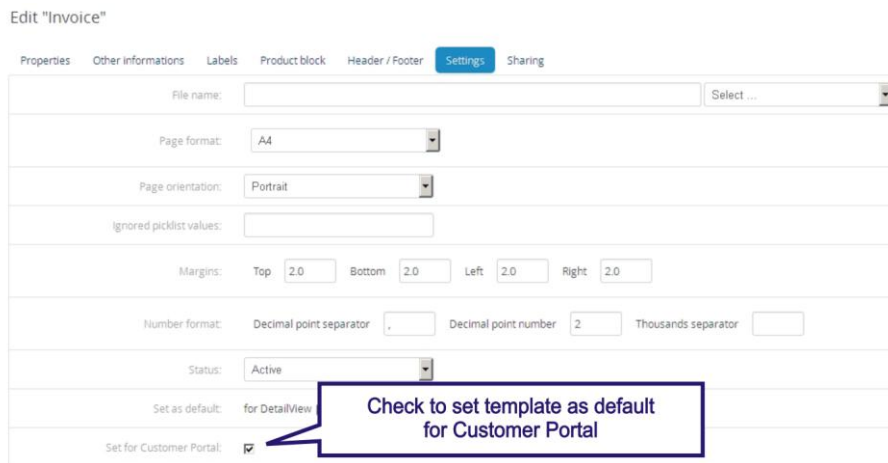
Please take into account that templates using ListView block cannot be in parallel set as default for DetailView. The checkbox “for DetailView” in “Settings” tab is automatically inactive if you check checkbox “ListView block” in “Properties” tab (Picture 4.29)



Picture 4.29 Setting default vs. ListView block

#### 4.9.4 Set template for Customer Portal

The PDF Maker template can be set as default template for Customer Portal. In order to set it please go to the Settings tab and check the checkbox “Set for Customer Portal”.



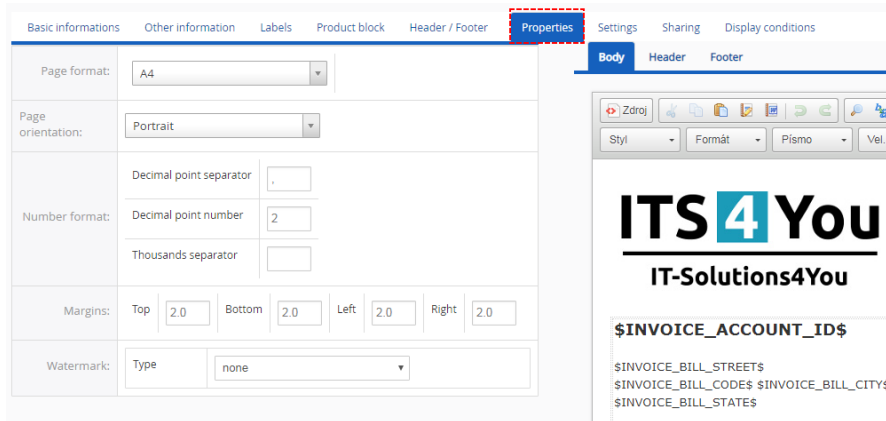
Picture 4.30 Setting the PDF template as template for Customer Portal

## 4.9.5 Watermark

Since PDF Maker **600.18.0**, there is very useful functionality to set Watermark available. You can use image as well as text. Text also should be static or dynamic based on module or related modules variables.

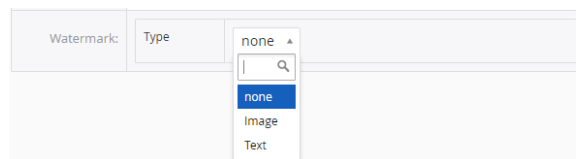
To set Watermark please provide following steps:

1. Open your template in EditView and open Properties tab



Picture 4.31 Watermark - PDF Maker Vtiger 6

2. Now choose image or text



Picture 4.32 Watermark type – PDF Maker Vtiger 6

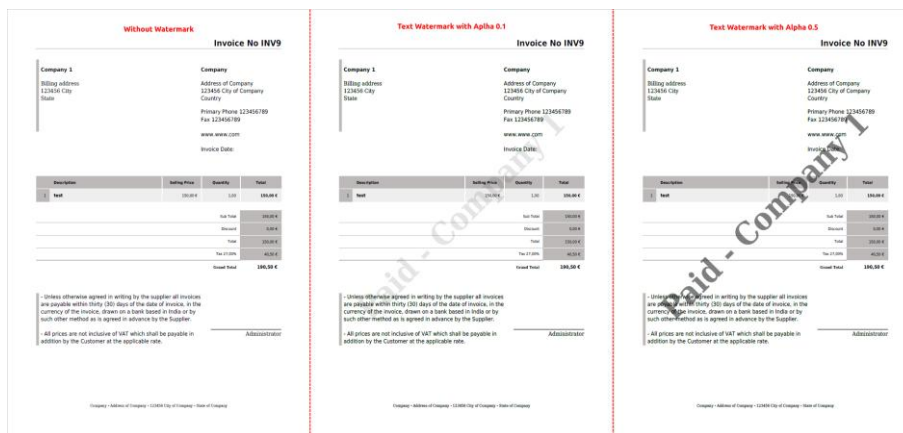
- If you select image, please upload your image and set Alpha (The Alpha property specifies the opacity/transparency of an element). Default Alpha is 0.1 and possible values are from 0.1 to 1.0.



Picture 4.33 Image Watermark – PDF Maker Vtiger 6

- If you select text you can set static text or dynamic based on values of module or related modules. And also you can set Alpha property.

Picture 4.34 Watermark text setting – PDF Maker Vtiger 6



Picture 4.35 Watermark text – PDF Maker Vtiger 6

#### 4.9.6 PDF Password

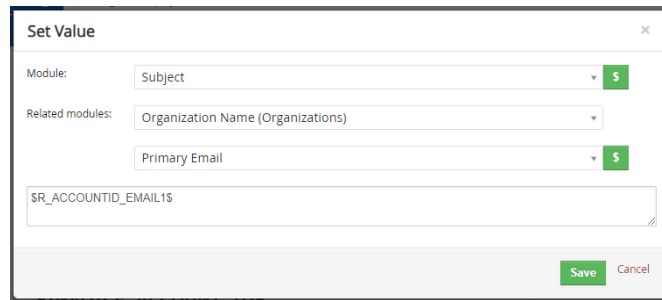
Since **PDF Maker 600.18.0**, there is also other very useful functionality to lock your PDF File with password. You can use static or dynamic password based on module or related modules variables.

To lock your PDF file please provide following steps:

1. Open your template in EditView and open Settings tab

Picture 4.36 PDF password – PDF Maker Vtiger 6

2. You can set static password or dynamic password based on values of module or related modules.

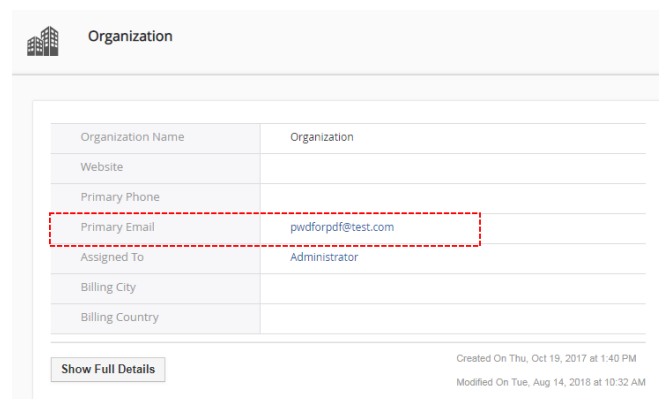


The 'Set Value' dialog box shows the following configuration:

- Module: Subject
- Related modules: Organization Name (Organizations), Primary Email
- Value: \$R\_ACCOUNTID\_EMAIL1\$

Picture 4.37 PDF password – PDF Maker Vtiger 6

For example, there is primary mail of Organization used like Password.

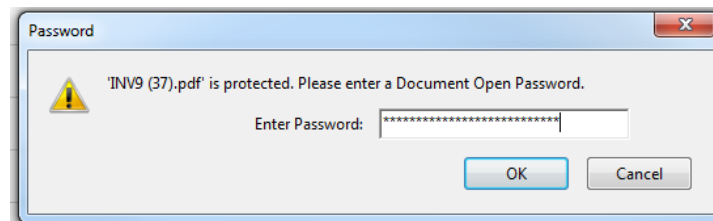


Organization Name	Organization
Website	
Primary Phone	
Primary Email	pwdforpdf@test.com
Assigned To	Administrator
Billing City	
Billing Country	

Created On Thu, Oct 19, 2017 at 1:40 PM  
Modified On Tue, Aug 14, 2018 at 10:32 AM

Picture 4.38 Organization mail like PDF password – PDF Maker Vtiger 6

To open your PDF file you need use Primary email of related Organization.



'INV9 (37).pdf' is protected. Please enter a Document Open Password.

Enter Password: [\*\*\*\*\*]

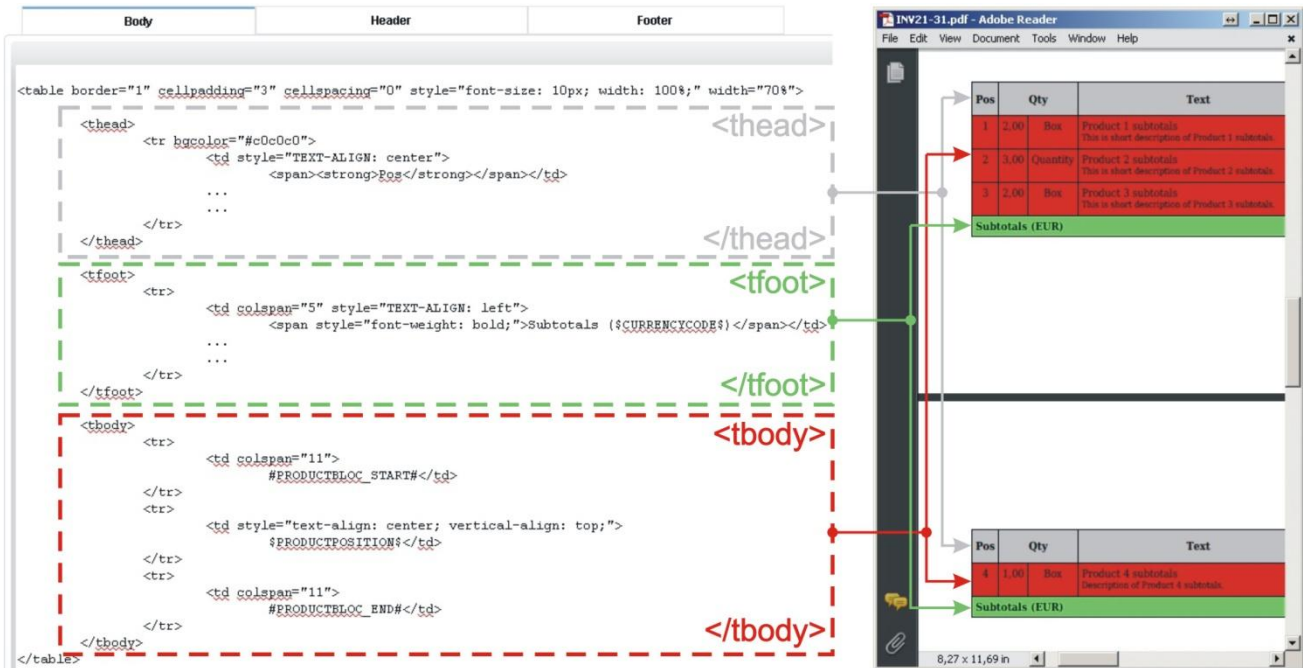
OK Cancel

Picture 4.39 Organization mail like PDF password – PDF Maker Vtiger 6

## 4.10 Advanced editing

### 4.10.1 Head and foot of the table

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



Picture 4.40 The structure of the table

### 4.10.2 Subtotal values

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

#### Restrictions of the subtotal values usage:

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



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

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

Table 4-3 Subtotal values

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

Pos	Qty	Text	List Price	Subtotal	Discount	Net Price without TAX	Tax (%)	Tax (EUR)	Total
1	2.00	Box Product 1 subtotals This is short description of Product 1 subtotals.	100.00	200.00	0.00	200.00	17.50	35.00	235.00
2	3.00	Quantity Product 2 subtotals This is short description of Product 2 subtotals.	200.00	600.00	60.00	540.00	5.00	27.00	567.00
3	2.00	Box Product 3 subtotals This is short description of Product 3 subtotals.	300.00	600.00	90.00	510.00	12.50	63.75	573.75
Subtotals (EUR)				1 400.00		1 250.00			1 375.75

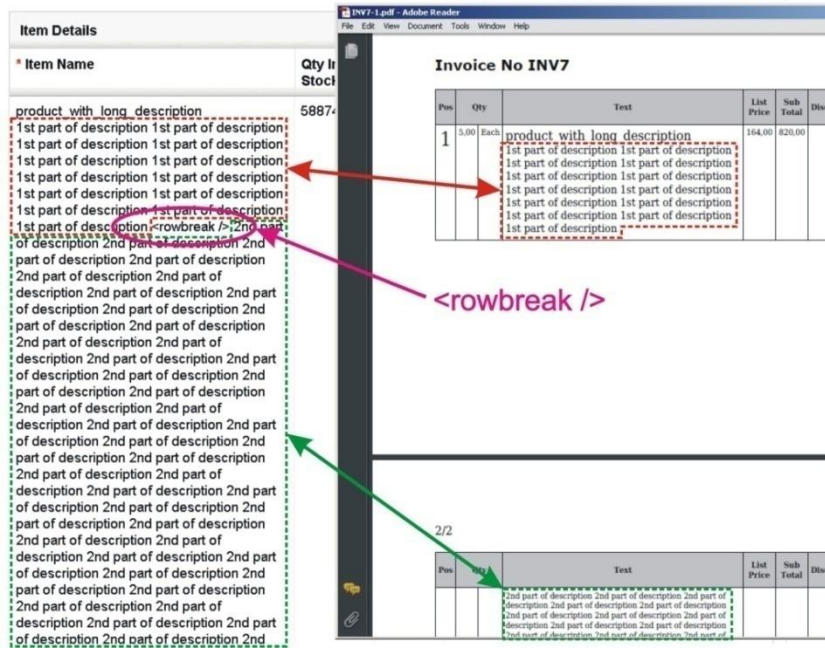
Pos	Qty	Text	List Price	Subtotal	Discount	Net Price without TAX	Tax (%)	Tax (EUR)	Total
4	1.00	Box Product 4 subtotals Description of Product 4 subtotals.	250.00	250.00	0.00	250.00	12.50	31.25	281.25
Subtotals (EUR)				1 650.00		1 500.00			1 637.00

\$TOTAL\_SUBTOTAL\$   
 \$TOTALAFTERDISCOUNT\_SUBTOTAL\$   
 \$TOTALSUM\_SUBTOTAL\$

Picture 4.41 Subtotal values

### 4.10.3 <rowbreak /> in tables








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



Picture 4.42 <rowbreak /> usage

## 5 PDF Maker block actions


The PDF Maker block (3.6) contains links to initiate several actions:

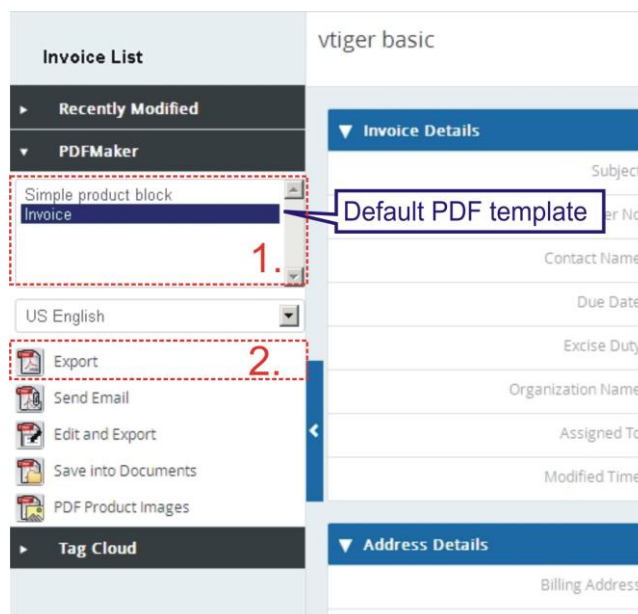
-  Export
-  Print
-  Send Email
-  Edit and Export
-  Save into Documents
-  PDF Product Page Break
-  PDF Product Images

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

### 5.1 Export

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


1. Go to the detail view of given Module and on the left side of detail view, in the PDF Maker block, choose your PDF Template. The template is selected automatically in case the only one exists for given module or in case the default template is already defined (see chapter 4.9.3).
2. Click on  Export and export will be done. Please note that next step depends on used web browser.

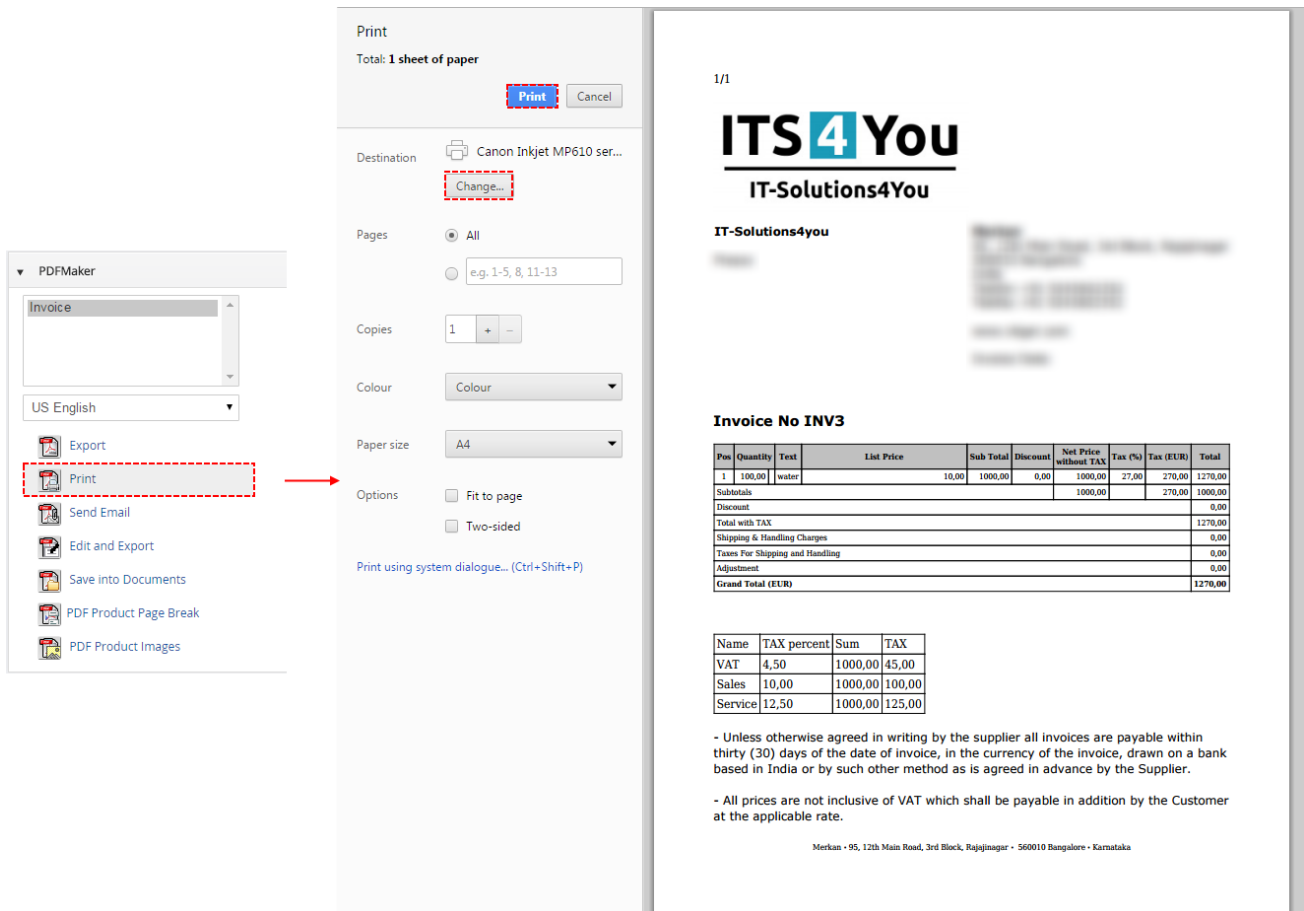


Picture 5.1 Export to PDF

## 5.2 Print


Until PDF Maker version 600.7.0, there is Print option available.

You need to only click on  Print button and then choose your printer and print.



The screenshot shows the PDF Maker interface. On the left, a sidebar contains various actions: Export, Print (highlighted with a red dashed box and an arrow), Send Email, Edit and Export, Save into Documents, PDF Product Page Break, and PDF Product Images. The main Print dialog box is open, showing settings for printing 1 sheet of paper to a Canon Inkjet MP610 printer. The Print button is highlighted with a red dashed box. The dialog also shows options for pages, copies, colour, paper size (A4), and options like 'Fit to page' and 'Two-sided'. The right side of the image shows the resulting invoice document, titled 'ITS 4 You IT-Solutions4You'. The invoice includes a table of items, a summary table, and tax information.

**Print**  
Total: 1 sheet of paper  
**Print** Cancel

Destination  Canon Inkjet MP610 ser...  
**Change...**

Pages  All  
 e.g. 1-5, 8, 11-13

Copies 1 + -

Colour Colour ▾

Paper size A4 ▾

Options  Fit to page  
 Two-sided

Print using system dialogue... (Ctrl+Shift+P)

**Invoice No INV3**

Pos	Quantity	Text	List Price	Sub Total	Discount	Net Price without TAX	Tax (%)	Tax (EUR)	Total
1	100,00	water	10,00	1000,00	0,00	1000,00	27,00	270,00	1270,00
Subtotals									1000,00
Discount									0,00
Total with TAX									1270,00
Shipping & Handling Charges									0,00
Taxes For Shipping and Handling									0,00
Adjustment									0,00
<b>Grand Total (EUR)</b>									<b>1270,00</b>

Name	TAX percent	Sum	TAX
VAT	4,50	1000,00	45,00
Sales	10,00	1000,00	100,00
Service	12,50	1000,00	125,00

- Unless otherwise agreed in writing by the supplier all invoices are payable within thirty (30) days of the date of invoice, in the currency of the invoice, drawn on a bank based in India or by such other method as is agreed in advance by the Supplier.



- All prices are not inclusive of VAT which shall be payable in addition by the Customer at the applicable rate.

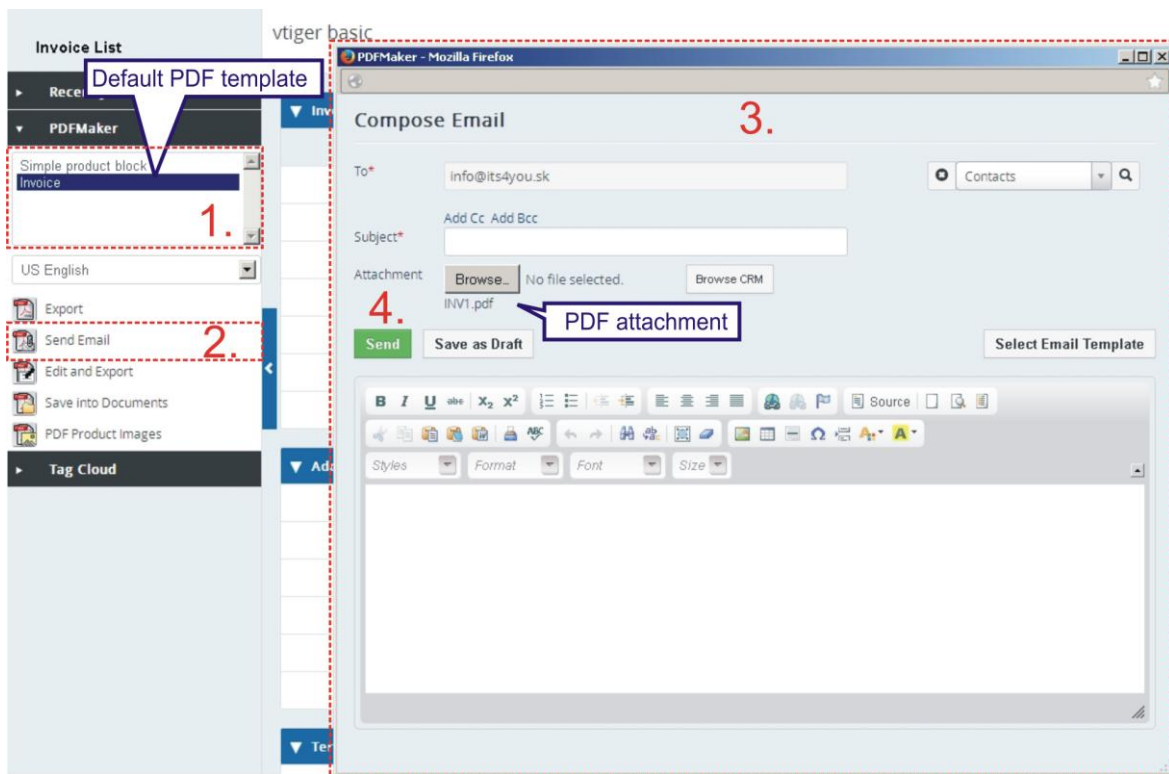
Merkan • 95, 12th Main Road, 3rd Block, Rajajinagar • 560010 Bangalore • Karnataka

Picture 5.2 Print

### 5.3 Send email with PDF


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


1. Go to the detail view of given Module and on the left side of detail view, in the PDF Maker block, choose your PDF Template. The template is selected automatically in case the only one exists for given module or in case the default template is already defined (see chapter 4.9.3).
2. Click on  Send Email .
3. A popup window “Compose Email” will appear on the screen with already attached PDF file. Please add subject and text according to your needs. You can add additional recipients if necessary as well.
4. Click on  button to send email with attached file(s).

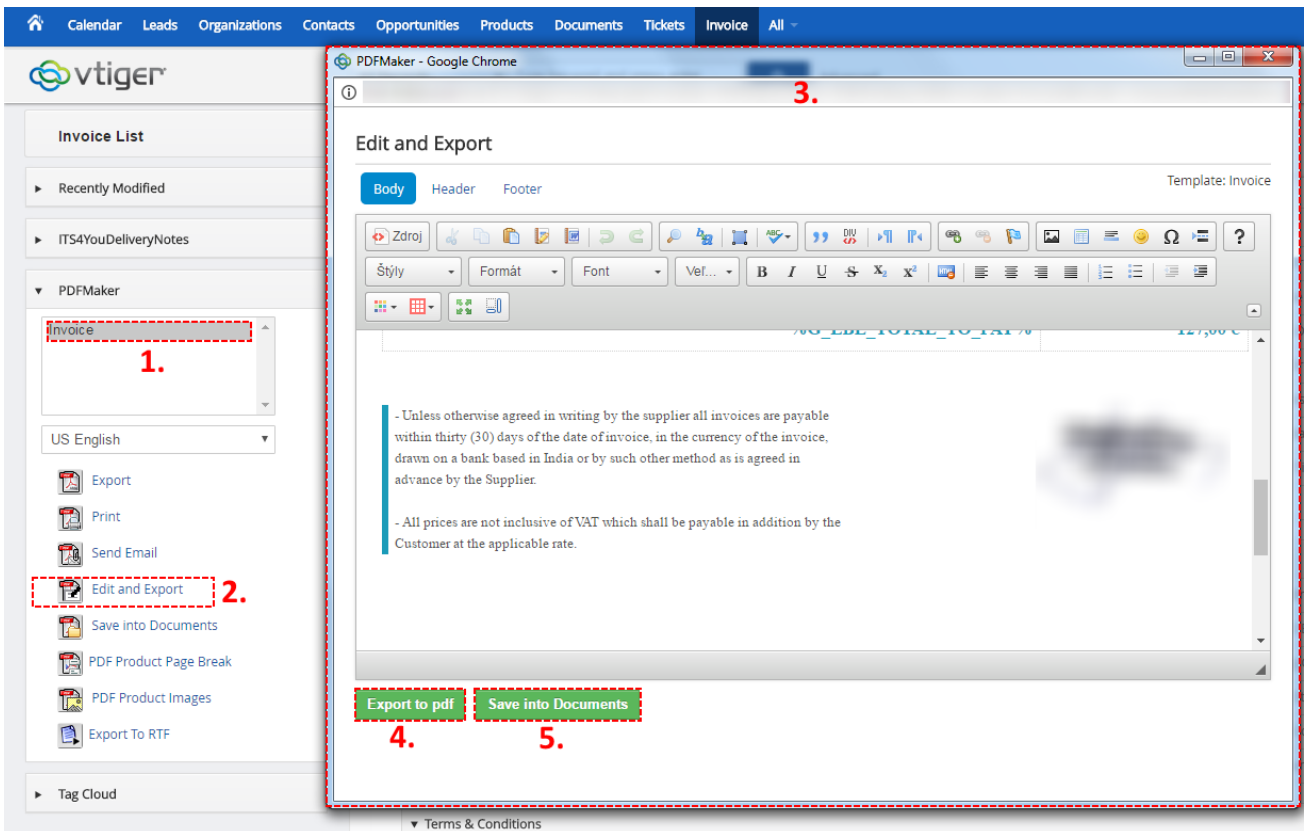


Picture 5.3 Send Email with PDF – Compose E-Mail

## 5.4 Edit and Export to PDF

From time to time it is necessary to edit your document before print or save. For example, you can change post address in one document but don't want to change record in database because it is temporary necessity. In that case you can choose  Edit and Export action item which gives you possibility to change not only layout of the document/template but in addition any text. In order to edit and export PDF file:



1. Go to the detail view of given Module and on the left side of detail view, in the PDF Maker block, choose your PDF Template.
2. Click on  Edit and Export link.
3. A popup window with template will appear in the screen. You can start to modify your document now.
4. Click on **Export to pdf** to export the final PDF file.
5. Since **600.15.0** version of PDF Maker is also Save Into Documents from Edit And Export available

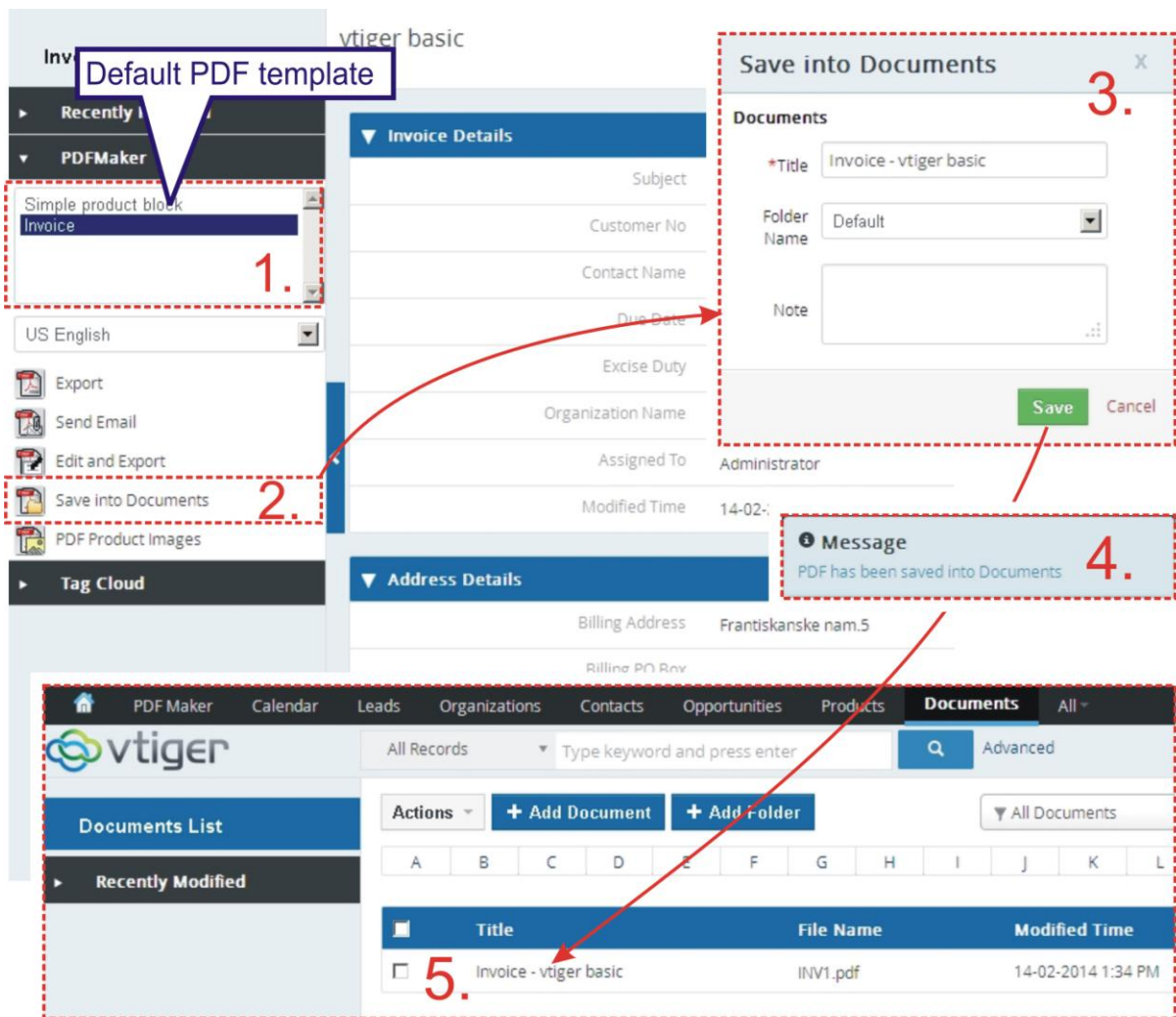


Picture 5.4 Edit and export to PDF

## 5.5 Save PDF into Documents

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

1. Go to the detail view of given Module and on the right side of detail view, in the PDF Maker block, choose your PDF Template.
2. Click on  Save into Documents link. A popup window will appear on the screen.
3. In the part “Documents” please write the title of the document and select the storage folder. You can also add a note.
4. Click on  Save button to save the PDF file into Documents.
5. After that the document can be find under module Documents.



Picture 5.5 Save PDF into Documents

## 5.6 PDF Product Page Break

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

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

5.6 Product break settings

Also good option is modify subtotal before page break. You can edit it if you edit **#PRODUCTBLOC\_START#** in your template (Picture 5.6).

5.7 Edit page break subtotal




## 5.7 PDF Product Images

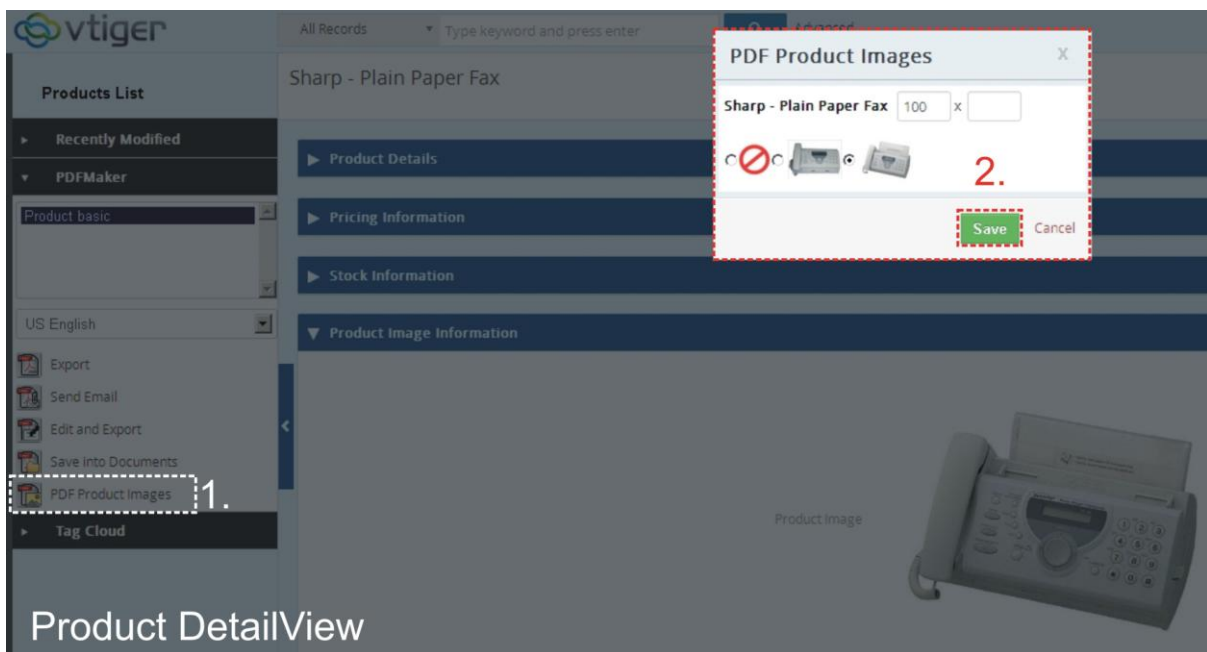
PDF Product Images action allows you to define some settings related to product images:

- used for product templates (see chapter 5.7.1)
- used inside product blocks (see chapter 5.7.2)

### 5.7.1 PDF Product Images in product templates

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

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



Picture 5.8 PDF Product Images in product templates

Depending on your selection 4 different situations can happen:

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

### 5.7.2 PDF Product Images in product blocks

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


1. Start editing of your PDF template. Go to the *Product block tab*, from “Available fields for Products” select “Product Image” and click on **Insert into template** button.
2. As can be seen below, it is required to insert the variable `$PRODUCTS_IMAGENAME$` between `#PRODUCTBLOC_START#` end `#PRODUCTBLOC_END#`.

The screenshot shows the 'Product block' tab in the PDF editor. The 'Available fields for Products' dropdown is set to 'Product Image', which is highlighted with a red box. A red arrow labeled '1.' points from this dropdown to the '\$PRODUCTS\_IMAGENAME\$' variable in a table below. The table also shows '#PRODUCTBLOC\_START#' and '#PRODUCTBLOC\_END#' variables, with a blue arrow labeled '2.' pointing to the '\$PRODUCTS\_IMAGENAME\$' variable between them.

Image	%G_Qty%	Text	%G_LBL_LIST_PRICE%
#PRODUCTBLOC_START#			
\$PRODUCTS_IMAGENAME\$	\$PRODUCT QUANTITY\$	\$PRODUCTUSAGEUNITS\$	\$PRODUCTNAME\$
#PRODUCTBLOC_END#			

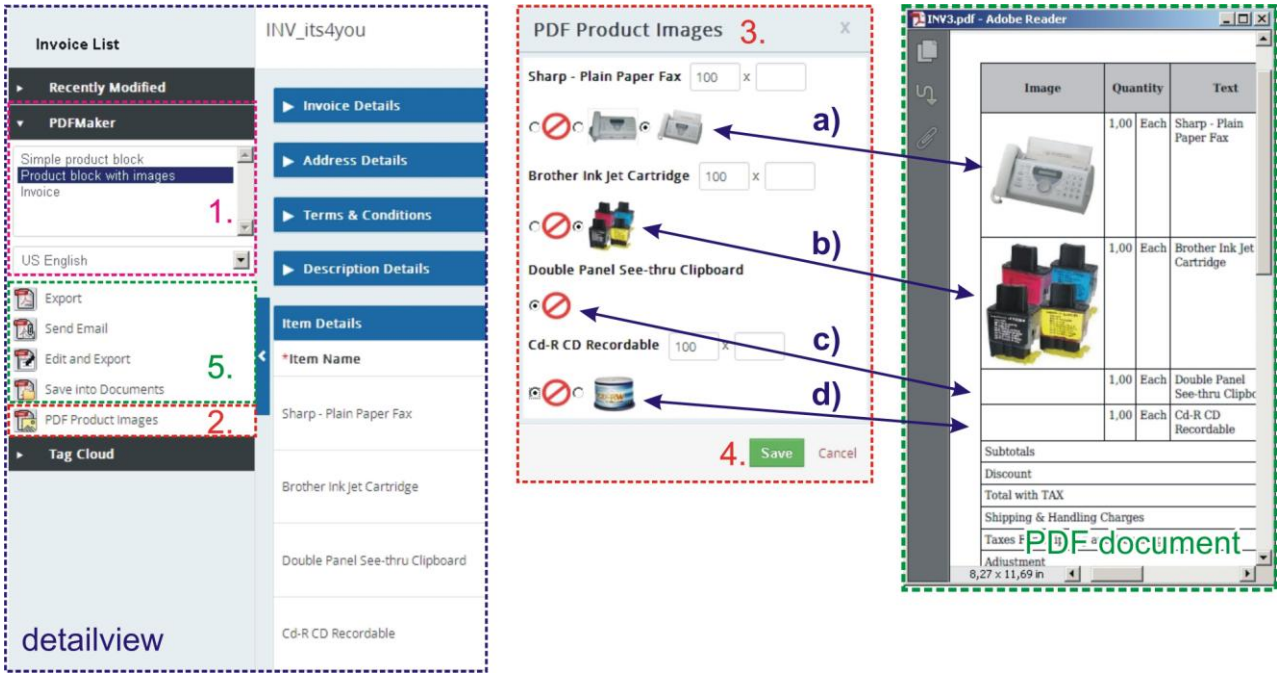
Picture 5.9 PDF Product images

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

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

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

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



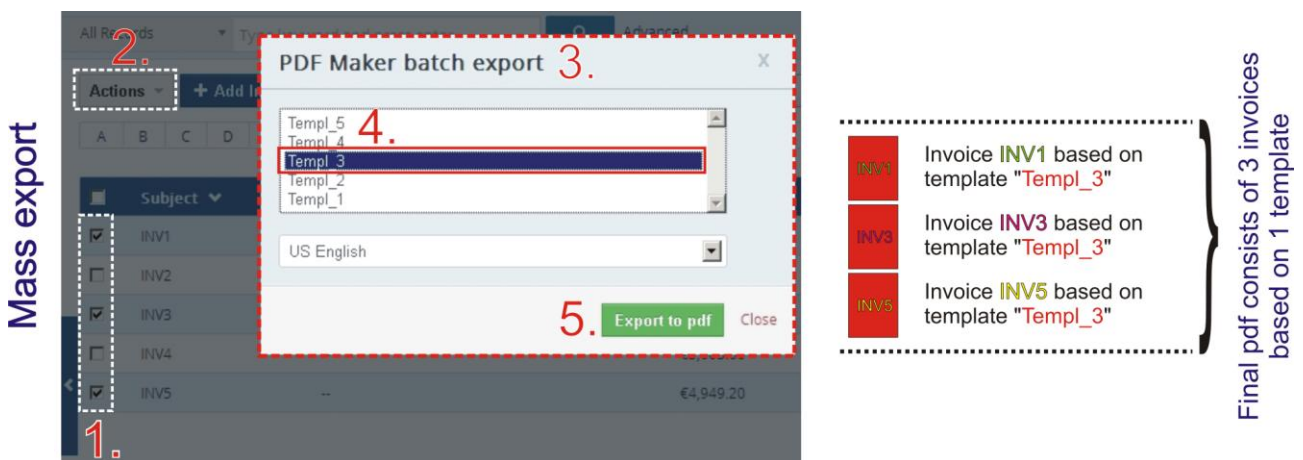
Picture 5.10 PDF Product images settings

## 6 Additional features

### 6.1 Mass export and merging templates

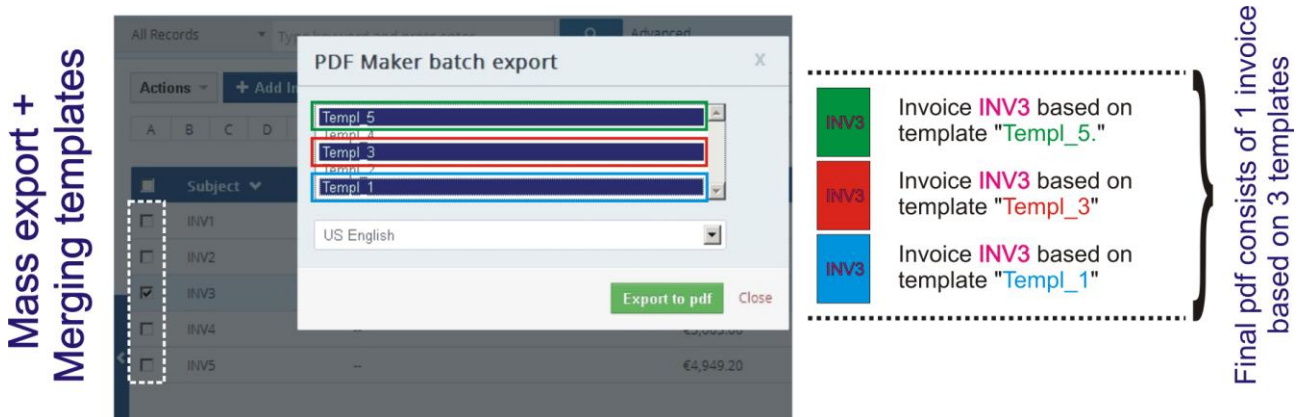
In the chapter 5.1 was described how to export documents via PDF Maker block. There is additional possibility of the export to PDF via ListView. In addition, ListView allows you mass export and merging templates. To do mass export in ListView please provide following steps:

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



Picture 6.1 Mass export

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



Picture 6.2 Merging templates

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

**Mass export + Merging templates**

The screenshot shows a 'PDF Maker batch export' dialog box with a list of templates: Templ 5, Templ 4, Templ 3, Templ 2, and Templ 1. Below the dialog, a list of invoices is shown, each with a colored icon and a description: Invoice INV1 based on template 'Templ\_5' (green), Invoice INV1 based on template 'Templ\_3' (red), Invoice INV1 based on template 'Templ\_1' (blue), Invoice INV3 based on template 'Templ\_5' (green), Invoice INV3 based on template 'Templ\_3' (red), Invoice INV3 based on template 'Templ\_1' (blue), Invoice INV5 based on template 'Templ\_5' (green), Invoice INV5 based on template 'Templ\_3' (red), and Invoice INV5 based on template 'Templ\_1' (blue). A bracket on the right indicates that the final PDF consists of 3 invoices, each based on 3 templates.

Picture 6.3 Mass export combined with merging templates

### 6.1.1 Sorting within mass export

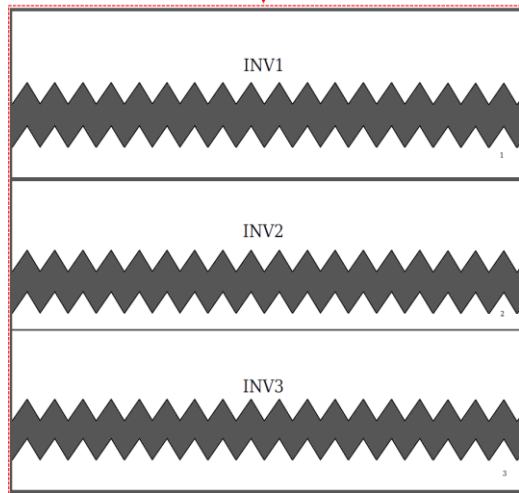
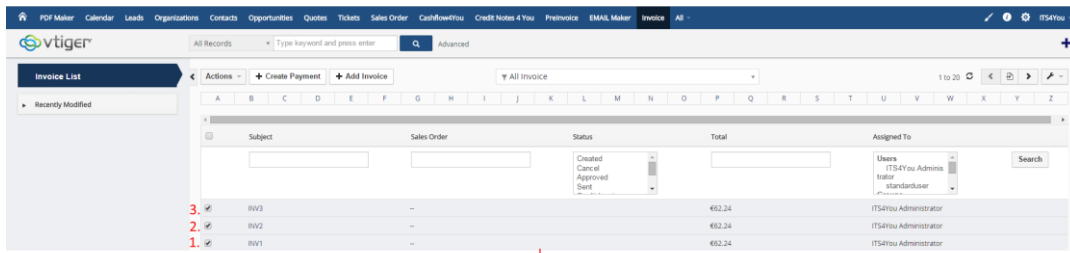
The order of the records exported in the PDF file within mass export depends on sorting used in the ListView. So if you change sorting of the records in the ListView then the final PDF file will correspond this sorting, i.e. records will be ordered as sorted in the ListView (Picture 6.4) and the order will depend on sequence of choosing records (Picture 6.5,6.6).

The figure shows three screenshots of a ListView interface, each demonstrating a different sorting method and its effect on the resulting PDF file. In each screenshot, three records are selected and numbered 1, 2, and 3. Red arrows indicate the mapping from the selected records to the PDF file output.

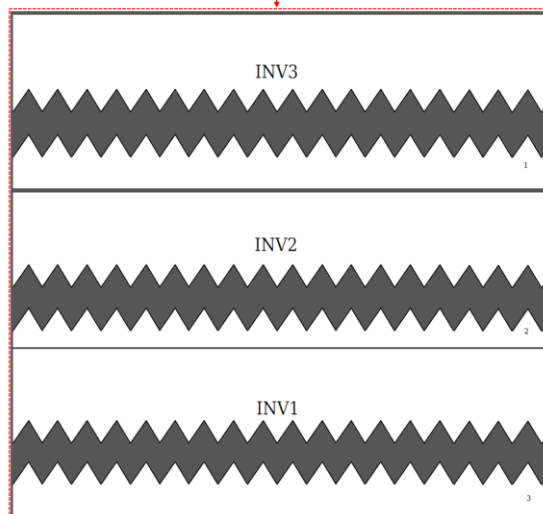
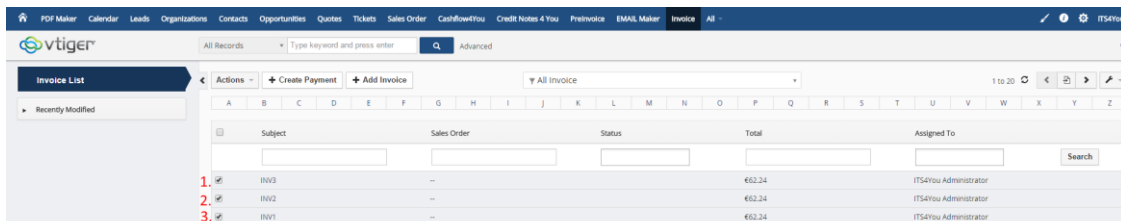
- Top screenshot:** Sorting by 'Invoice No'. Selected records: 1. INV1, 2. INV10, 3. INV11. PDF file output: 1. INV1, 2. INV10, 3. INV11.
- Middle screenshot:** Sorting by 'Organization Name'. Selected records: 1. INV1, 2. INV2, 3. INV4. PDF file output: 1. INV1, 2. INV2, 3. INV4.
- Bottom screenshot:** Sorting by 'Total'. Selected records: 1. INV5, 2. INV11, 3. INV8. PDF file output: 1. INV5, 2. INV11, 3. INV8.

Picture 6.4 Sorting within mass export

You are able to manage your records in PDF file according to choosing records in ListView.



### 6.5 Manage records in PDF



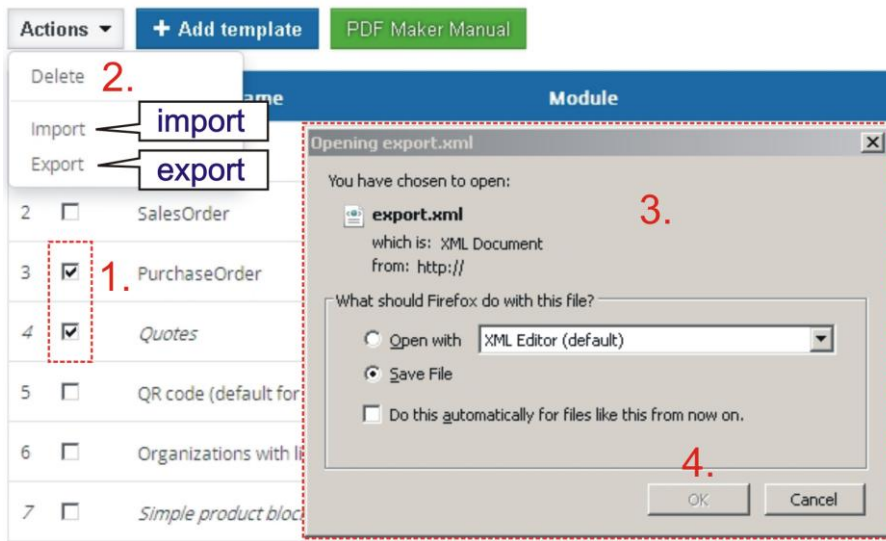
### 6.6 Manage records in PDF

## 6.2 Export and import templates

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

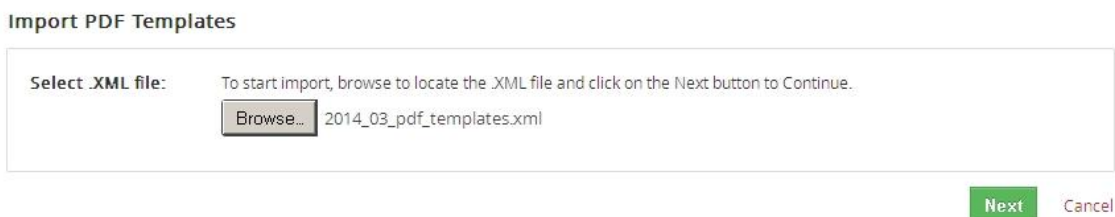
In order to export PDF templates to external sources in PDF Maker tool do following steps:

1. In the PDF Maker ListView page select one or more templates which would you like to export.
2. Click on **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 6.7 Export of the templates

To import PDF templates from external sources click on the “Import” from (see Picture 6.7 point 2.). After click the new import page will appear on the screen.



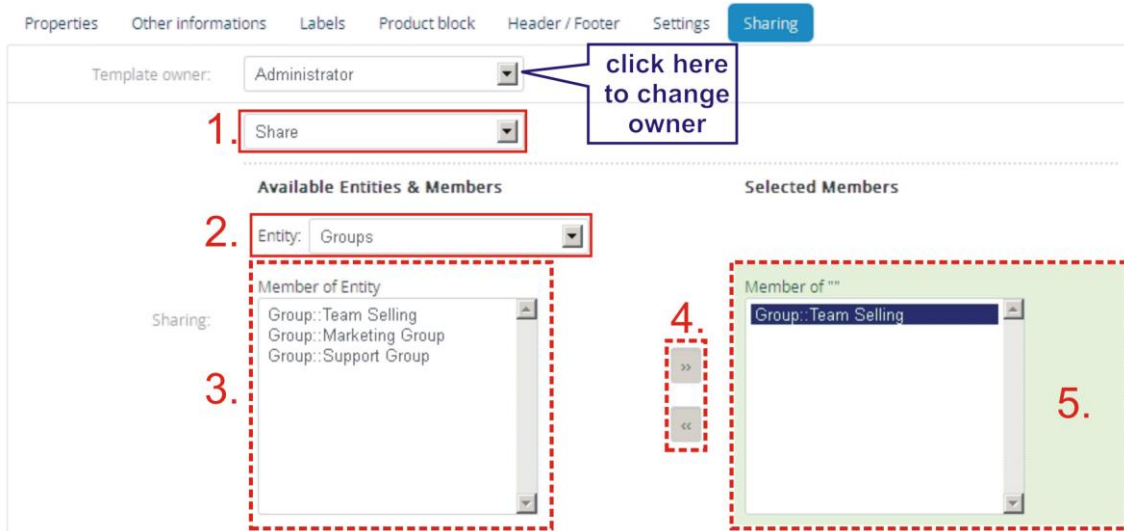
Picture 6.8 Import PDF templates page

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

## 6.3 Sharing

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

1. Select “Share” from the list.
2. Select “Entity” from the list. Available entities are: groups, roles, roles & subordinates, users.
3. Select member of entity
4. Click **>>** to add it to “Selected Members”
5. Click **<<** to remove selected member from “Selected Members”



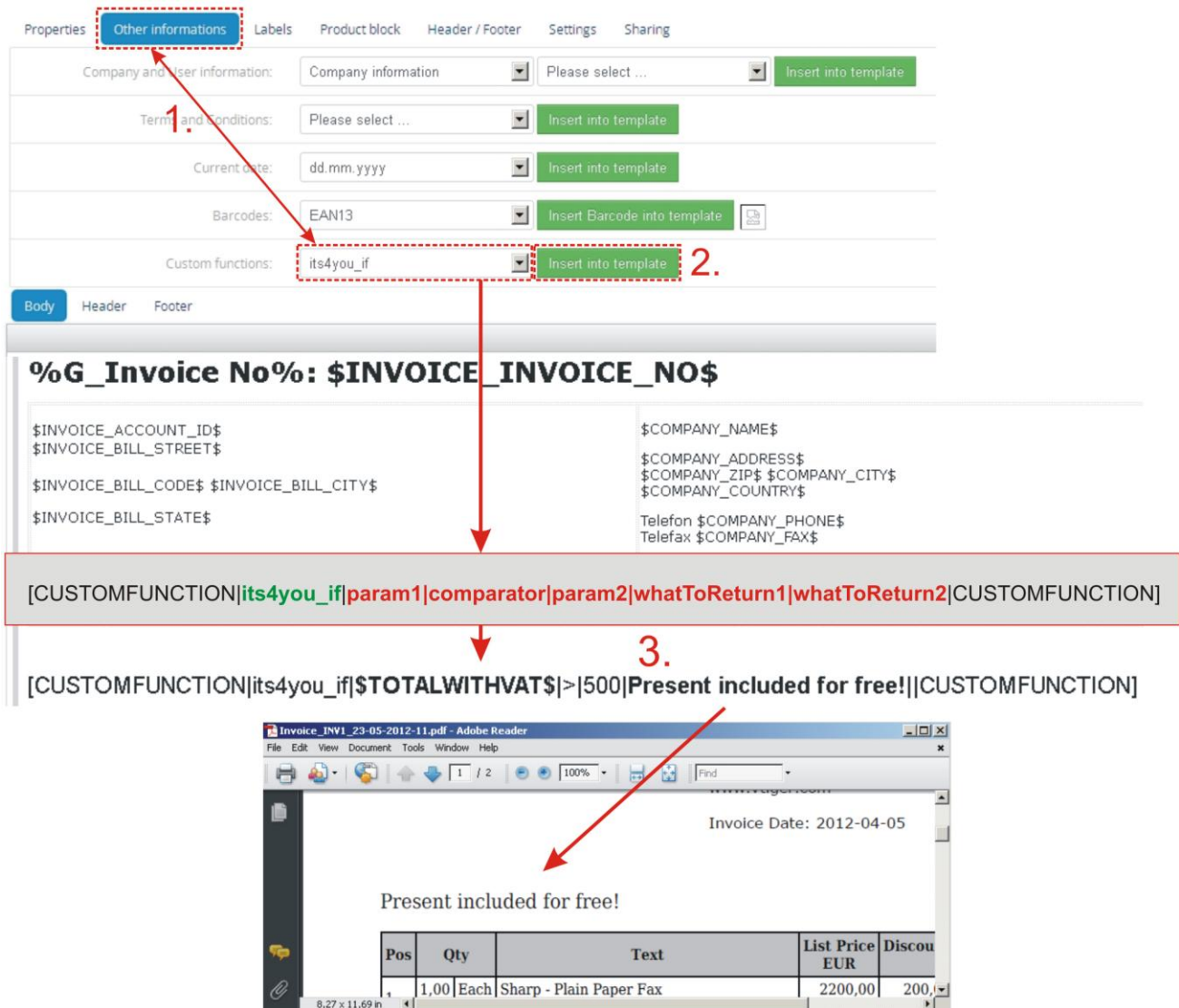
Picture 6.9 Sharing

## 6.4 Custom functions

If you need a special treatment of Vtiger data in your template, you can use custom (your own) functions. There is a folder „*functions*“ under `[vTigerROOT]/modules/PDFMaker/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/PDFMaker/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“. You can choose one of our functions (its4you\_\*), or your own function.
2. Click **Insert into template** button. It adds function in form `[CUSTOMFUNCTION|functionname|param1|param2|...|CUSTOMFUNCTION]`.
3. Finally you have to define parameters of the function as shown in the Picture 6.10.





Picture 6.10 Custom functions

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

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

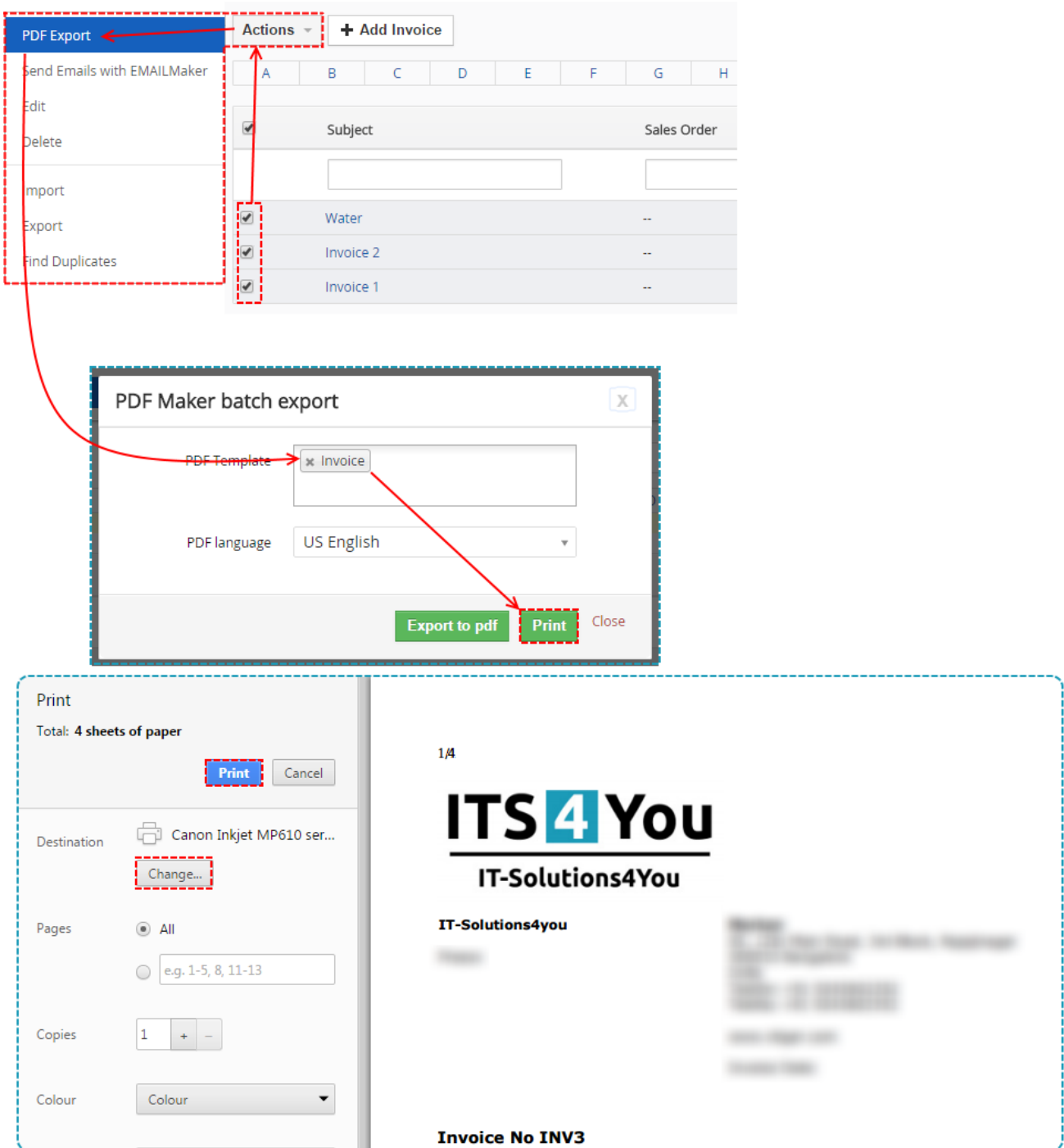
Following table contains short description of our its4you\_\* functions which you can use in your PDF templates.

Name	Description
its4you_if	<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> This function returns image of contact. <b>id</b> - contact id <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

## 6.5 Mass print

Allows you print from ListView more documents. Only you need to do is that choose records, click on **Actions** button and then choose *PDF Export*. In pop-up window, choose PDF Maker template, click on **Print**, choose your printer and click on Print.



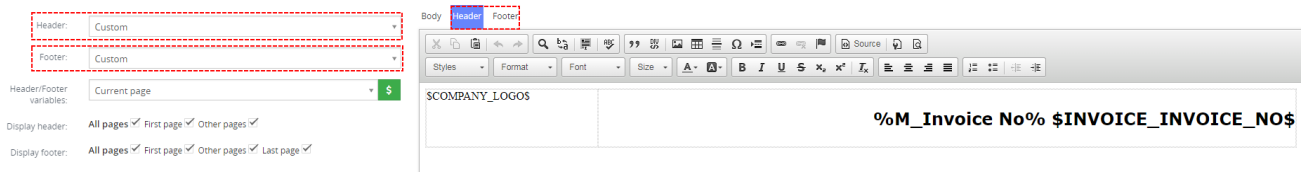
Picture 6.11 Mass print

## 6.6 Template for Header/Footer

Since PDF Maker 600.17.0 version there is useful option to create Header/Footer templates and then use it for PDF template. This function should save your time when you need make changes in all Header or Footer of PDF template.

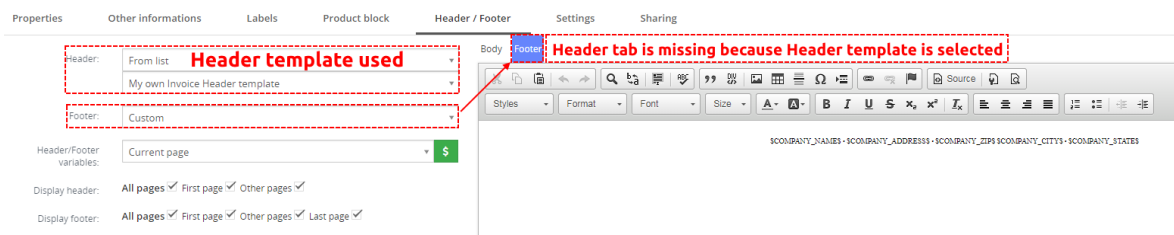
It is useful functionality that allows you create Header/Footer template and use it in PDF template. Then if you need to provide any change in Header or Footer you just provide changes in Header/Footer template and these changes will be applied in all PDF templates where you use Header/Footer template.

You can still use Header or Footer in PDF template. If you do not use Header/Footer template in PDF template EditView you can see tabs Header/Footer and this custom Header/Footer is used for creation of PDF file.

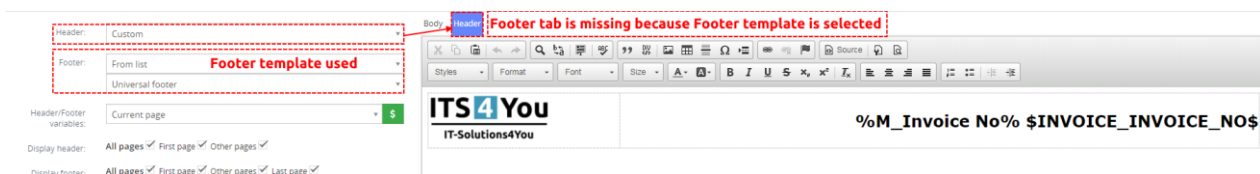


Picture 6.12 Custom Header/Footer in PDF template – PDF Maker Vtiger 6

Also you can create and select Header or (and) Footer template for your PDF template and then this (these) Header/Footer template is used for creation of PDF file. If you add Header/Footer template to your PDF template there is no tab of Header/Footer in EditView of PDF template visible anymore.

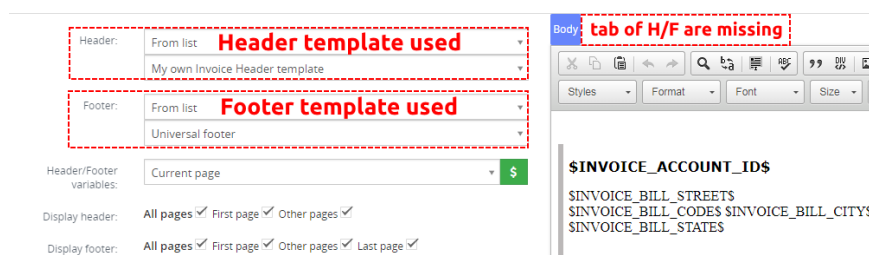


Picture 6.13 Header template used – PDF Maker Vtiger 6



Picture 6.14 Footer template used – PDF Maker Vtiger 6

If you use Header and Footer template then only Body tab is visible in EditView of PDF template.



Picture 6.15 Header and Footer templates are used – PDF Maker Vtiger 6

## How to use Header/Footer template

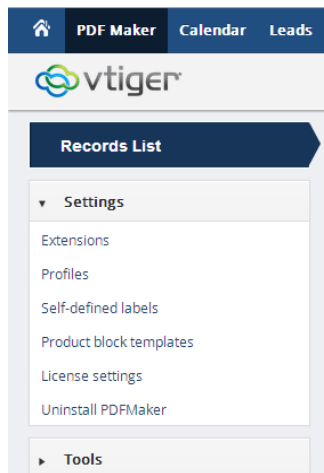
There are few simple steps how to start using Header/Footer template functionality. Please see following steps:

- First at all you need to create your Header/Footer template ([Create the simple Header/Footer template](#))
- Then your template is available in ListView of Header/Footer ([ListView of Header/Footer](#))
- Open your PDF template and select Header/Footer tab
- Choose Header or (and) Footer template for your PDF Maker template from list of Headers/Footers ([Header/Footer](#))
- Now you can generate PDF file with your Header/Footer template
- If you need to provide changes in header you do not need edit all PDF templates just your Header or Footer template

## 7 Settings

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

- [Extensions](#) – manage extensions Customer Portal and Workflows
- [Profiles](#) – manage user-specific PDF Maker access to different roles
- [Self-defined labels](#) – manage your own labels
- [Product block templates](#) – manage your own product block templates
- [License settings](#) – manage all settings related to your license
- [Uninstall PDFMaker](#) – remove PDF Maker completely from your Vtiger



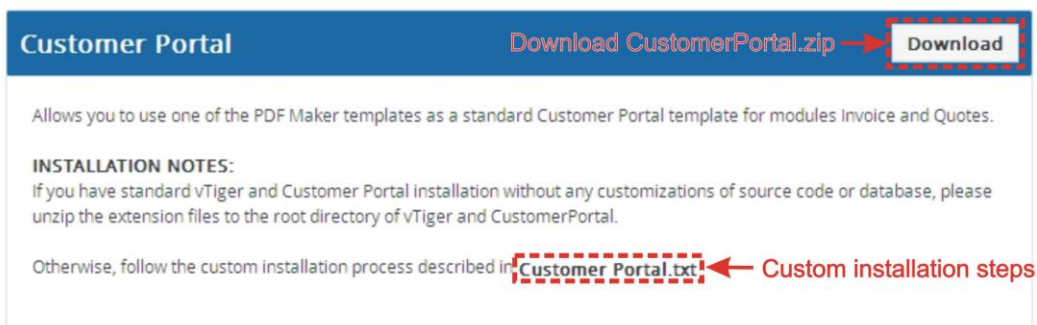
Picture 7.1 PDF Maker settings

### 7.1 Extensions

#### 7.1.1 Customer portal

We've already provided possibility to use one of the PDF Maker templates as a standard Customer Portal template for each module (if your customer portal supports export other modules). The requirement is to set PDF Maker template as default for Customer Portal. Please refer to chapter 4.9.4 to see how to set up PDF Maker template for Customer Portal.

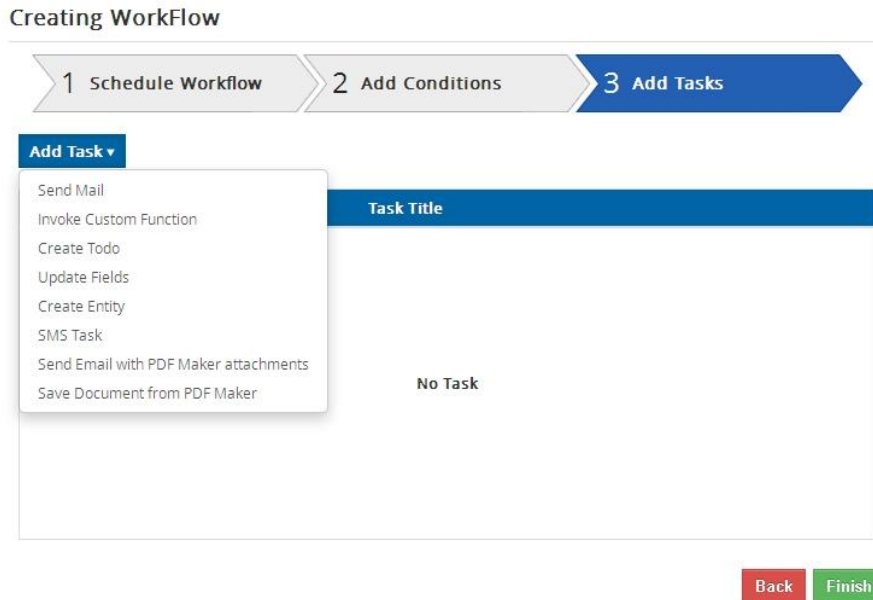
INSTALLATION NOTES: If you have standard Vtiger and Customer Portal installation without any customizations of source code or database, please unzip the extension files to the root directory of Vtiger and Customer Portal. Otherwise, follow the custom installation process described in Customer Portal.txt



Picture 7.2 Customer portal

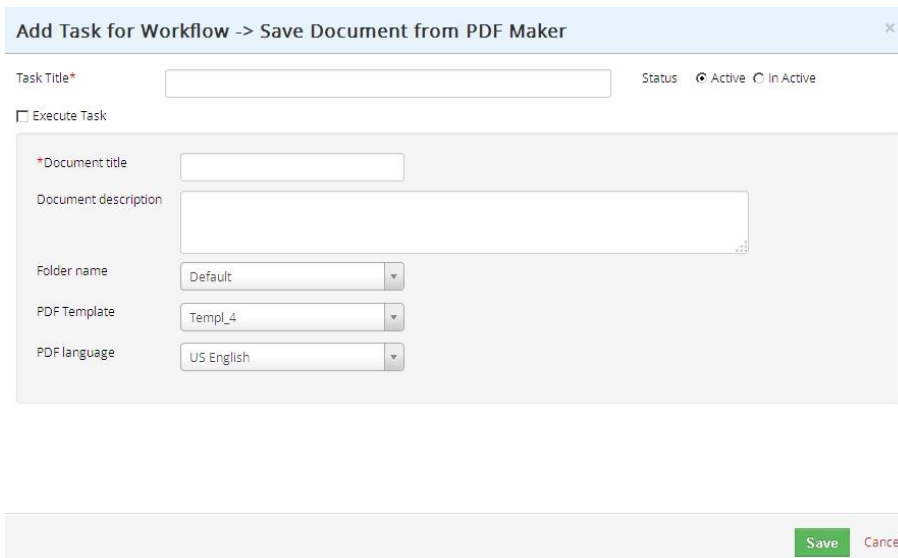
### 7.1.2 Workflows

PDF Maker Workflow extension is a new package which provides features to enhance usability of standard workflow of the Vtiger in cooperation with our PDF Maker. It allows you to create completely new tasks "Save Document from PDF Maker" and "Send Email with PDF Maker attachments" for any workflow.



Picture 7.3 PDF Maker tasks for workflows

"Save Document from PDF Maker" task brings you the possibility to automatically create and save Documents from PDF Maker templates for module you create workflow for. All you need to do is to create new Workflow for chosen module and create a new Task "Save Document from PDF Maker".



Picture 7.4 Save Document from PDF Maker for workflows

"Send Email with PDF Maker attachments" task brings you the possibility to automatically send email with attached PDF file based on PDF Template(s). When you create new Workflow for chosen module just create a new Task " Send Email with PDF Maker attachments" and select PDF Template which has to be used (Picture 7.5).

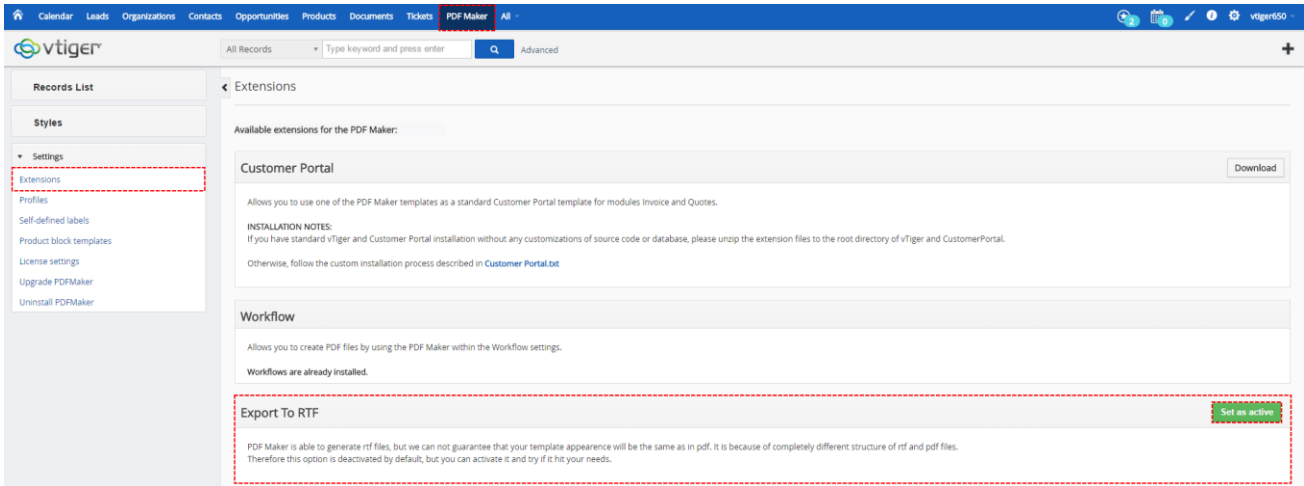
The screenshot shows a dialog box titled "Add Task for Workflow -> Send Email with PDF Maker attachments". It contains a "Task Title\*" input field, a "Status" section with radio buttons for "Active" (selected) and "In Active", and a checkbox for "Execute Task". Below these is a tabbed interface with three tabs: "Email details", "PDF Template" (which is active), and "Email content". The "PDF Template" tab contains a "PDF Template" input field with "Invoice" selected and a "PDF language" dropdown menu set to "US English". At the bottom right of the dialog are "Save" and "Cancel" buttons.

Picture 7.5 Send email with PDF maker attachments for workflows

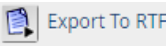


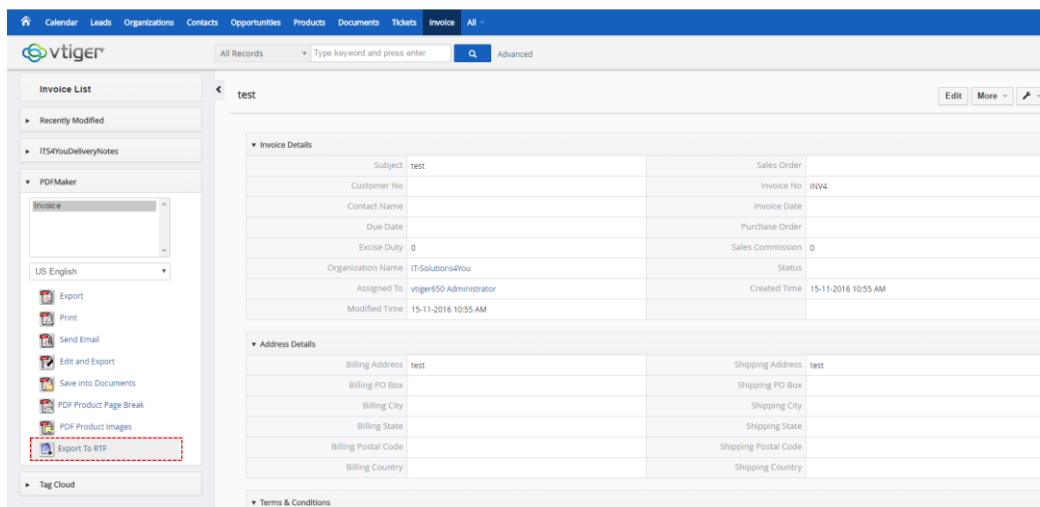
### 7.1.3 Export to RTF

PDF Maker is able to generate rtf files, but we can't guarantee that your template appearance will be the same as in PDF. It is because of completely different structure of rtf and PDF files. Therefore this option is deactivated by default, but you can activate it and try if it hit your needs.



Picture 7.6 How to enable export to RTF

To export RTF file please click on  button in PDF Maker block in your record.



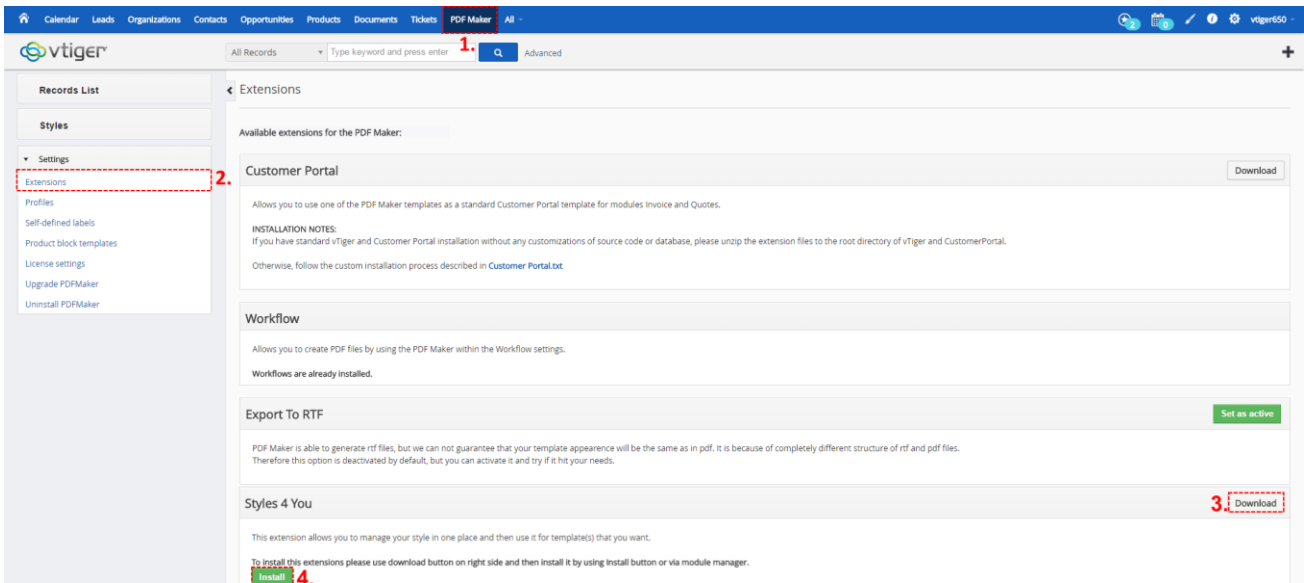
Picture 7.7 How to export RTF file

## 7.1.4 Styles 4 You

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

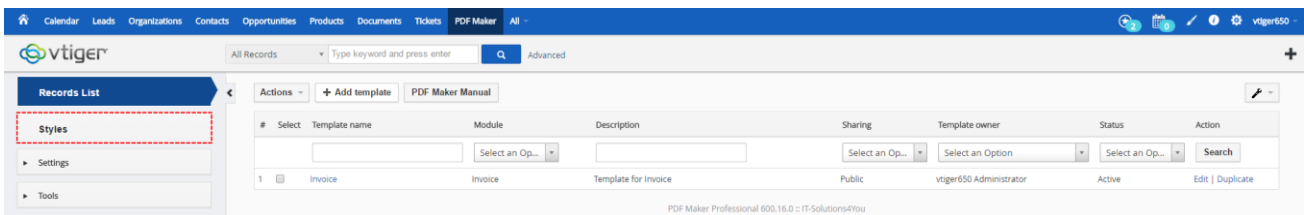
To install Styles4You please provide following steps:

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




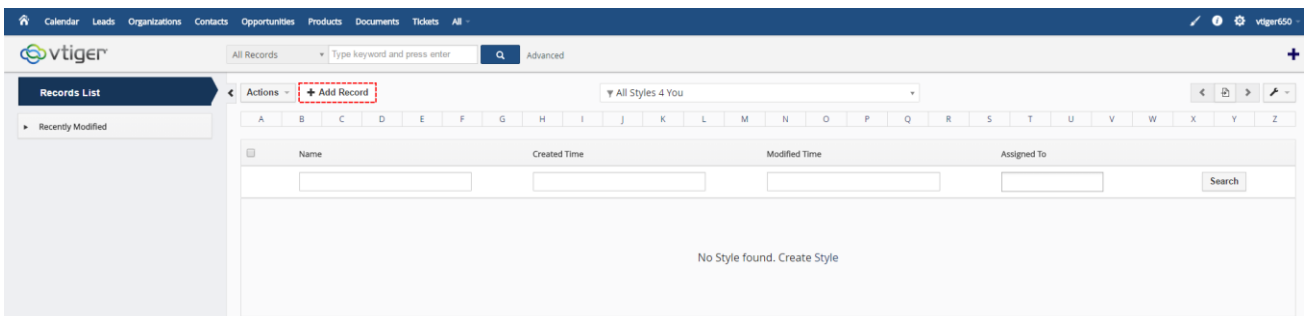
Picture 7.8 How to install Styles4You

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



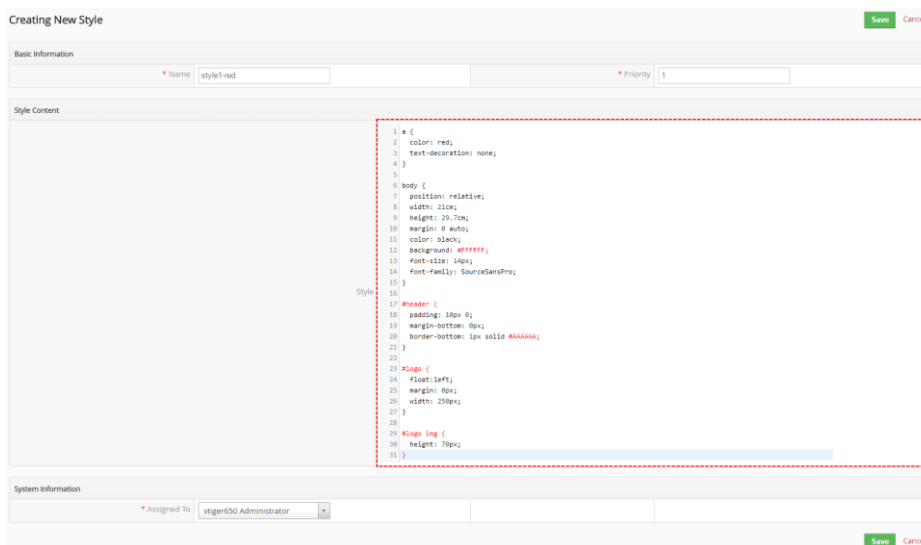
Picture 7.9 How to open Styles4You

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



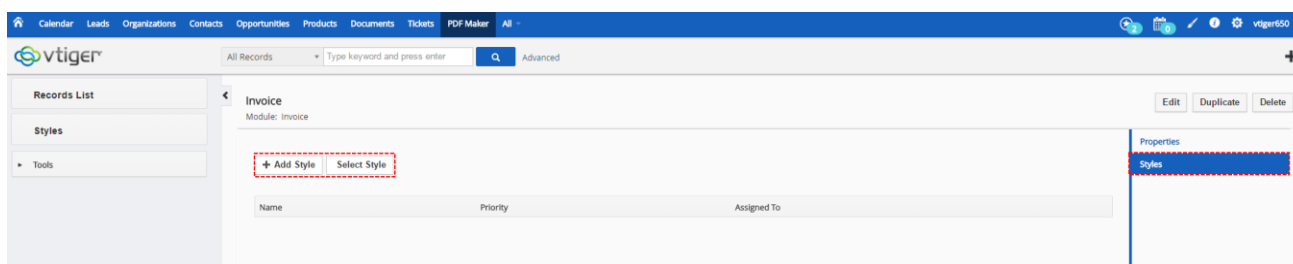
Picture 7.10 How to add new style

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



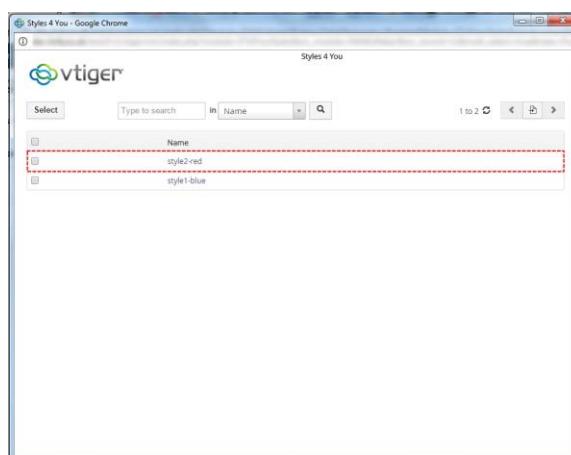
Picture 7.11 How to create Styles4You

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



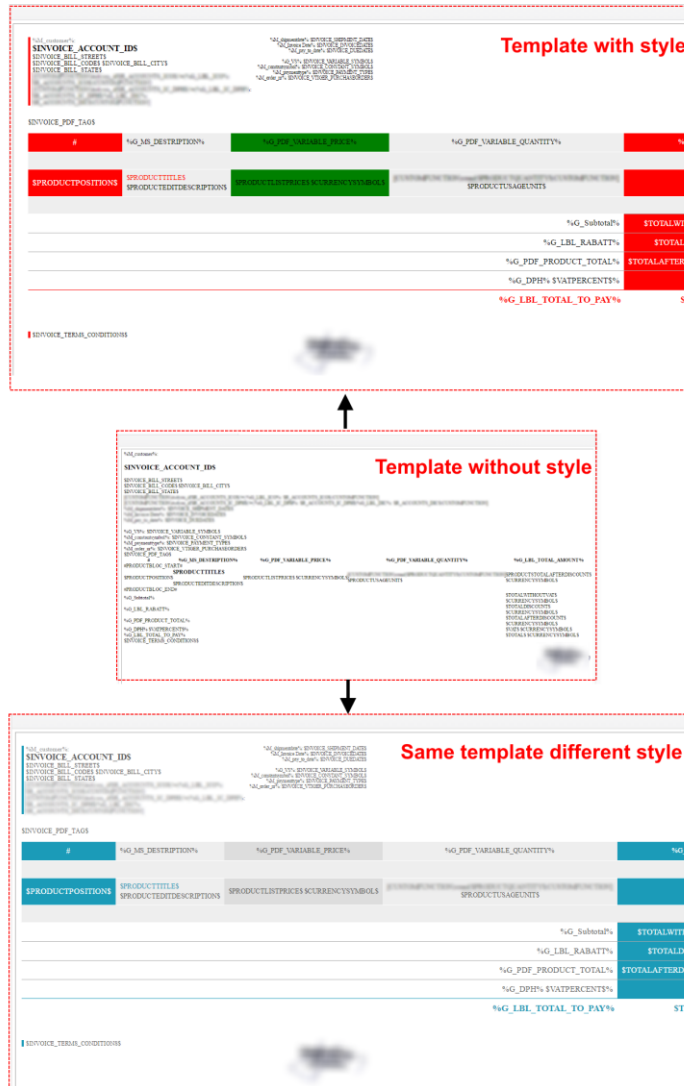
Picture 7.12 How to add style to template

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



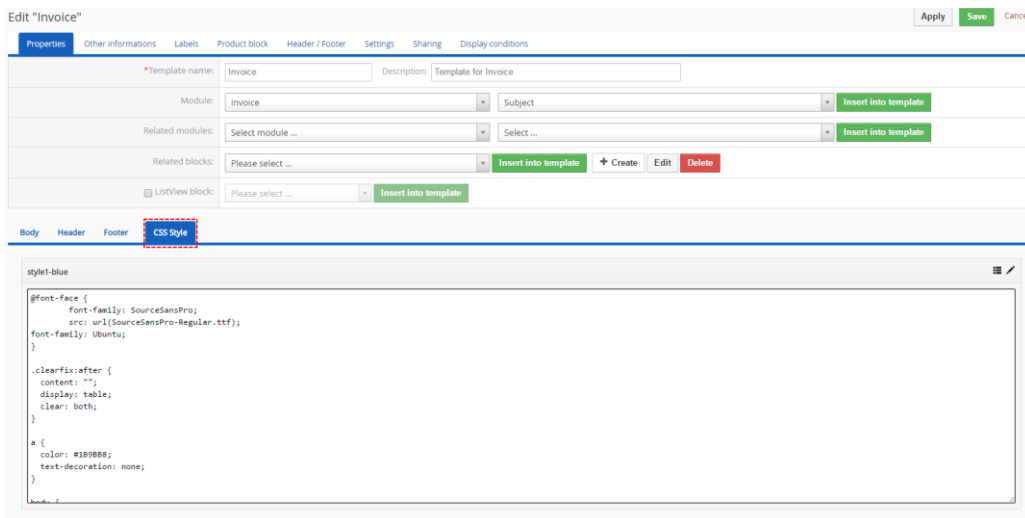
Picture 7.13 Select style

Now, your style has been added to your template.



Picture 7.14 Styles4You

Style used in your template you can also find in edit view of template in CSS Style tab.



Picture 7.15 Style in EditView of template

## 7.2 Profiles

You may define PDF Maker privileges for all profiles. You may define Create/Edit, View and Delete privileges. In order to change privileges click on **Edit**, use the checkboxes and click on **Save** button to save changes.

The image shows two screenshots of the 'Profiles' management interface. The top screenshot shows the 'Edit' button highlighted with a red dashed box and the number '1'. The bottom screenshot shows the 'Save' button highlighted with a red dashed box and the number '2'.

**Records List**

Profiles  
Manage user-specific PDF Maker access to different Roles.

Define PDF Maker privileges for all profiles:

Profiles	Create/Edit	View	Delete
Administrator	✓	✓	✓
Sales Profile	✓	✓	✓
Support Profile	✓	✓	✗
Guest Profile	✗	✗	✗

**Records List**

Profiles  
Manage user-specific PDF Maker access to different Roles.

Define PDF Maker privileges for all profiles:

Profiles	Create/Edit	View	Delete
Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sales Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Support Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Guest Profile	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

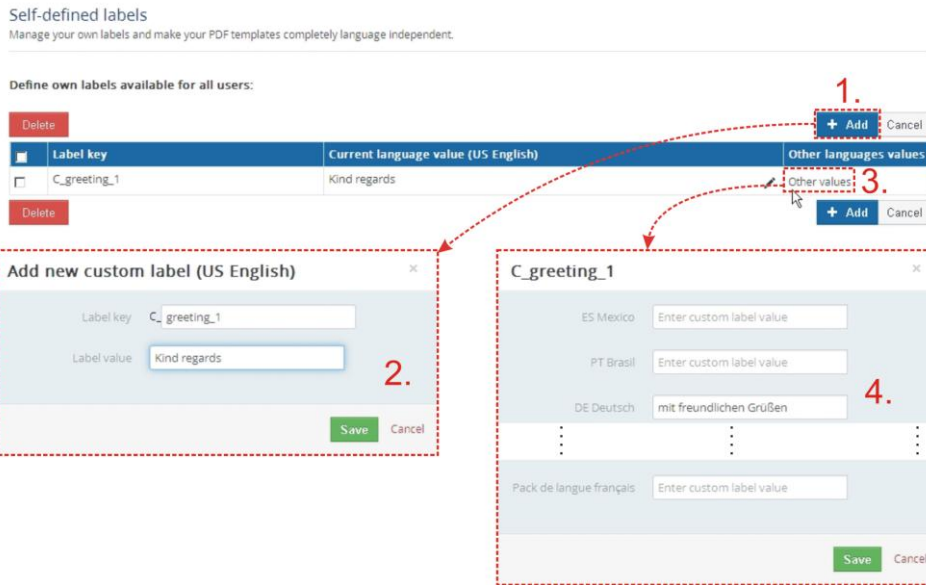
Picture 7.16 Manage profiles

## 7.3 Self-defined labels

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


1. Click on **+ Add** button.
2. Define label key C\_\*\*\*\*\* 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.

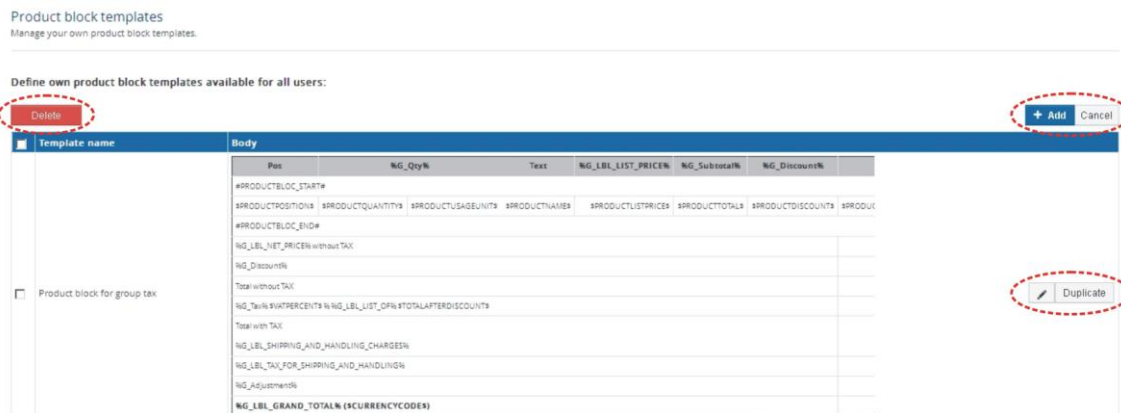
You can also find here button **Delete** which allows you to delete unnecessary labels.



Picture 7.17 How to define self-defined labels

## 7.4 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 7.18 Product block templates management

When you click on button **+ Add** following window will appear on your screen (Picture 7.19). 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.

Properties Labels

\*Template name: 1.

Product block: 2.

\*Common fields for Products & Services:

\*Available fields for Products:   3.

\*Available fields for Services:

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

Source

Styles Format Font Size **B** *I* U

2. #PRODUCTBLOC\_START#  
3. :SPS\_NO\$ \$PRODUCTS: PRODUCTNAME\$  
#PRODUCTBLOC\_END#

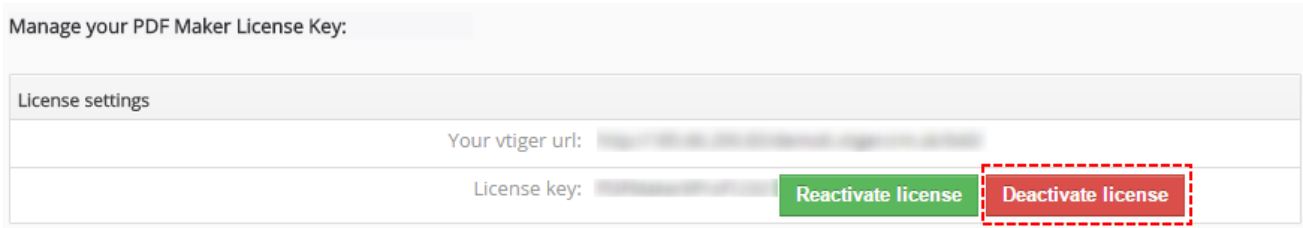
Picture 7.19 Create new product block template

## 7.5 License settings

### 7.5.1 Deactivate license

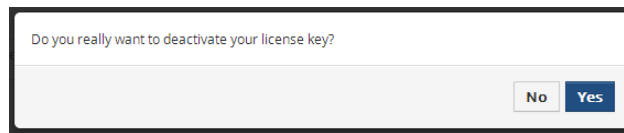
If you want to deactivate your license please provide following step:

1. Click on **Deactivate license** button



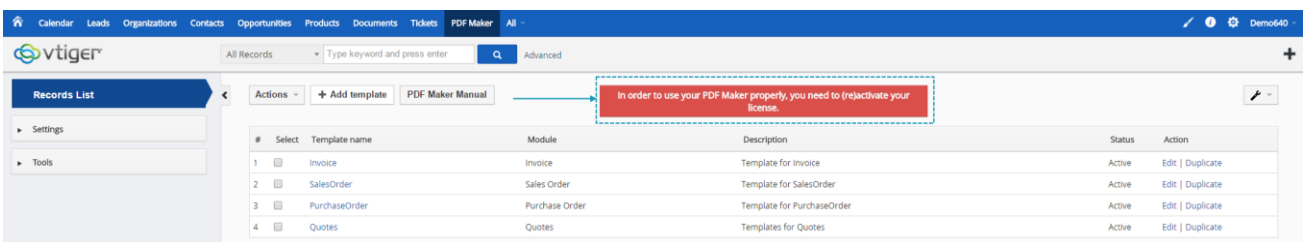
Picture 7.20 Deactivate PDF Maker

2. Confirm deactivation using **Yes** button

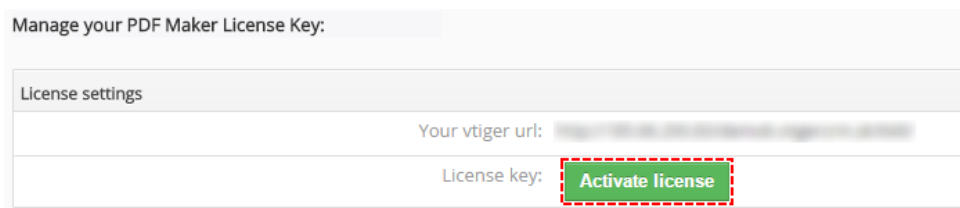


Picture 7.21 Deactivate PDF Maker

After deactivation of license you can list or export your PDF 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 PDF Maker block is not visible either. To use PDF 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 7.22 Deactivated PDF Maker



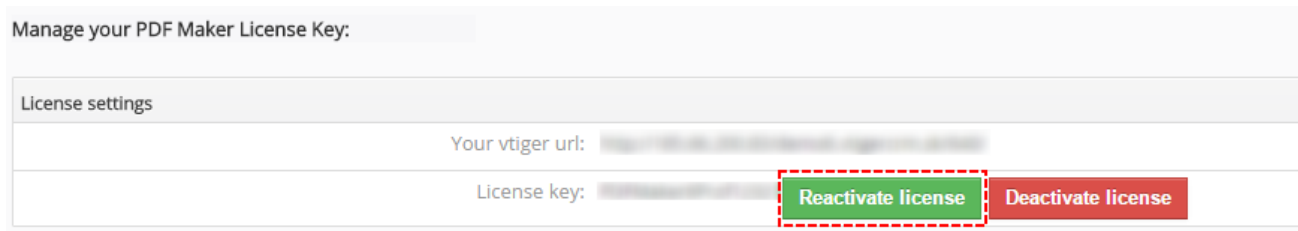
Picture 7.23 Activate PDF Maker



## 7.5.2 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 PDF Maker License Key:

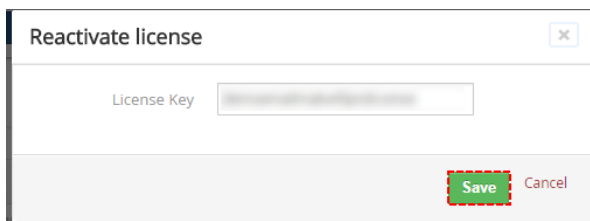
License settings

Your vtiger url: [redacted]

License key: [redacted] **Reactivate license** **Deactivate license**

Picture 7.24 Reactivate license

2. Confirm with **Save**



Reactivate license

License Key [input field]

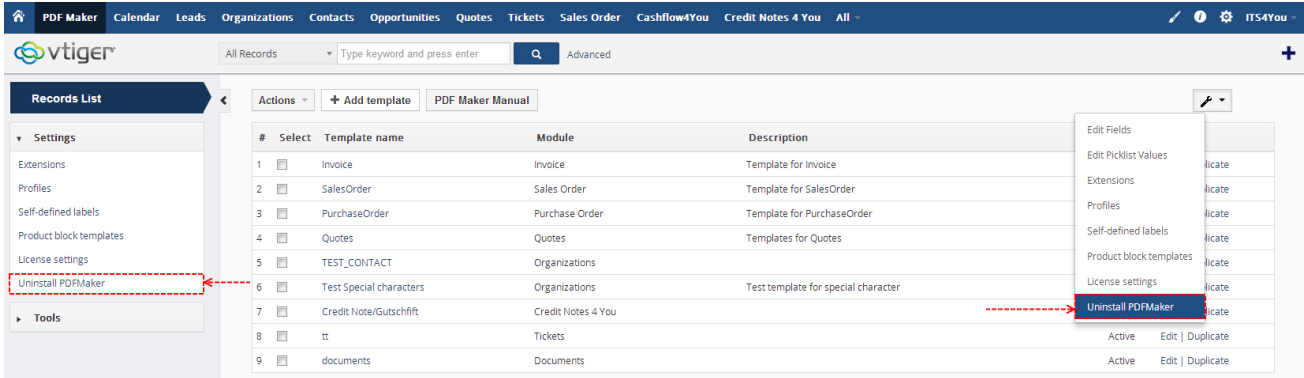
**Save** Cancel

Picture 7.25 Reactivate license

## 7.6 Uninstall

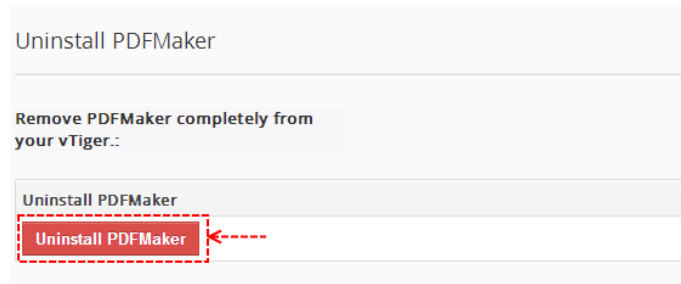
Until PDF Maker version 600.3.8 there is available to remove PDF Maker from your Vtiger. To uninstall please provide following steps:

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



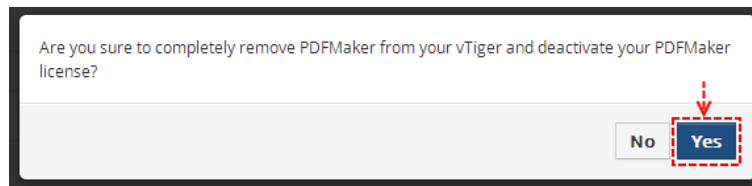
### 7.26 Uninstall PDF Maker – step 1

- Click on **Uninstall PDFMaker** button



### 7.27 Uninstall PDF Maker – step 2

- Confirm uninstall with **Yes** button




### 7.28 Uninstall PDF Maker – step 3

Now, PDF Maker is removed from your Vtiger and your license is deactivated. To use PDF Maker again you need to provide installation and validation steps (see chapter [1 How to install PDF Maker](#)).

## 8 Tips & tricks

### 8.1 How to define background image

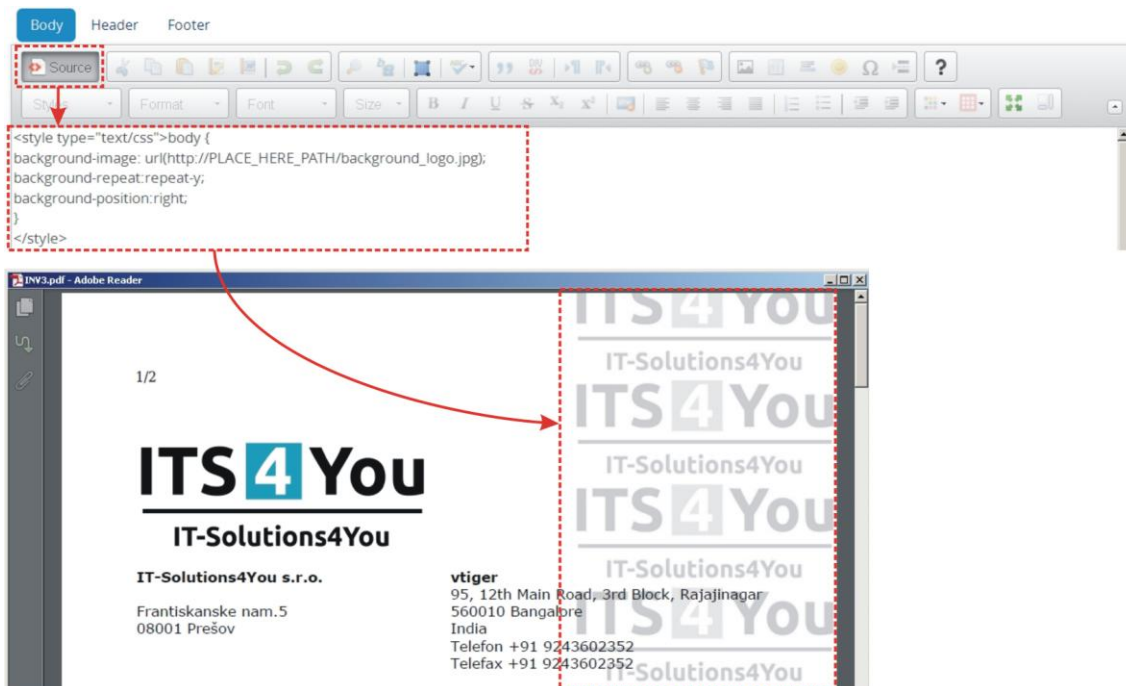
It is possible to define background image for PDF template as shown in the picture below. Just click on  and insert following code (see Picture 8.1):

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

In addition, you can define background image repeat property via “background-repeat: value;” by values:

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

or background position via “background-position: value”.

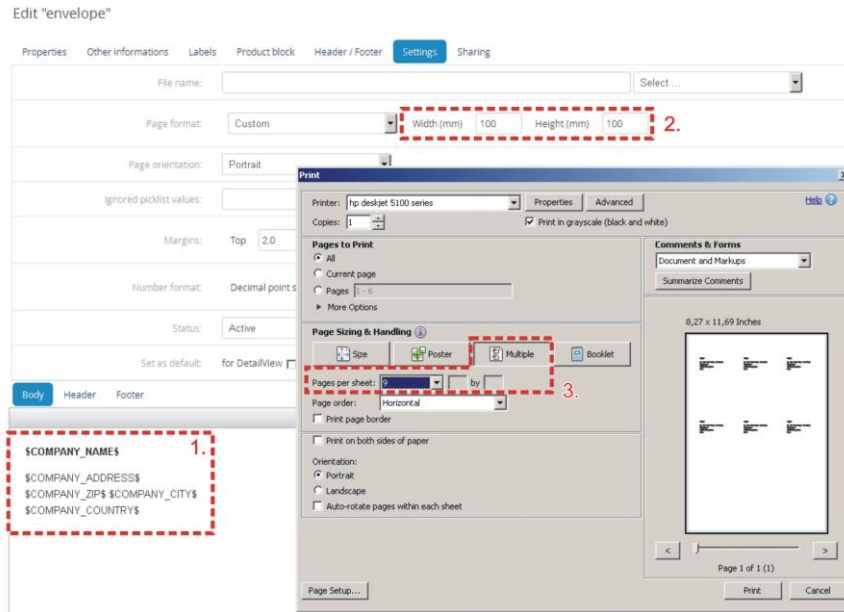


Picture 8.1 Background image

## 8.2 How to print labels, envelopes and more

Below is simple example how to print envelopes/labels. Please provide following steps:

1. Define simple PDF template – for example with fields for organization address.
2. Set minimum size of PDF template (100x100 mm).
3. Use option “Multiple” for Page sizing & Handling according to your needs.

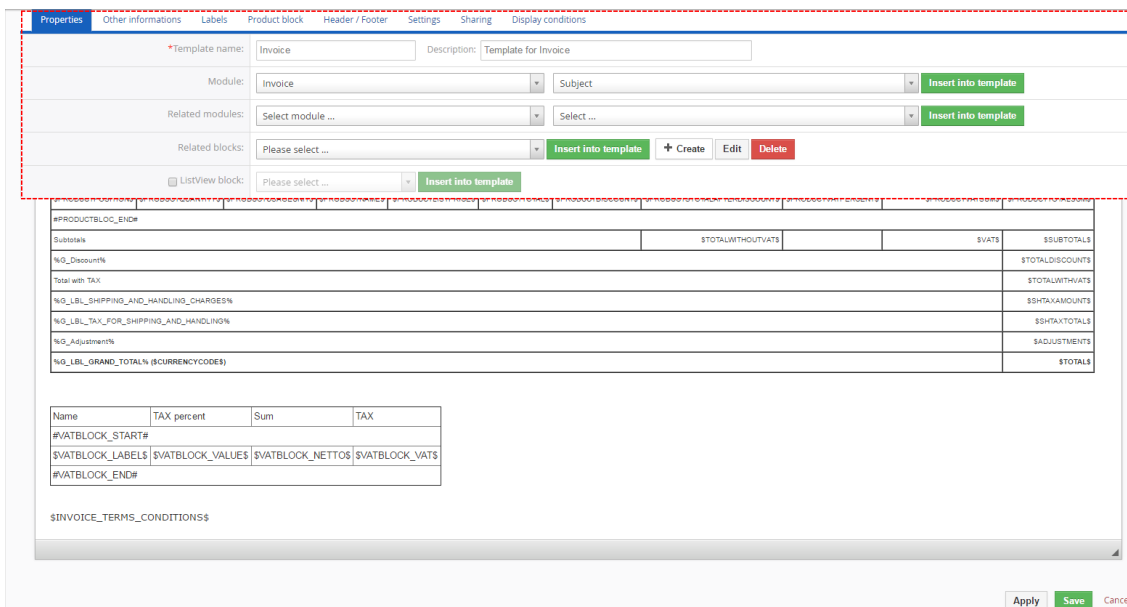


Picture 8.2 Envelope/labels printing

## 8.3 Movable PDF Maker block

Have you experienced that you edited your PDF Template but you needed to scroll up to show PDF Maker block with variables and you lost then?

Since **600.16.0** version, is PDF Maker block movable to more user-friendly template editing.



Picture 8.3 Movable PDF Maker block

## Change log of PDF Maker

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August 2018: **600.18.0**

- [Watermark](#)
  - [PDF Password](#)
  - Minor Improvements and bug fixes
- 

July 2018: **600.17.0**

- [Template for Header/Footer](#)
  - Minor Improvements and bug fixes
- 

November 2016: **600.16.0**

- [Styles4You](#)
  - More user-friendly create/edit of template ([movable PDF Maker block in EditView](#))
  - Minor Improvements and bug fixes
- 

August 2016: **600.15.0 – 600.15.1**

- Save PDF into Documents in Edit and Export
- 

July 2016: **600.14.0**

- [Export to RTF functionality](#)
  - Minor Improvements and bug fixes
- 

June 2016: **600.13.0**

- Searching in ListView (3.1 ListView)
  - Owner and Sharing in ListView of PDF Maker (Picture 3.1 ListView)
  - New variables for “Modified by User” and “Created by User” available
  - Brazilian Portuguese translation of PDF Maker
  - Since release 600.13.0 is in installation process new mpdf (mpdf6) installed
  - Issue with ListView export language fixed
  - Fixed its4you\_getContactImage custom function
- 

March 2016: **600.12.0 – 600.12.1**

- Issue with Custom Currency fields fixed
  - Fixed issue with wrong display & in QR code
  - Template owner is user who creates template
  - [Option to create separate Block for Products and for Services](#)
  - Fixed issue with printing from ListView
  - Minor Improvements and bug fixes
- 

January 2016: **600.11.0 – 600.11.1**

- Faster loading EditView of template and Create template page
- 

December 2015: **600.10.1**

- Vat block displays also when VAT is 0%
  - Issue with Currency fields fixed
  - \$site\_URL available in template by \$siteurl\$
- 

November 2015: **600.10.0**

- Finnish translation of PDF Maker
  - Available option to add custom Company Info into template
  - Showing description of template after mouse rollover in PDF Maker block
-

- Product block where is chosen column List Price is possible to select only for module PriceBook

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October 2015: **600.9.1 – 600.9.3**

- bug fixes
- fixed bug with showing \$PRODUCTS\_IMAGENAME\$

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August 2015: **600.9.0**

- option to add conditions to show/hide templates in PDF Maker block

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Jun 2015: **600.8.0 – 600.8.2**

- Compatibility with **Vtiger 6.3**

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May 2015: **600.7.0 – 600.7.2**

- Print PDF option available

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May 2015: **600.6.0**

- sorting of templates in PDF Maker block by name
- privileges for DETAIL/EDIT/DELETE of templates
- bug fixes

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17<sup>th</sup> December 2014: **600.5.3**

- Upgrade option added
- bug fixes

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10<sup>th</sup> December 2014: **600.5.1 – 600.5.2**

- fixed sorting in related blocks

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27<sup>th</sup> November 2014: **600.5.0**

- fixed export in Calendar module
- sorting within mass export

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November 2014: **600.4.3 – 600.4.5**

- correction release
- fixed saving PDF Templates
- removed the limit for the selection in related blocks
- correction filing discount in PDF

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24<sup>th</sup> October 2014: **600.4.0 – 600.4.2**

- add option to create page break in product block
- compatibility with Cashflow4You
- support of “Comments”
- bug fixes

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8<sup>th</sup> October 2014: **600.3.8 – 600.3.9**

- minor improvements and bug fixes
  - available option to Uninstall PDF Maker
  - fixed bug “assigned to”

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3<sup>rd</sup> June 2014: **600.3.3**

- change formatting for uitype 72
- correction for inserting (total, subtotal...) in the EditView for Invoice, Quotes, SalesOrder and PurchaseOrder

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28<sup>th</sup> May 2014: **600.3.2**

- introduction of Basic version of PDF Maker

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22<sup>nd</sup> May 2014: **600.3.1**

- improvements related to support EMAIL Maker

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13<sup>th</sup> May 2014: **600.3.0**

- added support for Workflows

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

- added support for Customer portal

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January - April 2014: **600.1.1 – 600.1.10**

- minor improvements and bug fixes related to movement of the PDF Maker to Vtiger 6

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11<sup>th</sup> December 2013: **600.1.0**

- first initiate version for Vtiger 6 based on main functionalities of PDF Maker for Vtiger 5.x

## Change log of Manual for PDF Maker

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August 2018: manual based on PDF Maker version: **600.18.0**

- new chapter: Watermark, PDF Password, Header/Footer template
- 

November 2016: manual based on PDF Maker version: **600.16.0**

- new chapter: 7.1.3 Export to RTF, 7.1.4 Styles 4 You, 8.3 Movable PDF Maker block
  - updated chapter: 5.4 Edit and Export to PDF
- 

July 2016: manual based on PDF Maker version: **600.13.0**

- updated picture: Picture 3.1 ListView, Picture 1.6 Validation step 2
  - updated chapter: 3.1 ListView
- 

April 2016: manual based on PDF Maker version: **600.12.1**

- new chapter: 4.5.3 Separate Block for Products and for Services
- 

November 2015: manual based on PDF Maker version: **600.10.0**

- update chapter: How to install PDF Maker, License settings
- 

August 2015: manual based on PDF Maker version: **600.9.0**

- new chapter: 5.2 Print, 6.5 Mass print, 3.5.9 Display conditions
- 

17<sup>th</sup> December 2014: manual based on PDF Maker version: **600.5.3**

- updated chapter: How to upgrade PDF Maker
- 

27<sup>th</sup> November: manual is based on PDF Maker version **600.5.0**

- minor changes: [6.1.1 Mass export and merging templates](#)
- 

24<sup>th</sup> October 2014: manual is based on PDF Maker version **600.4.2**

- new chapter: [5.5 PDF Product Page Break](#)
- 

8<sup>th</sup> October 2014: manual is based on PDF Maker version **600.3.9**

- new chapter: [7.6 Uninstall](#)
- 

23<sup>rd</sup> June 2014: manual is based on PDF Maker version **600.3.3**

- new chapters: What's new?; 4.9.4 Set template for Customer Portal; 7.1.1 Customer portal; 7.1.2 Workflows; 8.2 How to print labels, envelopes and more;
  - updated chapters: 4.4 Inserting labels; 4.5 Using a product blocks; 4.7 Using ListView block
  - minor changes: License agreement; 3.5.2 Other information; 4 Editing; 4.3 Inserting barcodes and QR codes; 7.2 Profiles
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27<sup>th</sup> March 2014: based on **600.1.7**

- first initiate version for Vtiger 6
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