

EMAIL MAKER FOR VTIGER CRM

Introduction

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

The Email Maker benefits are:

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

What's new?

Here is the list of the new features, improvements and layouts provided in version 540.04.04 available for vtiger CRM versions 5.2.1 - 5.4.0:

- using ListView blocks in templates (see chapter 4.6)
- new "after" custom functions (see chapter 6.2.1)
- direct sending emails from module Campaigns (see chapter 5.3)

Who needs EMAIL Maker?

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

Use case 1: "It is necessary to send invoice attached to email. In addition it would be nice to add into text of the email some information related to invoice e.g. invoice ID, sum to be paid, date of invoice, info that we are sending a present for free because order was higher than 500 Eur, etc."

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



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License agreement

- The EMAIL Maker License will be referred to as "The license" in the remainder of this text.
- This irrevocable, perpetual license covers all versions 1.xx of EMAIL Maker.
- This license gives the holder right to install EMAIL Maker on ONE productive vtiger CRM installation and ONE develop vtiger CRM installation for unlimited users.
- The license holder is allowed to make modifications to the EMAIL Maker sources but in no event will the original copyright holders of this library be held responsible for action or actions resulting from any modifications of the source.
- The license holder is not required to publicize or otherwise make available any software used in conjunction with EMAIL Maker.
- The license holder may not re-distribute the library or versions thereof to third party without prior written permission of the copyright holder.
- EMAIL Maker License does not allow the library to be redistributed as part of another product.
- The license may be transferred to another vtiger CRM installation only with prior written permission.
- The wording of this license may change without notice for future versions of EMAIL Maker.

Terms and conditions

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

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

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

Private policy

During installation it is necessary to exchange following information:

- vtigerCRM version (e.g. 5.4.0)
- EMAIL Maker version (e.g. 540.04.04)
- Date and time
- Domain in md5 coding format (e.g. 916b25c201a77a6721003c0030977f3b)
- Action provided by you (INSTALL, REACTIVATE, DEACTIVATE)

1 How to install EMAIL Maker

Please provide following steps in order to install EMAIL Maker:

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

- vtigerCRM version (e.g. 5.4.0)
- EMAIL Maker version (e.g. 540.04.04)
- Date and time
- Domain in md5 coding format (e.g. 916b25c201a77a6721003c0030977f3b)
- Action provided by you (INSTALL, REACTIVATE, DEACTIVATE)
 - Install the .zip package of the EMAIL Maker module via Settings -> Module Manager. Select the *Custom Modules tab* and click on the <u>Import New</u> button.

G	Manage module behavior inside vtiger CRM	
	Standard Modules	Custom Modules
		Import New
8	ConfigEditor	0 V 1
5	CronTasks	8 R I
5	Import	0 🗹 E
5	Integration	0 R I
5	MailManager	े 🗹 🗉
5	Mobile	0 R I
8	PDFMaker	8 🗹 E 🔦
5	WSAPP	a e e
abl	British English	0 0
abj	DE Deutsch	0 12

Picture 1.1 Installation of EMAIL Maker – step 1

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

Settings	
Manage mod	lie benavior inside vliger Crim
Select the Package	File
* File location:	H:\EMAIL Maker v.4.04\EMAILMaker_540_4_4.zip Browse
	vtiger module is packaged as a zip file.
	Canada

Picture 1.2 Installation of EMAIL Maker – step 2

3. Verify the import details parsed from the zip file. Please check that you accepted the license agreement and click Yes to proceed or No to cancel.

Manage modul	• Module Manager > Import s behavior inside vliger CRM	
verify Import Details		
Module Name	EMAILMaker	
Module Directory	nodules/EMAILMaker	
Req. vtiger version	5.4.0	
License	* Module : DMAIL Maker * Version : \$40.04.04 * Vigner : 5.4.0 * Author : 11-SolutionsYou s.r.o - www.itstyou.sk * Supported browsers : Intermet Explorer ? or higher, Mozilla Firefox 3.0 or higher * Supported browsers : Intermet Explorer ? or higher, Mozilla Firefox 3.0 or higher * LICENSE The EMAIL Maker License will be referred to as "The license" in the remainder of this text. This irrevocable, perpetual license covers all versions 540.xxx of EMAIL Maker.	

Picture 1.3 Installation of EMAIL Maker – step 3

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

Settings > Module Manager > Import Manage module behavior inside vtiger CRM		
Importing Module		
Creating Module EMAILMaker STARTED Initializing module permissions DONE Updating tabdata file DONE Creating Module EMAILMaker DONE Added to menu Tools DONE Updating parent_tabdata file STARTED Updating parent_tabdata file STARTED SQL: CREATE TABLE IF NOT EXISTS 'vitige_emakertemplates' ('foldername' 'body' text, 'deleted' int(1) NOT NULL default '0', 'templateid' int(19) NOT NUL 'emakertemplates_foldernamd_templatename_subject_idx' ('foldername''temp SQL: CREATE TABLE IF NOT EXISTS 'vitige_emakertemplates_seq' ('di 'int('	'varohar(100) default NULL, 'templatenan L auto_increment, 'module' varohar(255) platename', 'subject') ENGINE=MyISAM DTNU J NOT NULL) ENGINE=MyISAM DEFAU	me' varchar(100) default NULL, 'subject' varchar(100) default NULL, 'description' text,) default NULL, PRIMARY KEY ('templateid'), KEY .AUTO_INCREMENT=0 DEFAULT CHARSET=utf8 DONE JJT CHARSET=utf8 DONE
:		:
:	:	:
Adding Link (LISTVIEWBASIC - Send Email) DONE Adding Link (DETALIVEWWIDGET - ENAILDAker) DONE Adding Link (IJSTVIEWBASIC - Send Email) DONE Adding Link (DETALIVEWWIDGET - ENAILDAker) DONE Adding Link (IJSTVIEWBASIC - Send Email) DONE Adding Link (DETALIVEWWIDGET - ENAILDAker) DONE Adding Link (IJSTVIEWBASIC - Send Email) DONE Adding Link (DETALIVEWWIDGET - EMAILDAker) DONE Adding Link (LISTVIEWBASIC - Send Email) DONE Inviking ville, handler for model epatinsatil DONE		
		Finish

Picture 1.4 Installation of EMAIL Maker – step 4

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

1. EMAIL Maker Validation Step. Please insert a license key and make sure that your server has internet access. Click on <u>Validate</u>.



Picture 1.5 Validation step 1

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



Picture 1.6 Validation step 2 – Finish installation

2 How to start EMAIL Maker

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

1. In vtiger CRM menu (Picture 2.1), please go to *More* and from column *Tools* click on EMAIL Maker.

ts Opportunities	Products	Documents Email	Trouble Tickets	Dashboard	More 👻 Quick Create
Tools	Relative	Institute	Segurit	-	Series .
PDF Maker	Completes	Devices	Inter Labor	Bepate	instead of the second s
Our Sites		10040	Pine?		10000
Integration		Devolution	R COM		Dates Inde
PBX Manager		Print Bolling	Poper Casta		
Mail Manager		Page Inter	Property		
Recycle Bin		1	80		
SMSNotifier	/	r I.			
Comments					
EMAIL Maker					
RSS					

Picture 2.1 Start EMAIL Maker

2. The screenshot below (Picture 2.2) shows EMAIL Maker ListView which is lunched after previous step. As can be seen in the picture below, there are no any email templates created

yet. In order to add new template you can click buttons Add template or 👘.

Dools > EMAIL Maker	Module	2. Description	Add template Action
		No Template Found You can Create a Template Now. Click the link befor: Create a Template	
		EMAIL Maker 540.02 : 1T-Solutions¥You	

Picture 2.2 Add template in ListView

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

3 Work area

The Work Area of EMAIL Maker consists of:

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

3.1 ListView

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

ools	s > EM	AIL Maker	•	2	8 🖪 🗩 🖬			<u>«</u>	
C	elete		Module: All	Sel	ect			1	Add template
#	Select	Template name		Category	Module		Description		Action
1		Invoice - month	y	Regular	Invoice		Email with attached	invoice sent regularly each month	Edit Duplicate
2		Sales Order		Individual	Sales Ord	ler	sales order email		Edit Duplicate
		-							

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Picture 3.1 EMAIL Maker ListView

There	is	group	of	buttons	in	the	above	part.	The	most	important	buttons	are	"add	template	" 📥 ,
"impo	rt/e	xport"	em	ail templa	ate	butto	ons 🔳	🔳 ar	nd but	tton "s	ettings" ⋖).				

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

The main part of the EMAIL Maker ListView consists of list of the email templates, which gives you information about a template name, a category, a primary module and short description. In the list you can also select one or more templates and consequently delete or export the selected group of templates. As shown in the picture, it is also possible to use links in the "Action" column in order to edit or duplicate already created email templates directly from the ListView.

There are three additional buttons above the list of email templates:

- Add template is used to add new template
- Delete initiates deletion process of the selected templates
- Select allows you to filter email templates based on primary module

3.2 DetailView

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

- Properties part gives basic information of the email template
- Attachments button <u>Select Document</u> allows you to add attachments to the email template; this functionality is not available in EditView; before sending email you will be able to delete or add attachments as well
- EMAIL template itself
- Group of buttons
 - Edit switches to EditView and start editing
 - o Duplicate creates duplicate of the template and start editing
 - Delete allows you to delete template

				9 📃 🚳	
/iewing "Invoi	ice - monthly"				Edit Duplicate Dele
Properties					
Template name:	Invoice - mon	thly			
Description:	Email with attac	hed invoice sent regularly each	n month		
Category:					
Module:	Invoice				Droportio
Email subject:	\$s-invoice-inv	voice_no\$; \$s-invoice-invoice	edate\$		Propertie
Title	File Name		Modified Time	Assigned To	Attachment
Title Ferms and Conditions	File Name	ditions_ITS4You.docx	Modified Time 2012-11-30 17:38:45	Assigned To Rastislav Hovancak	Attachment

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Picture 3.2 DetailView

3.3 EditView

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

- Tabs area allows user to insert into template different kind of values, fields and to set up properties, sharing and other common settings of the email template. Tabs area consists of following tabs, which are described in the following subchapters:
 - o Properties
 - Other information
 - Product block
 - Settings
 - Sharing
- Editing area is mainly used for inserting/editing your own text, tables, images etc. and to
 make some design adjustment of the template like font change, color, format, size, background
 color of the text etc. This editing can be initiated via many toolbars located in the above part of
 Editing area. Please refer to the chapter 4 for the details related to editing.

Other information	Product block	Settings	Sharing		
Please select Please select	Select 💌 Insert into to				
Please select 💌	Select 💌 Insert into to				
Please select 💌	Select 💌 Insert into to				
Please select 💌		emplate			
	Select 💌 Insert into	template			
Please select 💌	Insert into template				
			Sel	ect	
Font 💌 Size 🕶	A- A- @ B. 0	1			
* 1	IADDU.	HOUD	AUS.		
	E € 8 0 ▲ 49 E € 7 44 ■ Font ♥ Size ♥	Save	Swe Cancel	See Succ Cancel Cancel Succ Cancel Cancel	Seet Swe Cancel Swe Cancel Swe Cancel Swe Cancel State A State A

Picture 3.3 EditView

3.3.1 Properties

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

Properties	Other information	Product block	Settings	Sharing	
*Template name:					
Description:					
Recipient variables (To):	Please select 💌	Select 💌 🛛 Insert into ten	nplate		
Module:	Invoice 💌	Subject	Insert into	template	
Related modules:	Sales Order	 SalesOrder No 	Inse	rt into template	
Related blocks:	Insert into template				
ListView block:	Please select 💌 🚺	nsert into template			
Email subiect:				Select	*

Picture 3.4 Properties tab

Name	Description
Template name	The name of the template. It is mandatory field for template creation.
Description	The description of the email template.
Recipient variables (To)	Variables related to recipient.
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 4.5.
ListView block	Allows to add ListView block. For details please refer to chapter 4.6.
Email subject	The subject of the email. You can use simple text, predefined common fields or
	fields related to primary module if exists.

Table 3-1 Properties tab

3.3.2 Other information

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

Properties	Other information	Product block	Settings	Sharing
Company and User information:	Please select	Insert into terr	plate	
Ferms and Conditions:	Please select 💽 Insert into template			
Current date:	dd.mm.yyyy 💽 💼	sert into template		
Custom functions:		Insert into templ	ate	

Picture 3.5 Other information tab

Name	Description
Company and User	Comprises mainly group of fields from Company information, Assigned to User and
information	Logged in User.
Terms and Conditions	Terms and Conditions.
Current date	Current date in several formats.
Custom functions	Custom functions. For details please refer to chapter 6.2.
Table 3-2 Other information	tab

3.3.3 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 4.4.

Properties	Other inform	mation	Product block	Settings	Sharing
Product block:	P	lease select 💌	Insert into template		
Common fields for Produc	ts & Services:	osition		📕 Insert i	nto template
Available fields for Product	s: P	roduct Name	📕 🛛 Insert i	nto template	
*Available fields for Service	s: S	ervice Name	📕 🛛 Insert into t	emplate	
Product block template:	P	lease select	Insert	into template	

Picture 3.6 Product block tab

Properties	Other information	Product block	Settings	Sharing
		Current module does not contain prod		72004 200
		Current module does not contain product		

Picture 3.7 Empty product block tab

Name	Description
Product block	Block start, Block end. Each product block has to start with "Block start" and ends with "Block end"
Common fields for	Fields common for products & services. You can find same fields for products and
Products & Services	services separately as well, but it is recommended to prefer common fields in the
	templates.
Available fields for	Fields for products.
Products	
Available fields for	Fields for services.
Services	
Product block	Insert predefined product block templates. For details please refer to chapter 4.4.
template	
Table 3-3 Product block tab	

Table 3-3 Product block tab

3.3.4 Settings

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

Properties	Other information	Product block	Settings	Sharing	
Category:					
Default from:	-None-				
Ignored picklist values:					
Number format:	Decimal point separator	Decimal poin	t number 0	Thousands sepa	rator

Picture 3.8 Settings tab

Name	Description
Category	Category of the email template. You can define categories according to your needs
	directly from this field.
Default from	Select here default sender of the email template.
	This value can be set separately for each logged user.
Ignored picklist values	Define picklist values which will be ignored in the final email like None, none, keine
	etc. Entered values have to be separated with comma.
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)

Table 3-4 Settings tab

3.3.5 Sharing

The *Sharing tab* changes depend on whether email template is shared (Picture 3.9) or public/private (Picture 3.10). Using this tab you can define how to share your template between you and other users or groups. Please refer to chapter 6.3 to see details.

Properties Other information Product block Settings Sharing Template owner: Rastislav Itsfouryou 💌 Sharing: Share 💌 Available Entities & Members Selected Members Entity: Groups -Members of "" Members of Entity Group::Team Selling Group::Marketing Group Group::Support Group . . ~~ Ŧ -

Picture 3.9 Sharing tab

Properties	Other information Product block		Settings	Sharing
Template owner:	Rastislav Itsfouryou	-		
Sharing:	Private 💌			

Picture 3.10 Sharing tab for private/public template

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

Table 3-5 Sharing tab

3.4 Email Maker block

The EMAIL Maker block can be found inside the specific module. In the module ListView it is necessary to click on any record to see details and on the right side, you can find the block. The EMAIL Maker block is used to send emails for particular record. Three forms of EMAIL maker block can be seen in the screen:

- a) EMAIL Maker block without email template
- b) Standard layout of the EMAIL Maker block
- c) EMAIL Maker block in the module Campaigns (see chapter 5.3 for details)

EMAILMaker	EMAILMaker	EMAILMaker
Send Mail	New product released Xmas	Send Emails to Contacts Send Emails to Leads Send Emails to Accounts Autumn Campaign
a)	b)	c)

Picture 3.11 EMAIL Maker block

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

4 Editing email templates

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

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

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

4.1 Create new email template

As was already described in the chapter 2, you can initiate creation of the new email template via buttons

Add template or 💼 (see below picture).

Tool	s > EM	AIL Maker	•		P	Q		<u>«</u>	
	Delete	Modu	ule: All	Select				Ū	Add template
#	Select	Template name	Category		Module	Description			Action
1		Invoice - monthly	Regular		Invoice	Email with at	tached i	nvoice sent regularly each month	Edit Duplicate
2		Sales Order	Individual		Sales Order	sales order e	email		Edit Duplicate

Picture 4.1 Add new email template

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



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

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

5-17 I							
Properties	Other information	Product block	Settings	Sharing			
'Template name:							1
Description:							
Recipient variables (To):	Please select 💌	Select 💌 🛛 Insert into t	emplate				
Module:	Please select	Select 💌 Insert into	o template				
ListView block:	Please select 💌 🔳	nsert into template					
Email subject:					Select	-	
Styles 💽 Format	Font Size	At* A* 💮 🖏 🛛	2				

Picture 4.3 New template creation

Please continue here with editing template by using CK Editor, inserting images, tables, product blocks, related blocks or listview blocks according to your need. CK Editor allows you to change formatting of your text and other inserted fields using a lot of toolbars. Just select the text/field and click on any icon of the tool like font, color, bold, italic, alignment etc.

When you finished please save the email template using button **Save**.

Important note: If you change the primary module the all inputs will be deleted and you can lose your work. This deletion helps to avoid using fields in template which are not from primary or related module. Please refer to chapter 8.2 as well.

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

4.2 Inserting images

Images can improve the design of your documents. CKEditor is used inside the EMAIL 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 image button 🔤 on the toolbar.

AN -14 100	Image Properties
	Image Info Link Upload Advanced 3.
Ar Ar @ 5. 2	URL // /logo-its.jpg Browse Server
	Alternative Text
	Width Preview Height C Preview Hspace Vspace Align <not set=""></not>
	× ×

Picture 4.4 Insert image

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

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

4.3 Creating tables

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

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

* * # # 1	Table Properties	۲
	Rows 3 Columns 2 Headers Porder size 1 Alignment <not set=""> Caption Summary 3.</not>	Width 200 pixels Height pixels Cell spacing Cell padding OK Cancel Cancel

Picture 4.5 Creating tables

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

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

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

4.4 Using a product blocks

You can find *Product block* tab in EditView which allows inserting, editing and creating of product blocks. The easiest way is to use already prepared templates (4.4.1) but you can create your own product block according to your needs (4.4.2).

4.4.1 Insert and edit product block template

There are already created product block templates which you can insert and edit. These templates are available only for modules Invoices, Quotes, Sales Order and Purchase Order that displays product block. You can simply add the whole product block template into your template by:

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

		1					
Properties	Other in	nformation	Product block	Settings	Sharing		
Product block:		Please select 💌	Insert into templa	ite 1			
*Common fields for Product	s & Services:	Position		Insert	into template		
*Available fields for Product	s:	Product Name	▼ Ins	sert into template			
*Available fields for Services	*	Service Name	Insert i	nto template			
Product block template: * fields are placed into Product block.	Product block will be	product block for g Please select product block for in product block for g	roup tax 💌 Ins Idividual tax roup tax	sert into template			
Source	* = = =	1 📾 🔒 🕸 🕸	• 🔶 斜 🕸	≥ ≡ ≈ 3.			
B I U abe X ₂ X ²	3∃ ⊟ (≪ +	🗄 99 Yakis 🔳 🗮			Ω 信		
Styles 🔄 Normal	Font	Size 🔽 🔺	•• A• 🔿 🖏	2			-
Pos	%G	_Qty%	Text	%G_LBL_LIST_PRICE%	%G_LBL_SUB_TOTAL%	%G_Discount%	%G_LBL_NET_PRICE%
#PRODUCTBLOC_START#							
\$PRODUCTPOSITION\$ \$PRO	DUCTQUANTITY\$	\$PRODUCTUSAGEUNI	T\$ \$PRODUCTNAME\$	\$PRODUCTLISTPRICE\$	\$PRODUCTTOTAL\$	\$PRODUCTDISCOUNT\$	\$PRODUCTSTOTALAFTERDISCOUNT\$
#PRODUCTBLOC_END#							
%G_LBL_TOTAL%							\$TOTALWITHOUTVAT\$
%G_Discount%							\$TOTALDISCOUNT\$
%G_LBL_NET_TOTAL%							\$TOTALAFTERDISCOUNT\$
%G_Tax% \$VATPERCENT\$ % %	G_LBL_LIST_OF%	\$TOTALAFTERDISCO	UNT\$				\$VAT\$
Total with TAX							\$TOTALWITHVAT\$
%G_LBL_SHIPPING_AND_HAN	LING_CHARGES	6					\$SHTAXAMOUNT\$
%G LBL TAX FOR SHIPPING							SUTATIOTALS
here and here and and here and	AND_HANDLING%						\$3HIPOTO DES
%G_Adjustment%	AND_HANDLING%						\$ADJUSTMENT\$

Picture 4.6 Insert product block template

When the product block template is inserted you can modify it according to your needs (Picture 4.7). For example you can add new cells / rows / columns, change font, change the background color, etc. You can edit layout like a table. As can be seen in the Picture 4.8, you can add some new variables / labels as well.

Pos		9	6_Qty%		Text	%G_LBL_LIST_PRICE%	%G_LBL_SUB_TOTAL%	%G_Discount%	%G_LBL_NET_PRICE%
#PRODUCTBLOC_START	*								
\$PRODUCTPOSITION\$	\$PRODUCTQUA	NTIT	Y\$ \$PRODUCTUSA	GEUNIT\$	\$PRODUCTNAME\$	\$PRODUCTLISTPRICE\$	\$PRODUCTTOTAL\$	\$PRODUCTDISCOUNT\$	\$PRODUCTSTOTALAFTERDISCOUNT\$
#PRODUCTBLOC_END#									2
%G_LBL_TOTAL%									\$TOTALMITHOUTVAT\$
%G_Discount%				51					\$TOTALDISCOUNT\$
		of	Cut						
%G_LBL_NET_TOTAL%		眴	Сору	1					\$TOTALAFTERDISCOUNT\$
%G_Tax% \$VATPERCENT	1\$%%G_LBL_L	1	Paste	SCOUN	Т\$				\$VAT\$
Total with TAX			Cell	1					\$TOTALWITHVAT\$
%G_LBL_SHIPPING_AND	_HANDLING_CH		Davis 1						\$SHTAXAMOUNT\$
%G_LBL_TAX_FOR_SHIP	PING_AND_HA		ROW	In	sert Row Before				\$SHTAXTOTAL
%G_Adjustment%			Column •	In	sert Row After				\$ADJUSTMENT\$
%G_LBL_GRAND_TOTAL	%(\$CURRENCY		Delete Table	De	elete Rows 🗟 🚺				\$TOTAL\$
<u>.</u>			Table Properties	J		0			



Module:	Invoice 💌	Total discount (%)	
Related modules:	Sales Order	Terms & Conditions	
Related blocks:	Insert into template	Description Information	
ListView block:	Please select 💌 📑	Description Details	
Email subject:		Currency Currency symbol Select	×
		Currency code	
		Subtotal	
		Total discount (%)	
Source 🗌 🚱 🕷 🕷		VAT	
B I U abe X ₂ x ² ⅓Ξ ⋮	E 🤹 🕮 🕫 🐝 📄	VAT (%)	
Styles - Format	Font Rize R	Total with VAT	
		Shipping & Handling taxes	-
Pos	%G_Qty%	Adjustment %G_LBL_SUB_TOTAL% %G_Discour	t% %G_LBL_NET_PRICE%
#PRODUCTBLOC_START#		Grand total	
\$PRODUCTPOSITION\$ \$PRODUCTQU	ANTITYS SPRODUCTUSAGEUM	IT\$ \$PRODUCTNAME\$ \$PRODUCTLISTPRICE\$ \$PRODUCTTOTAL\$ \$PRODUCTDEC	DUNT\$ \$PRODUCTSTOTALAFTERDISCOUNT\$
#PRODUCTBLOC_END#			
%G_LBL_TOTAL%			\$TOTALWITHOUTVAT
%G_Discount%			\$TOTALDISCOUNT\$
			\$s-totaldiscountpercent
%G_LBL_NET_TOTAL%			\$TOTALAFTERDISCOUNT\$
%G_Tax% \$VATPERCENT\$ % %G_LBL	LIST_OF% \$TOTALAFTERDISC	OUNT\$	\$VAT
Total with TAX			\$TO TALWITHVAT
%G_LBL_SHIPPING_AND_HANDLING_	CHARGES%		\$SHTAXAMOUNT
%G_LBL_TAX_FOR_SHIPPING_AND_H	ANDLING%		\$SHTAXTOTAL
%G_Adjustment%			\$ADJUSTMENT
%G LBL GRAND TOTAL% (\$	CURRENCYCODE\$)		\$TOTAL\$

Picture 4.8 Edit product block template - insert new variables / formatting

4.4.2 Create new product block

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.

	Properties	Other	information	Product block	Settings	Sharing
	Product block:	1.	Please select 💌	Insert into template		
	*Common fields for Product	s & Services:	Please select Block start		Insert into	template
	*Available fields for Products	5:	Unit Price	Insert in	to template 2	
	*Available fields for Services	;	Service Name	Insert into te	mplate	
	Product block template:		Please select	Insert in	ito template	
	* fields are placed into Product block.	Product block will b	e shown for every product/se	rvice in BMAJL.		
			/	Save	Cancel	
	🗏 Source 🔲 🗔 🛒	* 🖻 🛍 (nes nes	· · · A 4 4		
	B I U =b∈ X X ²	!∃ ⊟ 🦛	🕸 " 🕷 🔳 🗏	역 🙈 🍇 🗏 🗏	Ω 🤤 🗖 🔤	
	Styles 🕤 Normal	Font	Size 🔽 🥖	" A' 🕸 🕄 🔋		
1.]	#PRODUCTBLOC_START#		2.			
<	\$products-productname\$ \$pr	oducts-unit_pr	ice\$			
	#PRODUCTBLOC_END#	J				

Picture 4.9 Create product block

4.5 Using related blocks

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

Account Information	More Information		Contact Information	More Information	Campaign Information	More Information
	Contacts			Potentials		Contacts
Account Information	Potentials		Contact Information	Activities	Campaign Information	Leads
Account N	Guotes		First I	Email	Campaign Nar	Potentials
Wei	Sales Order		Last	Trouble Tickets	Assigned	Activities
Ticker Sy	Invoice		Account I	Quotes	Campaign Ty	Accounts
Membe	Activities		Lead So	Purchase Order		Destine
Employ	Email			Sales Order	Sales Order Information	More Information
Other E	Activity History		Depart	Products		Activities
Indu	Documents	n		Activity History	4	Documents
	Trouble Tickets		Ass	Documents	Sales Order Information	Invoice
Email Opt	Products		Assistant P	Campaigns	Subje	c Activity History
Assigne	Campaigns		Email Op	Invoice	Customer I	Ic SalesOrder Status Histor
Modified	Services		Refer	Services	Quote Nar	10 0000
	Service Contracts		Created	Service Contracts		
V Address Information	Projects		Modified	Projects		
Billing Add	Assets	-				

Picture 4.10 More information tabs

4.5.1 Create and insert related block

How to create and insert related block will be shown on example based on "Organizations" module. Let's suppose that we would like to create simple email template based on module "Organizations", and we need to list all invoices for particular organization which were created within last 90 days. In order to do it:

- 1. Create new template based on Organization module and put your variables/text into the body of the template.
- 2. Go to the Properties tab and click on Insert into template button.
- 3. Manage related blocks widow will appear on the screen. Here list of the already created blocks is shown (in the example below just one "Assets block" exists).
- 4. In order to create a related block for selected module click on button Create a Related Block

Template name: lescription:			Organization	s with list of invoices			
lescription:							
		1	Simple organ	zations template, below list of in	ivoices		
ecipient variables (1	a):		Please set	ect 💌 Select 💌	Insert into template	3	
fodule:		2.	Organizatio	ons 💌 Organization	Name 💌	Insert into template	
lelated modules:			Select more	dule • Select •	Insert into templat	e	
elated blocks:			Insert into	template			
istView block:			Please sel	ect 💌 Insert into temp	late		
mail subject:				_			
				Manage related block	cs - Mozilla Firefox		_ ×
				Bardstyn of germanik	letable definit	E-048, Masharoville	NGP 合
	-			Manage related b	locks	4. Create a Related	Block
I Source 📋 😡			1 de de.	# Block name	Module	Action	
I U abe X ₂	x² Ξ	三 信 倍 **	W E =	1 Assets block 2	Assets	Insert into template Edi	t Delete
tyles 🔄 Norr	nal 💌	Font 💌	Size 🔽 🗛	3	•		



As you can see in the next picture, 4 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.

🕙 Edit block - Mozilla Fire	бох		
	CFR COMPANY		<u> </u>
Edit block			
1. Related Module	Related Module	1.	
2. Select Columns			
	Select Related Module:	C Contacts	
3. Filters		C Potentials	
4. Block style		C Quotes	
		C Sales Order	
		 Invoice 	
		C Calendar	
		C Documents	
		C Trouble Tickets	
		C Products	
		C Campaigns	
		C Services	
		C ServiceContracts	
		C Project	
		C Assets	2.
			< Back Next > Cancel

Picture 4.12 Creation of the related block – step 1

Second step is to select the fields to show in generated email 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.).

🥹 Edit block - Mozilla Fire	бох	
🗌 attes interaction and	Official States of the	*
Edit block		4
1. Related Module	Select Columns	1.
2. Select Columns	Available Fields	Selected Fields
3. Fitters	Invoice Information Subject	Invoice No Total
4. Block style	Sales Order Customer N Invoice To Concert Name Voice Date Due Date Purchase Order Adjustment Excise Duty Sub Total Sales Commission Total Tax Type Discount Percent	click here to change an order click here to delete
		< Back Next > Cancel

Picture 4.13 Creation of the related block – step 2

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

dit block				
I. Related Module	Filters			
2. Select Columns	🔝 Standard Filters	1.		
3. Filters	Column:		Start Date:	End Date:
4. Block style			2012-02-23	2012-05-22
	Invoice Date	Last 90 Days	буууу- mm-dd)	(уууу- mm-dd)
click here to select field	Advanced Filters	click here to select condition	on	
				New Grou

Picture 4.14 Creation of the related block – step 3

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.

🕗 Edit block - Mozilla Fir	efox
🗋 better Varenak	CONSTRUCTION AND CONSTRUCTION
Edit block	
1. Related Module	Block style
2. Select Columns	1. Name: Invoice list
3. Filters	
4. Block style	
	2. B Z U abs X ₂ X ² ⋮ ⋮ ⋮ ⋮ ⋮ ⋮ ♥ ₩ ■ Ξ ⋮ ■
	🗸 🕰 ڬ 🖾 🤌 📰 🗏 🧠 🕰
	Styles 💌 Normal 🐨 Font 🐨 Size 🐨 🗛 🖌 🗛
	• B 2
	Invoice No Total Invoice Date Status
	#RELBLOCK_START#
	<pre>\$invoice_no\$ \$hdnGrandTotal\$ \$invoicedate\$ \$invoicestatus\$</pre>
	#RELBLOCK_END#
	1
	body p 3.
	Capeal
	Caller

Picture 4.15 Creation of the related block – step 4

4.5.2 Insert related block

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

- 1. Click to editing are where would you like to have related block.
- 2. In Properties tab click on **Insert into template** button for related blocks.
- 3. Manage related blocks window will appear on the screen inside which click on Insert into template link.
- 4. Related block is inserted. You can continue with editing of the related block if necessary.
- 5. Example of the email in *Compose E-Mail* window and received mails are shown below.

Template name:	Organizations with	list of invoices					
)escription:	Simple organization	ns template, below list of inv	oices				
Recipient variables (To	Please select.	💌 Select 💌 📑	nsert into temj	plate			
fodule:	Z. Organizations	Organization	Name	Insert into	emplate		
telated modules:	Select module	💌 Select 💌 🔲	Insert into tem	plate			
telated blocks:	Insert into temp	plate					
istView block:	Please select.	📕 Insert into templa	ite				
mail subject:			🕙 Mana	age related block	s - Mozilla Firef	ох	
			(C) B.M	iya ayyaan ka	est hide photo	uside-indepty	DAN BACTOR-OF
			Mana	ge related bl	ocks	Creat	te a Related Bl
			# Blo	ck name	Module	Action	
ello,			1 As:	sets block	Assets	Insert into t	template Edit D
tached you can find lis	t of invoices created within last 9	0 days.	2 Invo	bice list 3.	Invoice	Insert into t	template Edit D
nvoice No Total	Invoice Date Status						
RELBLOCK5_START	#						
\$invoice_no\$ \$hdnGra	andTotal\$ \$invoicedate\$ \$invoic	estatus\$					
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Sinvoice_no\$ \$hdnGra #RELBLOCK5_END# Instruction S4You Sompose E-Ma Emails sent from: "Emails Emails sent from: "Emails: "Subject: Subject: ello, tached you can find lis woice No Total RELBLOCK5_STARTA RELBLOCK5_END#	andTotal\$ \$invoicedate\$ \$invoic iii Rastislav Itsfouryou To: Baumaterial-XXL <pre>space</pre> to finvoices created within last 9 Invoice Date Status f IndTotal\$ \$invoicedate\$ \$invo	estatus\$ (@ts-4you.sk> s4you.sk> s4you.sk> s4you.sk> estatus\$	Hu at Internet Intern	ello, tached you can find <u>voice No Total</u> <u>IV30 € 53761</u> <u>IV32 € 53761</u> est Regards S4You ello, tached you can find <u>voice No Total</u> <u>IV31 € 56000</u> est Regards S4You	5.	created within te Status 3 Paid 3 Sent created within te Status 4 AutoCreate	last 90 days. last 90 days.
Sinvoice_no\$ \$hdnGra #RELBLOCK5_END# Instructions Sent From: "Emails sent from: "Emails sent from: "Emails: "Subject: ello, tached you can find lis woice No Total RELBLOCK5_STARTA invoice_no\$ \$hdnGra RELBLOCK5_END# 2st Regards	andTotal\$ \$invoicedate\$ \$invoic iii Rastislav Itsfouryou To: Baumaterial-XXL <pre>space</pre> to finvoices created within last 9 Invoice Date Status f IndTotal\$ \$invoicedate\$ \$invoic	estatus\$ (@ts-4you.sk> s4you.sk> s4you.sk> s4you.sk> estatus\$	Hu at B T Hat B B T	ello, tached you can find <u>voice No Total</u> <u>IV30 € 53761</u> <u>IV32 € 53761</u> est Regards S4You ello, tached you can find <u>voice No Total</u> <u>IV31 € 56000</u> est Regards S4You	5. I list of invoices of Invoice Da 000 2012-10-2 000 2012-10-2 I list of invoices of Invoice Da 000 2012-11-0	created within te Status 3 Paid 3 Sent created within te Status 4 AutoCreate	last 90 days. last 90 days.



4.6 Using ListView block

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

- 1. Go to EditView and in Properties tab select the "Block start" and click Insert into template.
- 2. Insert fields you would like to have in ListView block.
- 3. Insert "Block end" using button Insert into template .
- 4. Click on button **Save** to save the email template.
- 5. The Compose E-Mail window is shown as well with ListView block to be sent.

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

	Properties	Other information	Settings
	ATemplate pamer	List of invoices for accounter	EditView
	Description:	cimple list of invoices	n
	Besipient variables (To):		
		Please select Y	elect 🗾 Insert into template
	Module:	Invoice 🗾	Subject Inse
Compose E-Mai	Related modules:	Select module	Select Insert into template
Emails sent from:	Related blocks:	Insert into template	
*Emails:	ListView block:	Please select 💌 💷	sert into template
Linuis.	ernail subject:	Please select	!
		Block end	4.
		Counter	Save Cancel
	4.10		
	1./3	•/	
	Dear \$contacts-firstname\$ \$co	ntacts-lastname\$,	
	here is the list of invoices your	isked me to send:	2.
	#LISTVIEWBLOCK_START# \$s	-invoice-invoice_no\$ \$s-invoice-in	voicedate\$ \$s-invoice-invoicestatus\$
"Subject:	# #LISTVIEWBLOCK_END#		
	Best regards, ITS4You		
	· · · · · · · · · · · · · · · · · · ·		<u>-i</u>
Dear \$contacts-firstnames	§\$contacts-lastname\$,		
here is the list of invoices t	you asked me to send:		
INB/22 2042 40 22 Cont			
INV15 2012-11-07 AutoCri	eated 5		
INV3 2012-10-22 Approve INV6 2012-10-23 Paid	d <mark>O</mark> .		
INV31 2012-11-04 AutoCro	eated		
Best regards,			
ITS4You			

Picture 4.17 ListView block

4.7 Attach documents into templates

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

Click on button **Select Document** in the DetailView and in the pop-up window click on title of the document/file in order to attach it into template. In case you need delete attached document click on link "Delete" (Picture 4.18).



Picture 4.18 How to attach documents into email template

5 Sending emails

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

ListView:

- 1. Select the record.
- 2. Click on Send Email button.
- 3. Select EMAIL Template.
- 4. Select Email address/es.
- 5. Click on Select button.

DetailView:

- Select EMAIL template in the EMAIL Maker block.
- 2. Click on link 🗵 Send Mail .
- 3. Select EMAIL address/es.
- 4. Click on Select button.

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



Picture 5.1 How to send email

5.1 Select Email IDs

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

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

- a) In DetailView window doesn't contain EMAIL Template part because it is assumed that template is selected within EMAIL Maker block.
- b) In ListView part related to Emails offers to select email address/es depending on used module. Email is not offered in case that related emails are not found for particular module or record.
- c) Select Email IDs window differs also within same module in ListView. It depends whether one or more records were selected. The concrete email address/es are shown in case that only one record was selected.
- d) In case you would like to use also PDF Maker template inside your email as attachment please click on *Add PDFMaker Templates* link. The part "PDF Maker templates" will appear in the Select Email IDs window. Provide selection of the PDF Maker template and continue with button Select. Please refer also to chapter 6.5.



Picture 5.2 Select Email IDs

5.2 Compose E-Mail

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

- 1. Add additional "To", "CC" and "BCC" recipients, remove recipients or change sender.
- 2. Change subject of the email.
- 3. Add/remove attachments.
- 4. Using buttons:
 - Show variables add additional fields into template
 - Select Email Template add or change the whole email template
 - Send send email(s)
 - Cancel cancel sending and close Compose E-Mail window
- 5. Additional edit of the email.
- 6. Preview of the email.

Emails sent from: Residuer vaceo 2@/tet/your.sk/> Contacts PF Maker templates: t quarter / reconstruction: To::::::::::::::::::::::::::::::::::::	Compose E-Mail			
t quarter / reconstruction To: Haudebauer «rado 2@tedyou.sk> Contacts PDF Maker templates: Twoice - monthly detailed taschments: Terms and Conditions 1. 2. *Subject: [s-invoice-invoice_nos], s-invoice-invoicedates 4. Stow wurlables: Select Email Template	Emails sent from: Rastislav tisfouryou	tsm. 💌	Attachment : File	•
1st quarter / material: To: Buumaterial:XXL	st quarter / reconstruction: To: To: Häuslebauer <asto 2@its4you.sk=""></asto>	2 Contacts	PDF Maker templates:	
1. 3. 2. *Subject: \$s-invoice-invoice_nos; \$s-invoice-invoicedates 3. 4. Show variables: Select fmail Template: Send Cancel ; 5. 8. U are: x2 x2 ;:::::::::::::::::::::::::::::::	1st quarter / material: To: Baumaterial-XXL <bau_main@its4you.sk></bau_main@its4you.sk>	Contacts	Invoice - monthly detailed	
1. 3. 2 "Subject: "s-invoice-invoice_not; "s-invoice-invoicedates"			Terms and Conditions	
1. 3. 2 Subject: \$s-invoice-invoice_invoicedates				
2. *Subject: \$s-invoice-invoice_no\$; \$s-invoice-invoicedde!\$ 4. Show variables: Select Email Template: Send Cancel; 8 I U ••• X_ X^2 JE E IIII IIIIIIIIIIIIIIIIIIIIIIIIIIII	1.		3.	
2 *Subject: \$s-invoice-invoice-invoicedate\$ 4 Show variables Select timai Template Send Cancel 8 I Image: Select timai Template Send Cancel 8 Image: Select timai Template Send Select timai Template Send 9 Image: Select timai Template Send Image: Select timai Template Select t				
2 *Subject: \$\$-invoice_nos; \$\$-invoicedate\$ 4 Show variables Select Email Template Send Cancel; 8 1 u u x, x				
4. Show variables Select Email Template Send Cancel B I U *** X x2 I III *** IIII *** IIIII *** IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	2. *Subject: \$s-invoice-invoice_no\$; \$s-invoice-invoicedate\$			
B / U *** X2 X2 E E ** E E E E E E E E E E E E E E E E	A Show variables Select	Email Template Send	Cancel	
Image: Applied and Applied Applied and Applied and Applied and Applied				
Image:		📾 📾 🏴 🗏 Source		
ityles Normal Font Size fello, included for Payment is our monthy invoice number \$s-invoice-invoice_no\$ attached to this email. <i>tetre are some details from attached invoice;</i> Invoice No: \$sinvoice-invoice_no\$ Total with TAX \$TOTALWITHVAT\$ %6_LBL_SHIPPING_AND_HANDLING_CHARGES% \$SHTAXAMOUNT\$ %6_LBL_TAX_FOR_SHIPPING_AND_HANDLING% \$SHTAXTOTAL\$ %6_Adjustment% \$ADJUSTMENT\$ %6_LBL_GRAND_TOTAL%(\$CURRENCYCODE\$) \$TOTAL\$			5.	
Hello, Included for Payment is our montly invoice number \$s-invoice_invoice_no\$ attached to this email. Here are some details from attached invoice; Invoice No: \$s:invoice-invoice_no\$ Total with TAX \$TOTALWITHVAT\$ %o_LBL_SHIPPING_AND_HANDLING_CHARGES% \$SHTAXAMDUNT\$ %o_LBL_TAX_FOR_SHIPPING_AND_HANDLING% \$SHTAXTOTAL\$ %o_Adjustment% \$AdJUSTMENT\$ %d_LBL_GRAND_TOTAL\$(\$CURRENCYCODE\$) \$TOTAL\$	Styles 🔽 Normal 🔽 Font 🔽 Size 🔽			
ncluded for Payment is our montly invoice number \$s-invoice_invoice_no\$ attached to this email. Here are some details from attached invoice: Invoice No: Total with TAX STOTALWITHVAT\$ %6_LBL_SHIPPING_AND_HANDLING_CHARGES% SSHTAXAMOUNT\$ %6_LBL_TAX_FOR_SHIPPING_AND_HANDLING% SSHTAXTOTAL\$ %6_Adjustment% SADJUSTMENT\$ %6_LBL_GRAND_TOTAL%(\$CURRENCYCODE\$) STOTAL\$	Hello,			
Here are some details from attached invoice: Invoice No: \$\$ invoice-invoice_no\$ Total with TAX \$TOTALMITHVAT\$ %o_LBL_SHIPPING_AND_HANDLING_CHARGES% \$SHTAXADUNT\$ %o_LBL_TAX_FOR_SHIPPING_AND_HANDLING% \$SHTAXATOTAL\$ %o_Adjustment% \$ADJUSTMENT\$ %o_LBL_GRAND_TOTAL\$(\$CURRENCYCODE\$) \$TOTAL\$	ncluded for Payment is our montly invoice number \$s-invoice-invoice	e_no\$ attached to this email.		
Invoice No: \$\$:invoice_no\$ Total with TAX \$TOTALMITHVAT\$ %G_LEL_SHIPPING_AND_HANDLING_CHARGES% \$SHTAXAMOUNT\$ %G_LEL_TAX_FOR_SHIPPING_AND_HANDLING% \$SHTAXTOTAL\$ %G_Adjustment% \$ADJUSTMENT\$ %G_LBL_GRAND_TOTAL%(\$CURRENCYCODE\$) \$TOTAL\$	Here are some details from attached invoice;		6	
Total with TAX \$TOTALWITHVAT\$ %G_LBL_SHIPPING_AND_HANDLING_CHARGES% \$SHTAXAMOUNT\$ %G_LBL_TAX_FOR_SHIPPING_AND_HANDLING% \$SHTAXTOTAL\$ %G_Adjustment% \$ADJUSTMENT\$ %G_LBL_GRAND_TOTAL%(\$CURRENCYCODE\$) \$TOTAL\$	Invoice No:	\$s-invoice-invoice_no\$	0.	
%G_LBL_SHIPPING_AND_HANDLING_CHARGES% \$SHTAXAMOUNT\$ %G_LBL_TAX_FOR_SHIPPING_AND_HANDLING% \$SHTAXTOTAL\$ %G_Adjustment% \$ADJUSTMENT\$ %G_LBL_GRAND_TOTAL%(\$CURRENCYCODE\$) \$TOTAL\$	Total with TAX	\$TOTALWITHVAT\$		
%6_LBL_TAX_FOR_SHIPPING_AND_HANDLING% \$SHTAXTOTAL\$ %6_Adjustment% \$ADJUSTMENT\$ %6_LBL_GRAND_TOTAL% (\$CURRENCYCODE\$) \$TOTAL\$	%G_LBL_SHIPPING_AND_HANDLING_CHARGES%	\$SHTAXAMOUNT\$		
%G_Adjustment% \$ADJUSTMENT\$ %G_LBL_GRAND_TOTAL%(\$CURRENCYCODE\$) \$TOTAL\$	%G_LBL_TAX_FOR_SHIPPING_AND_HANDLING%	\$SHTAXTOTAL\$		
%G_LBL_GRAND_TOTAL% (\$CURRENCYCODE\$) \$TOTAL\$	%G_Adjustment%	\$ADJUSTMENT\$		
	%G_LBL_GRAND_TOTAL% (\$CURRENCYCODE\$)	\$TOTAL\$		
	Fhank you for your business.			
hand you for your business.	ooking forward to receive your fresh order ASAP.			
Tank you for your business. .ooking forward to receive your fresh order ASAP.	lincerely,			
hank you for your business. .ooking forward to receive your fresh order ASAP. Sincerely,	TS4You			
Tonk you faire any quotation contenting payment request you are invited to contact us. .ooking forward to receive your fresh order ASAP. Sincerely, 754You	ody p			



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

5.2.1 Recipients To, CC, BCC

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

- change sender of the emails (just select from the list of available senders)
- add recipients you can select the recipients from module Contacts, Organizations, Vendors, Leads, Users or you can type any email address using selection "Other" (see Picture 5.5 a))
- remove recipients simply click on
- change type of recipients select the type from the list To:, CC:, BCC:

	Change sender Remo	ove r	ecipients	
Emails sent from:	Rastislav Itsfouryou <		Add recipier	nts
*Ernails:	To: ▼ Davis Jennifer <i>⊴ennifer_davis@company.com></i> To: ▼ Jones Barbara <i><barbara_jones@company.com></barbara_jones@company.com></i> Co: ▼ Johnson Patrici <i>a <patricia_johnson@company.com></patricia_johnson@company.com></i>	2 2 2	Contacts Contacts Organizations Vendors	
Change type	Cc: • Smith Mary <pre>smith@company.com> Boo: • Williams Linda <pre>smith@company.com> Boo: • Brown Elizabeth <=lizabeth_brown@company.com></pre></pre>		Leads Users Other	
	List of recipients			¥

Picture 5.4 Actions related to recipients

The picture below shows some examples of pop-up windows. You will be informed using these pop-up windows in case that email addresses are missing (Picture 5.5 b),c)).



Picture 5.5 Compose E-Mail pop-up windows

As you can see in the picture below two different Compose E-Mail window parts related to recipients exist. Please refer to below picture where 6 recipients are selected. In both examples only 2 emails will be sent. The differences are in Cc, Bcc recipients as described in the following sections:

- For modules like Contacts, Organizations, Vendors, Leads ...
 - At least one recipient has to be defined as To
 - It is not possible to define *Cc*, *Bcc* recipient for particular *To*, it means that *Cc* recipient will be included in all To emails (same for *Bcc*)
- For modules like Invoices, Products, Purchase orders, Sales orders, Quotes ...
 - At least one recipient has to be defined as *To* for each selected record (INV_01, INV_02)
 - It is possible to define *Cc*, *Bcc* recipient for each particular *To*, it means *Cc*, *Bcc* recipients are better controlled

Contacts	, Organ	izations, Vendors, Leads			
*Emails:	To: 💌	Davis Jennifer <i>sjennifer_davis@company.com></i>	Q	Contacts 💌	-
To: 1 recip.	Co: 💌	Jones Barbara <i>≤barbara_jones@company.com</i> >	Q		
Bcc: 2 recip.	Bcc : 💌	Johnson Patricia <i><patricia_johnson@company.com></patricia_johnson@company.com></i>	Q	Email 2:	
	To: 💌	Smith Mary <i><mary_smith@company.com></mary_smith@company.com></i>	2	To: 1 recipient	
	Co: 💌	Williams Linda <i>⊲linda_williams@company.com></i>	0	Bcc: 2 recipients	
	Bcc : 💌	Brown Elizabeth <i><elizabeth_brown< i="">@co<i>mpany.com></i></elizabeth_brown<></i>	Q		

Invoices, Products, Purchase Orders, Sales Orders, Quotes ...

	To: 💌	Jennifer Davis <i>sjennifer_davis@company.com></i>	2	Contacts	-	-
INV_01:	Co: 💌	Barbara Jones <i><barbara_jones@company.com></barbara_jones@company.com></i>	2	Email 1: To: 1 recipient		
	Bcc : 💌	Patricia Johnson <i><patricia_johnson@company.com></patricia_johnson@company.com></i>	2	Cc: 1 recipient Bcc: 1 recipient		
	To: 💌	Mary Smith <mary_smith@company.com></mary_smith@company.com>	2	Contacts	-	-
INV_02:	To: 🔹 Co: 💌	Mary Smith <i>«mary_smith@company.com></i> Linda Williams <i>«linda_williams@company.com></i>	Q Q	Contacts Email 2: To: 1 recipient	•	Ŧ

Picture 5.6 Compose E-Mail window parts related to recipients

5.2.2 Attachments

Three ways how to attach the attachments into emails are currently supported in the Email Maker (Picture 5.7):

- 1. The attachments inserted directly into email template (see chapter 4.7 for details).
- 2. The attachments inserted within Compose E-Mail window. In order to add attachment within *Compose E-Mail* window please firstly select the type of attachment, select the document or file and finally click on button 主:
 - a. Type "Document": The document/file from the module "Documents" will be added.
 - b. Type "File": The document/file from your local drive will be added.
- 3. PDF Maker templates. Please refer to chapter 6.5 for details.



Picture 5.7 Compose E-Mail – part Attachment

In order to add attachment within Compose E-Mail window please firstly select the type of attachment.

5.2.3 Show variables

The purpose of the "Show variables" is to allow you to add primary module fields or recipient variables into email directly within Compose E-Mail window. So if you need small temporary change of the email template it is not necessary to create duplicate of the email template and you can provide this change directly in Compose E-Mail window before sending of the email. The next picture shows some types of "Show variables" part for different modules visible after click on button Show variables.





5.2.4 Select Email Template

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

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

Lindiis Sent II oni.	🕙 Email Templates List - M	ozilla Firefox	
*Emails:	Concernation of the second second	No. of a local state of the	Station and the state of the
	Email Templates		
	Template Name	Module	Description
	Invoice basic	Invoice	basic template for invoices
	Invoice - monthly detailed	Invoice	for sending regular monthly invoices
	Christmass		
*Subject:			^

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

Picture 5.9 Select Email Template

5.3 Sending emails within module campaigns

The sending of the emails within module campaign has additional functionality opposite to other modules. You can send emails to contacts, leads or organizations using EMAIL Maker block which contains for that purpose additional links (Picture 5.10). The sending of the emails in module campaigns consists of:

- 1. Standard sending of emails based on email templates with primary module "Campaigns" or common email templates i.e. templates which are not using primary or related module fields.
- 2. The sending of the emails towards contacts, leads or organizations related to particular campaign. In case you need to send emails towards campaign related recipients, please use links within campaign email maker block (Picture 5.10). Please note that for such emails you cannot use campaign email templates but templates related to contacts / leads / organizations or common templates.



Picture 5.10 Sending emails from module campaigns

6 Additional features

6.1 Export and import templates

Export and import of the email templates makes it easy to work with EMAIL Maker templates by migration process or moving templates from development to productive installation. For import/export of the templates you can use import/export buttons

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

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

#	Select	Template name	Cate	jory Module Description	Action
1		Sales Order	1	Opening export.xml	Edit Duplica
2	N	Invoice - monthly	Mont	You have chosen to open: d invoice sent regularly each month	Edit Duplica
3	N	Invoice - monthly detailed	Mont	export.xml 3. d invoice sent regularly each month	Edit Duplica
4		Autumn Campaign		which is a: XML Document (6,5 KB)	Edit Duplica
5		Contact test		from: http://	Edit Duplica
6	N	Invoice basic	Basi	what should hirerox do with this hier	Edit Duplica
7	V	Invoice basic with details	Basi	Gen with XML Editor (default) Gave File d invoice sent regularly each month	Edit Duplica
				Do this automatically for files like this from now on.	

Picture 6.1 Export of the templates

To import email templates from external sources click on the Import toolbar button (see Picture 6.1 point 2.). After click the new import page will appear on the screen.

oort EMAIL Templates					
To start import, browse to k	cate the .XML file and (click on the Next button f	to Continue.		
File Locatio	n :			Browse	
				Ne	xt → Cancel

Picture 6.2 Import EMAIL templates page

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

6.2 Custom functions

If you need a special treatment of vtiger data in your template, you can use custom (your own) functions. There is a folder *"functions"* under *[vTigerROOT]/modules/EMAILMaker*, 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 *"its4*you.php", which contains our functions. These functions are listed in the Table 6-1 and are provided for you for free. Do not modify this file, because by next version it will be overwritten. If you would like to use your own functions, please create your own file/files, it means create new .php file under *[vTigerROOT]/modules/EMAILMaker/functions* and place here your functions. In order to insert custom function into template provide following:

- 1. Go to EditView, and in *Other information tab* select custom function from selectbox "Custom functions". As example in the picture below its4you_if is selected.
- Click button Insert into template. It adds function in form [CUSTOMFUNCTION|functionname|param1|param2|...|CUSTOMFUNCTION] or [CUSTOMFUNCTION_AFTER|functionname|param1|param2|...|CUSTOMFUNCTION].
- 3. Finally you have to define function name and parameters of the function as shown in the picture below.

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



Picture 6.3 Custom functions

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

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

Following table contains short description of our its4you_* functions for your email templates.

Name	Description
its4you_if	[CUSTOMFUNCTION its4you_if param1 comparator param2 whatToReturn1 whatToReturn2 CUSTOMFUNCTION]
	This function executes if-else statement based on given parameters: param1 first parameter of comparison comparator comparison sign - one of ==,!=,<,>,<=,>= param2 second parameter of comparison whatToReturn1 value returned when comparison succeeded whatToReturn2 value returned when comparison didn't succeed
its4you_unsubscribeemail	[CUSTOMFUNCTION_AFTER its4you_unsubscribeemail \$accounts-crmid\$ \$contacts- crmid\$ URL_ADDRESS Unsubscribe email CUSTOMFUNCTION_AFTER]
	This function is used for unsubscribing. Please refer to details in separate chapter 6.4.
its4you_getTemplateId	[CUSTOMFUNCTION its4you_getTemplateId CUSTOMFUNCTION]
	This function returns id of current template.
its4you_getContactImage	[CUSTOMFUNCTION its4you_getContactImage id width height CUSTOMFUNCTION]
	Please note that function has to be executed after sending email. So please use notation CUSTOMFUNCTION_AFTER
	This function returns image of contact. id – as parameter use \$s-contacts-crmid\$ width - width of returned image (10%, 100px) height - height of returned image (10%, 100px)
its4you_sum	[CUSTOMFUNCTION its4you_sum arg1 arg2 CUSTOMFUNCTION]
	This function returns sum of input values: arg1+arg2++argN. Function is inserted with two arguments by default but you can edit it and add more arguments.
its4you_deduct	[CUSTOMFUNCTION its4you_deduct arg1 arg2 CUSTOMFUNCTION]
	This function returns deducted value arg1-arg2argN (all following values are deducted from the first one). Function is inserted with two arguments by default but you can edit it and add more arguments.
its4you_multiplication	[CUSTOMFUNCTION its4you_multiplication arg1 arg2 CUSTOMFUNCTION]
	This function returns multiplication of all input values: arg1*arg2**argN. Function is inserted with two arguments by default but you can edit it and add more arguments.
its4you_divide	[CUSTOMFUNCTION its4you_divide arg1 arg2 CUSTOMFUNCTION]
	This function returns divided value arg1/arg2//argN. Function is inserted with two arguments by default but you can edit it and add more arguments.
its4you_formatNumberToPDF	[CUSTOMFUNCTION its4you_formatNumberToPDF value CUSTOMFUNCTION]
	This function returns formatted value and is used by other functions. value – int
its4you_formatNumberFromPDF	[CUSTOMFUNCTION its4you_formatNumberFromPDF value CUSTOMFUNCTION]
	This function returns converted value into integer and is used by other functions. value - int

Table 6-1 its4you functions

6.2.1 "AFTER" custom functions

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

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



Picture 6.4 Custom function groups

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

Important not	e: Always use	CUST		R for fields "R	Recipient variables (To)".
Recipient variables (To):	Contacts	•	Mailing Country	•	
Example: Mailing Country is \$	contacts-mailingcour	try\$.	·		EMAIL Template
[CUSTOMFUNCTION its4you_if	contacts-mailingcour	itry\$ == S	Slovakia Call us: +42151123458	i Please contact us via	email.(CUSTOMFUNCTION]
[CUSTOMFUNCTION_AFTER]its	:4you_if \$contacts-ma	ilingcoun	ntry\$ == Slovakia Call us: +421	1123456 Please conta	act us via email.[CUSTOMFUNCTION_AFTER]
Example: Mailing Country is \$	contacts-mailingcour	try\$.			Compose E-Mail view
Please contact us via email.					
	4you_if \$contacts-ma	ilingcoun	ntry\$ == Slovakia Call us: +421	51123456 Please conta	act us via email.[CUSTOMFUNCTION_AFTER]
Example: Mailing Country	y is Slovakia.				Final sent email
Please contact us via email	N				
Call us: +42151123456					



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

	Related modules:	Contacts	•	Mailing Country		•	
	Example: Mailing Count	ry is \$r-contactid-contac	ts-mailing	gcountry\$.			EMAIL Template
/	CUSTOMFUNCTION lits4y	ou_if \$r-contactid-conta	cts-mailin(gcountry\$ == Slovakia Ca	all us: +421511	23456	Please contact us via email. [CUSTOMFUNCTION]
([CUSTOMFUNCTION_AFT	ER its4you_if \$r-contact	id-contact	ts-mailingcountry\$ == Slo	ovakia Call us:	+42151	1123456 Please contact us via email. CUSTOMFUNCTION_AFTER]
X	Example: Mailing Count	ry is Slovakia.					Compose E-Mail view
V	Call us: +42151123456						
/	[CUSTOMFUNCTION_AFT	"ER its4you_if Slovakia =	= Slovaki	ia Call us: +42151123456	Please conta	ct us vi	a email.[CUSTOMFUNCTION_AFTER]
1							
\mathbb{N}	Example: Mailing Co	ountry is Slovakia.					Final sent email
Ŋ	Call us: +4215112345	6					
	Call us: +4215112345	6					

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

6.3 Sharing

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

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



Picture 6.7 Sharing

6.4 Unsubscribe from emails

For some kind of the email templates (campaign, advertising ...) you can insert into your email template "Unsubscribe from emails" link. This link allows recipient to unsubscribe himself from receiving such multiple emails just by one click. We developed for that purpose related custom function as well as other files which you can find in [vTigerROOT]/modules/EMAILMaker/UnsubscribeEmail.zip. Please copy whole content of the file [vTigerROOT]/modules/EMAILMaker/UnsubscribeEmail.zip into your webserver (Picture 6.8).

t Meno	Ext	Velkost'	Dátum	Atrib	t Meno	Ext	Veľkosť	Dátum	Atrib
^ []		<dir></dir>			^ []		<dir></dir>	06.12.2012 0	9:48 —
[vtwsclib]		<dir></dir>	08.01.2013 1	4:16 -755	[vtwsclib]		<dir></dir>	07.11.2012 1	3:36 -a-
UnsubscribeEmail	php	2 653	8 08.01.2013 1	4:16 -644	UnsubscribeEma	ail php	2 653	06.12.2012 0	9:46 -a-

Picture 6.8 Copying content of UnsubscribeEmail.zip

You can use *UnsbuscibeEmail.php* within your webpage or vice versa you can edit *UnsbuscibeEmail.php* according to your needs. Inside *UnsbuscibeEmail.php* is necessary to define (Picture 6.9):

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

	TS 4	You	Search		• 9			Standarduser	8		1	
ធ	PDF Make	r EMAIL Maker Ter	rms and Conditions 4You	Descriptions 4You	Business Case	Invoice	Quotes	Organization	is Co	ontac		
	8	My Preferences /iewing details about the us	er " Standarduser"									
	1. User Lo	jin & Role							Edit			
		User Name	standarduser			Admin	off					
		Password	Change Password			Email	standarduser	r@its4you.sk				
		Status	Active		First	Name						
		Last Name	Standarduser		Default Lead	View	Today					
		Role	CEO		Default Calendar	View	Today					
T	6. User Ad	ranced Options									1	
		Reminder Interval	None		Acces	s Key	mGnVSWikk	MnVcmDe		1		
\$56 \$113 \$113	erver p ser nam ser acc	path = 'htt me = 'standa cess_key =	://demo.vti arduser'; mGnVSWtkkMr	lgercrm.sk NVcmDe';				Unsu	ubs	cri	Co beEi	onte mai
if	(\$upda	ate)										
	echo	"Your email	l address ha	as been un	subscribe	d. </td <td>b×/c</td> <td>enter></td> <td>;</td> <td></td> <td></td> <td></td>	b×/c	enter>	;			
els	e											
	echo	"Your email	l address ha	as not been	n unsubsc	ribe	d. Se	t parra	amet	ers	are	wro

Picture 6.9 Edit of UnsubscribeEmail.php

The final step is to put custom function *its4you_unsubscribeemail* into your template. There are just two parameters which you need to modify inside custom function [CUSTOMFUNCTION_AFTER] its4you_unsubscribeemail|\$accounts-crmid\$|\$contacts-crmid\$|URL_ADDRESS|Unsubscribe email|CUSTOMFUNCTION_AFTER]:

- parameter 3 URL_ADDRESS url address of your unsubscribe email web page
- parameter 4 Text of the unsubscribe link

Important note: You can use feature "Unsubscribe from emails" ONLY for templates based on primary modules: Contacts, Organizations or Leads. It means that also within common templates you cannot use "Unsubscribe from emails" feature.

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

Hello,				Edit\/iew
We would like to inform you about				Laitview
If you don't want to receive emails, p	lease click on below link.			
[CUSTOMFUNCTION_AFTER]its4yo Unsubscribe email CUSTOMFUNC	ou_unsubscribeemail \$accour TION_AFTER]	nts-crmid\$ \$contacts-crmid	\$ http://demoweb.vtiger	rcrm.sk/UnsubscribeEmail.php
Best regards				
IT-Solutions 4 You s.r.o.				
Hello,	R	eceived		
We would like to inform you	about	Email		
If you don't want to receive	emails, please click on b	oelow link.		
Unsubscribe email				
		🔶 🛞 demoweb.vtigercm	n.sk /UnsubscribeEmail.	php?u=863&c=1bf45d
Post regarde				
Best regards		0		Webpage
Best regards IT-Solutions 4 You s.r.o.				Webpage
Best regards IT-Solutions 4 You s.r.o.		Your email a	ddress has been ur	Webpage
Best regards IT-Solutions 4 You s.r.o.		Your email a	ddress has been ur	Webpage
Best regards IT-Solutions 4 You s.r.o.	Contact Informatio	Your email a	ddress has been ur	
Best regards IT-Solutions 4 You s.r.o.	Contact Informatio	Your email a n First Name	ddress has been ur	
Best regards IT-Solutions 4 You s.r.o.	Contact Informatio	Your email a n First Name Last Name	ddress has been ur viedo	Webpage Isubscribed.
Best regards IT-Solutions 4 You s.r.o.	Contact Informatio	Your email an n First Name Last Name Organization Name	ddress has been ur viedo	
Best regards IT-Solutions 4 You s.r.o.	Contact Informatio	Your email a First Name Last Name Organization Name Lead Source	ddress has been ur	
Best regards IT-Solutions 4 You s.r.o.	Contact Informatio	Your email a First Name Last Name Organization Name Lead Source Title	ddress has been ur	
Best regards IT-Solutions 4 You s.r.o.	Contact Informatio	Your email a First Name Last Name Organization Name Lead Source Title Department	ddress has been ur	
Best regards IT-Solutions 4 You s.r.o.	Contact Informatio	Your email a First Name Last Name Organization Name Lead Source Title Department Email	ddress has been un viedo r -None mericko@#s4you.sk	
Best regards IT-Solutions 4 You s.r.o.	Contact Informatio	Your email and n First Name Last Name Organization Name Lead Source Title Department Email Assistant	ddress has been ur viedo r -None mericko@its4you.sk	
Best regards IT-Solutions 4 You s.r.o.	Contact Informatio	Your email a First Name Last Name Last Name Organization Name Lead Source Title Department Email Assistant Phone	ddress has been ur viedo n None mericko@its4you.sk	
Best regards IT-Solutions 4 You s.r.o.	Contact Informatio	Your email au n First Name Last Name Organization Name Lead Source Title Department Email Assistant Phone Email Opt Out	ddress has been un viedo n None mericko@its4you.sk	

Picture 6.10 Process of unsubscribing from emails

6.5 Support of the PDF Maker

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

- a) from ListView you can send emails based on EMAIL Maker templates including PDF files created by PDF Maker as attachment by simple selection of both templates in the Select EMAIL IDs window (see also chapters 5.1 and 5.2.2)
- b) from DetailView you can also use both EMAIL Maker and PDF Maker templates in one email. There are two approaches (the first approach is faster and simple)
 - Select the PDF Maker template in PDF Maker block and continue with Send Email With PDF; then in Compose E-Mail window click on Select Email Template in order to use EMAIL Maker template for your email (see chapter 5.2.4).
 - II) In case you already created and stored PDF file please select the EMAIL Maker template from EMAIL Maker block and continue to Compose E-Mail window where you can attach PDF file by Attachment: File (see chapter 5.2.2).

For details about PDF Maker tool please refer to <u>http://www.its4you.sk/images/pdf_maker/pdfmaker-for-vtigercrm.pdf</u>.

EMAIL Template	For accountant
Invoice basic with details	Invoice - monthly detailed
Emails	US English
Contact Name	Export To PDF
Email Email	Send Email With PDF
Secondary Email	
Organization Name	East and Export to PDF
Email	Save PDF into Documents
Other Email	PDF Product Page Break
The email will be sent only for records with defined email address!	PDF Product Images
	Export To RTF
PDF Maker templates	
Invoice A nonthly detailed For accountant	EMAILMaker
<u></u>	Basic
US English	Invoice basic with details
PRemove PDFMaker Templates	II) Invoice - custom after Invoice - custom after 2
Select Cancel	Send Mail

Picture 6.11 Support of the PDF Maker

7 Settings

The EMAIL Maker settings can be initiated from ListView using button 4 as you can see in the picture below (Picture 7.1). In the Settings you can find:

- Remail buttons Setting visibility of the EMAIL Maker block and button
- Profiles Manage user-specific EMAIL Maker access to different roles
- Templates in block Set count of templates show in EMAIL Maker block
- EMAIL Maker License Manage your EMAIL Maker License key
- Upgrade allows to upgrade EMAIL Maker

Please refer to following chapters for details.



Picture 7.1 How to initiate EMAIL Maker settings

7.1 Email buttons

This section allows you to customize the visibility of the EMAIL Maker block (chapter 3.4) and button Send Email. Please use checkboxes in the column "Block in DetailView" to make EMAIL Maker block in/visible in the DetailView for particular module according to your needs. In similar way please provide settings for button Send Email in the column "Button in ListView".

Module	Block in DetailView	Button in ListView
Opportunities		Ø
Contacts	2	V
Organizations	2	1
Leads		V
Documents		
	†	1

Picture 7.2 Setting email buttons and EMAIL Maker block for modules

7.2 Manage profiles

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

Manage user-specific EMAIL Maker a	access to different Roles.		
afine EMAIL Maker privile	gies for all profiles		
	0		
Profiles	Create/Edit	View	Delete
Profiles Administrator	Create/Edit	View V	Delete 🔽
Profiles Administrator Sales Profile	Create/Edit	View V	Delete V
Profiles Administrator Sales Profile Support Profile	Create/Edit	View V V	Delete

Picture 7.3 Manage profiles

7.3 Templates in block

The count of templates shown in EMAIL Maker block can be defined in few following steps (Picture 7.4):

- 1. Click on Edit button.
- 2. Set the values.
- 3. Click on Save button.

Below picture shows also some examples of the EMAIL Maker block for different values. Please note that some web browsers don't support all possible values and final behavior of the EMAIL Maker block can differ. The default value for all modules is 5.



Picture 7.4 Templates in EMAIL Maker block

7.4 Deactivate/Reactivate license key

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

- 1. Click on Deactivate license
- 2. Confirm deactivation using $\square \square$ button in next window.



Picture 7.5 Deactivate license

After deactivation of license you can list or export your email templates, but you cannot add, edit, delete or use them. The buttons or links to work with templates are inactive or not visible in the ListView and DetailView (Picture 7.6). EMAIL Maker block is not visible either.

Tool	s > EM	AlL Maker 🚽 🖉	i () 🖪 🗩 🖬				
L		Module: All	Select				
#	Select	Template name	Category	Module	Description		
1	V	Sales Order		Sales Order	sales order email		
2		Invoice - monthly	Monthly	Invoice	Email with attached invoice sen	t regularly each month	
3		Invoice - monthly detailed	Monthly	Invoice	Email with attached invoice sen	t regularly each month	

Picture 7.6 ListView after license deactivation

To reactivate license you have to provide following steps (see picture next page):

- Insert the license key and click on button Activate if you are reactivating license after previous deactivation, or click on button Reactivate license if you are reactivating license after previous migration of the server.
- If license key is correct you will be informed about successful reactivation. Just confirm activation via button Finish
 (2a.) or reactivation via button
 OK
 (2b.).

Moc Manag	dule Manager > EN ge your EMAIL Maker Licens	MAILMaker > EMAIL Make	er License	
	License Key		tivate Reactivate license	[Scroll to Top]
EMAIL Ma	ker >> Finish >	>> 2/2		28
You l Click a	r license key v In the "Finish" button	was successfully va and You will be redirected	lidated to EmailMaker ListView.	in h
You Click a	r license key v n the "Finish" button	vas successfully va	lidated to EmailMaker ListView.	nish 21
Your Click o	r license key v n the "Finish" button Nodule Manag anage your EMAIL M	Vas successfully va n and You will be redirected	lidated to EmailMaker ListView. Fit Maker License	iish 2

Picture 7.7 Re/activate license

7.5 Upgrade of the EMAIL Maker

The upgrade of EMAIL Maker can be started using Supprade link in the Settings. Please browse the package using button Browse... and click on button Upgrade.

	Settings > Module Manager > Upgrade
	fanage module behavior inside vliger CRM
Select the	e Package File
* File loca	stion: Browse.
	vtiger module is packaged as a zip file.
	Upgrade Cancel

Picture 7.8 Upgrade of EMAIL Maker

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

C .	Settings > Module Manager > Upgrade
	Manage module behavior inside vliger CRM
Upgrad	de Failure
Cannot	t upgrade! Installed Version 540.04.02 matches Package Version

Picture 7.9 Upgrade failure

Next steps are similar with installation of the EMAIL Maker, therefore please refer to chapter 1 for additional information.

8 Tips & tricks

8.1 How to disable Send Mail buttons/links

This section describes how to disable buttons **Send Mail** from ListView and Action links **Send Mail** from DetailView (Picture 8.1). Please note that this disabling is not necessary for correct work of the EMAIL Maker tool. It is recommended to make backup of files ListViewEntries.tpl and DetailView.tpl before any action.

Searcl	nced Sear	ch	Search for		Actions
А	В	C D	EF	GH	Tara Oraci Marit
					Send Mail;
	ecords 1 - 1	13 of 13			and the second
nowing R					Add Event
nowing R Delete	Mass E	dit Send Mail	Send Email		Add Event
Delete	Mass E	dit Send Mail First Name	Send Email	Title	Add Event
Delete Con CON	Mass Ed act Id	dit Send Mail First Name Mary	Send Email Last Name Smith	Title Mgr Operations	Add Event Add To Do Add Note

Picture 8.1 Disabling Send Mail button and link

Please edit the file [vTigerROOT]/Smarty/templates/ListViewEntries.tpl in order to disable button from ListView as it is shown in the following picture.

102	{elseif \$button_check eq 'mass_edit'}	102	(elseif \$button_check eq 'mass_edit')
103	<input class="crmbutton small edit" crmbutton="" edi<="" edit"="" small="" td="" type="but</td></tr><tr><th>106</th><th><pre>(elseif \$button_check eq 's_cmail')</pre></th><th>106</th><th>{elseif \$button_check eq 's_cmail'}</th></tr><tr><th></th><th></th><th>-</th><th></th></tr><tr><td></td><td> ListView</td><td>es.tpl</td></tr><tr><td></td><td></td><td></td><td></td></tr><tr><th>293</th><th>{elseif \$button_check eq 'mass_edit'}</th><th>293</th><th>(elseif \$button_check eq 'mass_edit')</th></tr><tr><td>294</td><td><input class="/> <td>294</td> <td><input class="crmbutton small edit" t<="" td=""/></td>	294	<input class="crmbutton small edit" t<="" td=""/>
295	{elseif \$button_check eq 's_mail'}	895	elseif \$button_check eq 's_mailDISABLED')
296	<input class="crmbutton small edi</td><td>296</td><td><input class=" crmbutton="" edit"="" small="" t<="" td=""/>		
297	<pre>(elseif \$button_check eq 's_cmail')</pre>	297	<pre>(elseif \$button_check eq 's_cmail')</pre>

Picture 8.2 How to edit ListViewEntries.tpl

Please edit the file [vTigerROOT]/Smarty/templates/DetailView.tpl in order to disable link Send Mail from DetailView as it is shown in the following picture.



Picture 8.3 How to edit DetailView.tpl

8.2 How to use already created template for another module

All primary module fields and all related module fields are replaced in the email template by real values stored in your vtiger CRM when you send email to particular receiver. It is not recommended to put manually fields into template which can be not selected from tabs in EditView. In order to avoid problems with mixing fields all template inputs are deleted when you change primary module.

In case you would like to reuse your template in another primary module please provide following steps:

- 1. In original template within EditView select (Ctrl+A) and copy (Ctrl+C) whole template.
- 2. Create new template.
- 3. Define new primary module.
- 4. Paste (Ctrl+V) the content into template.
- 5. Delete in the new template all fields related to original previous module.
- 6. Insert new fields using tabs and buttons Insert into template

9 FAQs

Q: With which version of vtiger CRM is EMAIL Maker compatible?

ITS4You: The EMAIL Maker is compatible with vtiger CRM 521, 530 and 540.

Q: How can I migrate to latest vtiger CRM version with installed EMAIL Maker extension? **ITS4You:** Please provide following steps:

- 1. Deactivate your License key. (see also chapter 7.4)
- 2. After successful migration to latest vtiger CRM version, our extension is disabled.
- 3. Go to Setting->Module manager and choose Custom Modules tab.
- 4. Find and enable EMAIL Maker extension.
- 5. If necessary download our compatible release version from our download center.
- 6. Upgrade our extension as described in the chapters 7.5 and follow installation steps described in the chapter 1.

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

ITS4You: Please follow the instructions described in the chapter 7.5.

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

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

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

ITS4You: The trial version is not available, but you can use our demo <u>http://demo.vtigercrm.sk/index.php?module=EMAILMaker&action=index</u> to try it. You can download a FREE version too.

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

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

Q: Can I use custom fields?

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

Q: When I sent emails I got a blank page in the browser. How to proceed now?

ITS4You: Please increase the memory of PHP to minimal 256MB.

Q: Because I am using only EMAIL Maker I don't need buttons **Send Mail** and action links **Send Mail**. Is it possible to disable it?

ITS4You: YES it is possible. Please refer to chapter 8.1.

Q: Is it possible to send emails within module campaign using EMAIL Maker?

ITS4You: YES, it is possible using EMAIL Maker block in the DetailView of particular campaign.

Q: How to send email based on campaign module to all campaign related contacts?

ITS4You: It is not supported, you can send emails to all campaign related contacts but it is necessary to use contacts template or common email template. Please refer also to chapter 5.3.