IT-Solutions 4You

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

PDF MAKER FOR VTIGER CRM

Introduction

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

The PDF Maker benefits are:

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

What's new?

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

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

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

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License agreement

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

Terms and conditions

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

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

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

Private policy

During installation it is necessary to exchange following information:

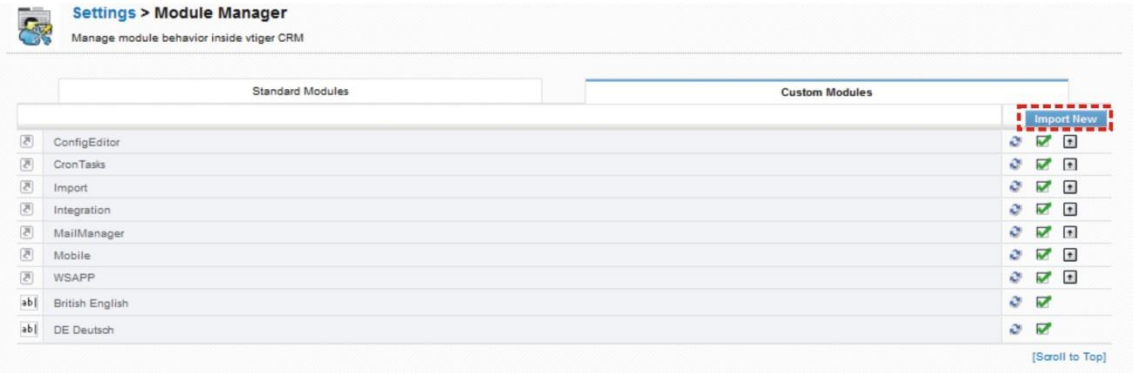
- vtigerCRM version (e.g. 5.4.0)
- PDF Maker version (e.g. 530.34.3)
- Date and time
- Domain in md5 coding format (e.g. 916b25c201a77a6721003c0030977f3b)
- Action provided by you (INSTALL, REACTIVATE, DEACTIVATE)

1 How to install PDF Maker

Please provide following steps in order to install PDF Maker:

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

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

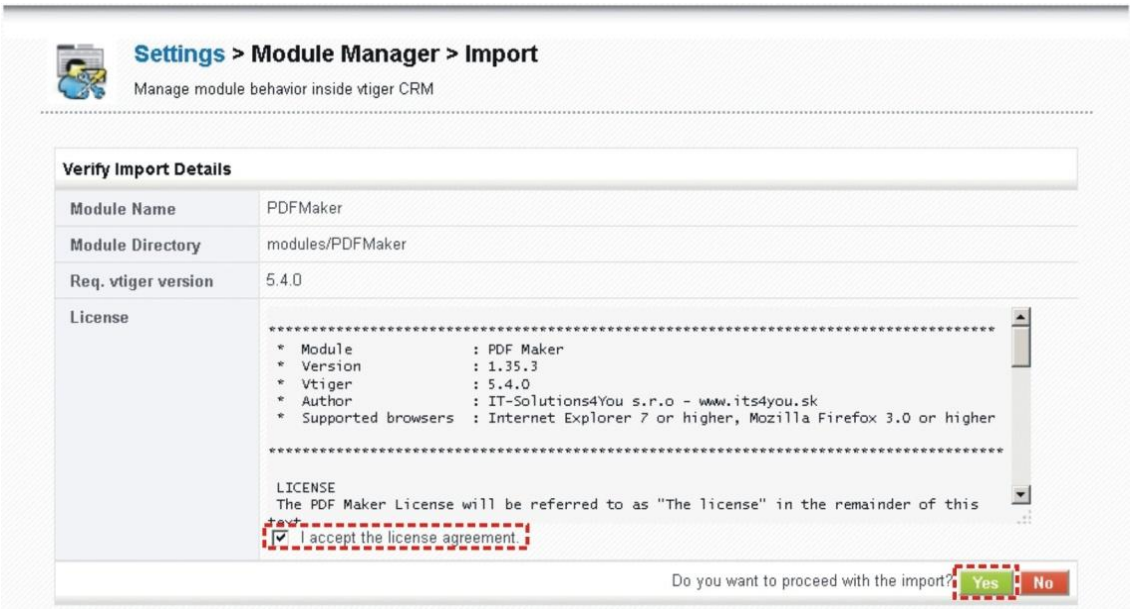


Picture 1.1 Installation of PDF Maker – step 1

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

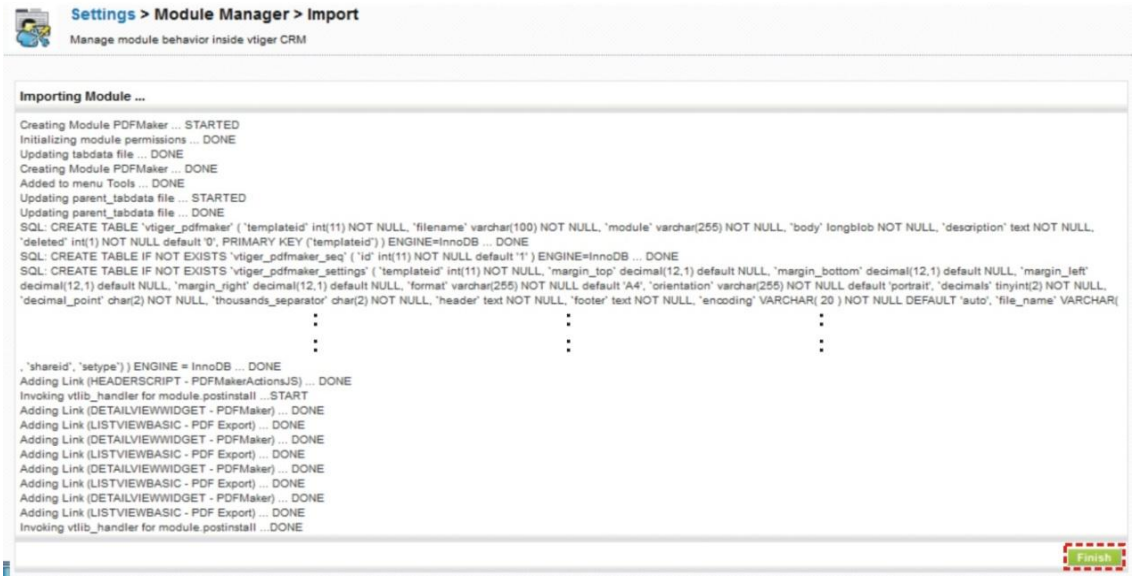
Picture 1.2 Installation of PDF Maker – step 2

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.



Picture 1.3 Installation of PDF Maker – step 3

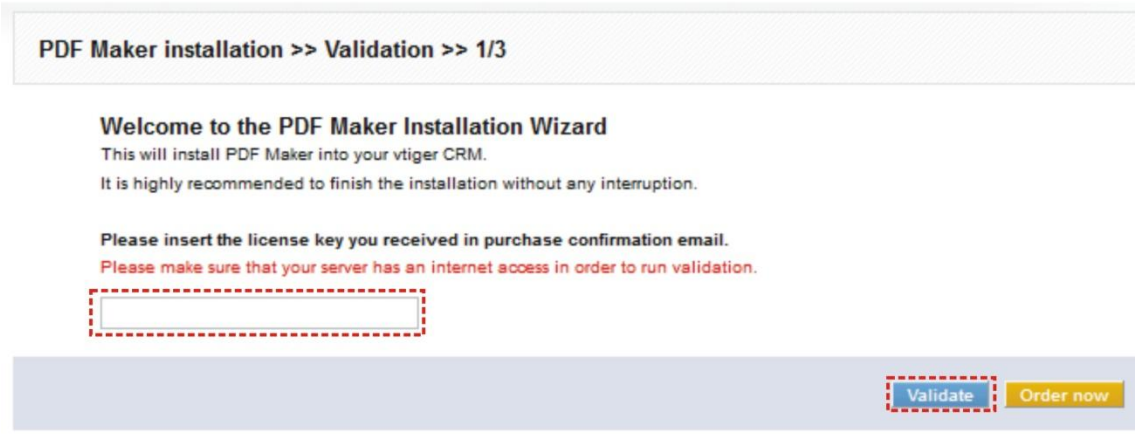
4. Click on Finish to complete the module import.



Picture 1.4 Installation of PDF Maker – step 4

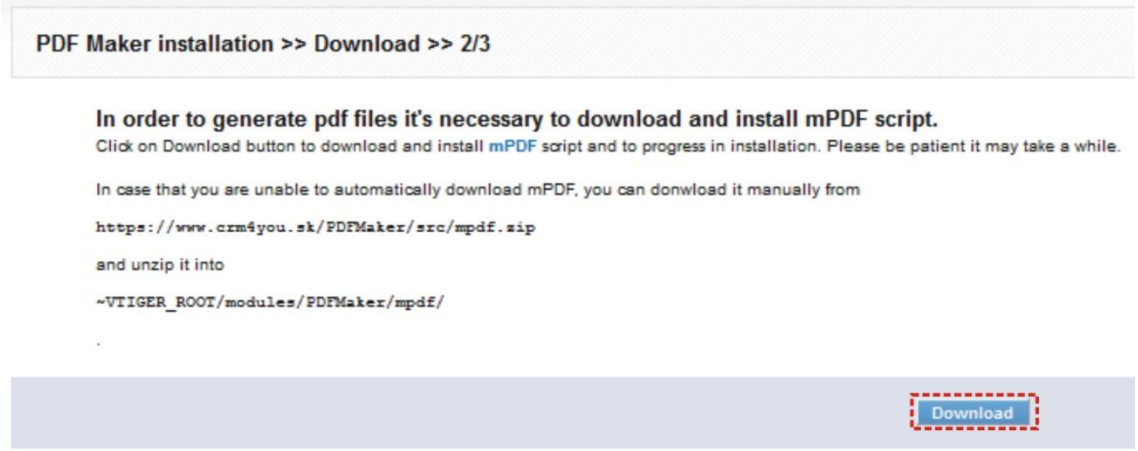
In order to finish installation, please provide following validation steps.

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



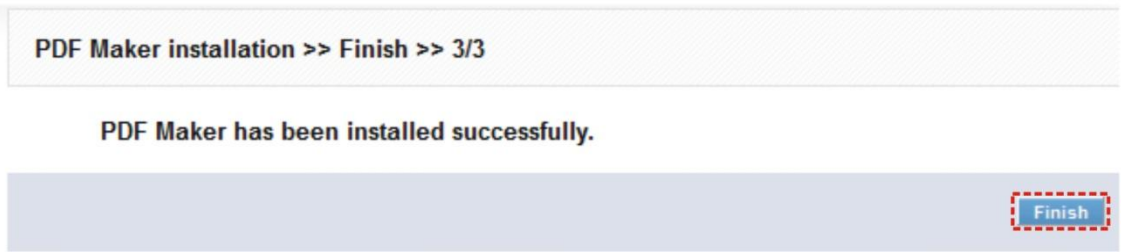
Picture 1.5 Validation step 1

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



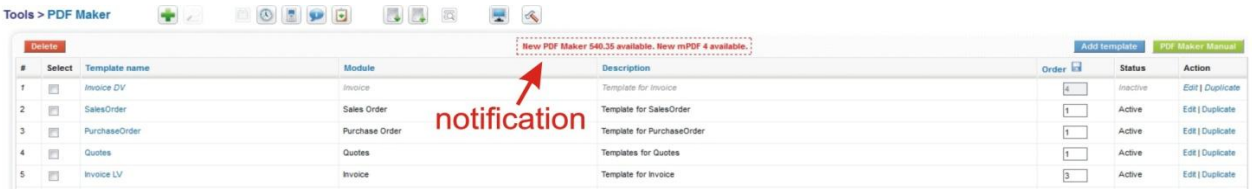
Picture 1.6 Validation step 2

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



Picture 1.7 Validation step 3 – Finish installation

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



Picture 1.8 Automatic notification of the updates

2 Quick start

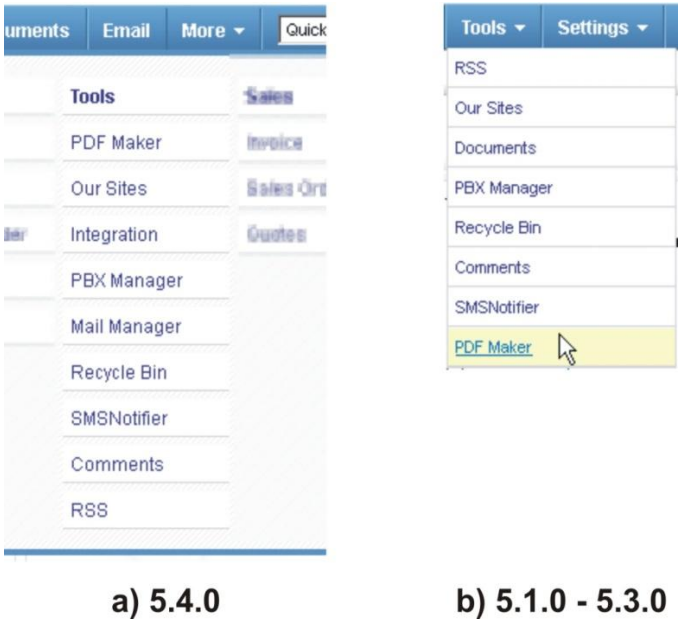
In the following section you can find short description how to create your first simple PDF template for vtiger CRM using PDF Maker.

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

2.1 Create the simple PDF template

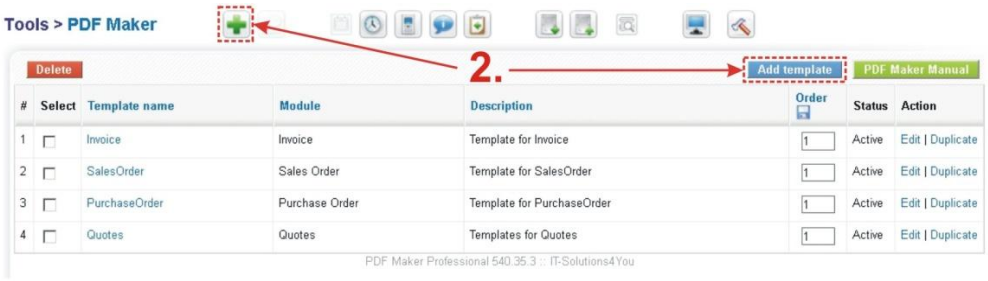
In order to create the PDF template you have to start the PDF Maker tool which can be located under the More Tab and Tools column or in older versions under the Tools tab as seen below on the picture.

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



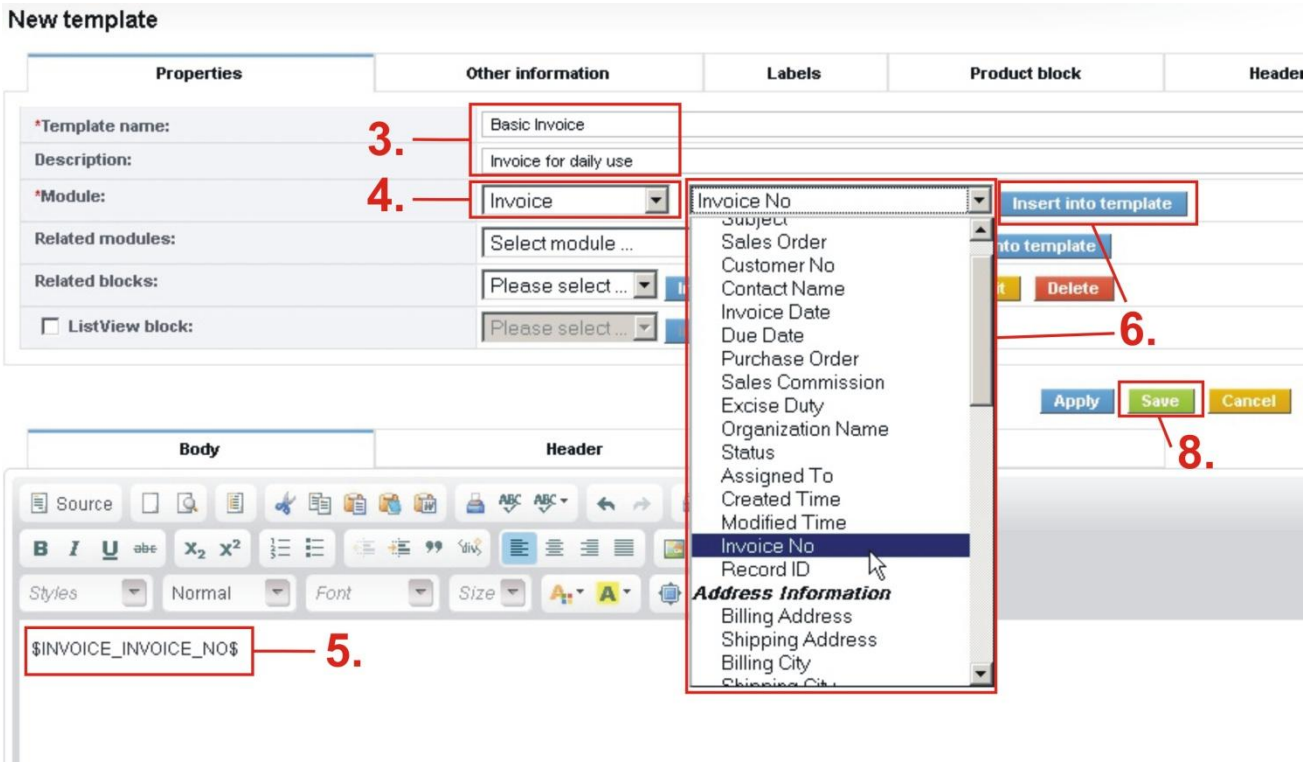
Picture 2.1 Start PDF Maker

2. The screenshot below (Picture 2.2) shows PDF Maker ListView. You can click Add template or to add new 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. Type the text into the Body section.
6. Choose one of the all available fields from the selected module (i.e. Invoice No) and click on the button Insert into template.
7. Repeat the steps 5. and 6. to finish your pdf template according to your needs.
8. Finally click on the Save button.

2.2 Generate the PDF file

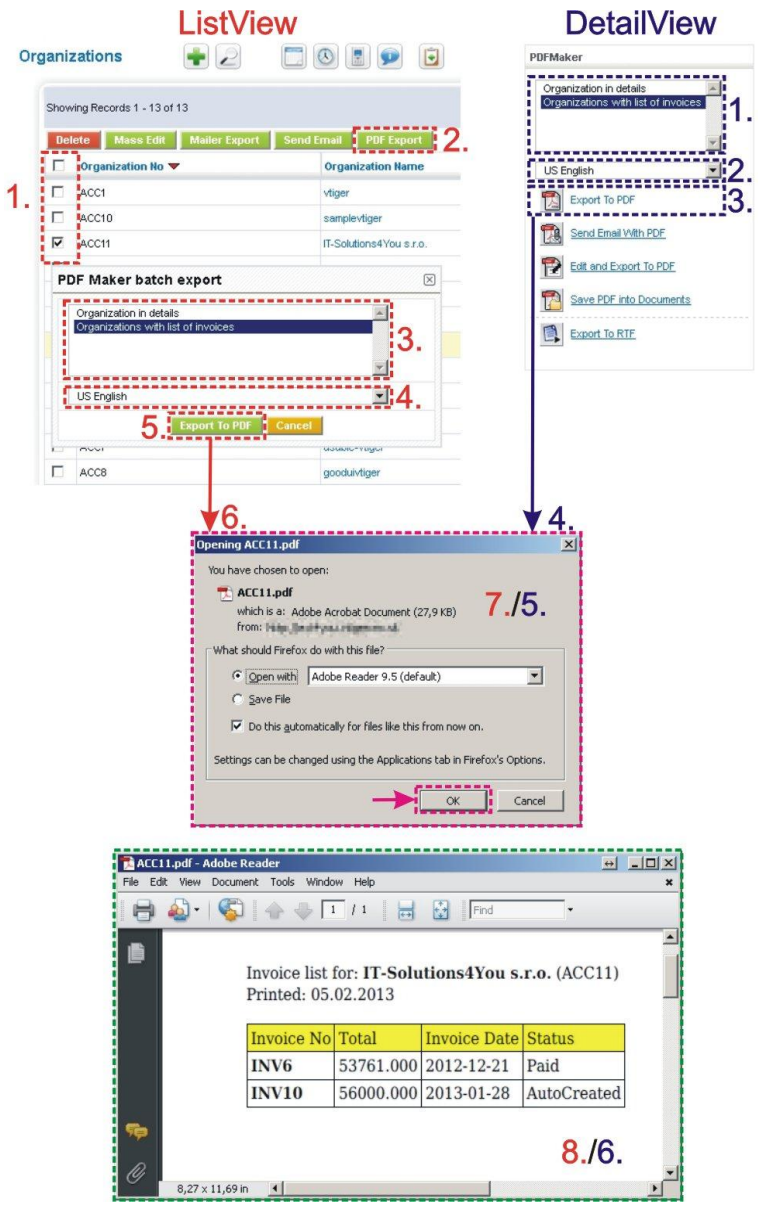
In the following picture you can see how to generate PDF file in the ListView or DetailView using PDF Maker:

ListView

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

DetailView

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



Picture 2.4 Generate the PDF file

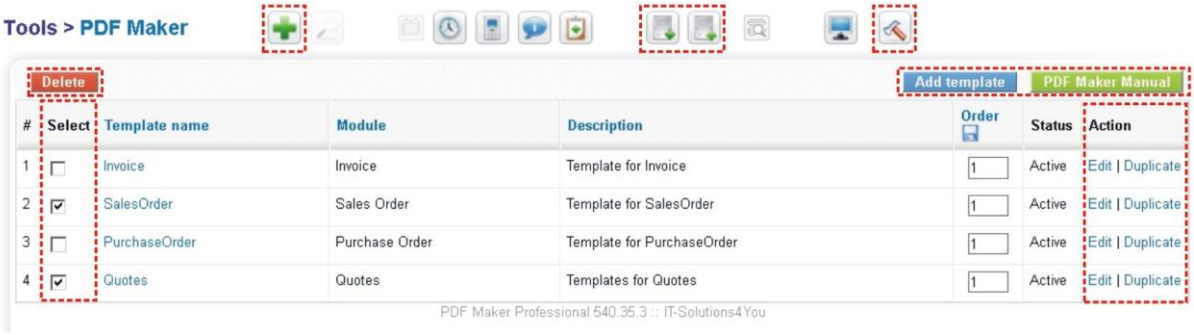
3 Work area

The Work Area of PDF Maker consists of:

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

3.1 ListView

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



Picture 3.1 ListView

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

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

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

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

- is used to add new template
- is link to this document

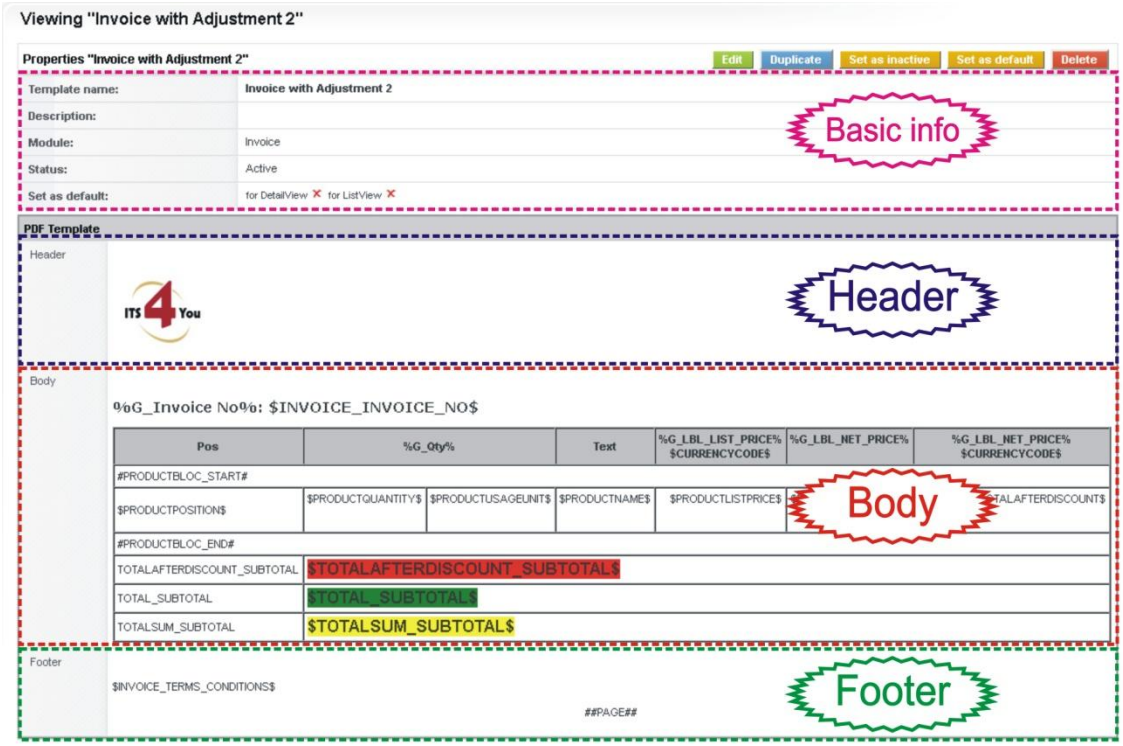
Within ListView you can define the order of the templates in PDF Maker block. To change it just put numbers into column order in the ListView and click on save button.

Picture 3.2 How to change the order of the templates

3.2 DetailView

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

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



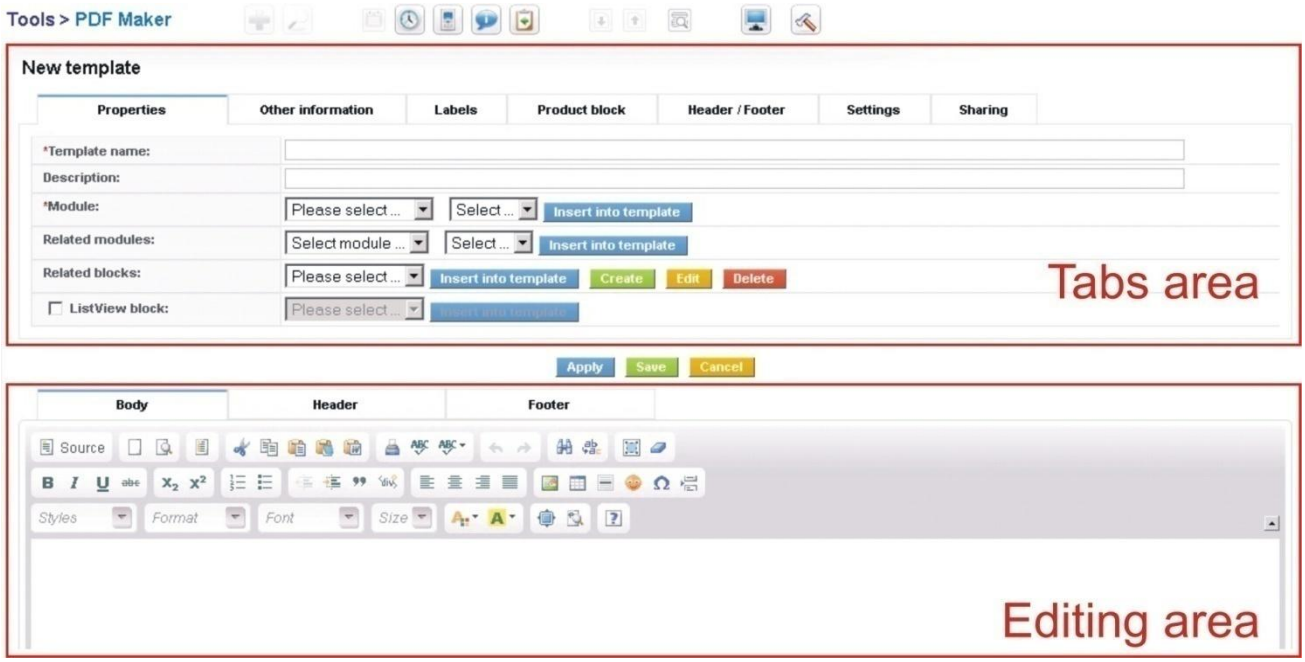
Picture 3.3 DetailView

3.3 EditView

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

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

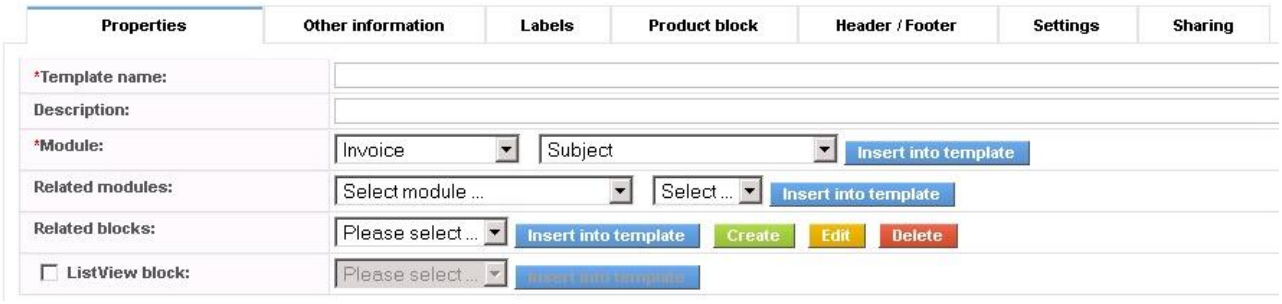
Note: If you click on *Body tab* in editing area you are automatically switched to *Properties tab*. Also if you click on *Header tab* or *Footer tab* in editing area then it switches *Tabs area* to *Header/Footer tab.*



Picture 3.4 New template work area

3.3.1 Properties

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



Picture 3.5 Properties tab

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

Picture 3.6 Properties tab for header/footer

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

Table 3-1 Properties tab

3.3.2 Other information

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

Picture 3.7 Other information tab

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

Table 3-2 Other information tab

3.3.3 Labels

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

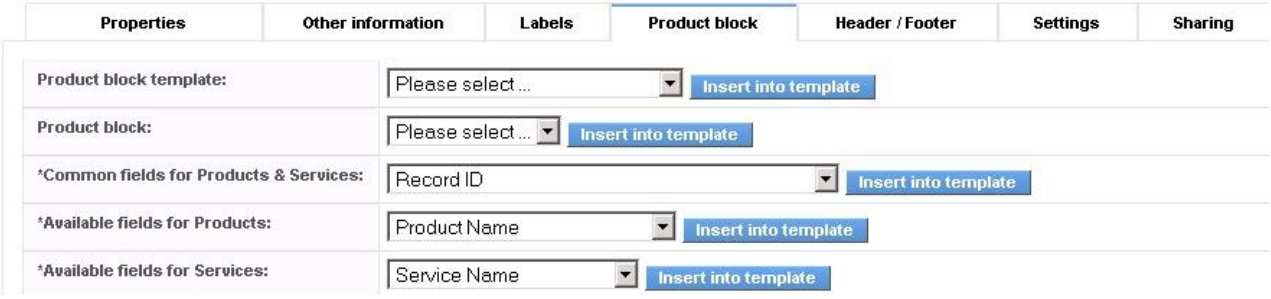
Picture 3.8 Labels tab

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

3.3.4 Product block

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



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

3.3.5 Header / Footer

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

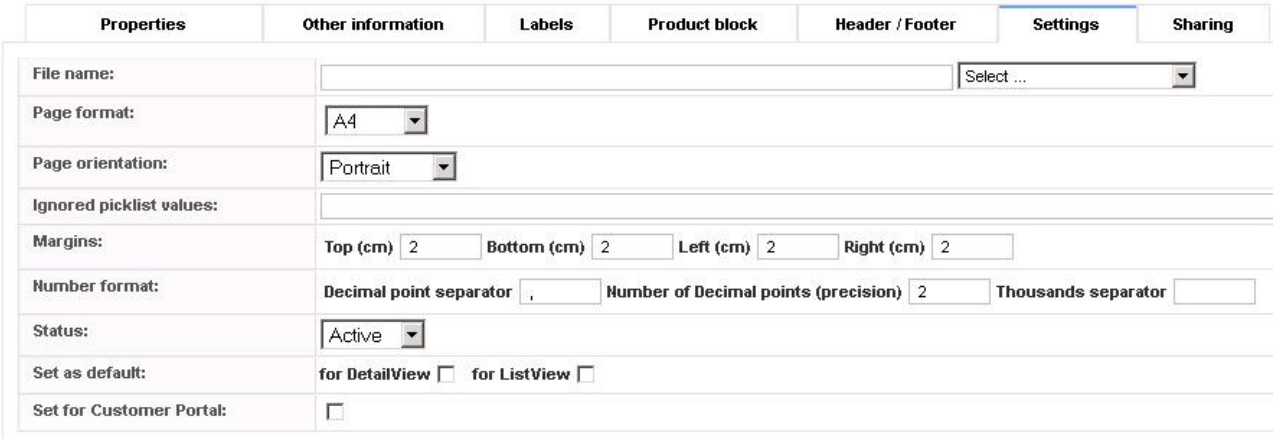
Picture 3.10 Header / Footer tab

Name	Description
Header / Footer variables	“Current page”, “Total pages” and “Page/pages”.
Display header	Allows defining how to display the header of the pdf document.
Display footer	Allows defining how to display the footer of the pdf document.

Table 3-5 Header / Footer tab

3.3.6 Settings

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



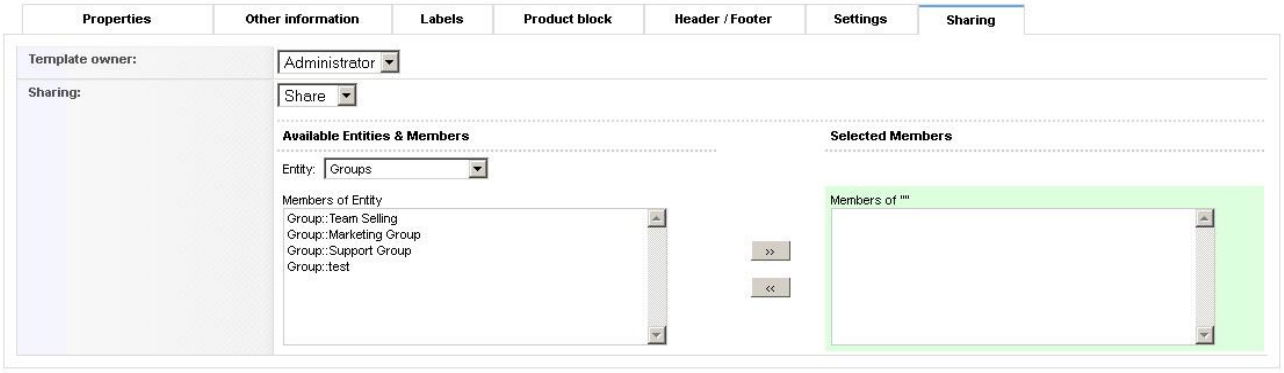
Picture 3.11 Settings tab

Name	Description
File name	File name in different formats. Please refer to chapter 4.9.1 for details.
Page format	A3, A4, A5, A6, Letter, Legal or Custom. Custom page format allows to define width and height of the page in mm. Maximum values are 2000 mm x 2000 mm and minimum values are 100mm x 100mm
Page orientation	Portrait or landscape
Ignored picklist values	Define picklist values which will be ignored in the final pdf document like None, none, keine etc. Entered values have to be separated with comma.
Margins	Margins in cm. Maximum value is 9.9 cm and minimum value is 0 cm.
Number format	Decimal point separator – comma, dot (but any symbol can be used) Number of decimal points - 0-3 Thousands separator – comma, dot, space (but any symbol can be used)
Status	Active / Inactive. Please refer to chapter 0 for details.
Set as default	Set/unset as default for DetailView and ListView. For details please refer to chapter 4.9.3.
Set for Customer Portal	Set/unset for customer portal. For details please refer to chapters 4.9.4 and 7.1.1. This setting is available only for modules *Invoice* and *Quotes*.

Table 3-6 Settings tab

3.3.7 Sharing

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



Picture 3.12 Sharing tab

Picture 3.13 Sharing tab for private/public template

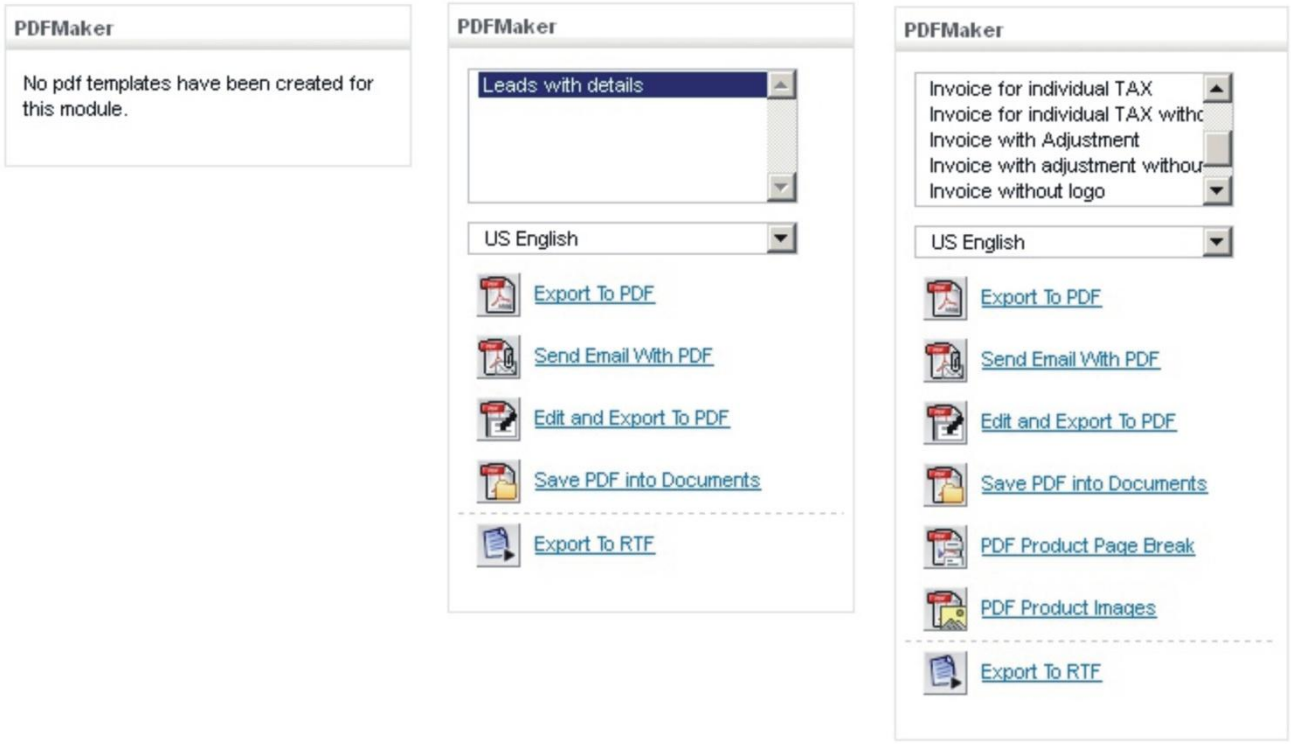
Name	Description
Template owner	Select template owner from the list.
Sharing	Select “Public”, “Private”, “Share”

Table 3-7 Sharing tab

3.4 PDF Maker block

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

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



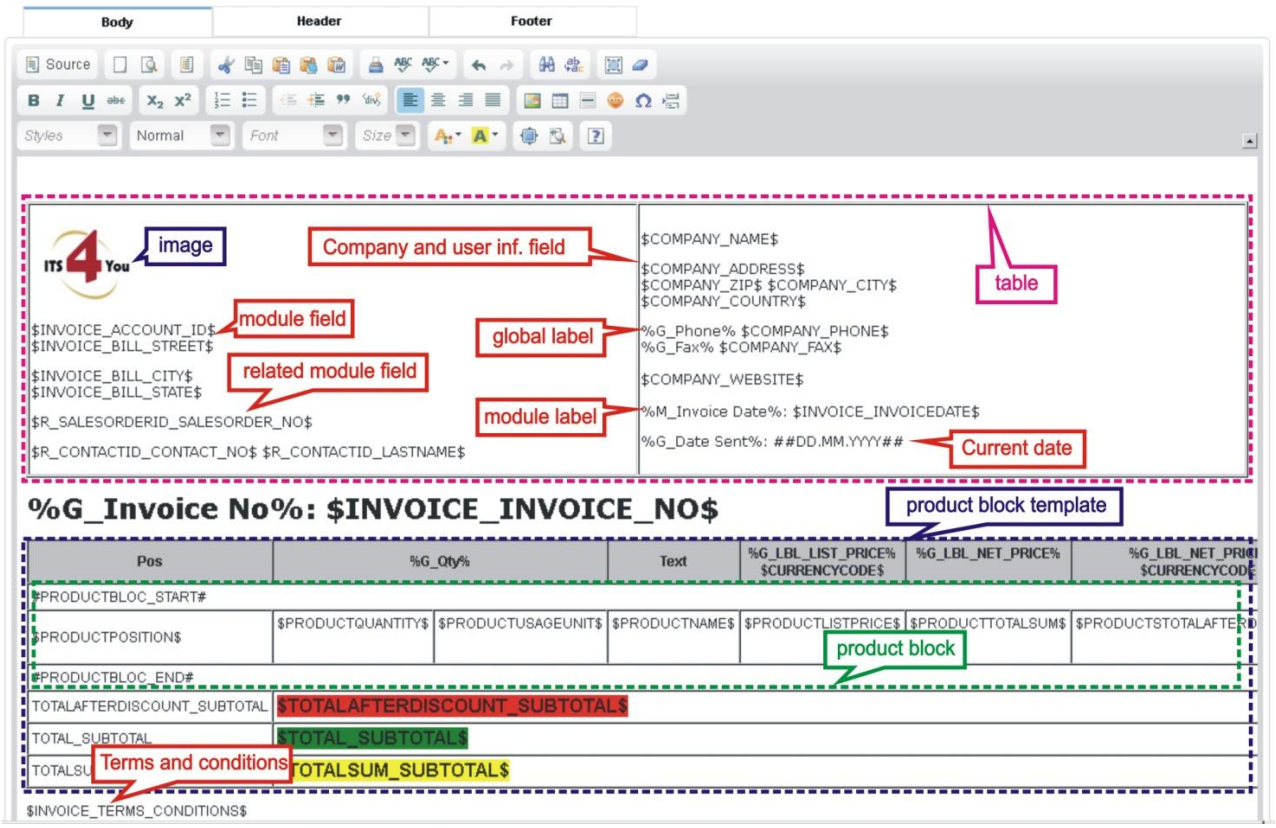
Picture 3.14 PDF Maker block

4 Editing

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

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

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



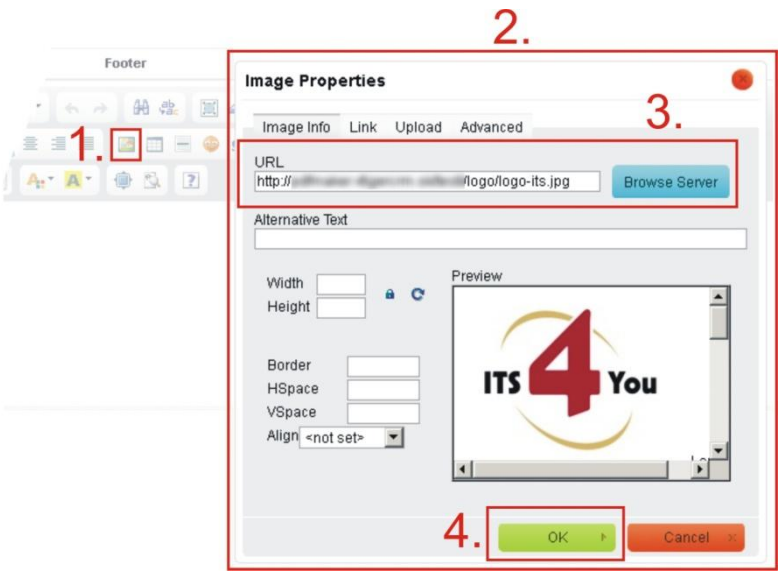
Picture 4.1 Editing

4.1 Inserting images

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

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

1. Press the button on the toolbar.



Picture 4.2 Insert image

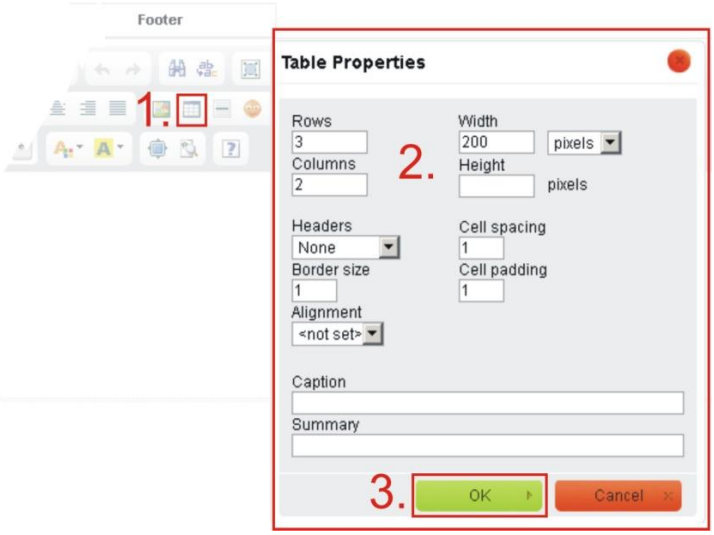
2. A pop-up window called "Image Properties" will appear. It includes four tabs that group image options.
3. Define the URL address of the image. You may also use the Browse Server in order to browse the files. Set up other properties of the image.
4. Click OK to add image into Templates.

For more info visit following site: 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 OK button.

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

Please refer also to the chapter 4.10.1 for more details.

For more info visit following site: 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*.

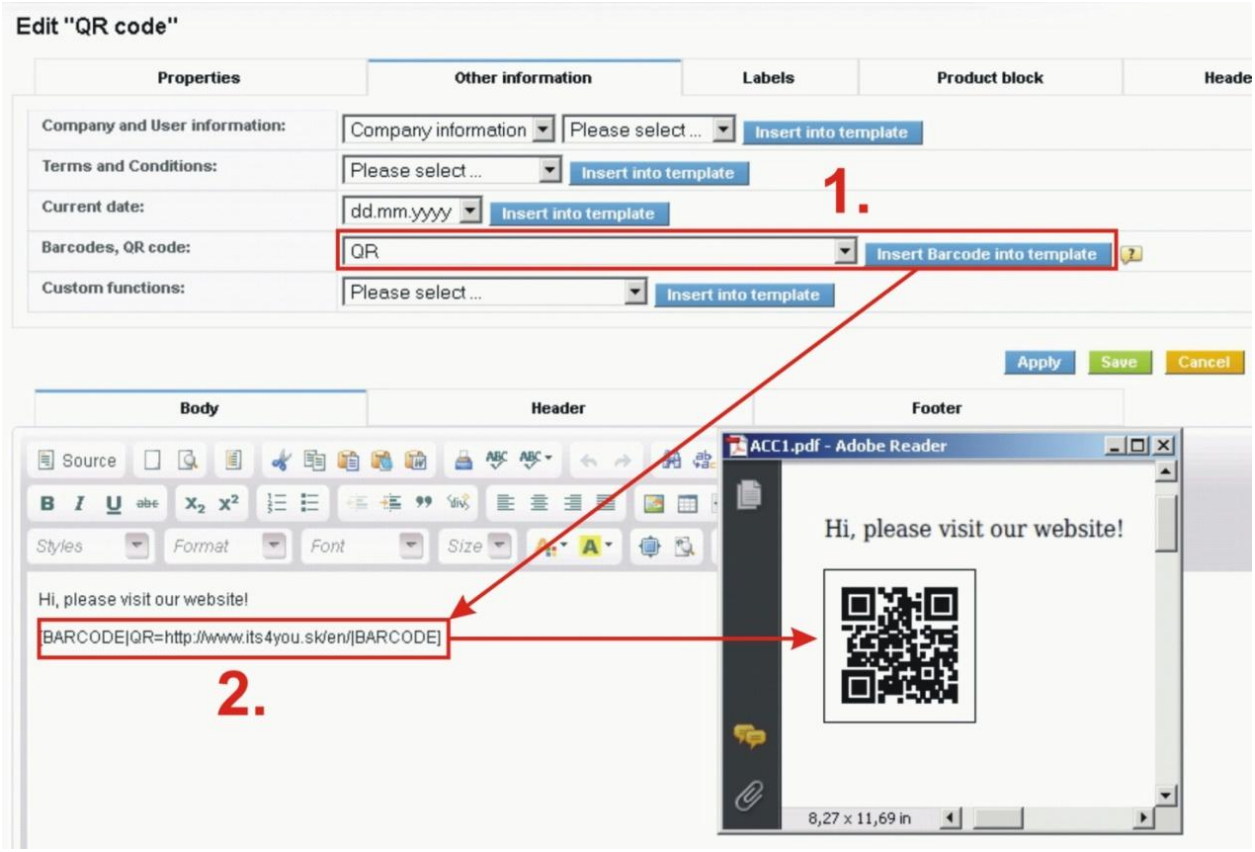
In order to insert the barcode into the template please provide following steps:

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

Picture 4.4 Barcode selection

How to insert QR code shows next picture:

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



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):

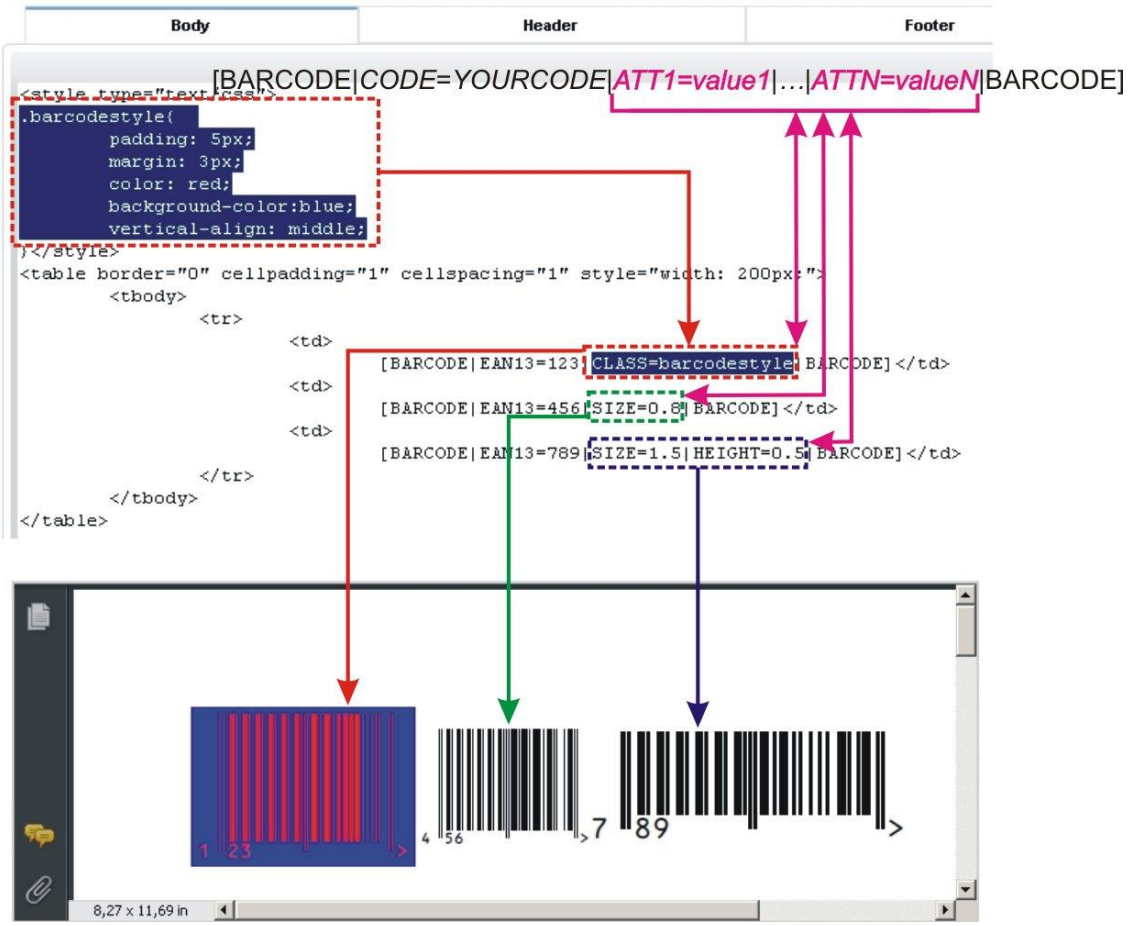
a) additional attributes – add one or more supported attributes into barcode/QR syntax like [BARCODE|*CODE*=*YOURCODE*|ATT*1*=value*1*|…|ATT*N*=value*N*|BARCODE]
Example: **[BARCODE|EAN13=789|SIZE=1.5|HEIGHT=0.5|BARCODE]**

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.



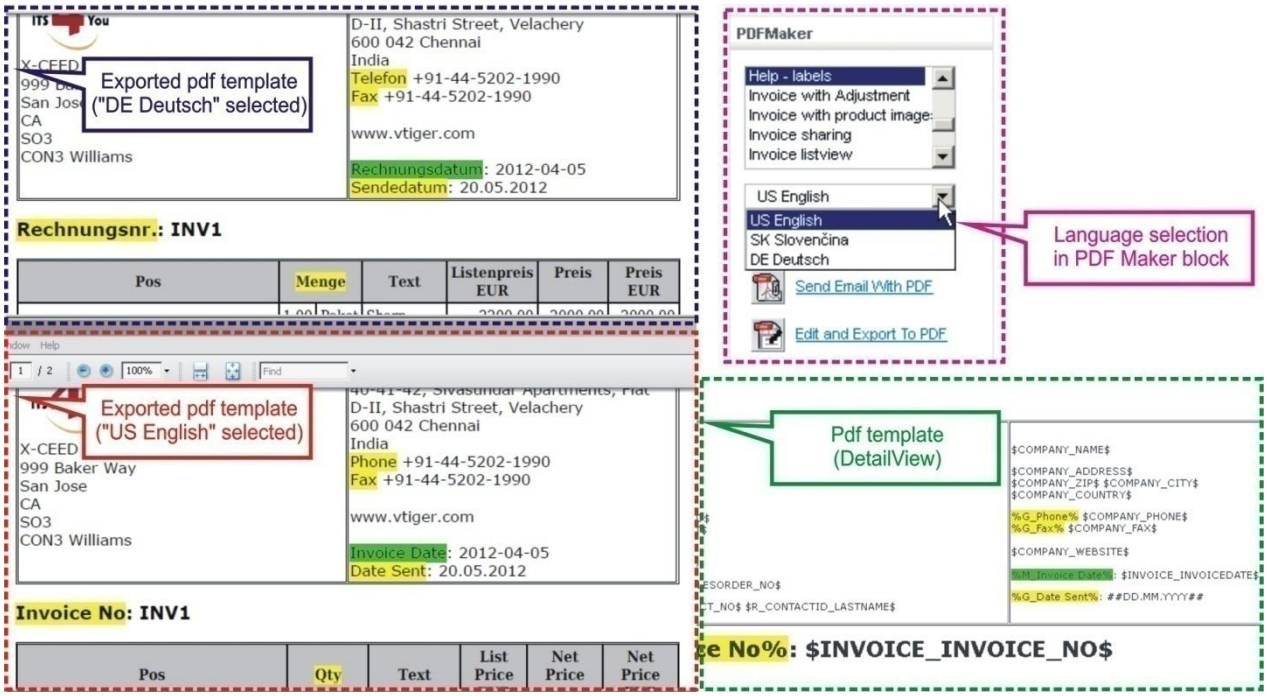
Picture 4.6 Formatting barcodes and QR codes

4.4 Inserting labels

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

Picture 4.7 Labels tab

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



Picture 4.8 Inserting labels

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

4.5 Using a product blocks

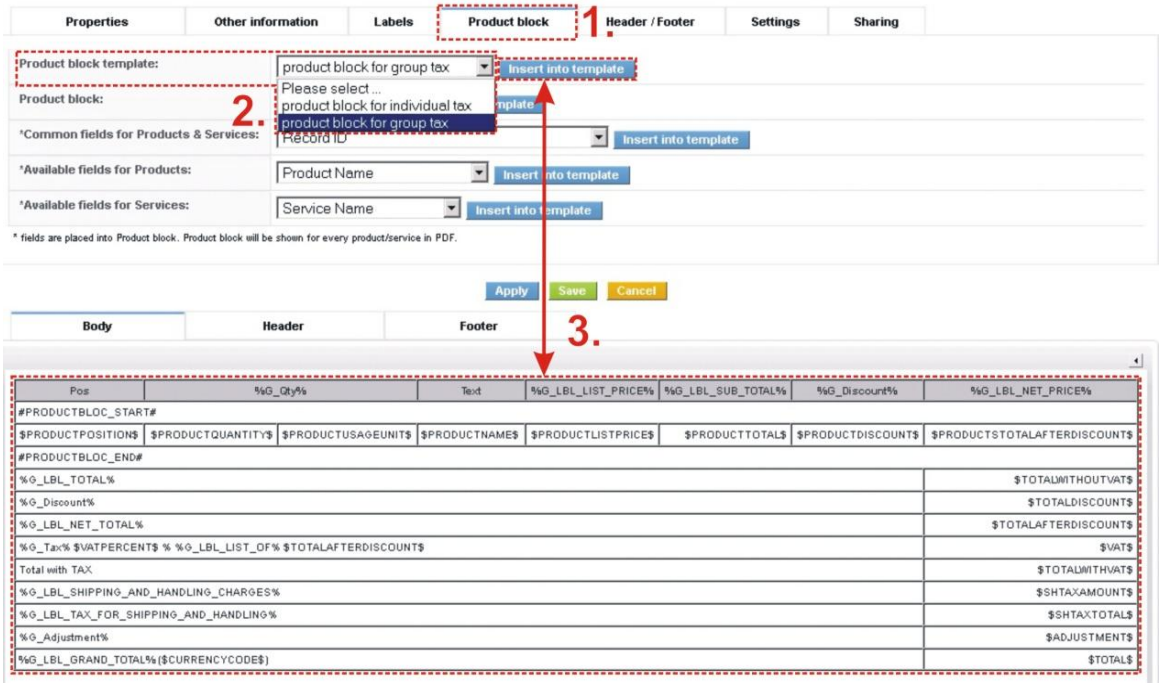
We introduced tool for product block templates management. Using this tool you can simply add, edit, duplicate or delete product block templates. Please refer to chapter 7.4 for details.

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

4.5.1 Insert and edit product block template

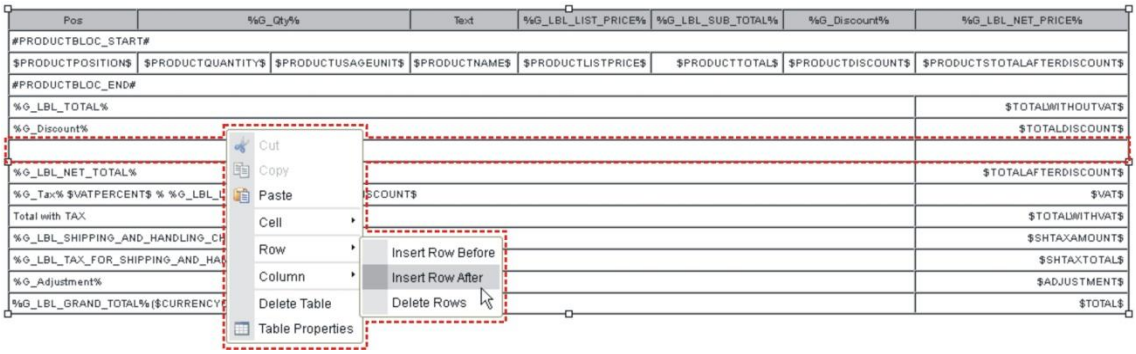
You can simply add the whole product block template into your template by:

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

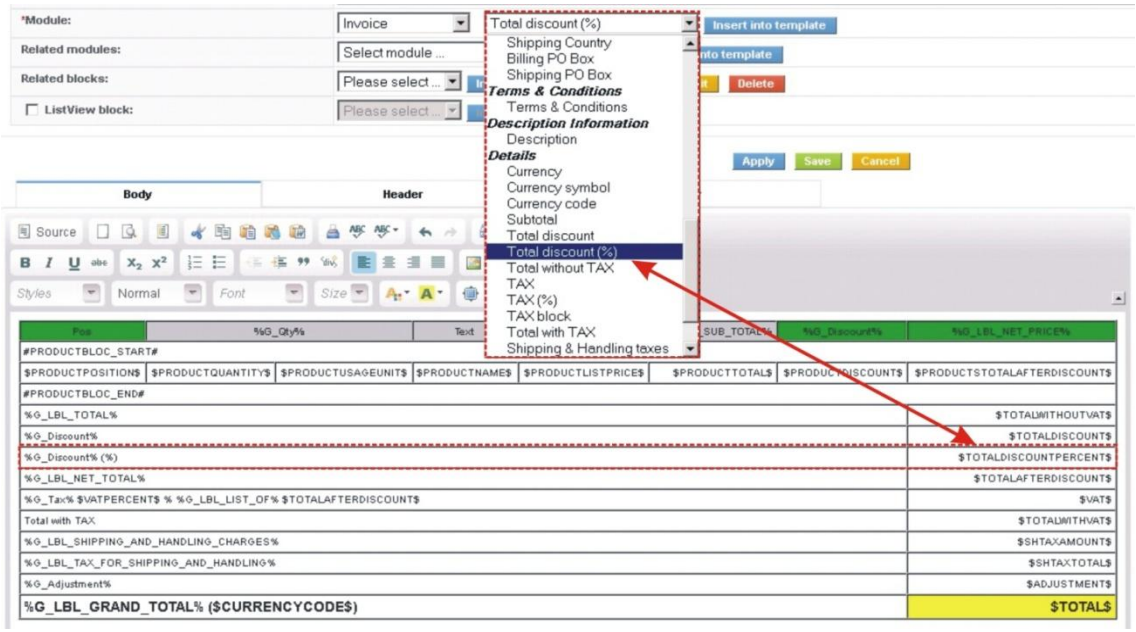


Picture 4.9 Insert product block template

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



Picture 4.10 Edit product block template – insert new row(s)

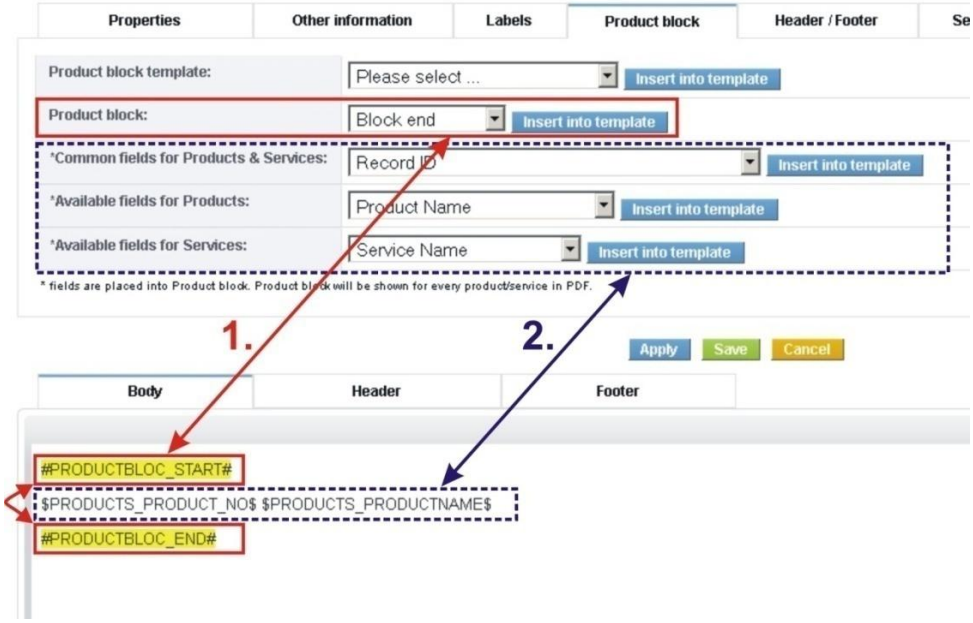


Picture 4.11 Edit product block template – insert new variables / formatting

4.5.2 Create new product block in EditView

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

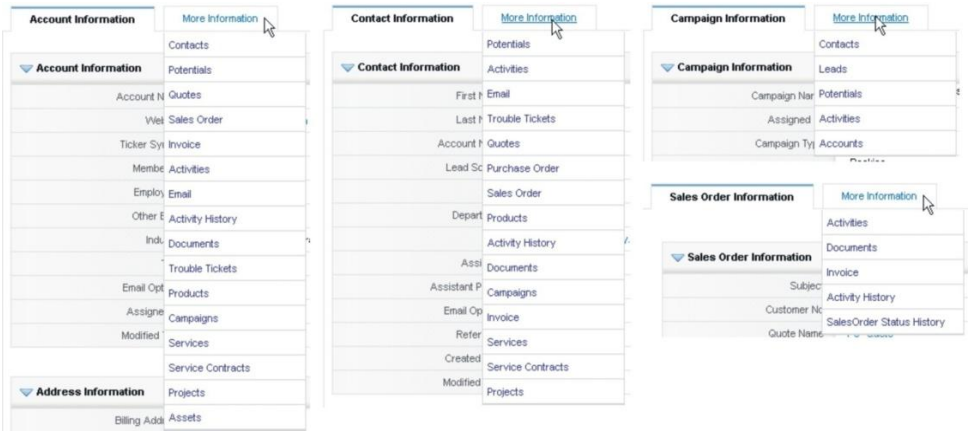
1. Go to *Product block tab* and insert product block start variable (#PRODUCTBLOC_START#) and product block end (#PRODUCTBLOC_END#).
2. Add all necessary product/service fields according to your needs between (#PRODUCTBLOC_START#) and (#PRODUCTBLOC_END#) and provide formatting if needed.



Picture 4.12 Create product block

4.6 Using related blocks

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

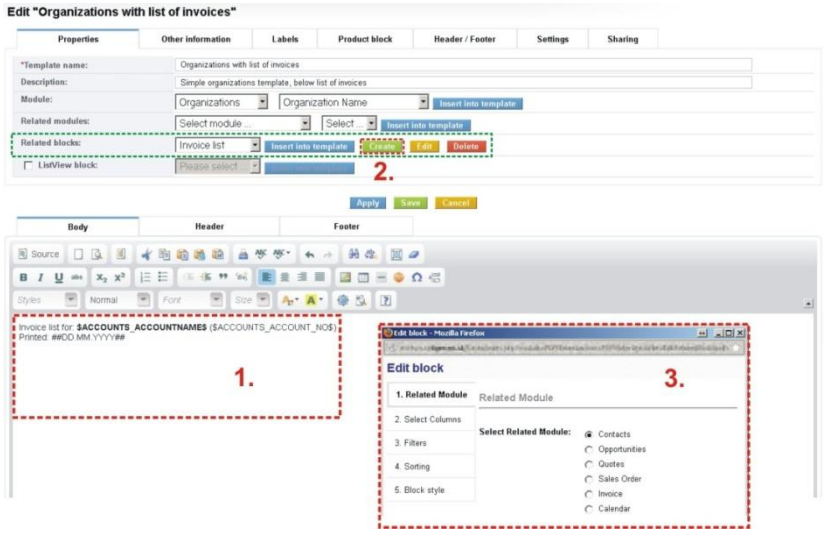


Picture 4.13 More information tabs

4.6.1 Create the related block

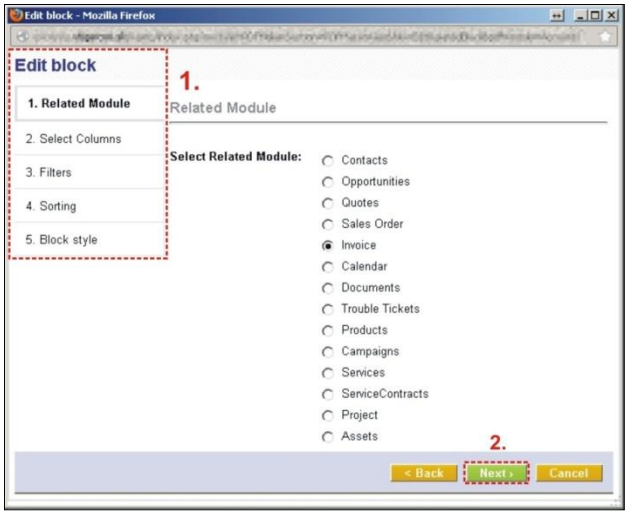
As you can see in the picture below, you can simply insert, create, edit or delete related blocks using buttons in *Properties* tab. How to create related block will be shown on example based on "Organizations" module. Let's suppose that we would like to create simple pdf template based on module "Organizations",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

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



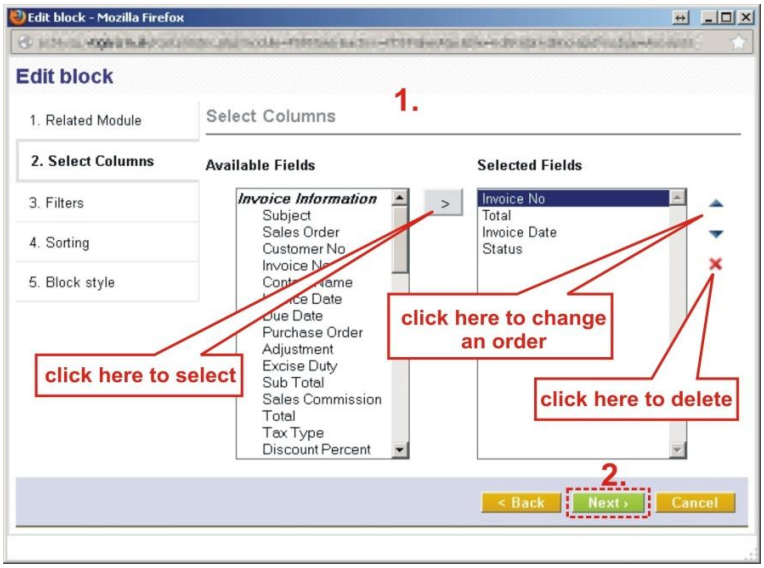
Picture 4.14 Start creation of the related block

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



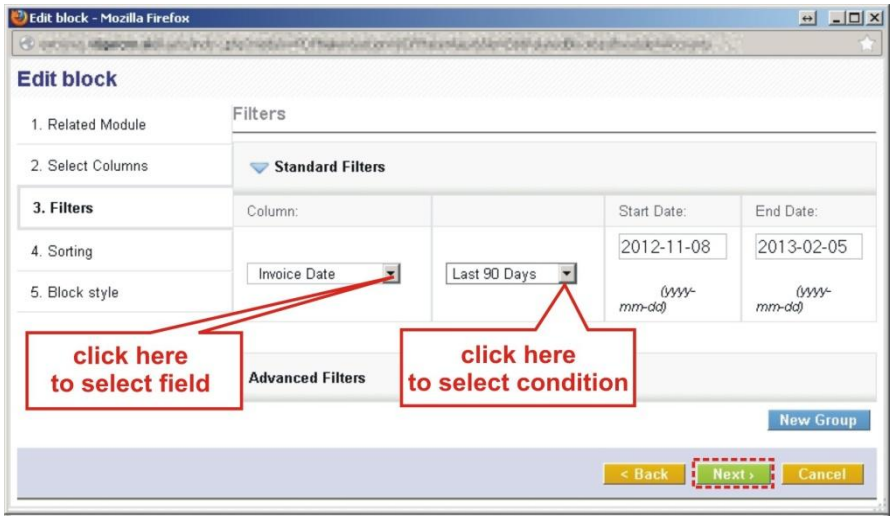
Picture 4.15 Creation of the related block – step 1

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



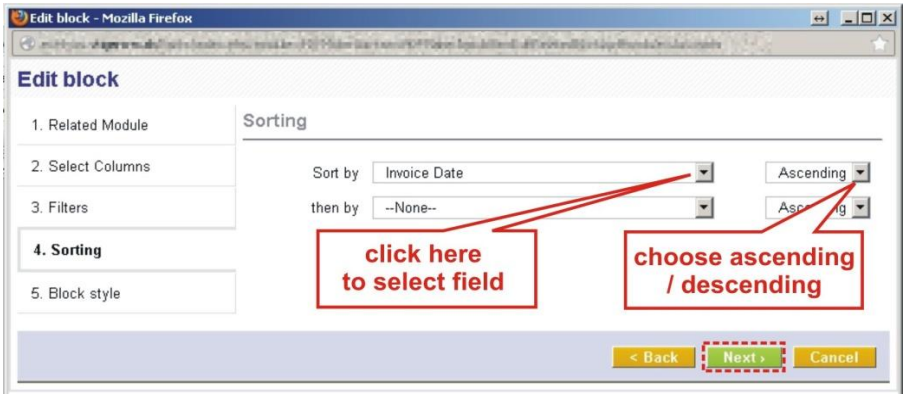
Picture 4.16 Creation of the related block – step 2

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



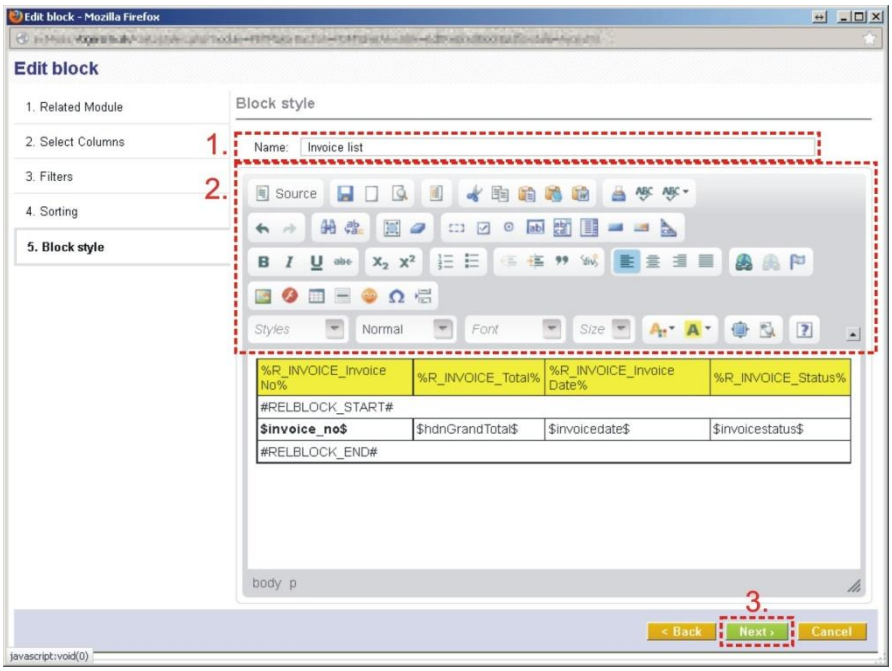
Picture 4.17 Creation of the related block – step 3

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



Picture 4.18 Creation of the related block – step 4

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

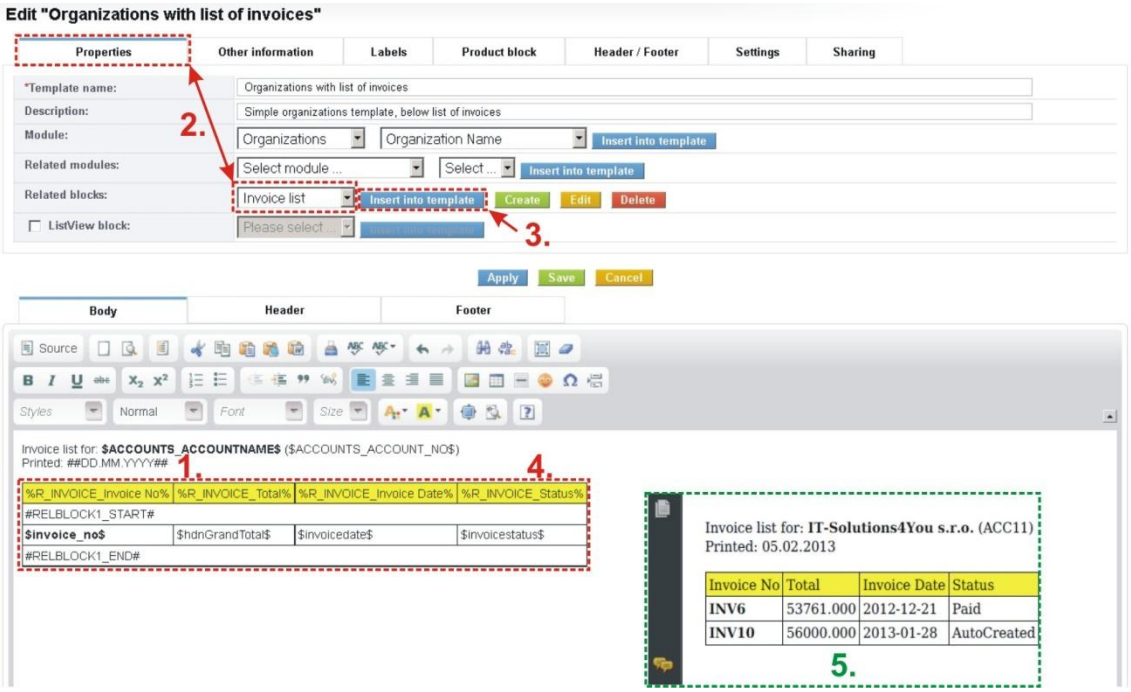


Picture 4.19 Creation of the related block – step 5

4.6.2 Insert related block

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

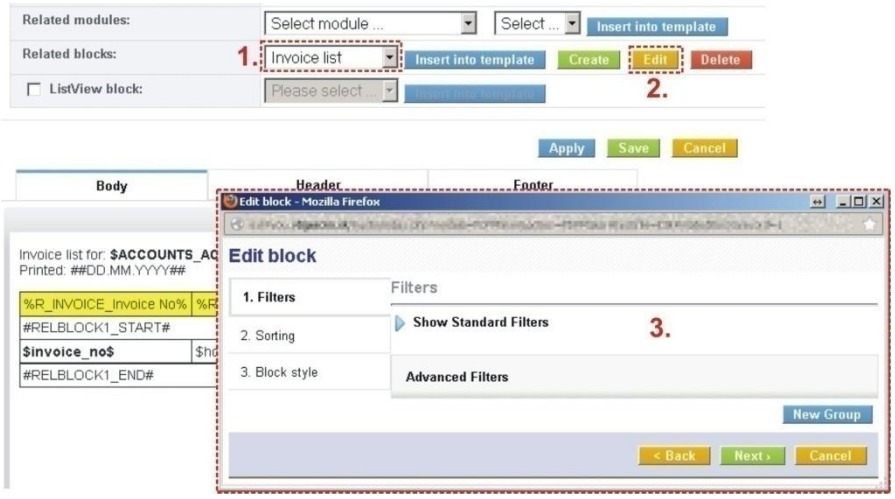
1. Click to editing area where would you like to have related block.
2. Using dropdown list select your related block.
3. Click on Insert into template button.
4. Related block is inserted. You can continue with editing of the related block if necessary.
5. Example of the final pdf document is shown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



Picture 4.20 Insert related block

4.6.3 Edit related block

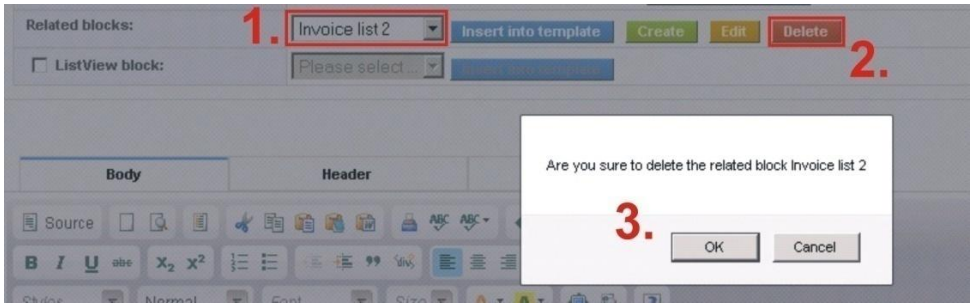
In order to edit already existing related block, just select it (1.) in the *Properties tab* and click on button Edit. Please notice that you can change only filters, sorting and formatting of the already existing related blocks.



Picture 4.21 Edit related block

4.6.4 Delete related block

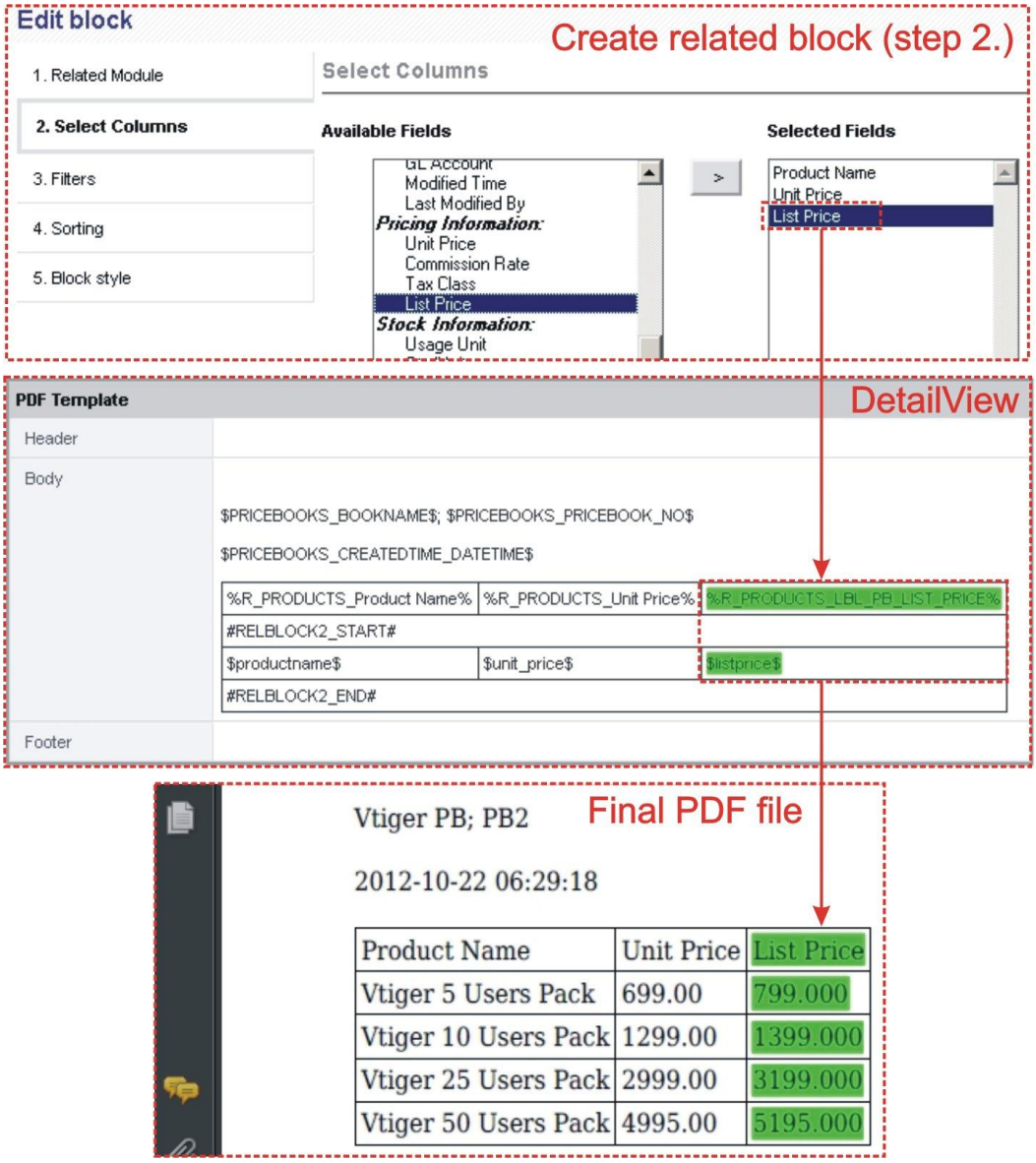
Please provide following simple steps in order to delete related block. Select the related block (*Properties tab*) using dropdown list (1.), click on button Delete (2) and finally confirm deletion.



Picture 4.22 Delete related block

4.6.5 Using List Price within related blocks for Price books

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



Picture 4.23 Using List Price within related blocks for Price books

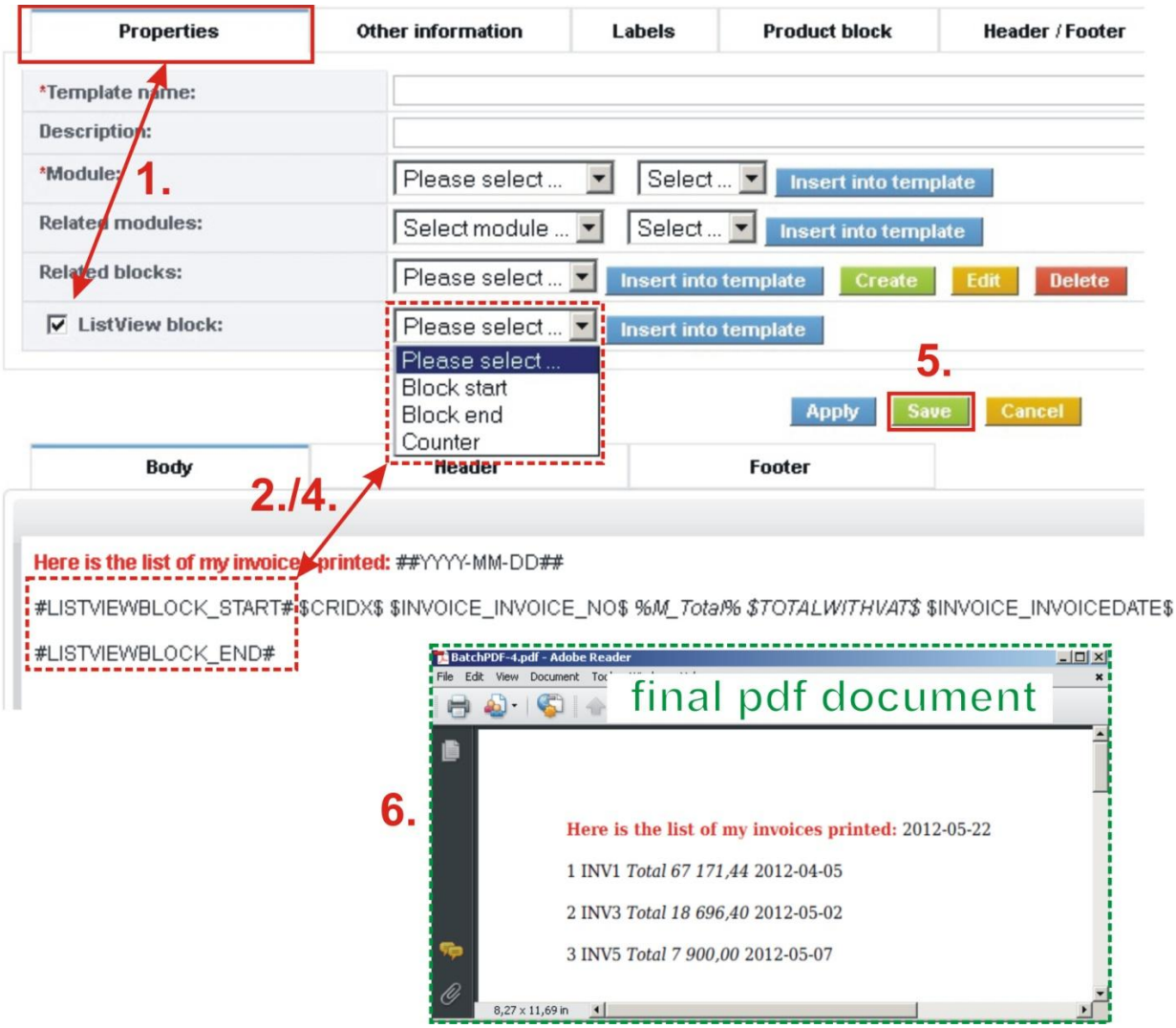
4.7 Using ListView block

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

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

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

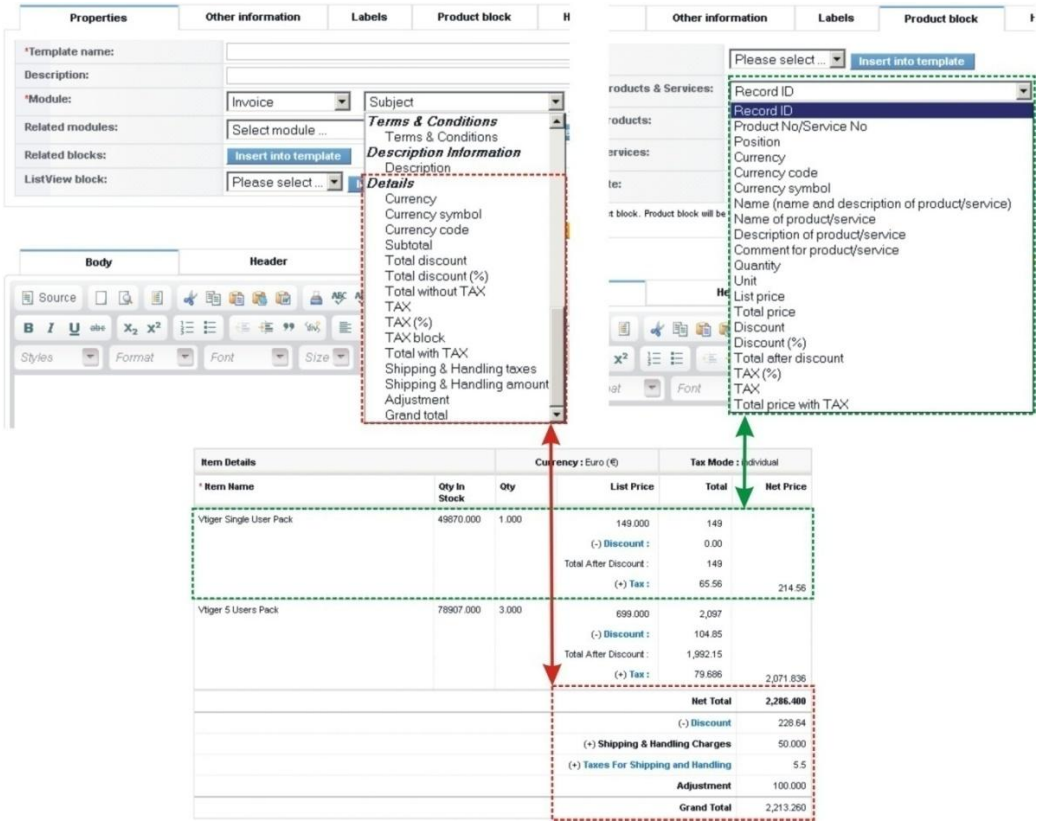
Note: Each ListView block has to start with "Block start" (#LISTVIEWBLOCK_START#) and ends with "Block end" (#LISTVIEWBLOCK_END#).



Picture 4.24 ListView block

4.8 Mapping product block with vtiger form

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



Picture 4.25 Mapping product block with vtiger form

Name	Description
Currency	Euro, Dollar
Currency symbol	€, $
Currency code	EUR, USD
Subtotal	Price without TAX before discount, by Tax Mode: group = Net Total
Total discount	Final Discount amount
Total discount (%)	Final Discount in %
Total without TAX	Total price without TAX after discount
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 pricer available in Invoices, Quotes, Sales and Purchase Order

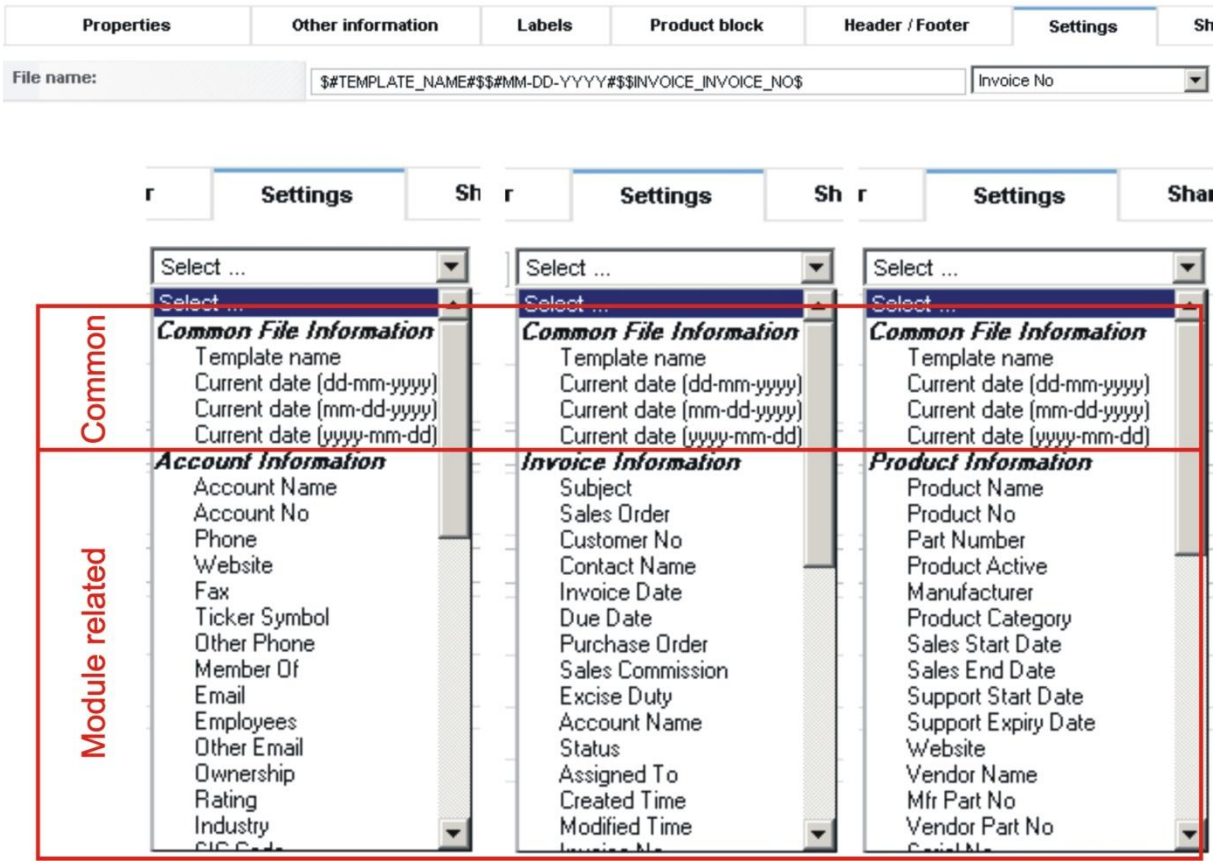
Name	Description
Record ID	Record ID
Product No / Service No	Number of product / service
Position	Number of position (1,2,3,...)
Currency	Euro, Dollar
Currency code	EUR, USD
Currency symbol	€, $
Name	Name and description of the product or service
Name of product/service	Only the name of the product or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

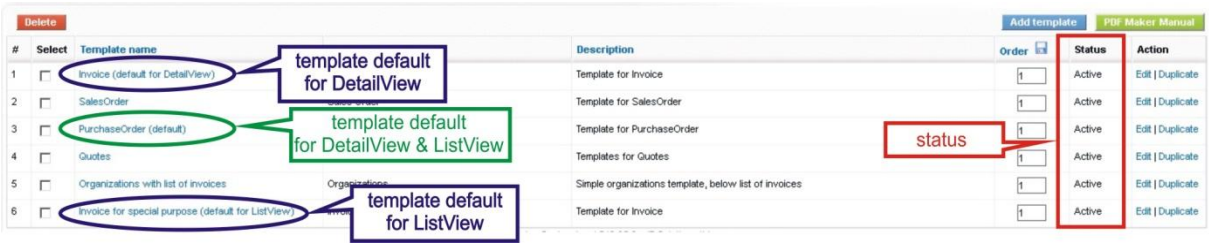


Picture 4.26 File name settings

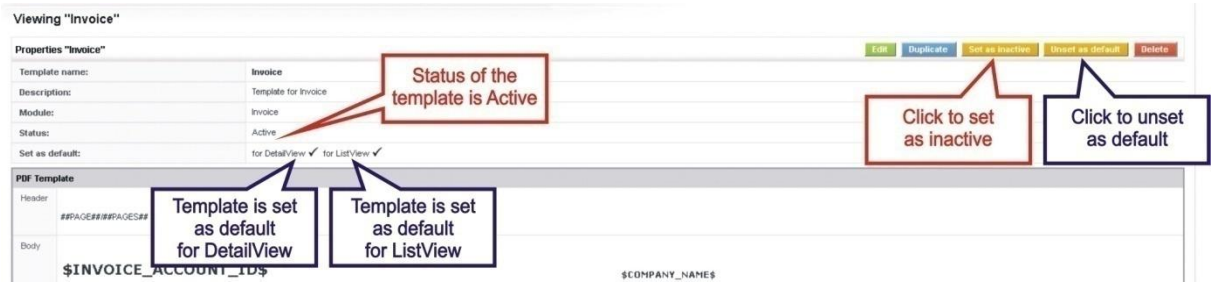
4.9.2 Status

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

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



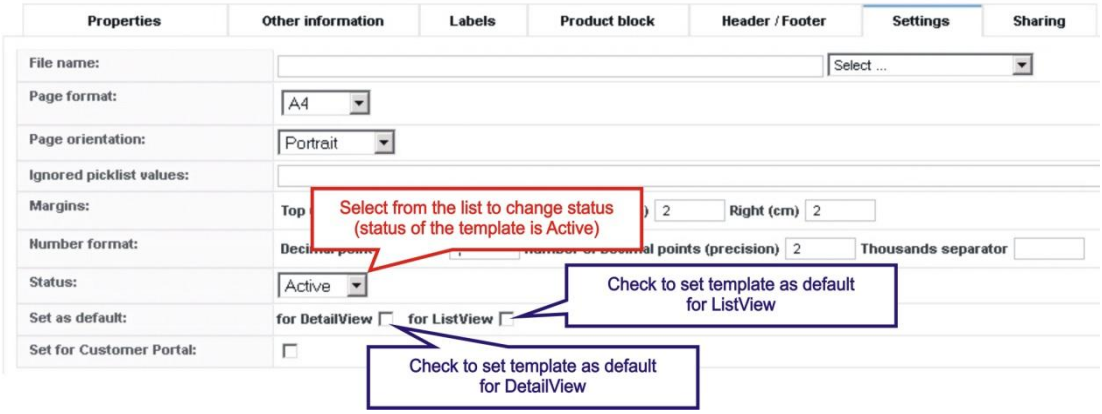
Picture 4.27 Status and setting of default in ListView



Picture 4.28 Status and setting of default in DetailView

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

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



Picture 4.29 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 status of existing templates in

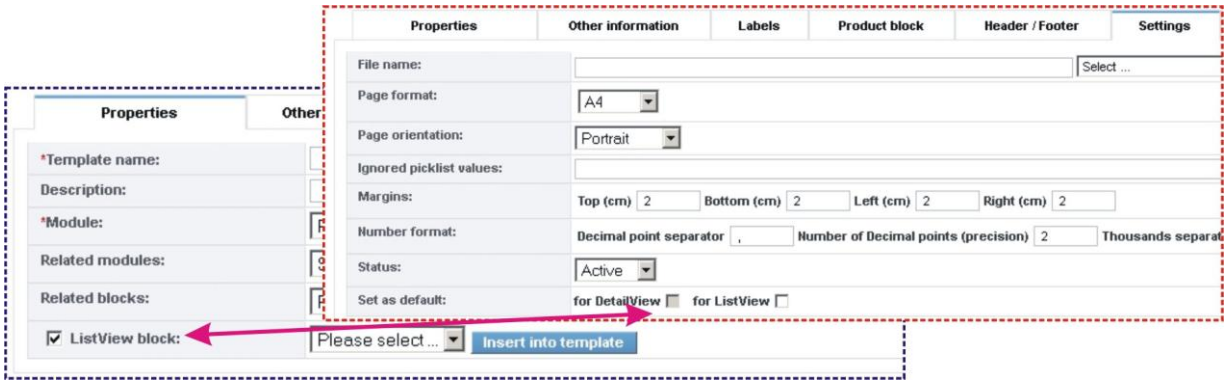
a) ListView (Picture 4.27) – template default for DetailView is marked with text "(default for DetailView)", template default for ListView is marked with text "(default for ListView)". If the template is default for DetailView as well as for ListView, then in the template name column text "(default)"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

Picture 4.30 Default template in PDF Maker block

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

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

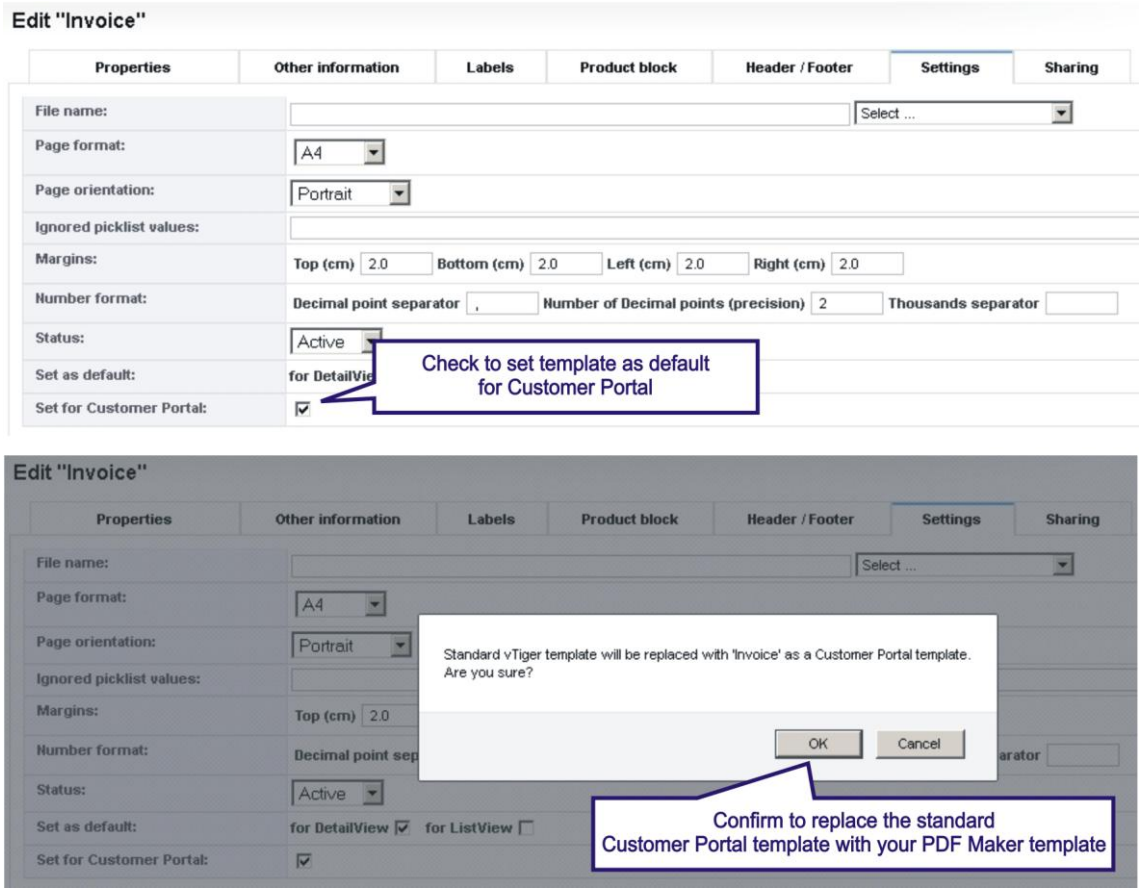
Please take into account that templates using ListView block cannot be in parallel set as default for DetailView. The checkbox "for DetailView" in "Settings" tab is automatically inactive if you check checkbox "ListView block" in "Properties" tab (Picture 4.31)



Picture 4.31 Setting default vs. ListView block

4.9.4 Set template for Customer Portal

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

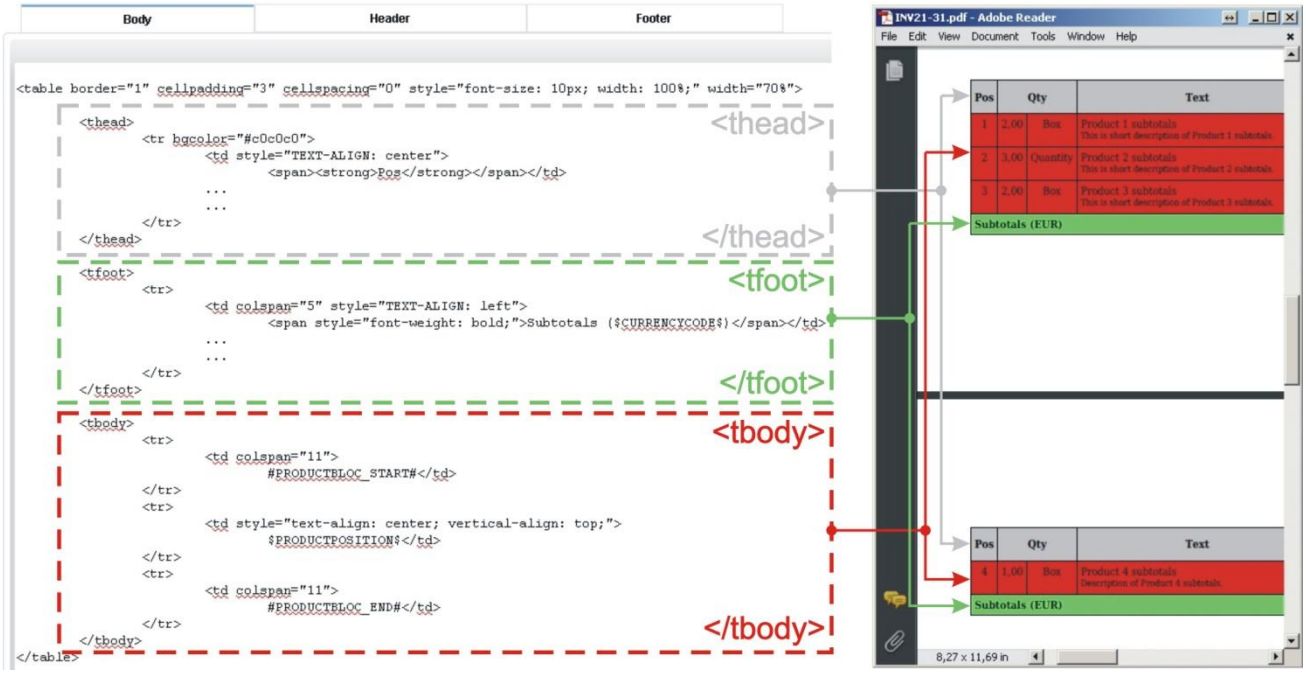


Picture 4.32 Setting the PDF template as template for Customer Portal

4.10 Advanced editing

4.10.1 Head and foot of the table

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



Picture 4.33 The structure of the table

4.10.2 Subtotal values

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

Restrictions of the subtotal values usage:

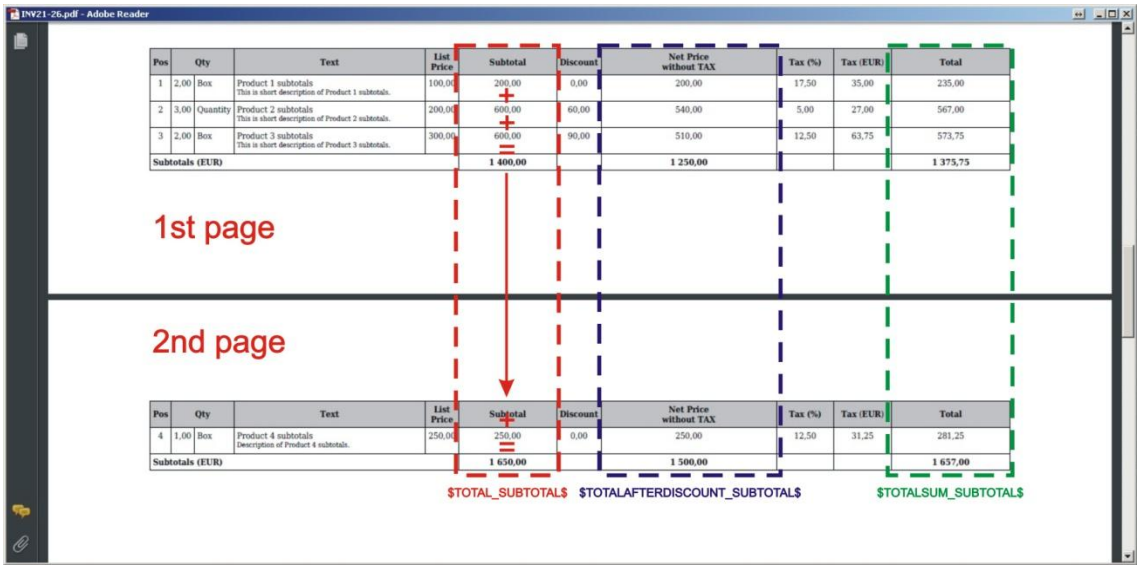
- can be used only in the foot of the tables, it means within tags <tfoot>, </tfoot>
- it is not allowed to use them together with tag <rowbreak />

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

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

Table 4-3 Subtotal values

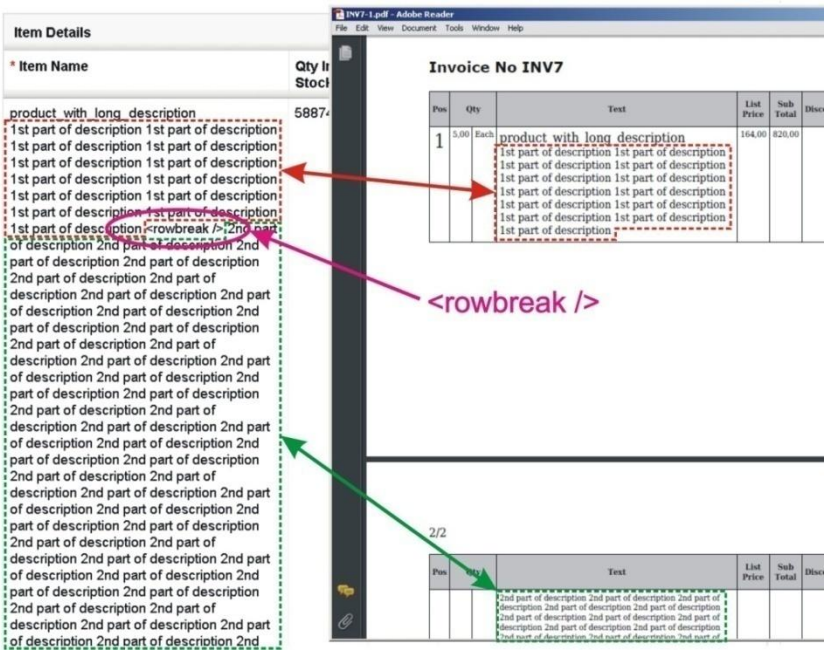
In the following picture you can find example for individual tax. Please notice that subtotal values are counted from the beginning of the table (invoice) to the end of the particular page. So values are cumulative, i.e. they are not counted per page.



Picture 4.34 Subtotal values

4.10.3 <rowbreak /> in tables

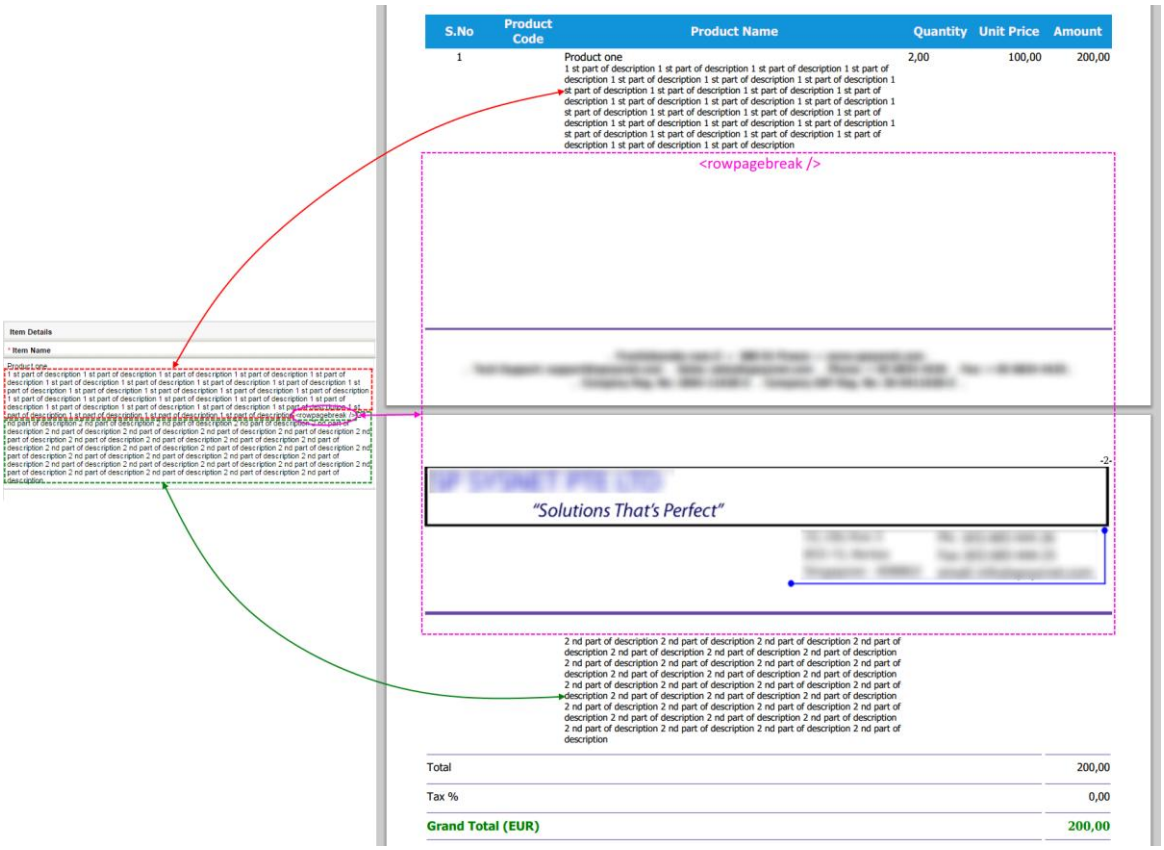
The tag <rowbreak /> was developed to be used inside tables in order to allow dividing longer text into the several rows of the table if necessary. In the next picture you can find how to use <rowbreak />. In order to divide longer text in exact place, insert tag directly inside text. It means you have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



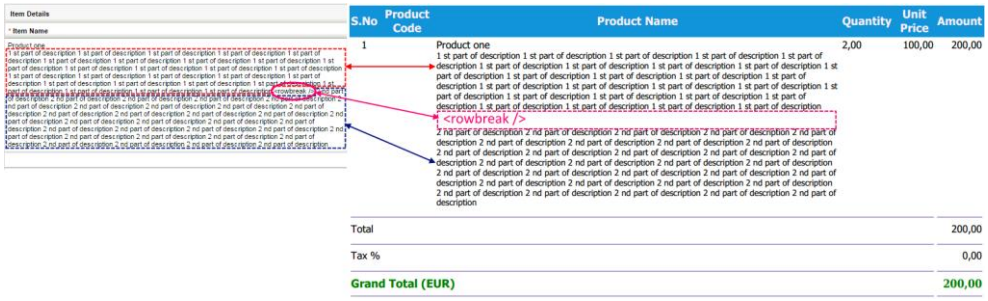
Picture 4.35 <rowbreak /> usage

4.10.4 <rowpagebreak /> in tables

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



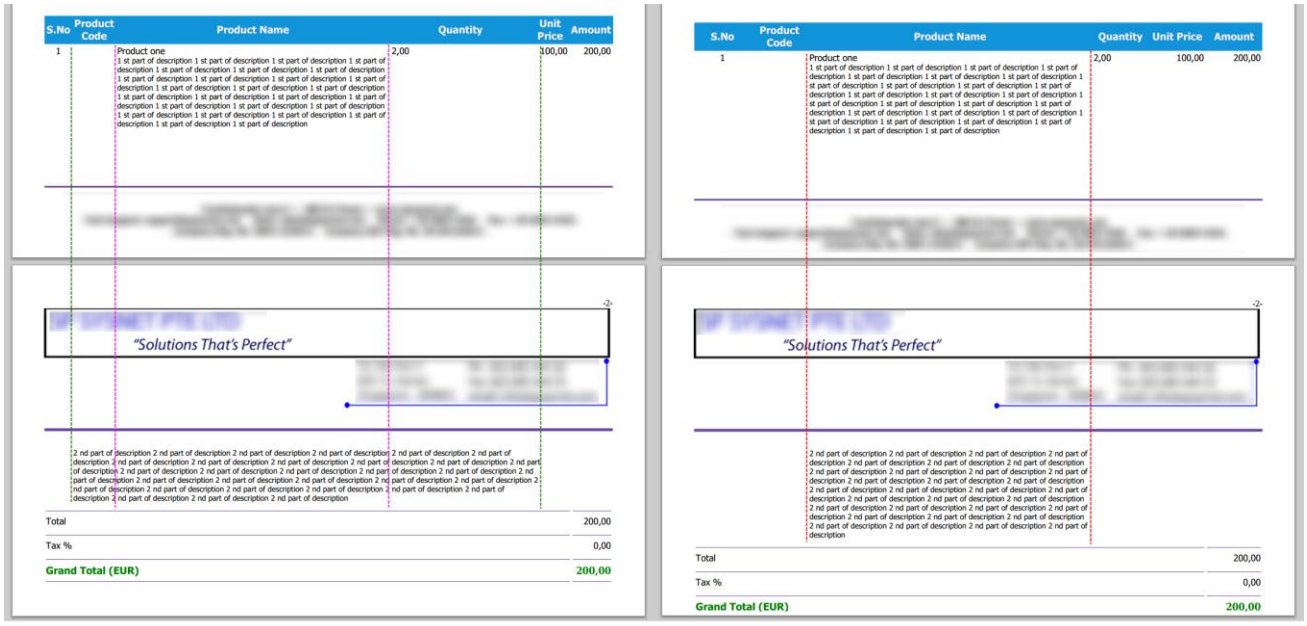
Picture 4.36 <rowpagebreak /> usage



Picture 4.37 <rowbreak /> usage

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

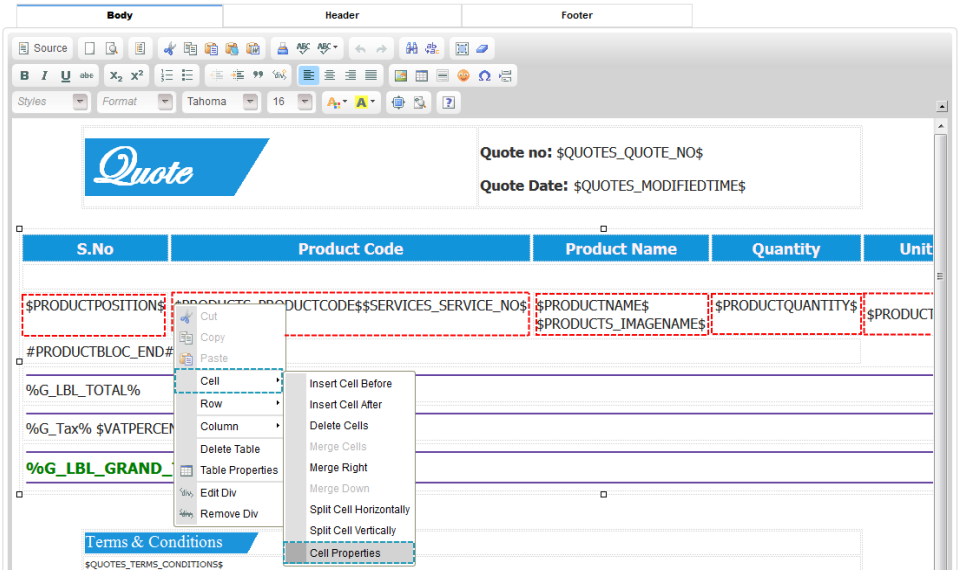
If you want to use <rowpagebreak /> we recommend to set fixed size of table in pixels or percentage. In the following pictures you can see difference between usage dynamic and fixed size of table and how to set fixed size of table.



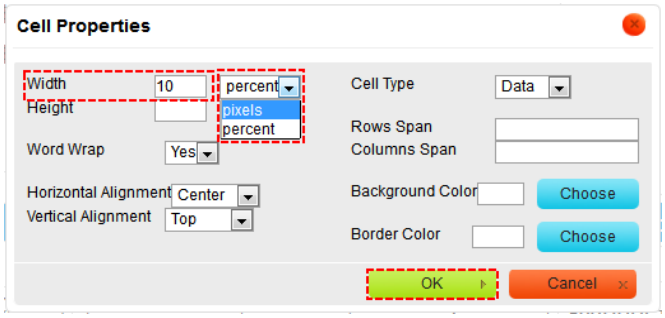
Picture 4.38 Difference between dynamic and fixed size of table

To set fixed size of table please provide following steps:

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



Picture 4.39 How to set fixed size of table step 1



Picture 4.40 How to set fixed size of table step 2

5 PDF Maker block actions

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

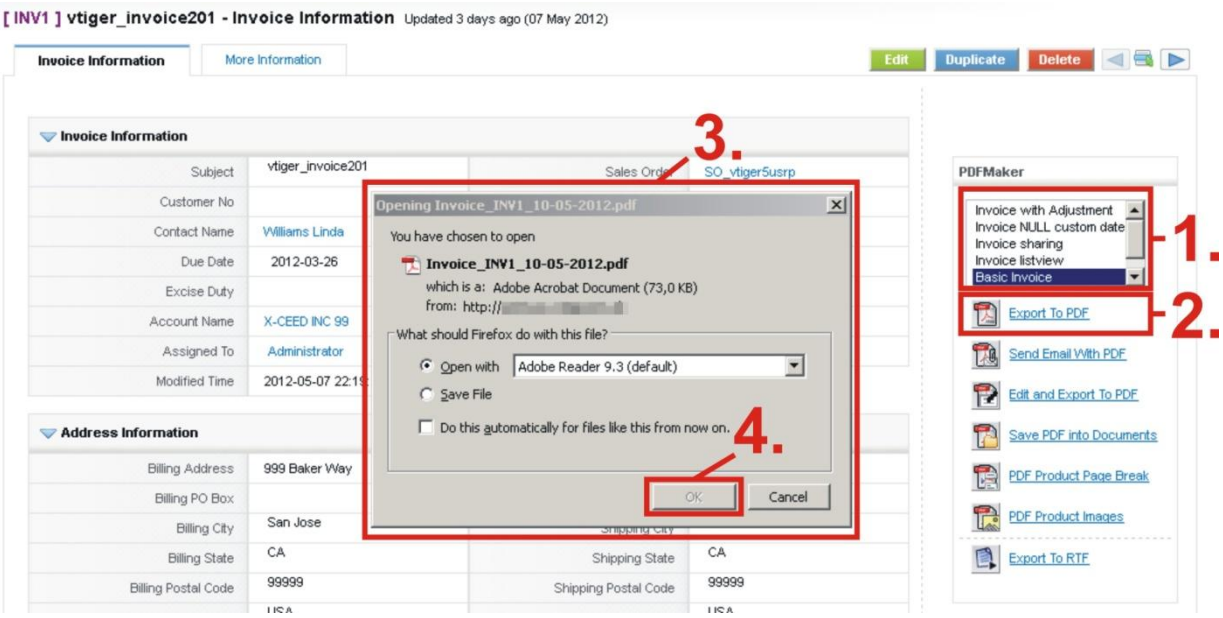
- Export To PDF
- Send Email With PDF
- Edit and Export To PDF
- Save PDF into Documents
- PDF Product Page Break
- PDF Product Images
- Export To RTF

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

5.1 Export to PDF

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

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

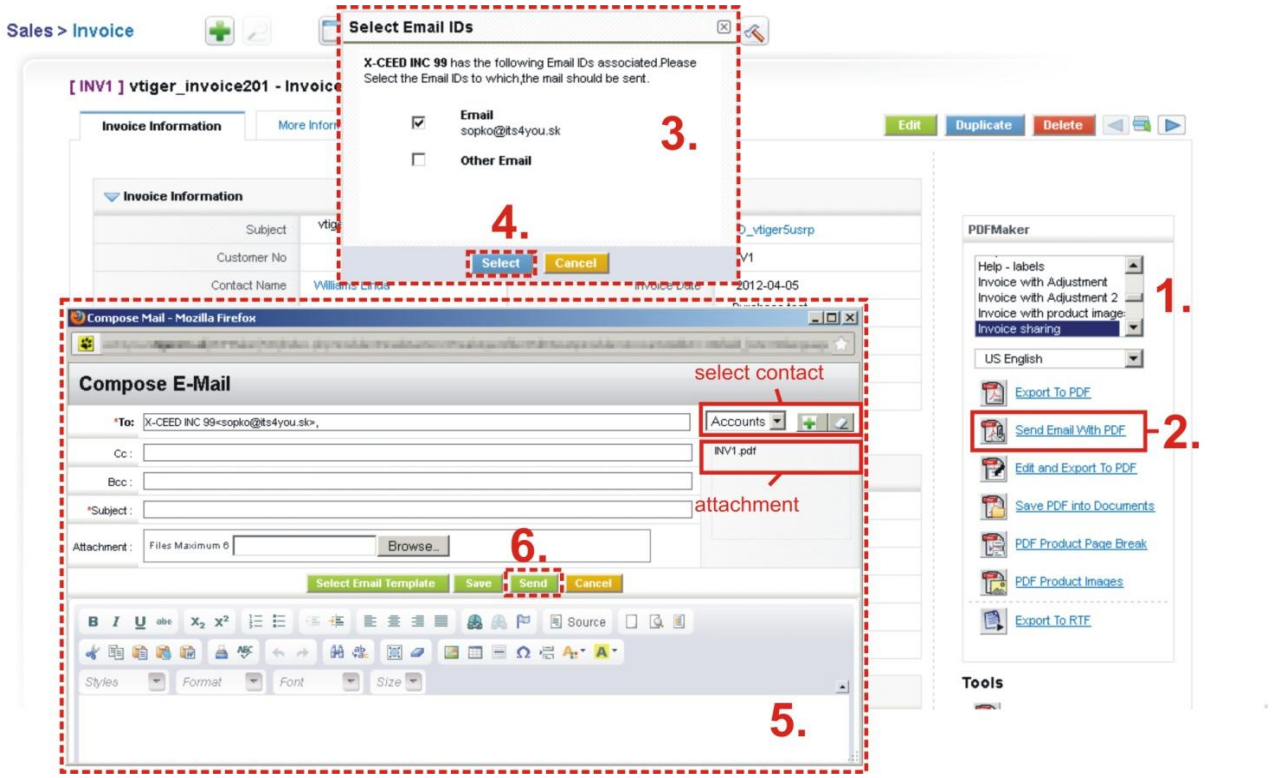


Picture 5.1 Export to PDF

5.2 Send email with PDF

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

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



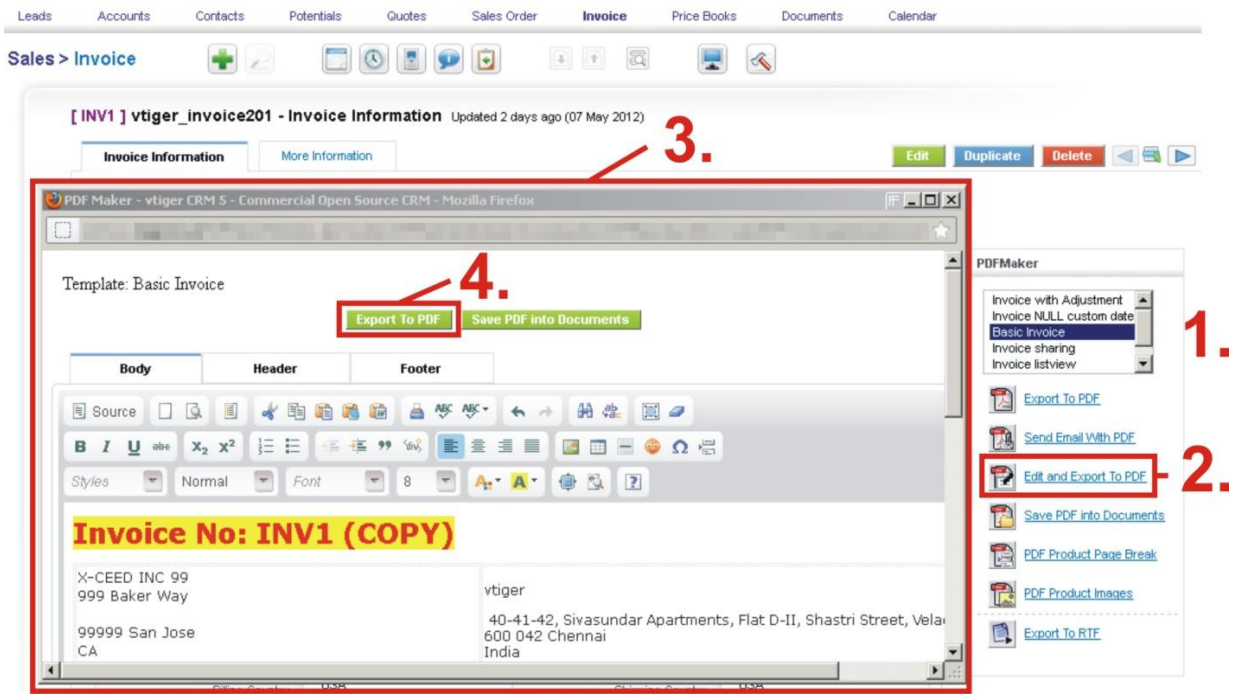
Picture 5.2 Send Email with PDF – Compose E-Mail

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

5.3 Edit and Export to PDF

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

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

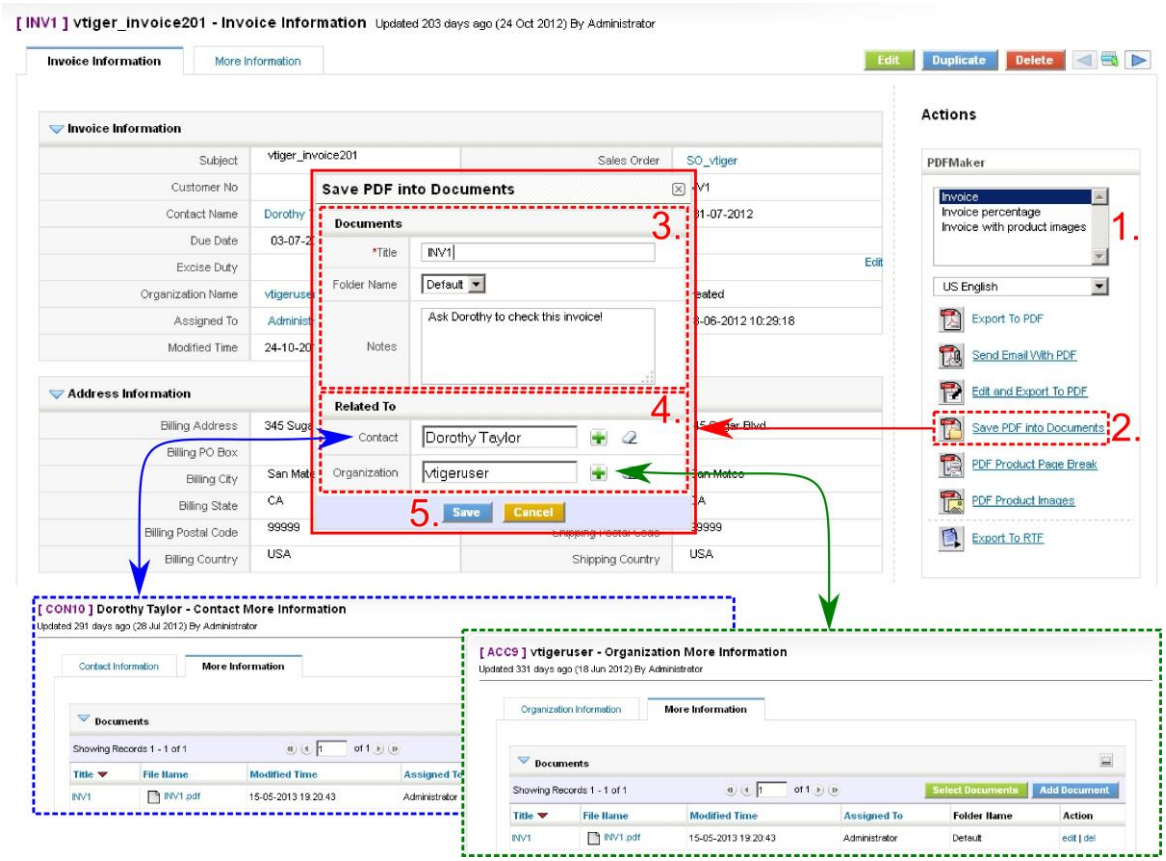


Picture 5.3 Edit and export to PDF

5.4 Save PDF into Documents

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

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

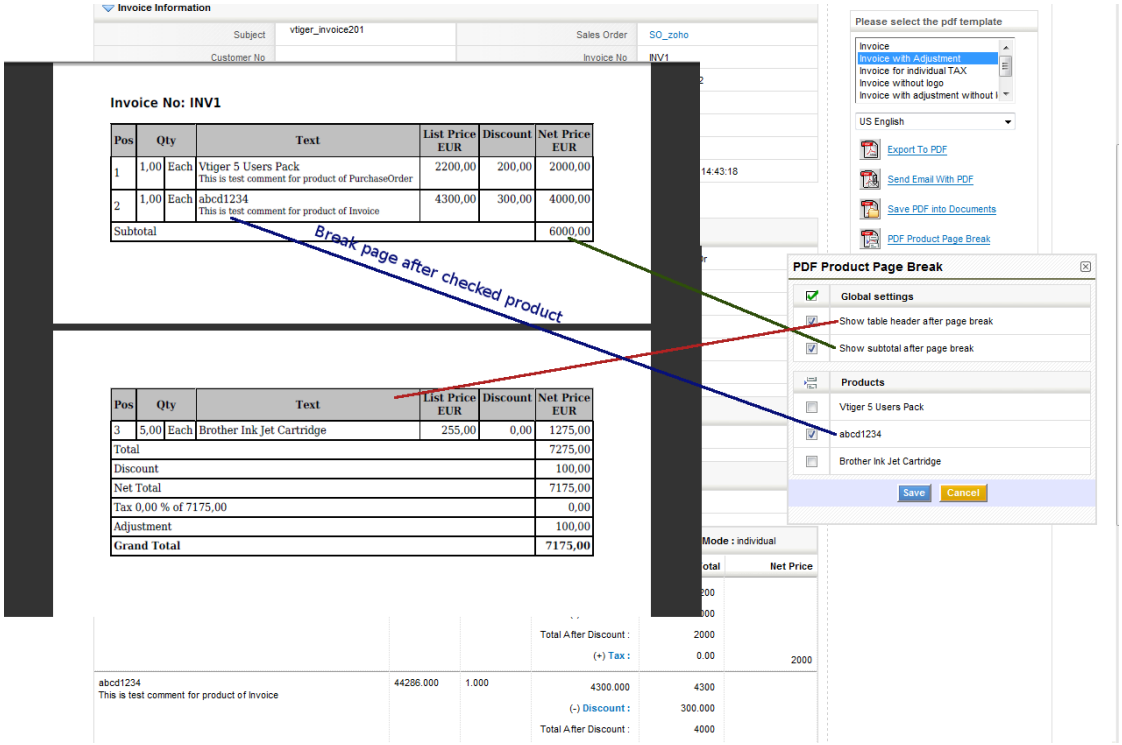


Picture 5.4 Save PDF into Documents

5.5 PDF Product Page Break

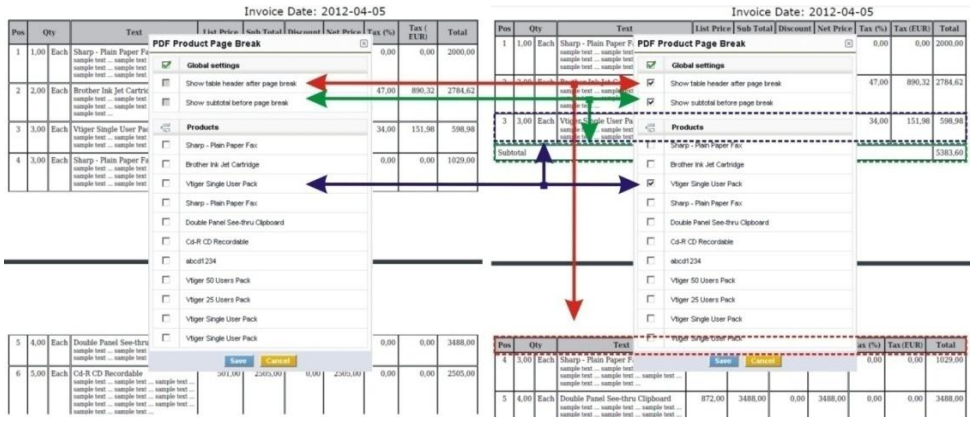
Product blocks are available for some modules (Invoice, SO, PO, Q). PDF Product Page Break action allows you to setup additional settings according to your needs. You can define:

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



Picture 5.5 Product page break settings

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



Picture 5.6 Product page break settings comparison

5.6 PDF Product Images

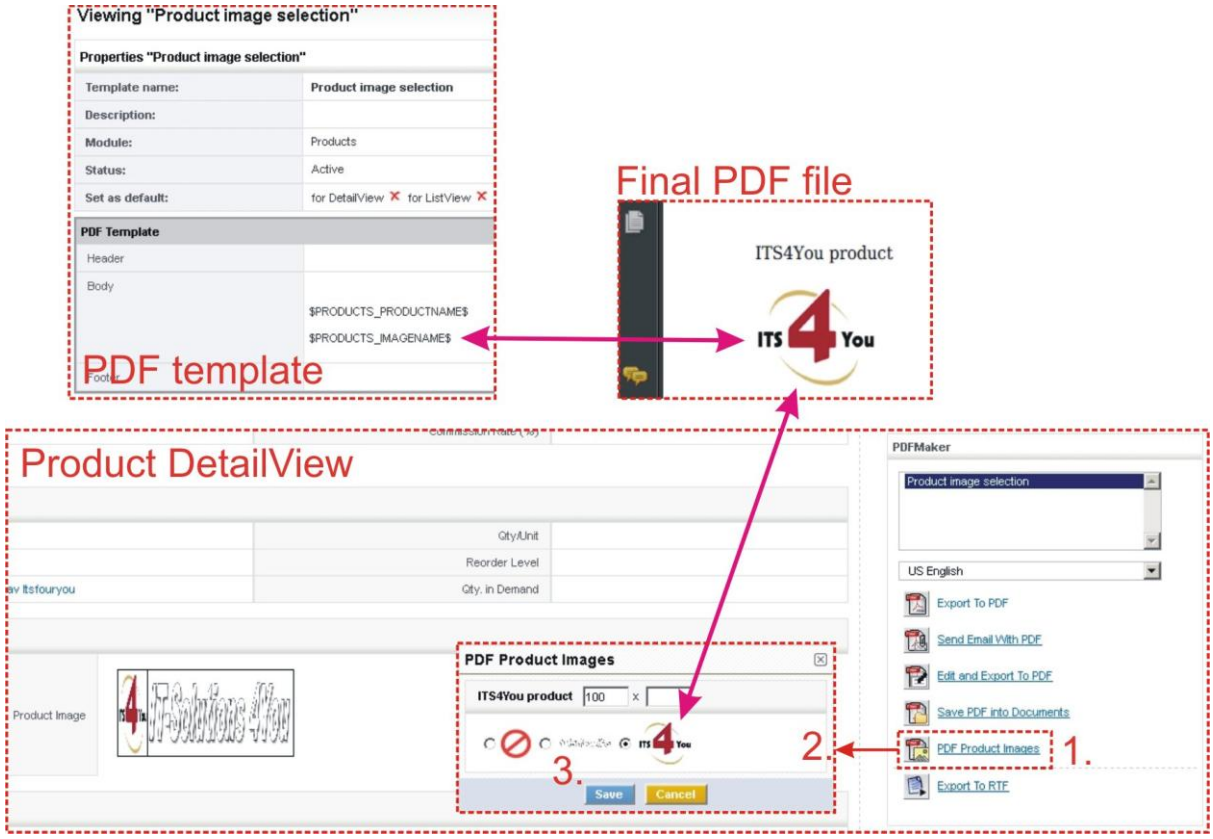
PDF Product Images action allows you to define some settings related to product images:

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

5.6.1 PDF Product Images in product templates

The link 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 5.7 PDF Product Images in product templates

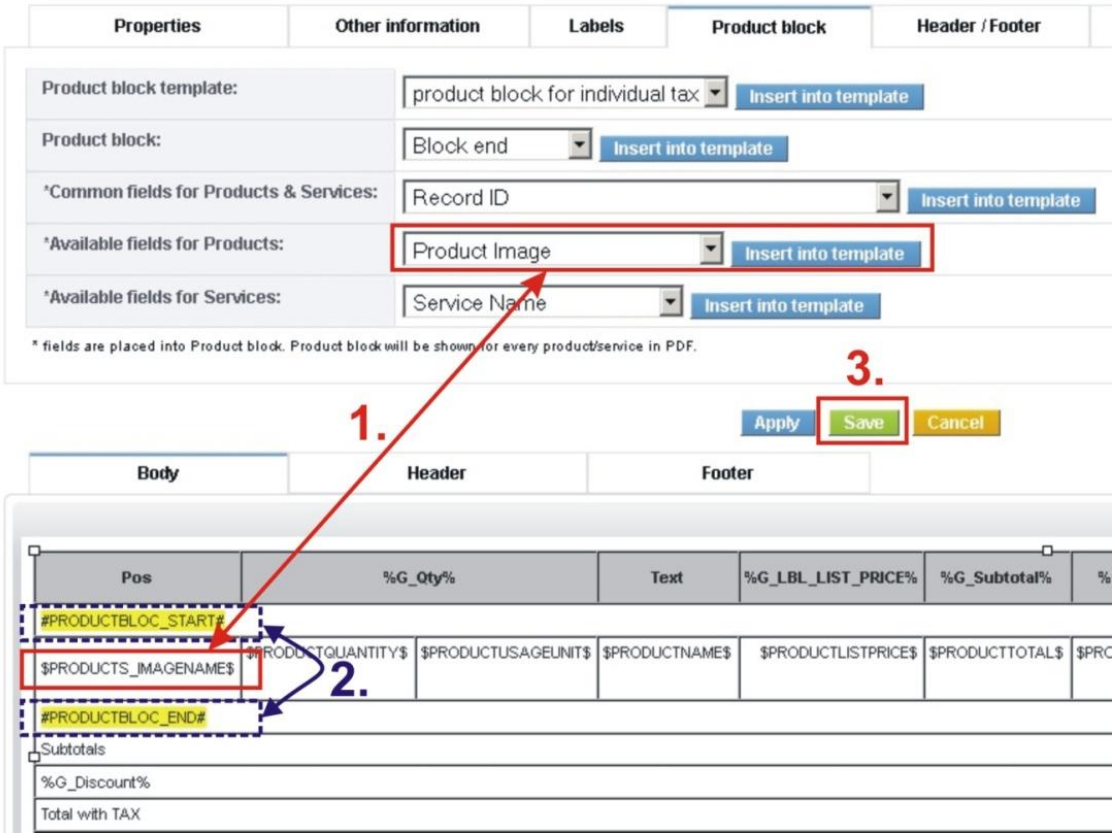
Depending on your selection 4 different situations can happen:

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

5.6.2 PDF Product Images in product blocks

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

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

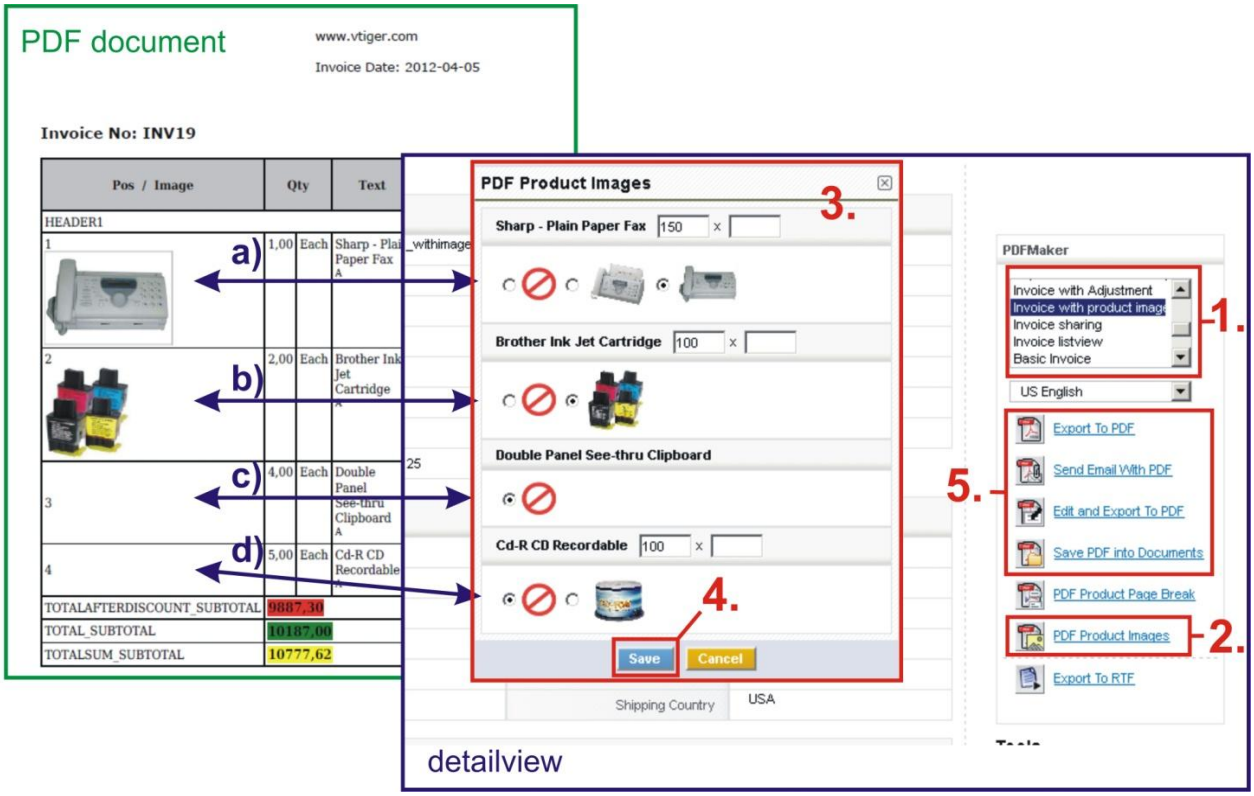


Picture 5.8 PDF Product images

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

1. Go to the detail view of given Module (for example Invoice) and on the right side of detail view, in the PDF Maker block, choose your PDF Template.
2. Click on 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). 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.



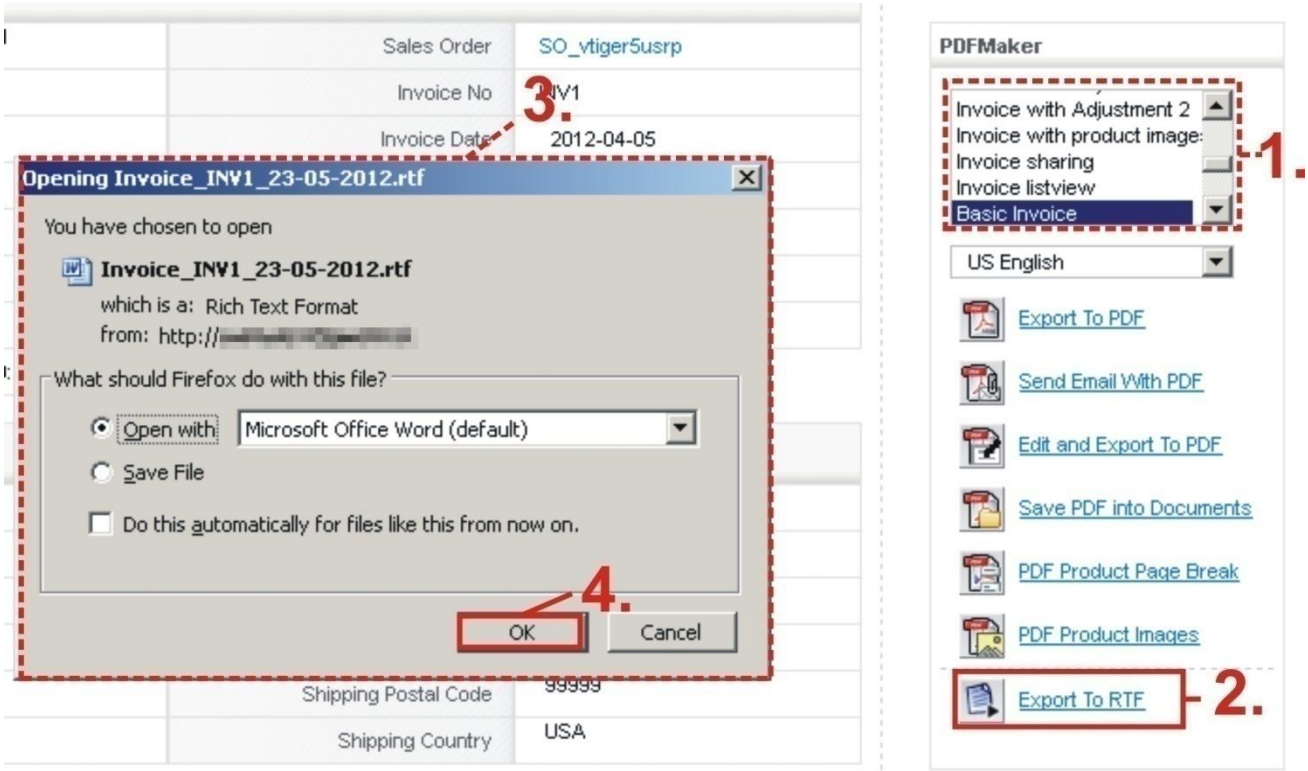
Picture 5.9 PDF Product images settings

5.7 Export to RTF

PDF Maker also supports export to RTF.

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

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



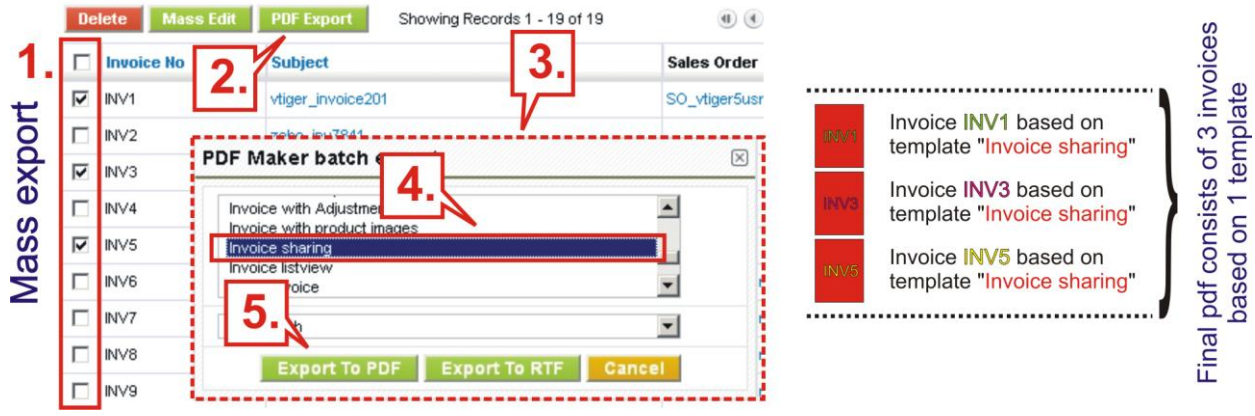
Picture 5.10 Export to rtf

6 Additional features

6.1 Mass export and merging templates

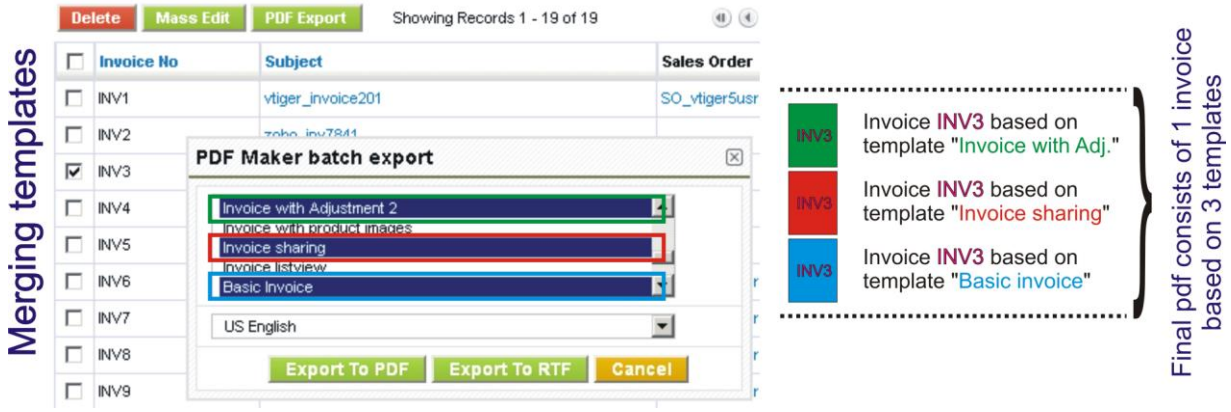
In chapters 5.1 and 5.7 was described how to export documents via PDF Maker block. There is additional possibility of the export to pdf or rtf via ListView. In addition, ListView allows you mass export and merging templates. To do mass export in ListView please provide following steps:

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



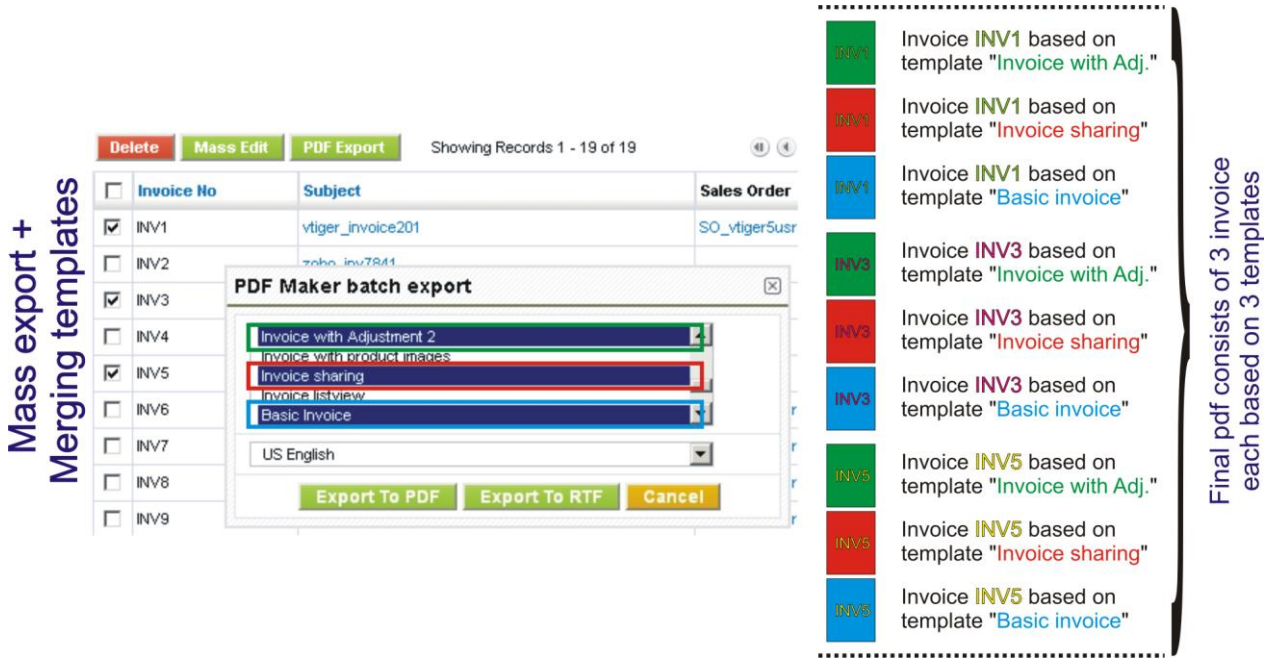
Picture 6.1 Mass export

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



Picture 6.2 Merging templates

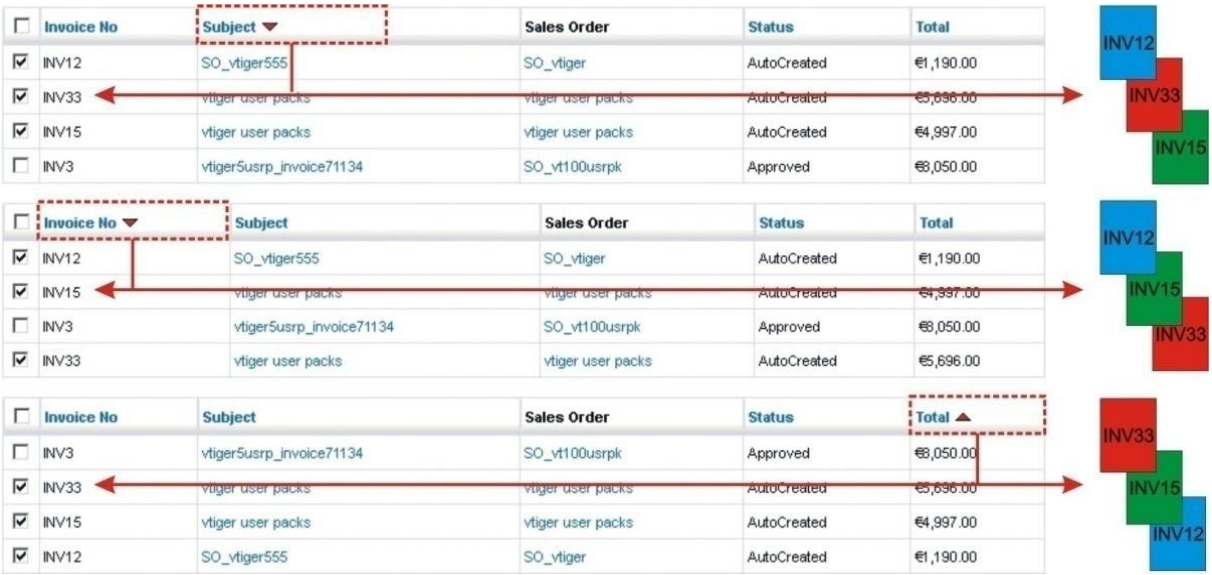
If you combine mass export and merging templates you will obtain final pdf document as is shown in the next picture.



Picture 6.3 Mass export combined with merging templates

6.1.1 Sorting within mass export

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



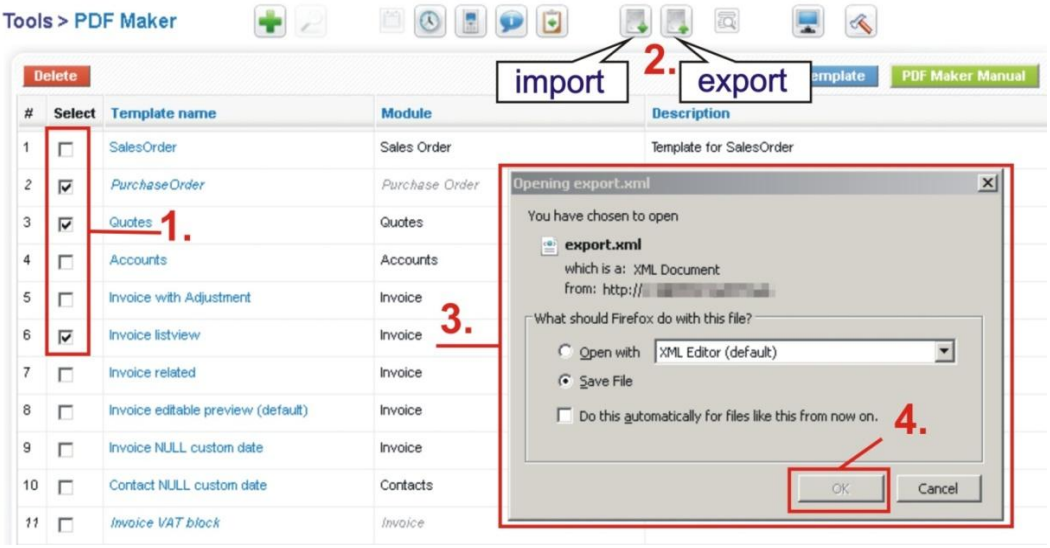
Picture 6.4 Sorting within mass export

6.2 Export and import templates

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

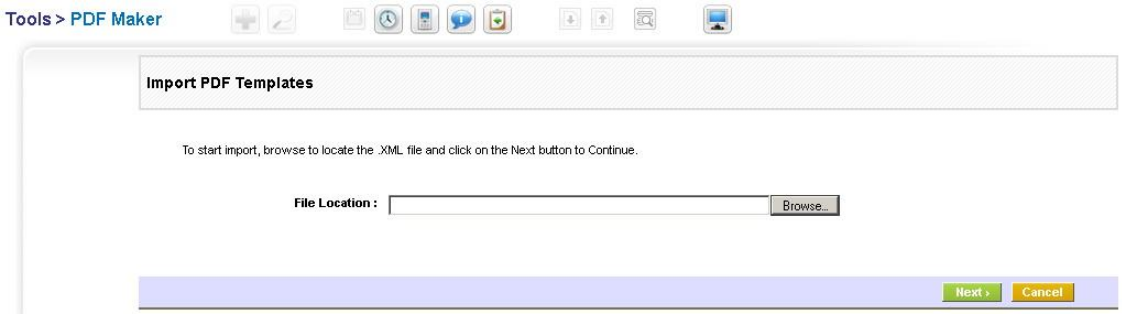
In order to export PDF templates to external sources in PDF Maker tool do following steps:

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



Picture 6.5 Export of the templates

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



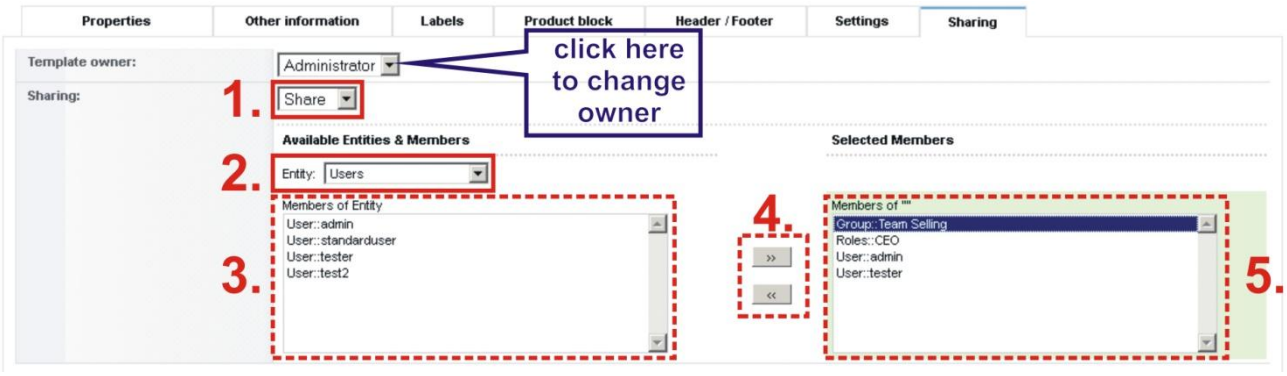
Picture 6.6 Import pdf templates page

In the Import pdf templates page, browse the PDF Maker template-related data in *.xml format and then click the 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”



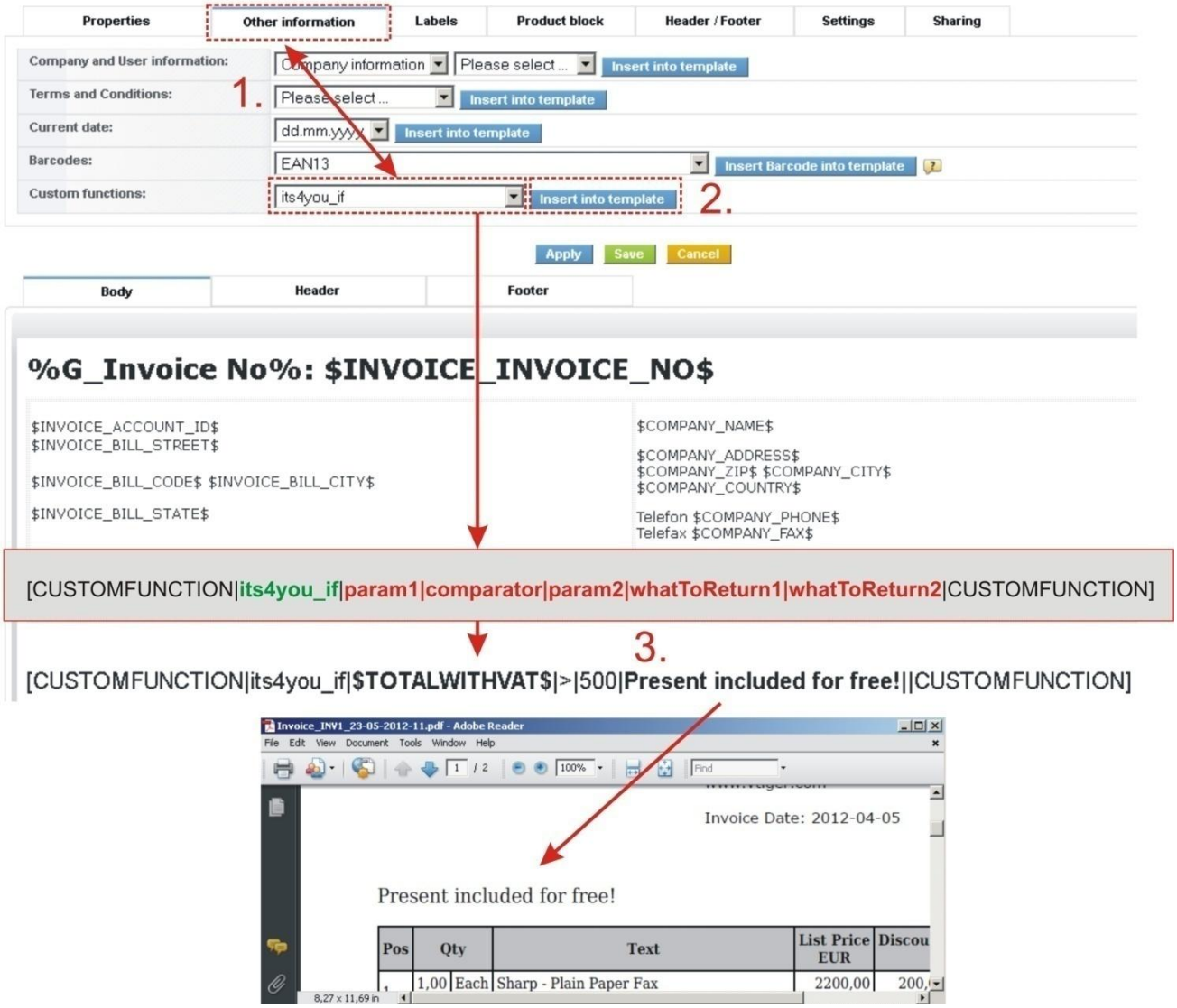
Picture 6.7 Sharing

6.4 Custom functions

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

1. Go to EditView, and in *Other information tab* select custom function from selectbox „Custom functions“. You can choose one of our functions (its4you_*), or your own function.
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 6.8.

.



Picture 6.8 Custom functions

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

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

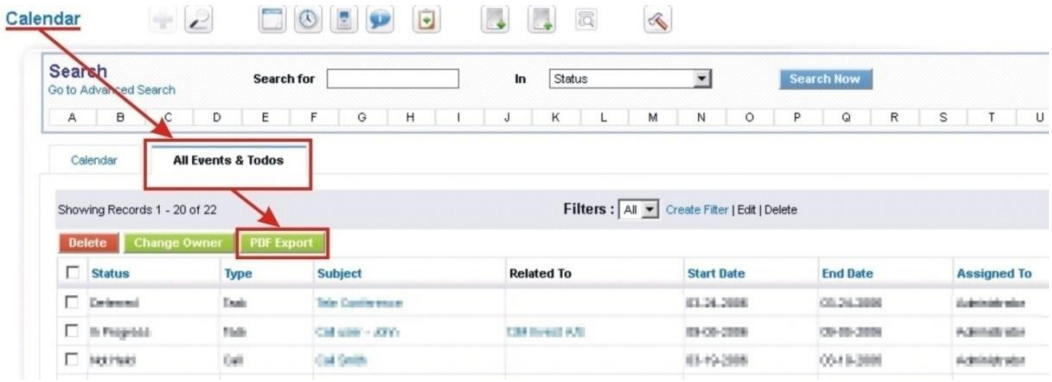
Following table contains short description of our its4you_* functions which you can use in your pdf templates.

Name	Description
its4you_if	*[CUSTOMFUNCTION|its4you_if|param1|comparator|param2|whatToReturn1|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_getTemplateId	*[CUSTOMFUNCTION|its4you_getTemplateId|CUSTOMFUNCTION]*
	This function returns id of current template.
its4you_getContactImage	*[CUSTOMFUNCTION|its4you_getContactImage|id|width|height|CUSTOMFUNCTION]*
	This function returns image of contact. **id** - contact id **width** - width of returned image (10%, 100px) **height** - height of returned image (10%, 100px)
its4you_sum	*[CUSTOMFUNCTION|its4you_sum|arg1|arg2|CUSTOMFUNCTION]*
	This function returns sum of input values: arg1+arg2+…+argN. Function is inserted with two arguments by default but you can edit it and add more arguments.
its4you_deduct	*[CUSTOMFUNCTION|its4you_deduct|arg1|arg2|CUSTOMFUNCTION]*
	This function returns deducted value arg1-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	*[CUSTOMFUNCTION|its4you_multiplication|arg1|arg2|CUSTOMFUNCTION]*
	This function returns multiplication of all input values: arg1*arg2*…*argN. Function is inserted with two arguments by default but you can edit it and add more arguments.
its4you_divide	*[CUSTOMFUNCTION|its4you_divide|arg1|arg2|CUSTOMFUNCTION]*
	This function returns divided value arg1/arg2/.../argN. Function is inserted with two arguments by default but you can edit it and add more arguments.
its4you_formatNumberToPDF	*[CUSTOMFUNCTION|its4you_formatNumberToPDF|value|CUSTOMFUNCTION]*
	This function returns formatted value and is used by other functions. **value** – int
its4you_formatNumberFromPDF	*[CUSTOMFUNCTION|its4you_formatNumberFromPDF|value|CUSTOMFUNCTION]*
	This function returns converted value into integer and is used by other functions. **value** - int

Table 6-1 its4you functions

6.5 Calendar

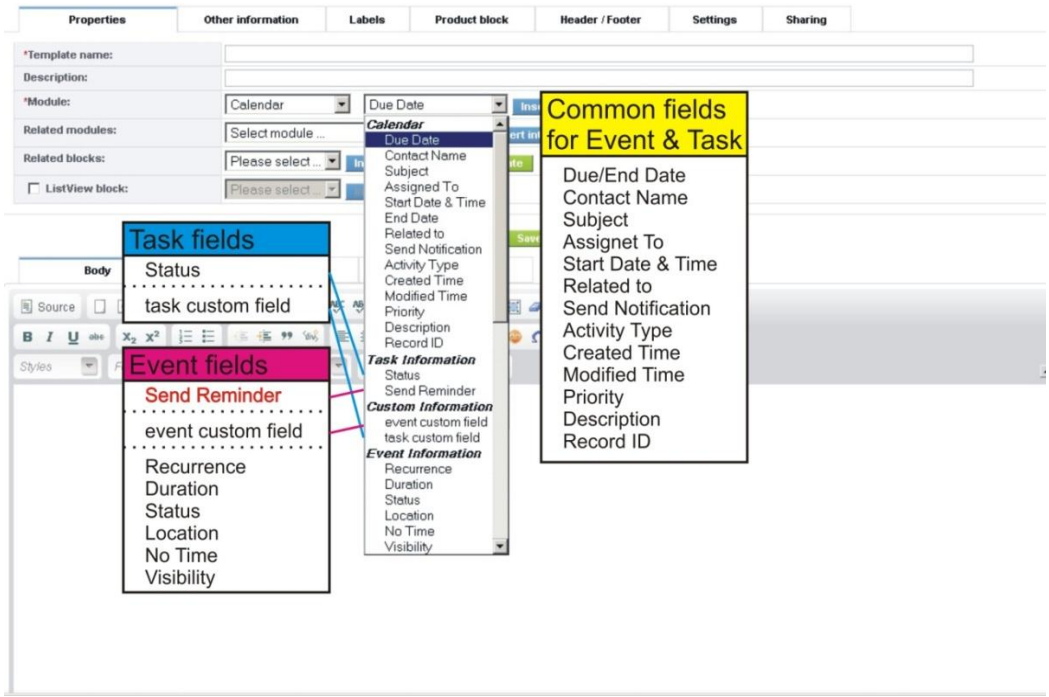
PDF Maker is also supported for module Calendar. The PDF export is possible from DetailView as well as from ListView. Please take into account that the export from ListView is supported only inside “All Events & Todos” tab.



Picture 6.9 PDF Export in Calendar

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

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

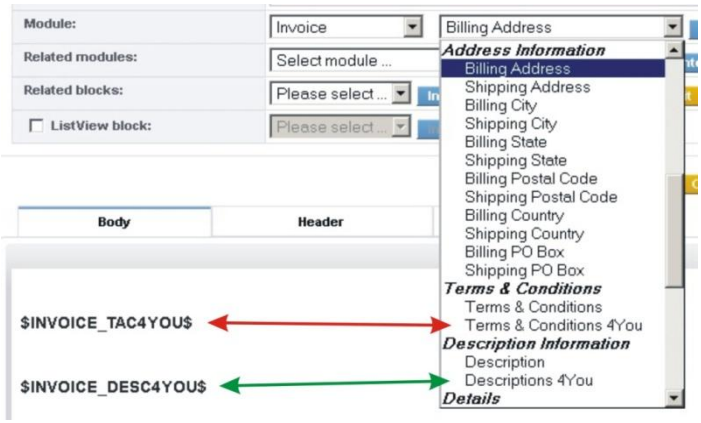


Picture 6.10 Event & Task fields

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

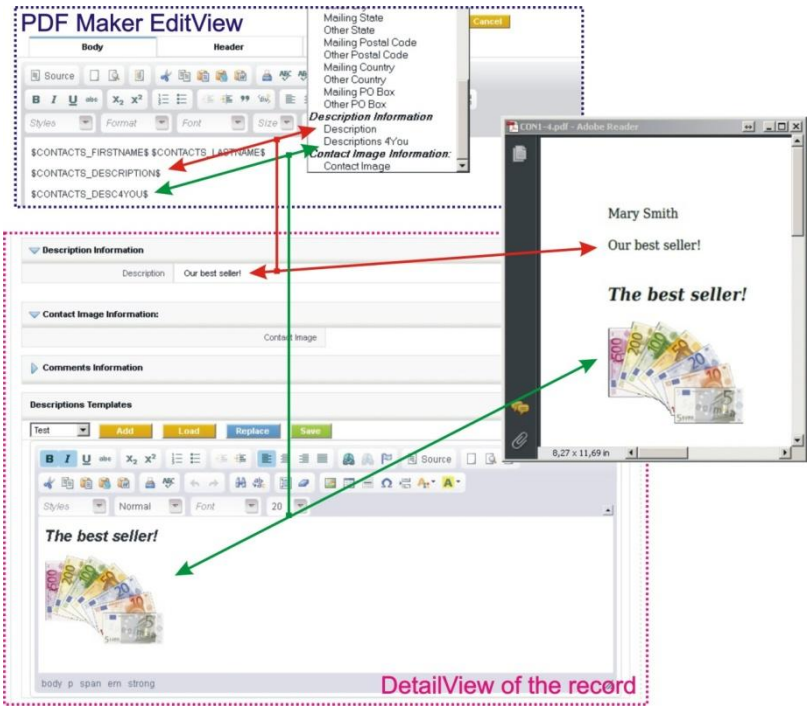
The Descriptions 4You (Desc4You) and Terms and Conditions 4You (T&C4You) are vTiger extensions which allow you to create well formatted descriptions or terms and conditions according to your needs. Desc4You and T&C4You were already integrated into PDF Maker. Please refer to our web page or manuals for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

From PDF Maker point of view it is necessary to mention that separate fields for descriptions and terms and conditions created within Desc4You and T&C4You were introduced. They are *"Terms & Conditions 4You"* ($*****_TAC4YOU$ for example $INVOICE_TAC4YOU$ in Invoice module) and *"Descriptions 4You"* ($*****_DESC4YOU$).



Picture 6.11 T&C4You and Desc4You fields

Please notice following: In case that you have in your record different values stored for "Description" and "Descriptions 4You" it will be correctly introduced in PDF Document as can be seen in the example below (Picture 6.12). The same behavior is for "Terms & Conditions" and "Terms & Conditions 4You".

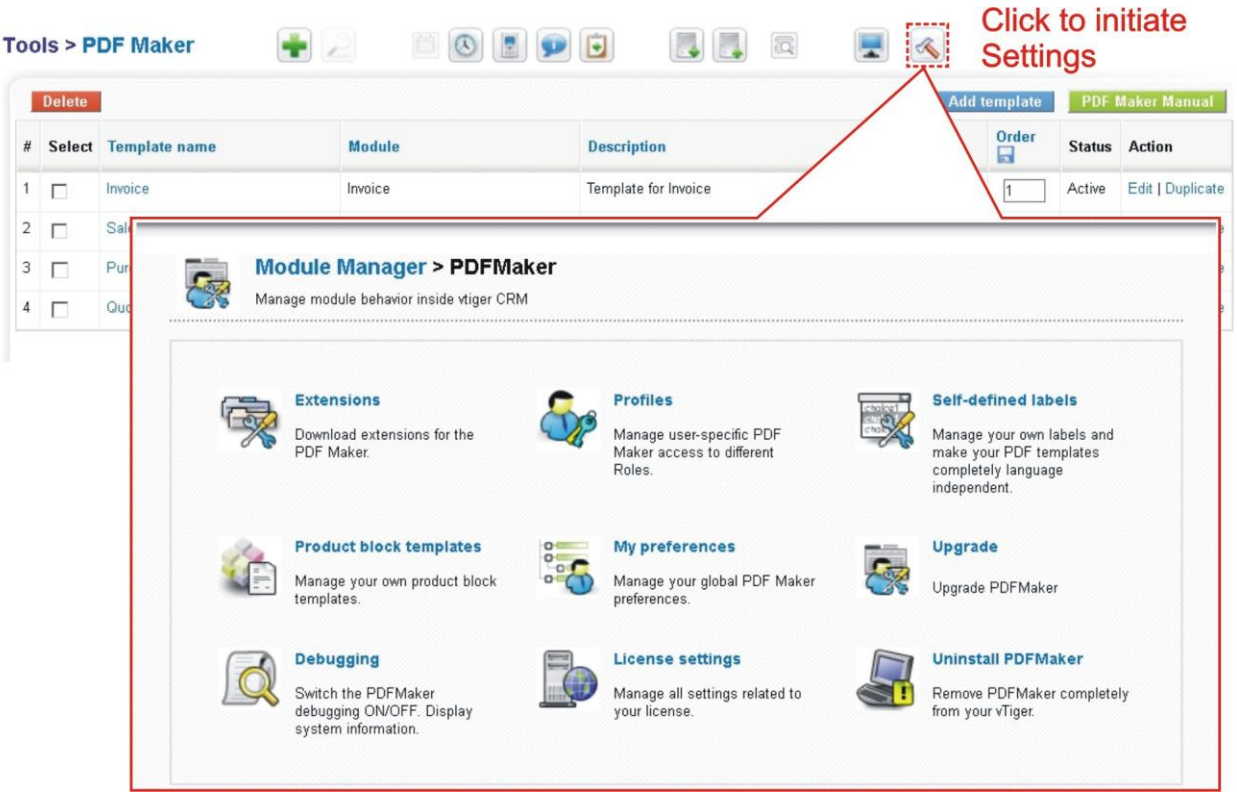


Picture 6.12 Description vs. Descriptions 4You

7 Settings

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

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



Picture 7.1 PDF Maker settings

7.1 Extensions

7.1.1 Customer Portal

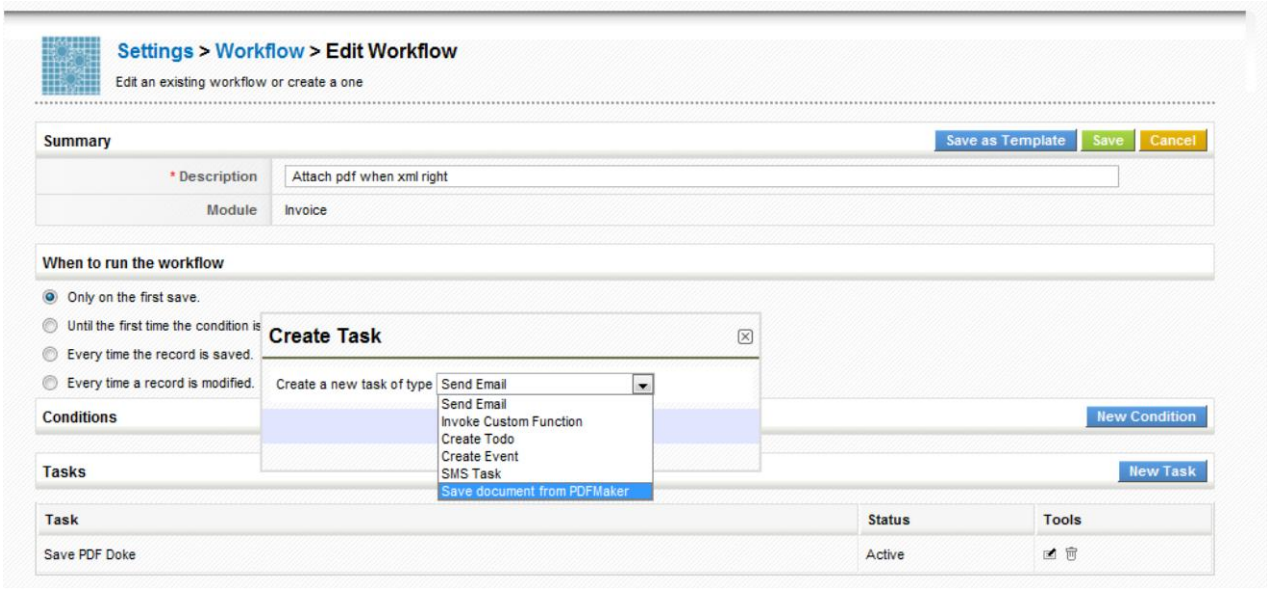
Allows using one of the PDF Maker templates as a standard Customer Portal template for modules Invoice and Quotes. Please refer to chapter 4.9.4 to see how to set up PDF Maker template for Customer Portal.

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

7.1.2 Workflow

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

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



Picture 7.2 Edit Workflow

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

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

Picture 7.3 Task Operations tab for workflow

7.2 Profiles

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

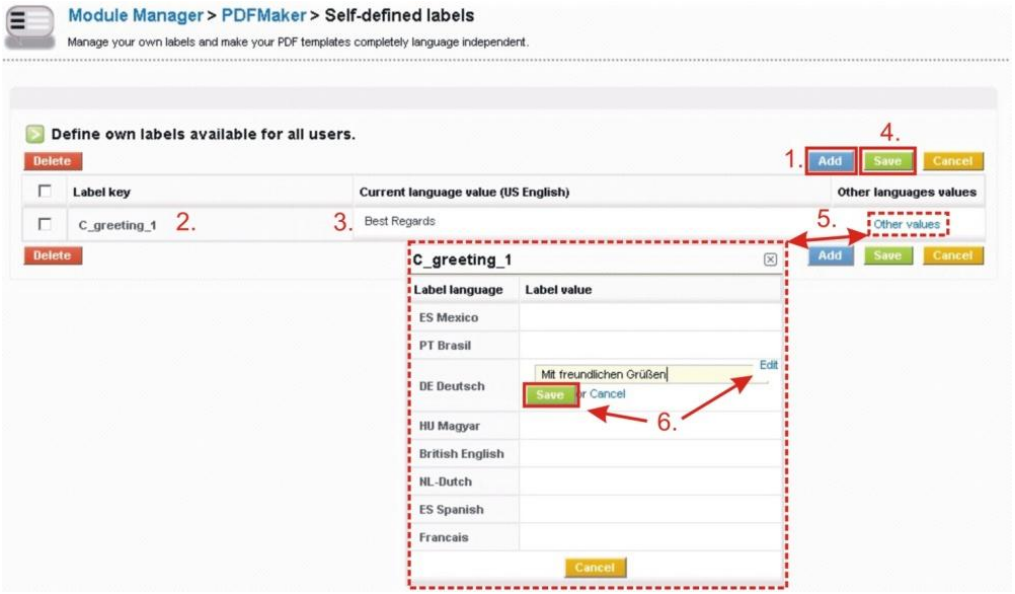
Picture 7.4 Manage profiles

7.3 Self-defined labels

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

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

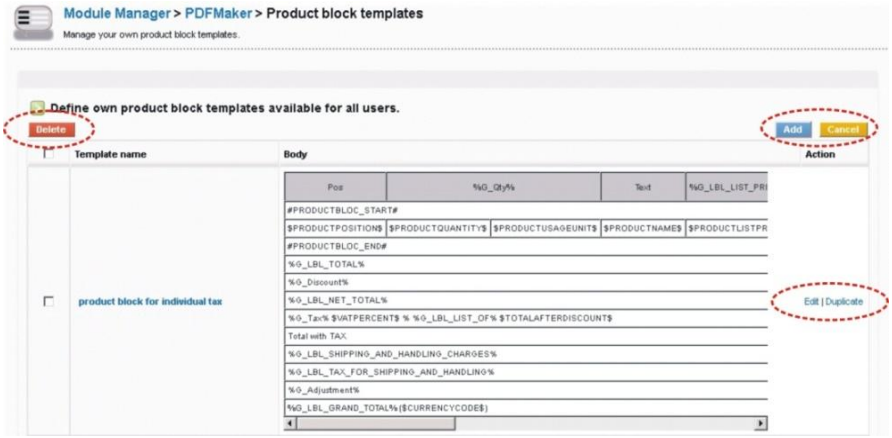
You can also find here button Delete which allows you to delete unnecessary labels.



Picture 7.5 How to define self-defined labels

7.4 Product block templates

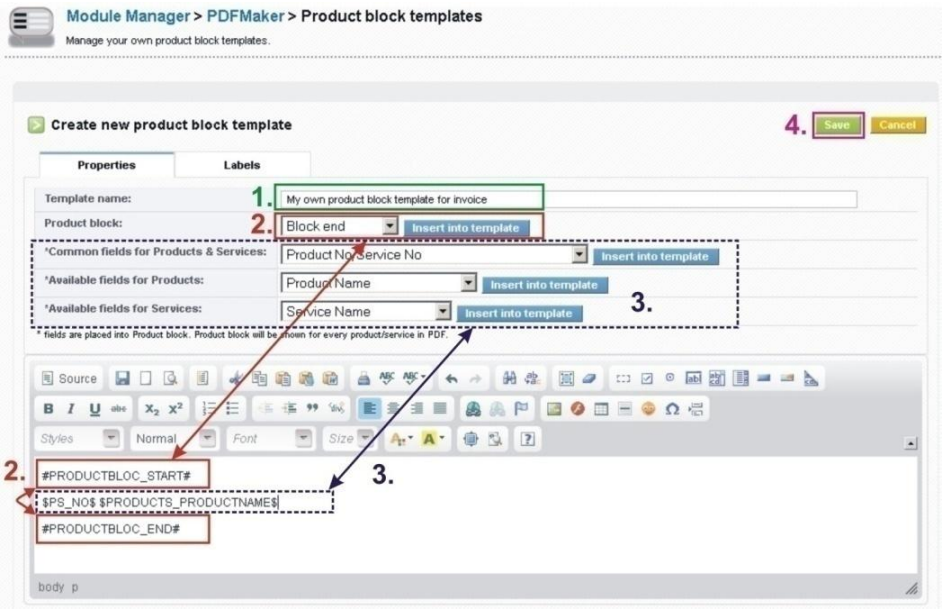
As can be seen in the picture below, you can simply add, edit, duplicate or delete product block templates. If you want to edit/duplicate already created product block template just click on link "Edit" / "Duplicate". In order to delete product block template it is necessary to check the checkbox related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



Picture 7.6 Product block templates management

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

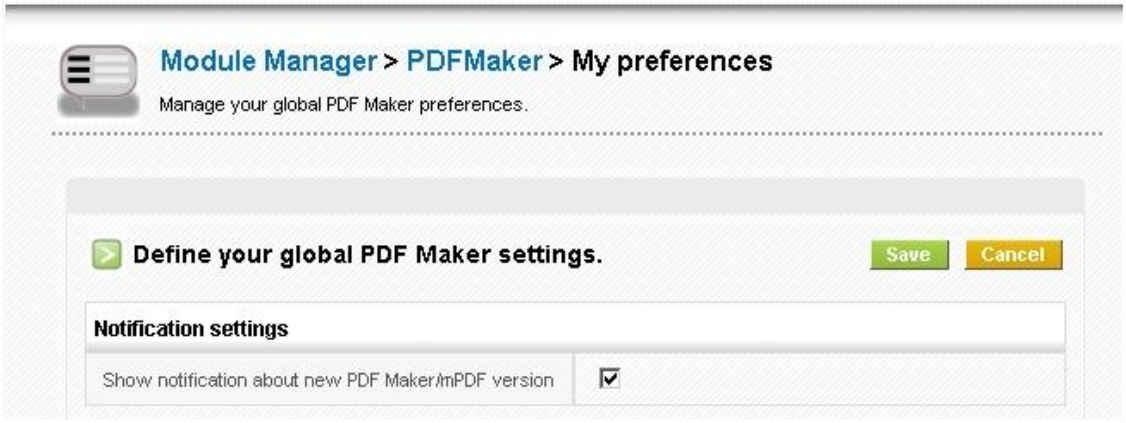
1. Define product block template name.
2. Insert product block template start (#PRODUCTBLOC_START#) and product block template end (#PRODUCTBLOC_END#).
3. Add all necessary product/service fields according to your needs between (#PRODUCTBLOC_START#) and (#PRODUCTBLOC_END#) and provide formatting if needed.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



Picture 7.7 Create new product block template

7.5 My preferences

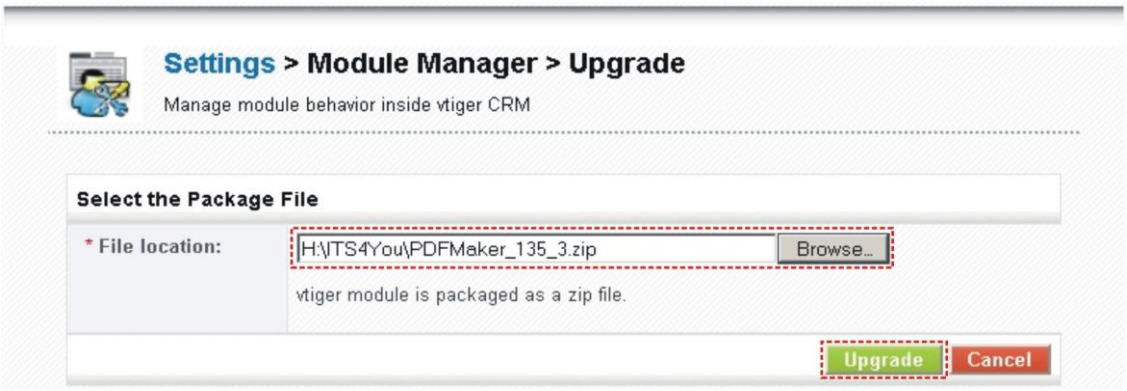
Within “My preferences” you can change global PDF Maker settings. In the current version of PDF Maker there is only one parameter related to upgrade notification settings described in the chapter 1. Just use checkbox and click on Save button to save changes.



Picture 7.8 My preferences

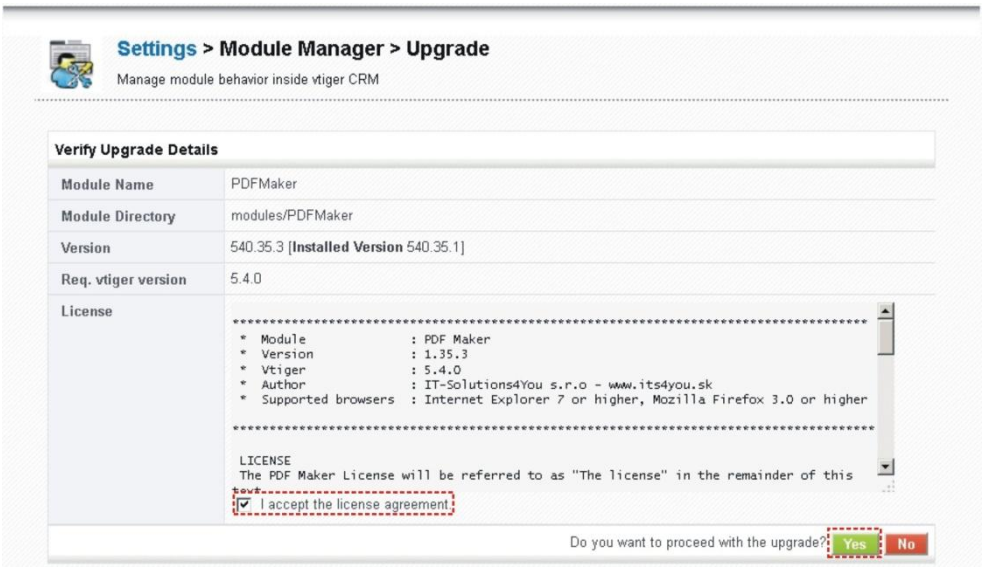
7.6 Upgrade PDF Maker

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



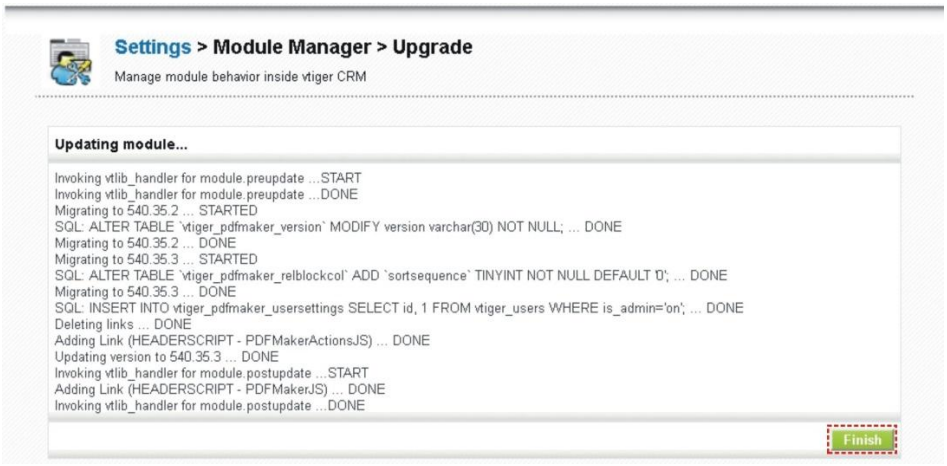
Picture 7.9 Upgrade of the PDF Maker – step 1

The upgrade continues with following window. Please verify the upgrade details parsed from the zip file. Please check that you accepted the license agreement and click Yes to proceed or No to cancel.



Picture 7.10 Upgrade of PDF Maker – step 2

Click on Finish to complete the module upgrade.



Picture 7.11 Finish upgrade

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

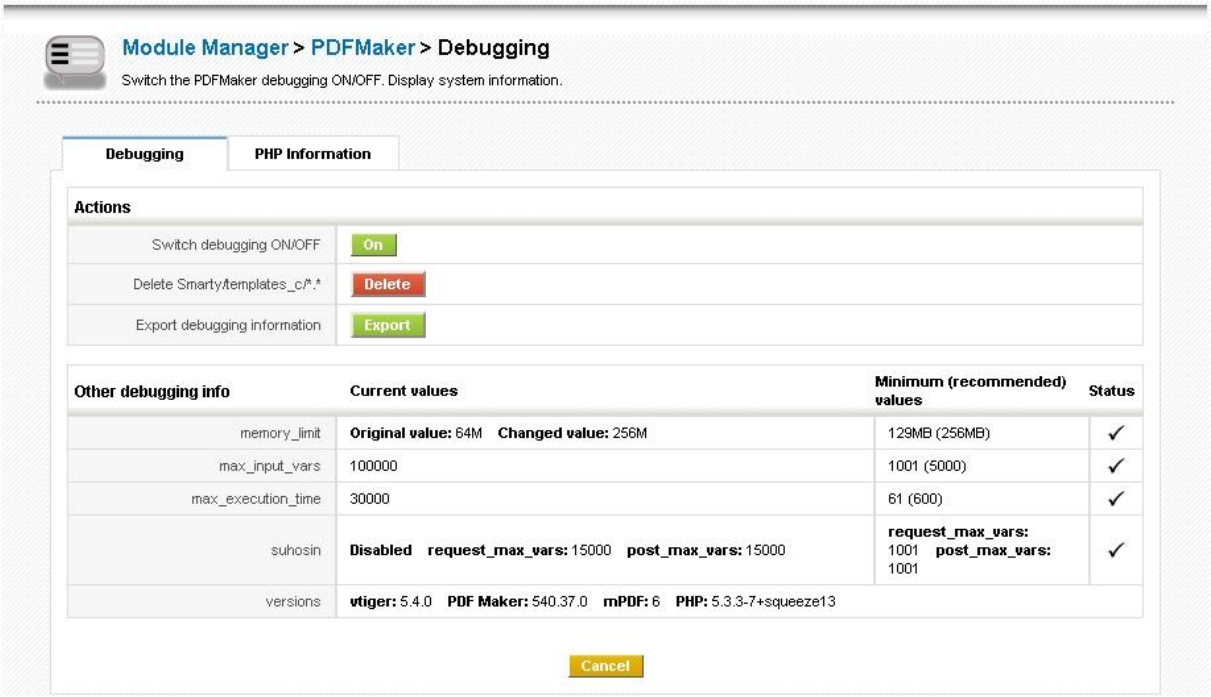
Picture 7.12 Upgrade failure

7.7 Debugging

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

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

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

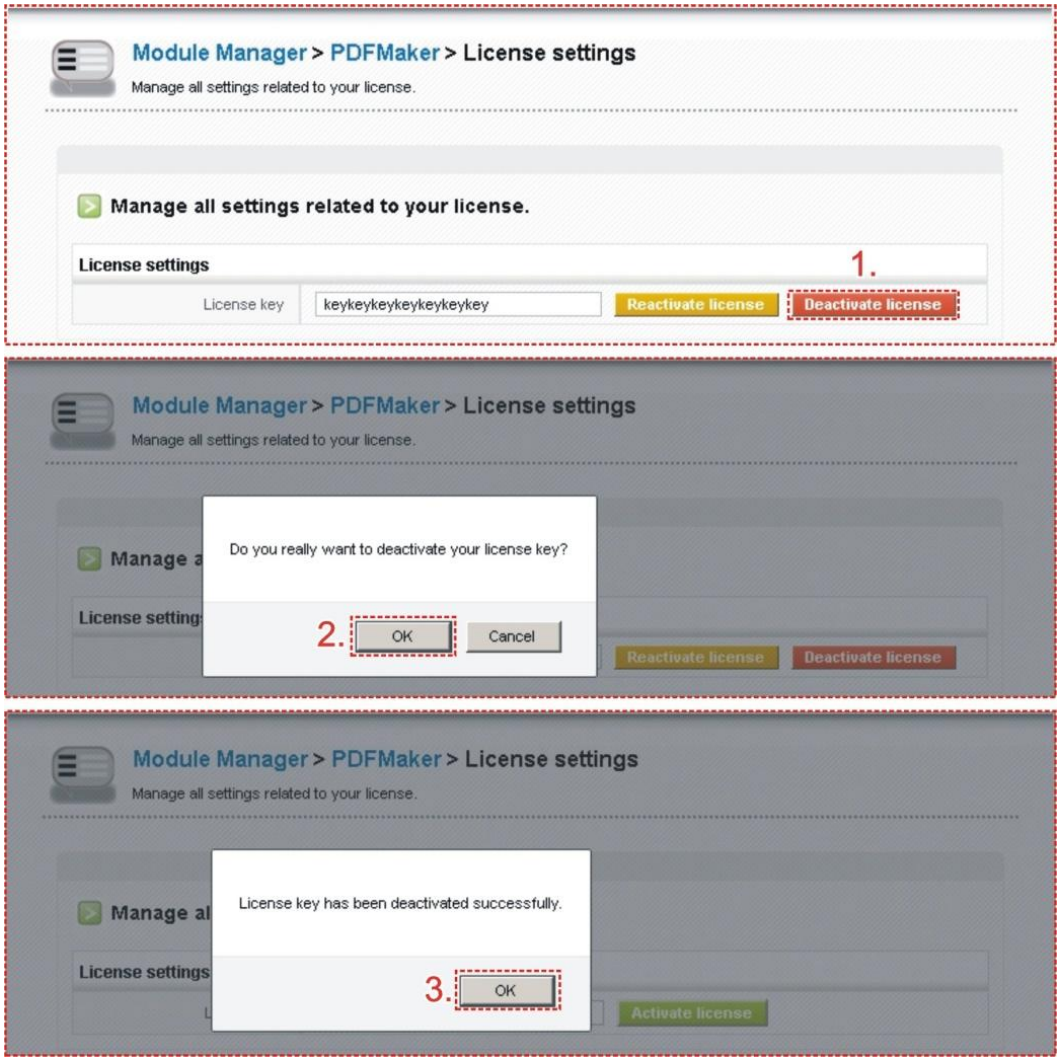


Picture 7.13 Debugging

7.8 License settings

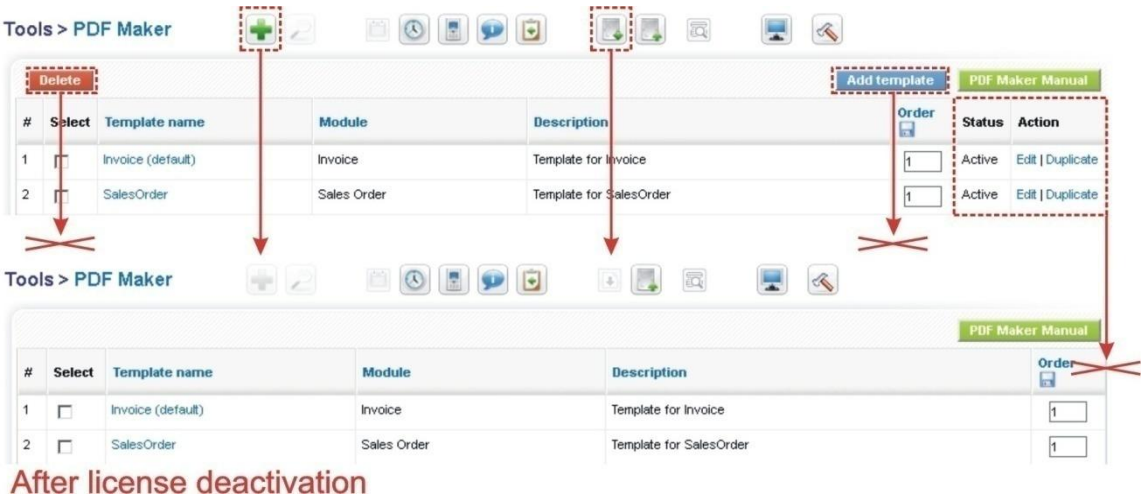
In case that some problem occurs with license key or in case you need to reinstall PDF Maker you have to deactivate and reactivate license key. To deactivate license key please provide following steps:

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



Picture 7.14 Deactivate license

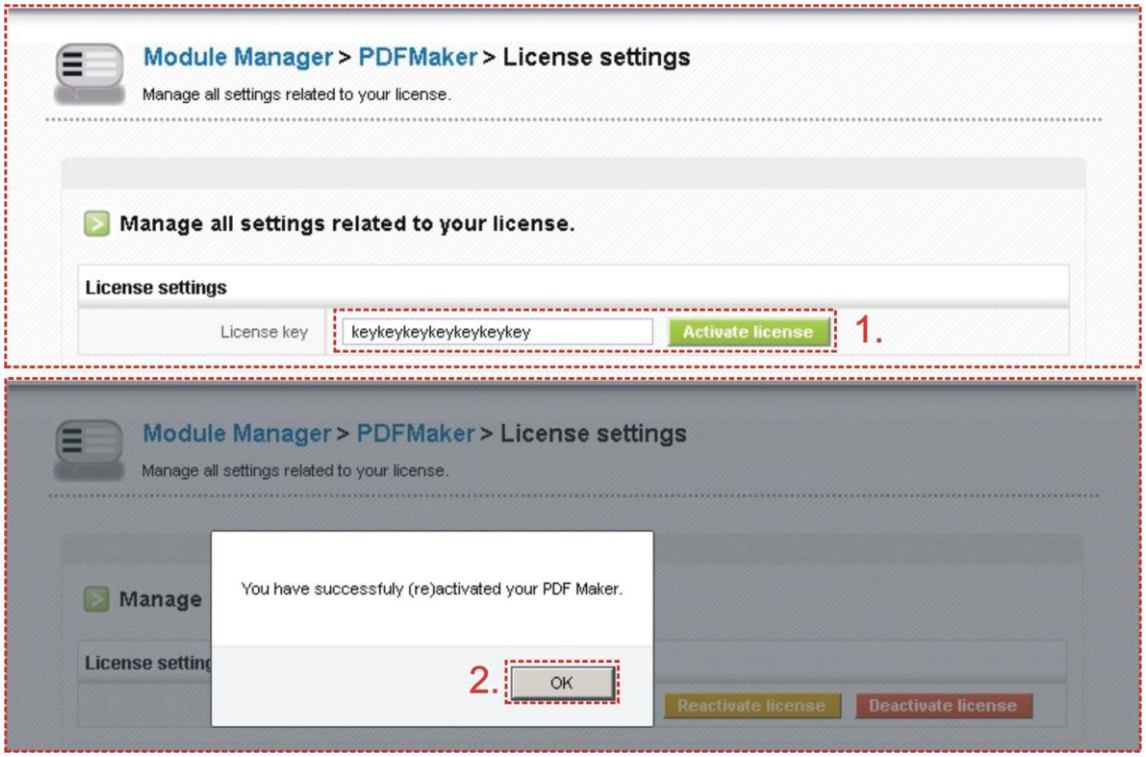
After deactivation of license you can list your pdf templates but you cannot edit or use them (see Picture 7.15). Also ListViews of other modules don't contain buttons/links to work with templates. PDF Maker blocks are not visible in the DetailViews either.



Picture 7.15 PDF Maker ListView before and after license deactivation

To activate license you have to provide following steps:

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

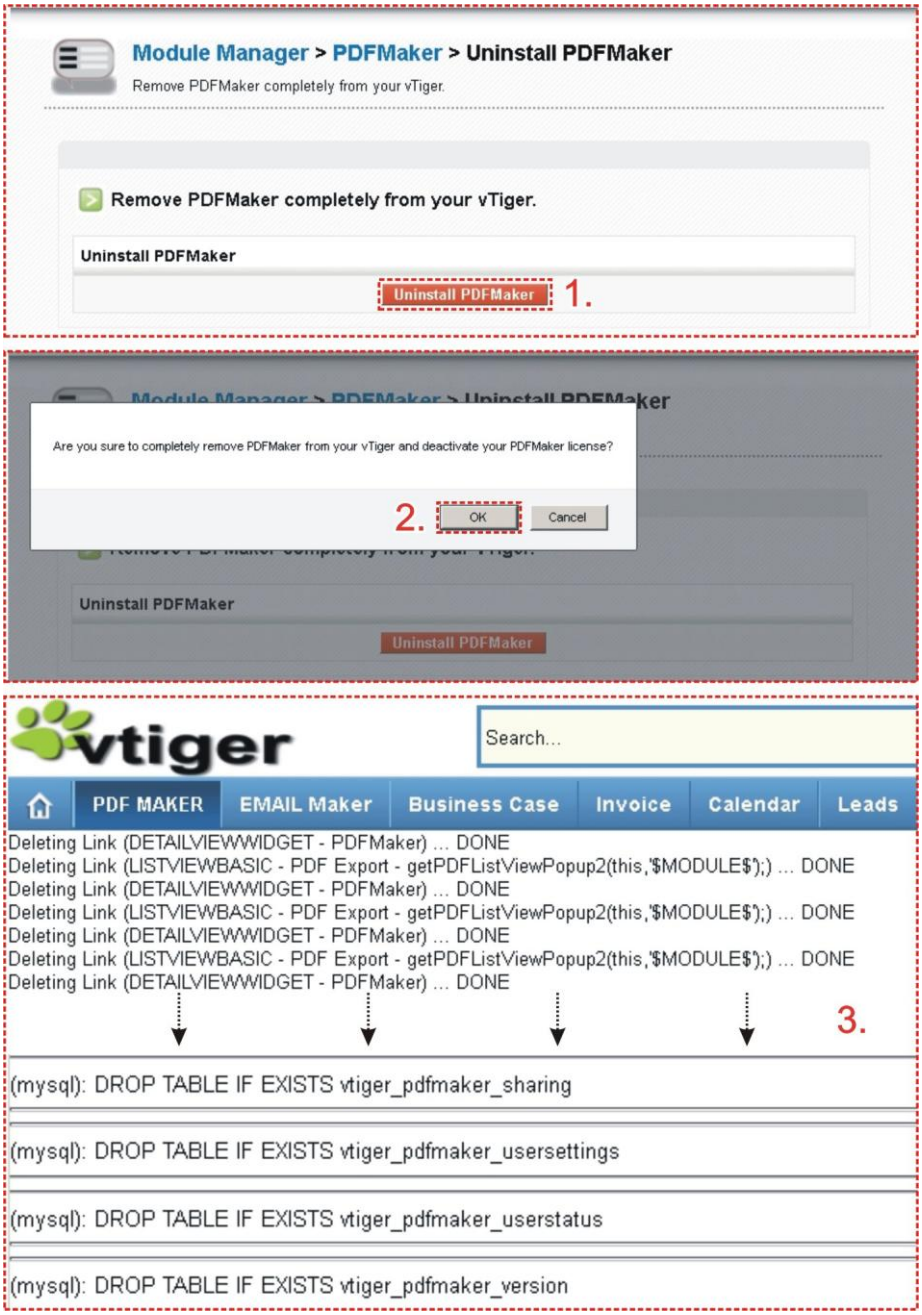


Picture 7.16 PDF Maker license activation

7.9 Uninstall PDF Maker

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

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



Picture 7.17 Uninstall PDF Maker

8 Tips & tricks

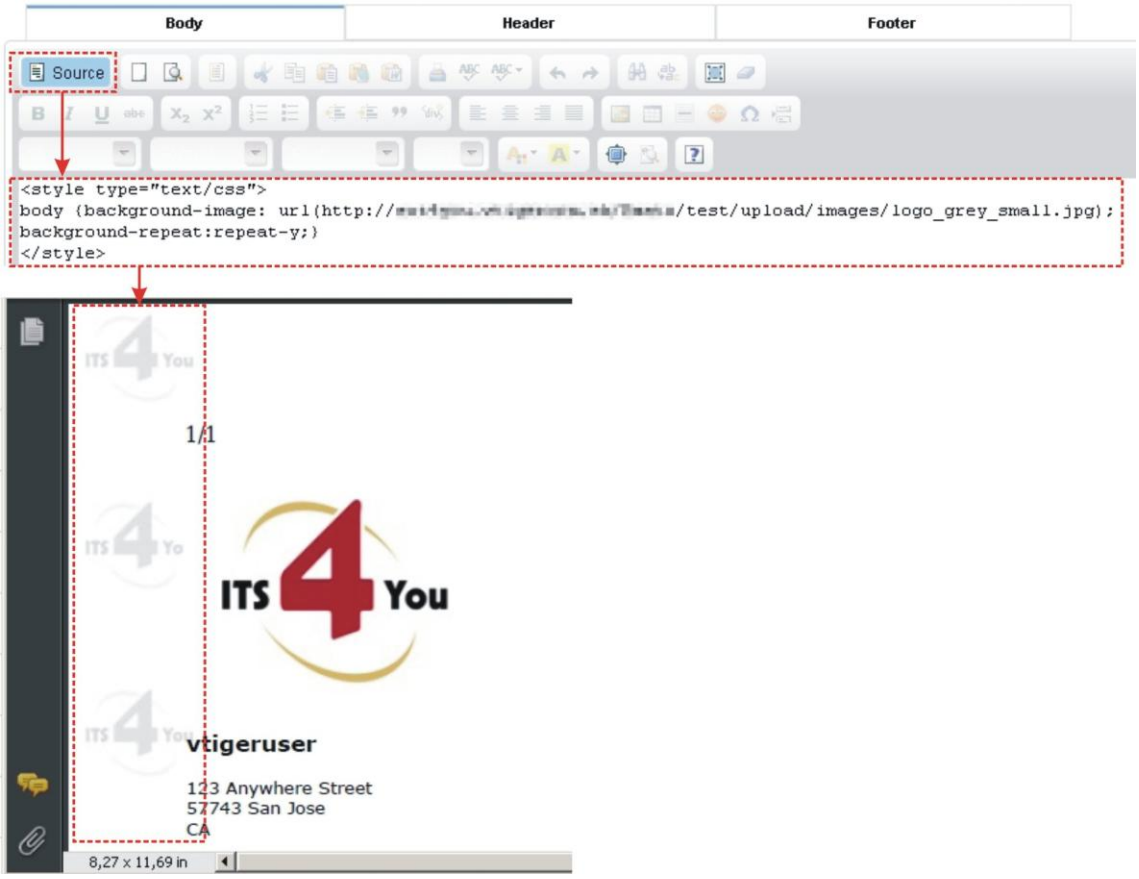
8.1 How to define background image

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

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

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

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



Picture 8.1 Background image

9 FAQs

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

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

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

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

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

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

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

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

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

ITS4You: Provide following steps:

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

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

ITS4You: There may be various reasons:

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

***Q:** When I export to pdf the export fail and I get a blank page in the browser. How to avoid this problem?*

ITS4You: Please, change the memory of PHP to minimal 256M.

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

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

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

***Q:** Can I use custom fields?*

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

***Q:** How to convert HTML code from text area?*

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

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

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

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

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

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

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

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

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

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

In your template you can use defined class like:

```
<table> <tbody>
  <tr>
  <td class="cellborder">
  Some Text</td>
  </tr>
</tbody> </table>
```

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

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

ITS4You: Switch CKEditor to HTML source code and change the table style by adding style="border-collapse:collapse;" e.g. <table border="1" style="border-collapse:collapse;">, or you can also use <table border="0"> and use style="border-top: 1px;" etc.

***Q:** There is a problem with table background colors?*

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

***Q:** How to use more fonts in PDF Maker?*

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

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

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

***Q:** How to implement PDF Maker with module Accounting?*

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

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

***Q:** Does PDF Maker support Product Bundles?*

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

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

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

ITS4You: There are more variables for Product description:

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

Change log

16.1.2015: **1.38.x**

- <rowpagebreak /> option available

30.10.2013: **1.37.0**

- minor improvements and bug fixes

12.09.2013: **1.36.x**

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

03.07.2013: **1.35.1 – 1.35.3**

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

28.9.2012: **1.35.0**

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

31.5.2012: **1.34.0**

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

13.3.2012: **1.33.0**

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

9.12.2011: **1.32**

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

11.11.2011: **1.31**

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

13.7.2011: **1.30**

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

12.5.2011: **1.29**

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

22.03.2011: **1.28**

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

31.1.2011: **1.27**

- mass export to pdf from listview
- minor bugs fixed

05.01.2011: **1.26**

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

1.25

- added custom functions
- Workflow management

1.24

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

1.23

- functionality of adding product page break
- minor bugs

1.22

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

1.21

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

1.20

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