

IT-Solutions4You

EMAIL MAKER FOR VTIGER CRM

Introduction

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

The Email Maker benefits are:

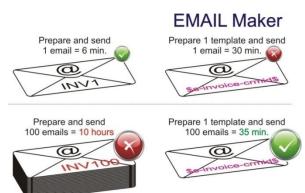
- supported mostly inside all modules
- unlimited number of email templates within one module
- simple addition, edit, duplication or deletion of the email templates
- advanced and more creative editing of emails using inserting images, tables, product blocks related blocks or listview blocks and many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

Who needs EMAIL Maker?

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

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

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



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License agreement

- The EMAIL Maker License will be referred to as "The license" in the remainder of this text.
- This irrevocable, perpetual license covers all versions 600.xx of EMAIL Maker.
- This license gives the holder right to install EMAIL Maker on ONE productive vtiger CRM installation and ONE develop vtiger CRM installation for unlimited users.
- The license holder is allowed to make modifications to the EMAIL Maker sources but in no event will the original copyright holders of this library be held responsible for action or actions resulting from any modifications of the source.
- The license holder is not required to publicize or otherwise make available any software used in conjunction with EMAIL Maker.
- The license holder may not re-distribute the library or versions thereof to third party without prior written permission of the copyright holder.
- EMAIL Maker License does not allow the library to be redistributed as part of another product.
- The license may be transferred to another vtiger CRM installation only with prior written permission.
- The wording of this license may change without notice for future versions of EMAIL Maker.

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

Terms and conditions

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

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

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

Privacy policy

During installation it is necessary to exchange following information:

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

1 How to install EMAIL Maker

Please provide following steps in order to install EMAIL Maker:

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

- vtigerCRM version (e.g. 6.0.0)
- EMAIL Maker version (e.g. 600.1.8)
- Date and time
- Domain in md5 coding format (e.g. 916b25c201a77a6721003c0030977f3b)
- Action provided by you (INSTALL, REACTIVATE, DEACTIVATE)
- 1. Install the .zip (package) file of the Email Maker module via **CRM Settings -> Module Manager**. Click on the **Install from Zip**.

Y Preinvoice Calendar Leads Org	ganizations Cont	acts Opport	inities Products Documents Tickets Al	I ~				✓ 0 🛱 demo610-1422
😒 vtiger	All Records	• Type ke	yword and press enter Q Advanced					CRM Settings
• Studio		88	Dashboard	×.		5	Opportunities	Manage Users
lit Fields	×	*	Contacts	×		N	Organizations	
cklist Editor	×.		Leads				Documents	
Icklist Dependency Setup 2.	×.	20	Calendar	1			Emails	
fodule Manager	×	0	Tickets	V			Products	
Templates	×	2	FAQ	V		0 0	Vendors	
Other Settings	×.	æ	Price Books	V		6	Quotes	
Integration	Z	P 0	Purchase Order	V		5	Sales Order	
Extension Store	Z		Invoice	V		2	RSS	
	v ©	*	ExtensionStore	2	٥	5	PDFMaker	
	V ©	*	Preinvoice					
3	Install from Zip							

Picture 1.1 Installation of EMAIL Maker – step 1

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

Import Modu	le from Zip	
	Disclaimer - Custom Files could put your CRM at risk This functionality has been made available for Developer's to test new modules. If you are installing from a file provided 3rd party, please proceed only if you trust the publisher. Custom Modules cou- vulnerabilities and overvite system files poting your CRM at risk. The module you are about to install has not been reviewed by Vitger.	ld include security
2.	I accept with disclaimer and would like to proceed	
1.	Choose File	3. Import Cancel

Picture 1.2 Installation of EMAIL Maker – step 2

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

Verify Import Details	
Viger Vesion : License	
* Module : * Version : * Vige : * Juppe : * Juppe : IT-Soutions4You is <i>r.o.</i> - www.its-fyou sk. * Supported browsers : Internet Explorer 7 or higher, Mozilla Firefox 3.0 or higher	ê
1. 📝 accept the license agreement.	2. Import Now

Picture 1.3 Installation of EMAIL Maker – step 3

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

Import Successfull	×
module was imported successfully.	
	Ok

Picture 1.4 Installation of EMAIL Maker – step 4

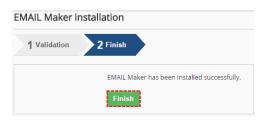
In order to finish installation, please provide following validation steps.

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

EMAIL Maker installat	inish										
v	Velcome to the EMAIL Maker Installation Wizard										
F	This will install EMAIL Maker into your vtiger CRM. It is highly recommended to finish the installation without any interruption. Please insert a license key you received in purchase confirmation email. Please make sure that your server have internet access in order to run validation.										
	Your Company Information		Change Company Information								
	Company Name:	THE CONTRACT OF A DESCRIPTION OF A DESCR									
	Address:	R1 120 Hart-Road, 210 Block, Napprogat									
	City:	Regative									
	State:	Kamataka									
	Country:	100									
	Postal Code:	1000110									
	VAT ID:	1204-0070-0012									
	EMAIL Maker License										
	Your vtiger url:	ing hater age in a fairer									
	License Key:	keykeykeykeykeykeykeykey Validate Order now									

Picture 1.5 Validation step 1

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



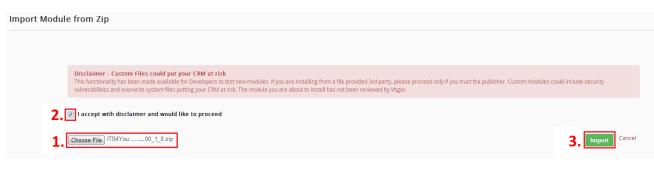
Picture 1.6 Validation step 2 – Finish installation

1.1 How to upgrade EMAIL Maker

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

😚 PDF Maker Calendar Leads Organiza	itions (Contacts	s Op	portunities Quotes Tickets Sales Order Casl	nflow 4 You Credit Notes 4 You Preinvoice EMA	IL Maker All -	🖌 🕄 🗘 1754You -
©vtiger	All Re	ecords		Type keyword and press enter Q	Advanced		+
Records List	<	Actio	ons -	+ Add template + Add theme			¥ -
Email Campaigns			Select	Template name	Module	Description	Edit Fields
		1 0		Orga Campaing (default for ListView)	Organizations		Edit Picklist Values
▼ Settings		2 (Ausstellerunterlagen (default for DetailView)	Contacts		Profiles
Profiles		3 (test	Organizations		Self-defined labels
Self-defined labels		4 6		Invoice with info (default for ListView)	Invoice	test	Product block templates
Product block templates		5 0		invoice silmple listview block	Invoice		License settings
License settings		6 [organization	Organizations		Extensions
Extensions		7 0		Invoice with detailinfo (default for DetailView)	Invoice	test	Upgrade EMAILMaker
Upgrade EMAILMaker	←	8 (Sales order template	Sales Order	Template for Sales Order	Uninstall EMAIL Maker
Uninstall EMAIL Maker		9 0		Test		Test 1	Active Edit Duplicate
▼ Tools		10 (cashflow	Cashflow 4 You		Active Edit Duplicate

Picture 1.7 Upgrade of the EMAIL Maker



Picture 1.8 Upgrade of the EMAIL Maker

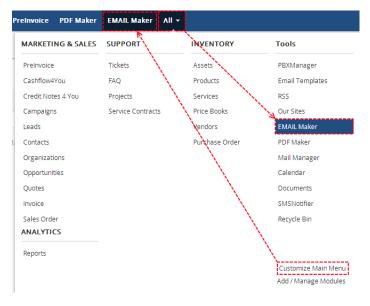
Verify Import Details	
Exists Viger Version : 6.0.0	
License	
* Module : * Version * Vriger : * Author : IT-Solutions-4You s.r.o - www.its4you.sk * Supported browsers : Internet Explorer 7 or higher, Mozilla Firefox 3.0 or higher	Î
	4. Update Now Cancel

Picture 1.9 Upgrade of the EMAIL Maker

2 How to start EMAIL Maker

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

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



Picture 2.1 Start EMAIL Maker

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

🕈 Preinvoice Calendar Leads Organizati	tions Contacts Opportunities Products Documents Tickets EMAIL Maker All ~	🖌 🕐 🖨 demo610-14221 =
💿 vtiger 🔤	Records * Type keyword and press enter Q Advanced	+
Records List	Actions - + Add template + Add theme	1-
▶ Settings	# Select Template name Module Description	Status Action
 Tools 	2. No Template found <u>-Create New Template</u>	
	EMAIL Maker Professional 600.1.13 :: IT-Solutions-PYou	

Picture 2.2 Add template in ListView

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

3 Work area

The Work Area of the EMAIL Maker consists of:

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

3.1 ListView

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

r Calendar Leads Organizations Co	ntacts C	Opportunities	Products	Documents	Tickets E	MAIL Maker	VI -								1	🛈 🤤 vtiger650 -
🕲 vtiger	All F	Records	• Туре	keyword and p	ress enter	٩	Advance	d								+
Records List	•	Actions ~	+ Add	template	+ Add the	ne										4 -
Email Campaigns			Template n			Module		Category	Description	5	Sharing	Template owner		Workflow	Status	Action
Styles						Select an O	0p 💌				Select a 💌	Select an Option	•	Select a 🔻	Select a	 Search
styles			Teststyles			Invoice		Category of Template	Description of Template		ublic	vtiger650 Administrator		No	Active	Edit Duplicate
 Settings 									EMAIL Maker Professional 600							
► Tools																

Picture 3.1 EMAIL Maker ListView

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

There are three buttons above the list of email templates:

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

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

3.2 DetailView

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

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

invoice monthly Module: Invoice					Edit Duplicate Delete
					Properties
Properties					Documents
Template name	invoice monthly			Properties tab	Email Campaigns
Description	Email with attached invoice				Email Workflows Styles
Module	Invoice				Julies
Status	Active				
Set as default	for DetailView 🗙 for ListView 🗙				
Email subject	\$s-invoice-invoice_no\$				
EMAIL Template					
Dear \$s-invoice-contact_id\$					
Here you can see body of template. You can create template like you need.				Template Body	
Select Documents				Documents tab	Properties Documents Email Campaigns
Title		Assigned To	File Name		Email Workflows
Terms and conditions	Default W	Narehouses2	http://terms_and_conditions.pdf		Styles
+ New Email Campaign				Email Campaigns tab	Properties Documents
Email subject List Name	Recipients Emails	Unsubscribes	Start of	status	Email Campaigns Email Workflows
test Contacts > All	3 3	0	06-01-2016 06:00 pm	Finished	Styles
i					
					Properties
	Module	Execution Condition		Email Workflows tab	Documents
test	Invoice	Schedule		1	Email Campaigns
L					Email Workflows
					Styles
				Styles tab	Properties
+ Add Style Select Style				Otyles tab	Documents Email Campaigns
Name Priority	Assigned To	0			Email Workflows
style2-red 2	vtiger650 A	Administrator			Styles

Picture 3.2 DetailView

3.3 EditView

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

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

New template		Apply Save Cance
Properties Module Information	Other information Labels Product block Settings Sharing Display conditions	Tabs area
*Template name:	Description:	
Recipient variables (To):	Please select Select Insert into template	
Email subject:	Select	
Source 3 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	8 ⊃ C P 2 1 ♥ 1 1 1 ♥ 1 1 ● 0 ● 1 □ □ = 0 Ω iont - Size - B I U + X _i x ⁱ □ ■ ■ □ □ = 0 Ω	diting area
	HAPPY HOUDAWS	

Picture 3.3 EditView

3.3.1 Properties

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

Properties Module information	n Other information	Labels Product block Settings	Sharing	
*Template name:		Description:		
Recipient variables (To):	Please select	Select	Insert into template	
Email subject:	Select			

Picture 3.4 Properties tab

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

Table 3-1 Properties tab

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

Edit "Accounts"			Apply Save Cancel
Properties Module information Other inform	nation Labels Product block Settings Sharing Display cond	litions	
*Template name:	Accounts Description: Showing description	n after mouseover	
Recipient variables (To):	Please select	Insert into template	
Email subject:		Select •	
	Organization List	Coragnisation 1	
	Dashboard		
	► Recently Modified	Organization Name	
	► Google Map	Website	
	▼ EMAILMaker	Primary Phone	
	Accounts for a construction of the constructio	Primary Email	
	org tickets Showing description after mouseover	Assigned To	
	· · · · · · · · · · · · · · · · · · ·	Billing City	
	US English •	Billing Country	
	Send Email	Show Full Details	
	► Tag Cloud		

Picture 3.5 Description after mouseover

3.3.2 Module information

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

Properties Module information Other information Labels Product block Settings Sharing Display conditions		
Module:	Contacts	
Related modules:	Select module	
Related blocks:	Please select Insert into template + Create Edit Delete	
ListView block:	Please select Insert into template	

Picture 3.6 Module information tab

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

Table 3-2 Module information tab

3.3.3 Other information

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

Properties Module information Other information	Labels Product block Settings Sharing Display conditions
Company and User information:	Company information Please select Insert into template
Terms and Conditions:	Please select Insert into template
Current date:	dd.mm.yyyy Insert into template
Custom functions:	Before Please select Insert into template

Picture 3.7 Other information tab

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

ther information tak

3.3.4 Labels

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

Properties Module information Other inform	ation Labels Product block Settings Sharing Display conditions	
Global language:	Before Event	Insert into template
Module language:	Add Contact	Insert into template
Self-defined labels:	Select	Insert into template

Picture 3.8 Labels tab

Name	Description
Global language	Global labels.
Module language	Labels related only to selected module.
Table 3-4 Labels tab	

3.3.5 Product block

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

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

Picture 3.9 Product block tab

Name	Description
Product block	Insert predefined product block templates. For details please refer to chapter 4.5.
template	
Product block	Block start, Block end. Each product block has to start with "Block start" and ends
	with "Block end"
Common fields for	Fields common for products & services. You can find same fields for products and
Products & Services	services separately as well, but it is recommended to prefer common fields in the
	templates.
Available fields for	Fields for products.
Products	
Available fields for	Fields for services.
Services	
Table 3-5 Product block tab	

3.3.6 Settings

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

Properties Module information Other inform	nation Labels Product block Settings Sharing Display conditions
Category:	
Default from:	None •
Ignored picklist values:	
Status:	Active •
Number format:	Decimal point separator . Decimal point number 2 Thousands separator .
Set as default:	for DetailView in for ListView

Picture 3.10 Settings tab

Name	Description
Category	Category of the email template. You can define categories according to your needs
	directly from this field.
Default from	Select here default sender of the email template.
	This value can be set separately for each logged user.
Ignored picklist values	Define picklist values which will be ignored in the final email like None, none, keine
	etc. Entered values have to be separated with comma.
Status	Active / Inactive. Please refer to chapter 4.10.2 for details.
Number format	Decimal point separator – comma, dot (but any symbol can be used)
	Number of decimal points - 0-3
	Thousands separator – comma, dot, space (but any symbol can be used)
Set as default	Set/unset as default for DetailView and ListView. For details please refer to
	chapter 4.10.3.

Table 3-6 Settings tab

3.3.7 Sharing

The *Sharing tab* changes depend on whether email template is shared (Picture 3.11) or public/private (Picture 3.12). Using this tab you can define how to share your template between you and other users or groups. Please refer to chapter 6.3 to see details.

Properties Module information Other infor	mation Labels Product block Settings Sharing Display conditions		
Template owner:	Administrator		
	Share		
	Available Entities & Members		Selected Members
	Entity: Groups		
Sharing:	Member of Entity Group::Team Selling Group::Marketing Group Group::Support Group	22	Member of **

Picture 3.11 Sharing tab

Properties Module information Othe	information Labels	Product block S	Settings Sharing	Display conditions
Template o	vner: Administrator	•		
Sh	ring: Private	¥		

Picture 3.12 Sharing tab for private/public template

Name	Description
Template owner	Select template owner from the list.
Sharing	Select "Public", "Private", "Share"
Table 3-7 Sharing tab	

le 3-7 Sharing tab

3.3.8 Display conditions

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

Properties Module information Ot	Other inform	ation Labels Product block Settings Sharing Display conditions
Di	isplayed:	Yes • if:
	anditions:	All Conditions (All conditions must be met) Select Field Add Condition
Cor	nations:	Any Conditions (At least one of the conditions must be met) Select Field Image: Condition Image: Conditit

Picture 3.13 Display conditions

3.4 Email Maker block

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

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



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

4 Editing email templates

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

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

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

4.1 Create new email template

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

PDF Maker Calendar Le	ads Organiza	itions	Contact	s Opportunities Q	uotes Tickets	Sales Order Cash	flow4You Credit Notes	4 You Preinvoice	EMAIL Maker	All -		/0¢
⇒vtig∈r [.]	A	ll Record	s	Type keyword and p	ress enter	Q Advanced						
Records List	•	Ac	tions ~	+ Add template	+ Add theme							4 -
Email Campaigns			Select	Template name		Module		Descripti	on		Status	Action
		1		Orga Campaing		Organization	s				Active	Edit Duplicate
Settings		2		Ausstellerunterlagen		Contacts					Active	Edit Duplicate

Picture 4.1 Add new email template

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

neral email theme dule.	s available for any						
EMAIL theme					1		
Blank	Basic1	Basic2	BluePage	Cubes	HappyHolidays	SeasonsGreetings	+ Add theme
				Der Law	THE REAL PROPERTY AND A RE		Create predefined

Picture 4.2 Email themes

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

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

New template				Apply Save	Cancel
Properties Module information	Other information Labels Pro	duct block Settings Sharing			
*Template name:		Description:			
Recipient variables (To):	Please select	Select	Insert into template		
Email subject:	Select				
		s x, x ⁱ ⊠ ≡ ≡ ≡ ≡			
	HAP	A HONDU	US CONTRACTOR		

Picture 4.3 New template creation

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

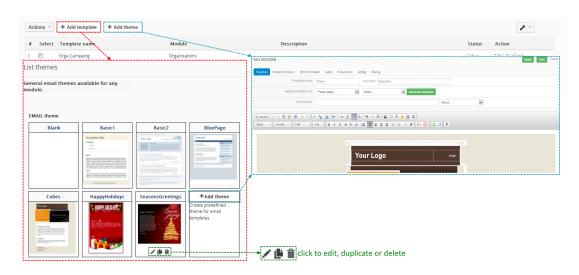
Important note: If you change the primary module the all inputs will be deleted and you can lose your work. This deletion helps to avoid using fields in template which are not from primary or related module.

When you finish please save the email template using button Save

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

4.2 Add theme

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



Picture 4.4 How to create new email theme

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

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

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

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

Properties	Other information	Labels						
	*Theme name:			Description:				
Reci	pient variables (To):	Please select		Select		Insert into theme		
Properties	Other information	Labels						
Company an	d User information:	Company information	•	Please select		Insert into theme		
Ter	rms and Conditions:	Please select		Insert into theme				
	Current date:	dd.mm.yyyy	-	Insert into theme				
	Custom functions:	Before Pl	ease select		Insert into them			
Properties	Other information	Labels						
	Global language:	Before Event					•	Insert into theme
	Module language:	Select					•	Insert into theme

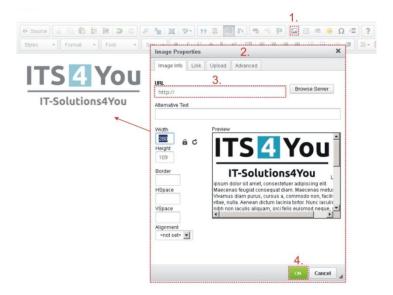
Picture 4.5 Add theme EditView tabs

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

4.3 Inserting images

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

1. Press the image button \square on the toolbar.



Picture 4.6 Insert image

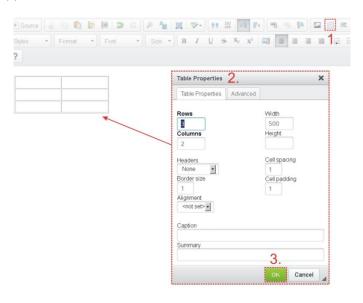
- 2. A pop-up window called "Image Properties" will appear. It includes four tabs that group image options.
- 3. Define the URL address of the image. You may also use button Browse Server in order to browse the files. Set up other properties of the image.
- 4. Click it add image into template.

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

4.4 Creating tables

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

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



Picture 4.7 Creating tables

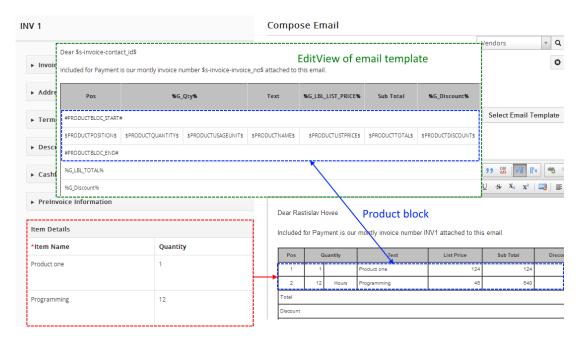
- 2. Set the basic table properties like number of columns and rows, width, height, etc.
- 3. Click on utton.

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

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

4.5 Using a product blocks

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



Picture 4.8 Product block usage

4.5.1 Create new product block

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

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

Pro	oduct block template:	Please select	Insert into template
	Product block:	Block start	Insert into template
*Common fie Services:	elds for Products &	Product No Service No	Insert into template
*Availabl	e fields for Products:	Unit Price	Insert into template
	1	/	i

Picture 4.9 Create product block

4.5.2 Create separate Block for Products and for Services

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

- 1. Go to Product block tab and insert product block start variable (#PRODUCTBLOC_PRODUCTS_START# or #PRODUCTBLOC_SERVICES_START#) and product block end (#PRODUCTBLOC_ PRODUCTS_END# or #PRODUCTBLOC_ SERVICES_END#).
- 2. Add all necessary product/service fields according to your needs between (#PRODUCTBLOC PRODUCTS START# **#PRODUCTBLOC SERVICES START#)** or and (#PRODUCTBLOC_ PRODUCTS_END# or #PRODUCTBLOC_ SERVICES_END#) and provide formatting if needed.

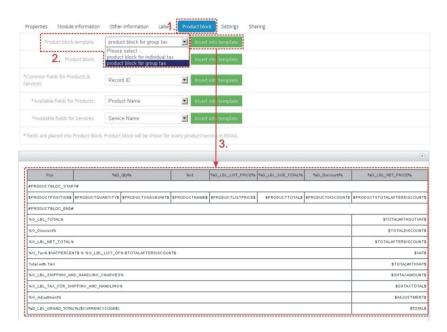
Pos		%G_Qty%	Text	%G_LBL_LIST_PRICE%		%G_Discount%	%6	LBL_NET_PRICE%
of Products								
DUCTBLOC_PRODUCTS_	START#							
SPRODUCTPOSITIONS	SPRODUCT	QUANTITYS SPRODUCTUSAG	SEUNITS SPRODUCTNAMES	SPRODUCTLISTPRICES	SPRODUCTTOTALS	SPRODUCTDISCOUNTS	SP	PRODUCTSTOTALAFTERDISCOU
DUCTBLOC_PRODUCTS_	END#							
of Services								
DUCTBLOC_SERVICES_S	START#							
SPRODUCTPOSITIONS	SPRODUCT	QUANTITYS SPRODUCTUSAG	SEUNITS SPRODUCTNAMES	SPRODUCTLISTPRICES	SPRODUCTTOTALS	SPRODUCTDISCOUNTS	SP	PRODUCTSTOTALAFTERDISCOU
DUCTBLOC_SERVICES_E	END#							
BL_TOTAL%								STOTALWITHOUTV
Discount%								STOTALDISCOU
Source 🔏	Format -	Font - Siz	^b 22 Ⅲ ⁴ 5 - ze - B <i>I</i> <u>U</u> - S	x₂ x² 🔤 ≣			⊞ - 53	. ?
Styles -	Format -	Font - Siz	ze → B I U -S			= = = =	₩ + 58	
							5# 29	Net Price
Styles -	Format	Font - Siz	ze → B I U -S			= = = =	₩ ▼ 5.8 8 8	
Styles +	Format	Font - Siz	ze → B I U -S			= = = =	0.00	
Pos Block of Products	Format • Quantity	Font • Siz	List Price		■ ■ E : 1.	E E Discount		Net Price
Pos Block of Products	Format	Font	B I U S List Price 10.00 20.00 10.00		11. 5.	E 3 3 II - Discount	0.00	Net Price 1,000.00 5,000.00
Pos Pos Block of Products Block of Services Block of Services	Format • Quantity • 100.00 • 250.00 •	Font Siz	B I U S List Price 10.00 20.00 10.00		11. 5.	Image: Second	0.00	Net Price 1,000.00 5,000.00
Pos Block of Products 1 2 Block of Services	Format • Quantity • 100.00 • 250.00 •	Font Siz Text product1 product2	B I U S List Price 10.00 20.00		11. 5.	Image: Second	0.00	Net Price 1,000.00 5,000.00
Pos Block of Products 1 Block of Services 3	Format • Quantity • 100.00 • 250.00 • 1.00 • 1.00 •	Font - Siz Text product1 product2	B I U S List Price 10.00 20.00 20.00		11. 5.	Discount	0.00	Net Price 1,000.00 5,000.00 20.00

Picture 4.10 Separate Blocks

4.5.3 Insert and edit product block template

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

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



Picture 4.11 Insert product block template

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

4.6 Using related blocks

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

4.6.1 Create and insert related block

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

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

Properties Module information Other	information Labels Product blog	ck Settings Sharing			
Module:	Organizations	Organization Name	Insert into template		
Related modules:	Select module	Select	Insert into template		
Related blocks:	Please select	Insert into template + Cre			
ListView block:	Please select	Insert into template 2			
📀 Source 😹 🕤 🖺 💆 🔳 ⊃ (c) 🔎 🐂 🗮 🛩 🗤 👯	M II			
Styles - Format - Font		4 x ¹ □3 E Ξ Ξ Ξ		22 ?	
Hello,		73			
attached you can find list of invoices create	d within last 90 days.	1.1			
🕑 EMAILMaker - Mozilla Firefox					_0×
Edit block 3.					
	2	2	4	5	
1 Related module	2 Select columns	3 Filters	4 Sorting	5 Block style	

Picture 4.12 Start creation of the related block

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

1 Related module	2 Select columns	3 Filters	4 Sorting	5 Block style
Related module		1.		
	C Contacts	N060		
	O Opportunities			
	C Quotes			
	C Sales Order			
	Invoice			
	C Calendar			
	O Documents			
	O Tickets			
	C Products			
	C Campaigns			
	C Services			
	C Service Contracts			
	C Projects			
2.	O Assets			
2.				

Picture 4.13 Creation of the related block – step 1

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

Edit block					
1 Related module	2 Select columns	3 Filters	4 Sorting	5 Block style	
Select Columns(MAX 12)					
x Invoice No x Total x Invoice Date viacoura concours organization Name Status]	1.		<u>.</u>	
Assigned To Created Time Modified Time Currency Conversion Rate	ick here to	select		 	
Edit block				10	
1 Related module	2 Select columns	3 Filters	4 Sorting	5 Block style	
Select Columns(MAX 12)	click he	re to delete			
× Invoice No × Total × Invoice Date	e 🛪 Status				
Back Next Cancel	clic	k here to add			

Picture 4.14 Creation of the related block – step 2

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

Edit block					
1 Related module	2 Select columns 3 Filters	4 Sorting 5 Block style			
Filters					
All Conditions (All con	ditions must be met)				
(Invoice) Invoice Di	late	x.	Last 90 Days	01-08-2014,29-10-2014	
	click here		click here		
Add Condition	to select field		to select condition		
Any Conditions (At lea	ast one of the conditions must be met)				
Add Condition					
Back Next Cancel					

Picture 4.15 Creation of the related block – step 3

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

dit block			
1 Related module	2 Select columns 3 Filters 4 Sor	nting 5 Block style	
Sorting	click here to select field	choose ascending / descending	
Sort by		Sort Order	
Invoice Date	······	🗸 💿 Ascending 💿 Descending	
None		* 💿 Ascending 💿 Descending	
None		+ OAscending ODescending	
Back Next Cancel			

Picture 4.16 Creation of the related block – step 4

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

Related module	2 Select	columns	3 Filters	4 Sorting	5 Block style	
ock style						
Name* Ir	nvoice list			1.		
Source		b _B ∐ ♥・	33 🐹 🕅 I 4 🗠 🤫		2.	
Styles - Format	• Font •	Size - B I	U 5 X X X III		- 🖩 - 🔢 🕄 ?	
,		0		P		
%R_INVOICE_Invoice No* #RELBLOCK_START#	% %R_INVOICE_Total9	6 %R_INVOICE_Invo	ice Date% %R_INVOICE_Sta	tus%		
\$invoice_no\$	\$hdnGrandTotal\$	\$invoicedate\$	404 disinvoicestatus\$			
#RELBLOCK_END#		-	च			
		_0				
ody table tbody tr td						

Picture 4.17 Creation of the related block – step 5

4.6.2 Insert related block

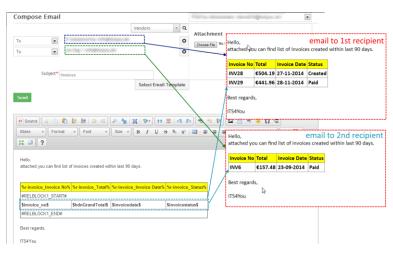
If the related block is created you can continue with editing your template and in order to insert related block provide following actions:

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

	Modue:	Organizations	•	Organizatio	n Name		Ins	ert into templa
Rel	ated modules:	Select module	•	Select			Ins	ert into templa
F	Related blocks:	Invoice list	4	Insert into te	mplate	+ Create	Edit	Delete
	ListView block:	Please select		Insert into tei	mplate			
	of invoices created	1. within last 90 days.						
Hello, attached you can find list %r-invoice_Invoice No% 1		1. within last 90 days. %r-invoice_Invoice Date%	%r-invoice St	tatus%				
attached you can find list			%r-invoice_St	tatus%				
attached you can find list %r-invoice_Invoice No% #RELBLOCK1_START#		%r-invoice_Invoice Date%	%r-invoice_SI \$invoicestatu:		L.			
attached you can find list %r-invoice_Invoice No% #RELBLOCK1_START#	%r-invoice_Total%	%r-invoice_Invoice Date%			.			
attached you can find list %r-invoice_Invoice No% #RELBLOCK1_START# \$invoice_no\$	%r-invoice_Total%	%r-invoice_Invoice Date%			ı.			

Picture 4.18 Insert related block

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





4.7 Using ListView block

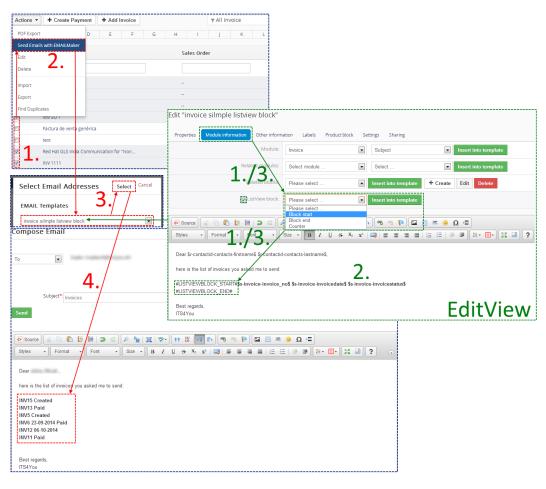
In case you need to send via email the output of the several records within one mail you can use ListView block. Within this block you can simply set which fields of the records you would like to send. Please refer to below picture which shows simple example of the email consists of list of invoices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

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

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

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

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



Picture 4.20 ListView block

4.8 Attach documents into templates

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

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

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

Invoice Module: Invoice								Edit Duplicate Delete
Select Documents	2.						1.	Properties Documents
Title	Folder Name		Assigned To			File Name		Email Campaigns
	©vtig	I€Γ	Docume	nts				
	Select 3.	Type to search	in Title v Q			1 to 8 🖸 < 🖹 >		
	🔲 Title	Assigned To	File Name	Active	File Size	Download Type		
	💌 bnmbn	standarduser	PINV0007.pdf	yes	0 B	Internal		
	Invoice	standarduser	Default_INV13.pdf	yes	0 B	Internal		
	Invoice	standarduser	Default_INV9.pdf	yes	0 B	Internal		
Invoice Module: Invoice								Edit Duplicate Delete
Select Documents			Ļ				Delete	Properties Documents Email Campaigns
Title	Folder Name		Assigned To		File Name		Ţ	
Invoice	Default		standarduser		Default_INV	13.pdf	â	
bnmbn	Default		standarduser		PINV0007.p	if		

Picture 4.21 How to attach documents into email template

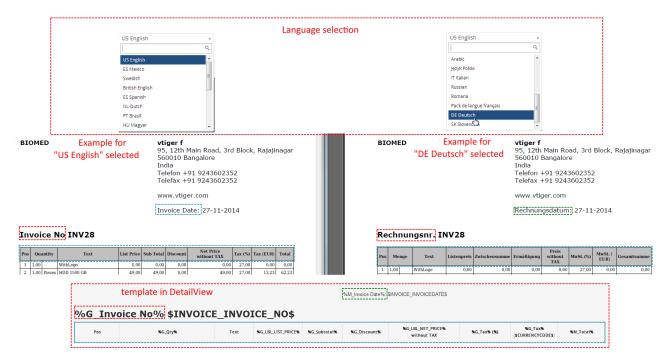
4.9 Inserting labels

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

Properties	Module information	Other information	Labels	Product block	Settings	Sharing	
	Global language:	Before Event					Insert into template
1	Module language:	Select					Insert into template

Picture 4.22 Labels tab

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

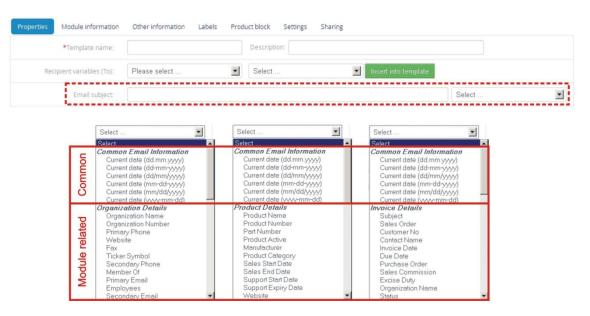


Picture 4.23 Inserting labels

4.10 Template settings

4.10.1 Email subject

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



Picture 4.24 Email subject settings

4.10.2 Status

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

- a) ListView (Picture 4.25) "Status" column
- b) DetailView (Picture 4.26) Properties tab

Ac	tions –	+ Add template + Add theme					J =
#	Select	Template name	Module	Description		Status	Action
1		Orga Campaing (default) - templat	e default for DetailView & Lis	tView		Active	Edit Duplicate
2		Ausstellerunterlagen (default for DetailView) 🗲		ilView		Active	Edit Duplicate
3		test	Organizations		status 🔶	Active	Edit Duplicate
4		Invoice (default for ListView)	nplate default for ListView	test		Active	Edit Duplicate
5		invoice silmple listview block	Invoice			Active	Edit Duplicate
6		organization	Organizations			Inactive	Edit Duplicate

Picture 4.25 Status and setting of default in ListView

▼ Tools	Properties		
Unset as default Set as inactive	Template name	Orga Campaing	
	Description	Status of the	
click to set	Module	Organizations template is Active	
as inactive	Template is not set	Active Template is set	
	as default	for DetailView for ListView as default	
	for DetailView Email Subject		

Picture 4.26 Status and setting of default in DetailView

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

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

Properties	Module information	Other information	Labels	Product block	Settings	Sharing
Category:						
Default from:	NONE					
lgnored picklist values:		Select from the list to (status of the templ				
Status:						
	Active Inactive Decimal set template as default for DetailView]]		Decimal point number	0	
Set as default:		for ListView 🔽 🧹	Check	to set template as for ListView	s default	

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

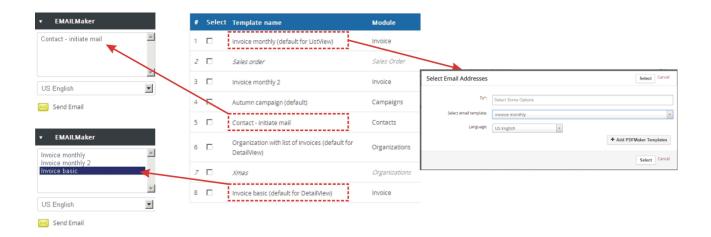
4.10.3 Set as default

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

- a) ListView (Picture 4.25) template default for DetailView is marked with text "(default for DetailView)", template default for ListView is marked with text "(default for ListView)". If the template is default for DetailView as well as for ListView, then in the template name column text "(default)" is written.
- b) DetailView (Picture 4.26) Properties tab

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

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



Picture 4.28 Default template visibility

5 Sending emails

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

ListView:

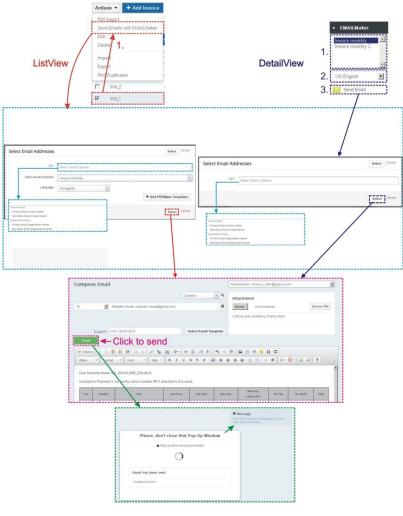
- 1. Select one or more records and click on *Send Emails with EMAIL Maker* from *Actions*.
- 2. Select EMAIL Template.
- 3. Select language to be used.
- 4. Select Email address/es.
- 5. Click on Select button.

DetailView:

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

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

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



Picture 5.1 How to send email

5.1 Select Email Addresses

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

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

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

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

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

Cancel				EMAIL Templates	Select	Cancel
				none		•
		20.0	mail	US English		•
					+ Add PDFMaker Temp	plates
ew			_		Select	Cancel
				C	(k	
Cancel Sele	ct Email Addresses	Select Cano	cel	Select Email Addresse	S Select	Cancel
EMA	IL Templates			EMAIL Templates		
Invoi	ice basic	×	1	Invoice basic		•
US E	English	<u>*</u>	1	US English		•
ates Emai	ils	+ Add PDFMaker Templates		Emails	+ Add PDFMaker Temp	plates
					eveedigmail.com	
_ C0	ntact Name <secondary em<="" td=""><td>all></td><td>-</td><td>Rastislav Hovee - Rastislavin</td><td>eveedits4yeusis</td><td></td></secondary>	all>	-	Rastislav Hovee - Rastislavin	eveedits4yeusis	
C Or	ganization Name <primary< td=""><td>Email> C)</td><td></td><td>Baumaterial-XXL</td><td>riel00.@grail.com/</td><td></td></primary<>	Email> C)		Baumaterial-XXL	riel00.@grail.com/	
	ganization Name <seconda< td=""><td>ry Email></td><td>1</td><td></td><td></td><td></td></seconda<>	ry Email>	1			
	EMA US ates Ema CO CO	Carcel Select Email Addresses EMAIL Templates Invoice basic US English ates Emails Contact Name <primary emails<br="">Contact Name <primary emails<="" td=""><td>Carcel Select Email Addresses Select Carcel EMAIL Templates Minoice basic US English ates Emails Contact Name <primary email=""> Contact Name <secondary email=""></secondary></primary></td><td>Cancel Select Email Addresses EMAIL Templates Invoice basic US English ates Emails Contact Name <primary email=""> Contact Name <primary email=""> Corganization Name <primary email=""> C)</primary></primary></primary></td><td>US English US English Carcel Select Email Addresses EMAIL Templates Wroice basic US English US English Emails Contact Name «Primary Email» Contact Name «Primary</td><td>US English US English Solice Carcel Select Email Addresses Select Email A</td></primary></primary>	Carcel Select Email Addresses Select Carcel EMAIL Templates Minoice basic US English ates Emails Contact Name <primary email=""> Contact Name <secondary email=""></secondary></primary>	Cancel Select Email Addresses EMAIL Templates Invoice basic US English ates Emails Contact Name <primary email=""> Contact Name <primary email=""> Corganization Name <primary email=""> C)</primary></primary></primary>	US English US English Carcel Select Email Addresses EMAIL Templates Wroice basic US English US English Emails Contact Name «Primary Email» Contact Name «Primary	US English US English Solice Carcel Select Email Addresses Select Email A

Picture 5.2 Select Email IDs

5.2 Compose E-Mail

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

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

Compose E	mail			1	Administrator < >
To*:	2. (* tommy Alanlu () Add Cc Add Bcc	Contacts	•	۹	5. Attachment Choose file No file chosen Browse CRM
3. Subject*:	Holidays				
Send Sele	ect Email Template 4.				
Styles		₩ • • • • • • • • • • • • • • • • • •		® © ≣	
7.		JDDA 11		ļ	DAUS

Picture 5.3 Compose E-Mail window

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

5.2.1 Emails sent from

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

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

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

Compose Email			Administrator <my.other.ema< th=""><th></th></my.other.ema<>	
Invoice List: INV_1			Administrator <my.primary.em Administrator <my.other.email Administrator <my.secondary. vtiger <rastislav.outgoing.serve< th=""><th>@mycompany.com> email@mycompany.com></th></rastislav.outgoing.serve<></my.secondary. </my.other.email </my.primary.em 	@mycompany.com> email@mycompany.com>
My Preferences Viewing user details " Administrator"		Change Password E	Outgoing Server	
▼ User Login & Role			Mail Server Settings (SM Server Name	ssl://smtp.gmail.com:465
User Name admin		Admin Yes	User Name	ssi.//smp.gmail.com
	//	Status Active	Password	*****
Primary Email my.primary.email@myo		Name Administrator	From Email	rastislav.outgoing.server@its4you.sk
Default Lead View Today		Role CEO	Requires Authentication	Yes
Calendar Settings				
Currency and Number Field Configur	ation			
▼ More Information				
Title	Fax			
Department	Other Email my.oth	ner.email@mycompany.com		
Office Phone	Secondary Email my see	condary.email@mycompany.co		

Picture 5.4 Emails sent from selection

5.2.2 Recipients To, Cc, Bcc

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

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

	Compose E	mail	
Email select box	Invoice List:	INV to SO 2 duplikat 2 🔹 Contacts 💌 Q	 Contacts 🔺
(Optional)	To*:	×:	۹
	Cc:	x,	Vendors
	Remove		Leads
	recipients	its List of recipients	Organizations
Add recipients by start typing address		Add Bcc Add type of recipient	Contacts
			Users
its	/		Other
Users			'
Administrator (i @ <u>its</u> 4 you.sk)			
Standard User (`` @ <u>its</u> 4you.sk)			
L			

Picture 5.5 Actions related to recipients

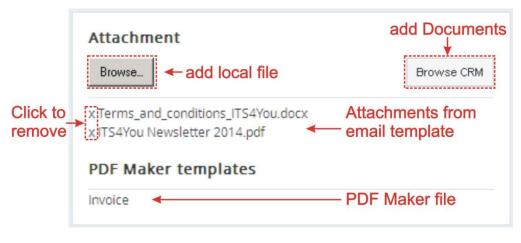
Please take into account that behavior of using To, Cc and Bcc differs in case of sending emails from ListView of the particular module in case more than one record was selected:

- For modules like Contacts, Organizations, Vendors, Leads ...
 - At least one recipient has to be defined as *To*
 - $\circ~$ In case you would like to send email also to Cc, Bcc recipient only for one selected record please use sending from DetailView of the module
- For modules like Invoices, Products, Purchase orders, Sales orders, Quotes ...
 - At least one recipient has to be defined as *To* for each selected record (INV_01, INV_02)
 - It is possible to define *Cc*, *Bcc* recipient for each particular *To*, it means *Cc*, *Bcc* recipients are better controlled

5.2.3 Attachments

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

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



Picture 5.6 Compose E-Mail – part Attachment

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

5.2.4 Select Email Template

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

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

Compose Er	mail				Administrator	
То	Häuslebauer <	teakboertyna	Contacts	v Q	Attachment Browse No file selected.	
	_					
Subje	ect*:		Selec	t Email Template		
Send				\$		
EMAI	LMaker - Mozilla Firefo	ж				1×1
EMAI	LMaker					1
Temp	olate name	Module	Subject	Description		-
Organ invoic	nization with list of es	Organizations	##DD.MM.YYYY##	invoices list within	last 90 days	
Xmas		Organizations	ITS4You invites you for Xmas party!	Invitation for Xmas	s party	-

Picture 5.7 Select Email Template

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

5.3 Email Campaigns

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

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

Email Campaigns functionality needs to correct working have implement workflow of Email Maker and correct setting of vtiger cron. More about standard vtiger cron you can read here: https://wiki.vtiger.com/index.php/Cron

To access to Email Campaign please click on Email Campaign:

Records List	•	Ac	tions ~	+ Add template	+ Add theme						+ -
Email Campaigns			Selec	t Template name		Module		Description		Status	Action
 Settings 		1		Orga Campaing		Organizations	5			Active	Edit Duplicate
► Tools		EMAIL Malker Professional 600.2.0 :: IT-Solutions-Prou									

Picture 5.8 Access to Email Campaign

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

+ New Email Campaign						1 to 1 < 🔁 🕨 🌽 🥣	
Email subject	List Name	Recipients	Emails	Unsubscribes	Start of	status	
Organisations	Organizations > All	3	2	0	24-09-2014 12:00 am	finished	
List of created Campaigns							

Picture 5.9 Email Campaigns

To create new Campaigns please provide following steps:

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

New Email Campaig	n				
1 Campaign Details	2 Recipients List	3 EMAIL Template	4 Additional Parameter	rs 5 Summary	
Email subject*	TestITS4You]		
From Name	ITS4You Administrator				
From Email*	its4you@its4you.sk]		
Email language	US English 🔻				
Description	Description				
				Back Next	Cancel

Picture 5.10 Create Campaign

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

https://wiki.vtiger.com/vtiger6/index.php/Creating_Custom_Filters

New Email Campaig	n			
1 Campaign Details	2 Recipients List 3 EMAIL	Template 4 Additional Parame	sters 5 Summary	
Module	Contacts 🔻		Organizations 🔺	
Filter	All	All	Contacts	
Column	Primary Email	All	Vendors Leads	
	Primary Email	Prospect Accounts New This Week	Organizations	
	Secondary Email	·		Back Next Cancel

Picture 5.11 Create Campaign

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

Back Next Cancel

Picture 5.12 Choose your template for Campaign

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

New Email Campaign	
1 Campaign Details 2 Recipients List 3 EMAIL Template 4 Additional Parameters 5 Summary	
Start of* 25-09-2014 🗰 12:00 am 🔹	
Limits (maximum count of sentemails per hour)	
	Back Next Cancel

Picture 5.13 Additional Parameters

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

New Email Campaign			
1 Campaign Details 2 Recipients List	3 EMAIL Template 4 Additional Parameters	5 Summary	
Properties			
Email subject	Email Campaign	List Name	Contacts > All
From Name	ITS4You	Number of recipients	7
From Email	info@its4you.sk	Column	Primary Email
Email language	US English	Start of	06-08-2016 12:00 am
Template name	testcontact	Limits (maximum count of sent emails per hour)	
Description		nd Example Email	×
		send to* insert mail to send	Cancel

Picture 5.14 Summary of Email Campaign/Preview/Send

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

estITS4YOU odule: Organizations > All					Edit Delete
				Campaign Deta	ail
Properties				Recipients List	
Email subject	TestIT54YOU	List Nan	Organizations > All		
From Name	ITS4You Administrator	Stat	IS Not started		
From Email	demo610@its4you.sk	Start	of 25-09-2014 12:00 am		
Template name	Orga Campaing	Limits (maximum count of sent email per hour)	5 10		
Description	Decsription				

Picture 5.15 Created Campaign

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

test campaign 1 Module: Contacts > All			
Properties			
Email subject	test campaign 1	List Name	Contacts > All
From Name	Admin Administrator	Column	Primary Email
From Email	®its4you.sk	Status	Finished
Email language	DE Deutsch	Start of	2015-03-10 12:00 am
Template name	Contact	Limits (maximum count of sent emails per hour)	0
Description			
Total entries in selected filter: 5000		Opened emails count	
sent emails	5000	Total opens	2000
Unsubscribes	0	Unique opens	1500

Picture 5.16 DetailView of Campaign

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

							Campaign Detail
						1 to 20 ⊀ 🗄 🕨	Recipients List
Recipient	Email	Subject	Date Sent	Time Sent	Status	Access Count	
Mar Da	creet holignations	test	30-05-2016	10:00 PM	SENT	1	
and the second	print machinal@issignu.dk	test	30-05-2016	10:00 PM	SENT	1	
the face	relation of the spin of the	test	30-05-2016	10:00 PM	SENT	1	
test Tester1	test1@its4you.sk	test	30-05-2016	10:00 PM	SENT		
test Tester2	test2@its4you.sk	test	30-05-2016	10:00 PM	SENT	1	
test Tester3	test3@its4you.sk	test	30-05-2016	10:00 PM	SENT	1	
test Tester4	test4@its4you.sk	test	30-05-2016	10:00 PM	SENT	1	
test Tester5	test5@its4you.sk	test	30-05-2016	10:00 PM	SENT	1	
test Tester6	test6@its4you.sk	test	30-05-2016	10:00 PM	SENT	1	
test Tester7	test7@its4you.sk	test	30-05-2016	10:00 PM	SENT	1	

Picture 5.17 Recipients List

6 Additional features

6.1 Export and import templates

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

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

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

Actions •	+ Add template	+ Add theme	
	import export Sales order	Opening export.xml You have chosen to open: export.xml which is: XML Document from: http:// cwhat should Erefox do with this file?	×
_ 1.	Invoice monthly 2 Autumn campaign	C gpen with XML Editor (default)	
	Contact - initiate mail	\Box Do this <u>a</u> utomatically for files like this from now on.	
6 🗖	Organization with list of in	Cancel	

Picture 6.1 Export of the templates

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

File Location :	To start import, browse to locate the XML file and click on the Next button to Continue. Browse 2014_05_email_templates.xml	
-----------------	--	--

Picture 6.2 Import EMAIL templates page

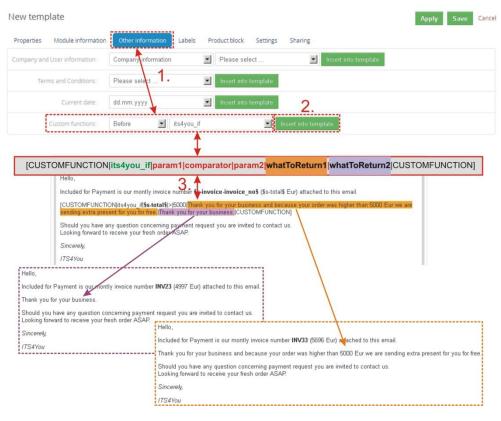
In the Import pdf templates page, browse the EMAIL Maker template-related data in *.xml format and then click the Next button. It will take a few seconds to complete the import. The imported templates can be found in the EMAIL Maker ListView page.

6.2 Custom functions

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

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

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



Picture 6.3 Custom functions

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

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

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

Name	Description
its4you_if	[CUSTOMFUNCTION its4you_if param1 comparator param2 whatToReturn1 whatToReturn2 CUSTOMFUNCTION]
	This function executes if-else statement based on given parameters: param1 first parameter of comparison
	comparator comparison sign - one of ==,!=,<,>,<=,>= param2 second parameter of comparison
	whatToReturn1 value returned when comparison succeeded
	whatToReturn2 value returned when comparison didn't succeed
its4you_getTemplateId	[CUSTOMFUNCTION its4you_getTemplateId CUSTOMFUNCTION]
	This function returns id of current template.
its4you_getContactImage	[CUSTOMFUNCTION its4you_getContactImage id width height CUSTOMFUNCTION]
	Please note that function has to be executed after sending email. So please use notation CUSTOMFUNCTION_AFTER
	This function returns image of contact.
	id – as parameter use \$s-contacts-crmid\$
	width - width of returned image (10%, 100px) height - height of returned image (10%, 100px)
its4you sum	[CUSTOMFUNCTION its4you sum arg1 arg2 CUSTOMFUNCTION]
, _	This function returns sum of input values: arg1+arg2++argN. Function is inserted with two
	arguments by default but you can edit it and add more arguments.
its4you_deduct	[CUSTOMFUNCTION its4you_deduct arg1 arg2 CUSTOMFUNCTION]
	This function returns deducted value arg1-arg2argN (all following values are deducted from the first one). Function is inserted with two arguments by default but you can edit it and add more arguments.
its4you_multiplication	[CUSTOMFUNCTION its4you_multiplication arg1 arg2 CUSTOMFUNCTION]
	This function returns multiplication of all input values: arg1*arg2**argN. Function is inserted with two arguments by default but you can edit it and add more arguments.
its4you_divide	[CUSTOMFUNCTION its4you_divide arg1 arg2 CUSTOMFUNCTION]
	This function returns divided value arg1/arg2//argN. Function is inserted with two arguments by default but you can edit it and add more arguments.
its4you_formatNumberToPDF	[CUSTOMFUNCTION its4you_formatNumberToPDF value CUSTOMFUNCTION]
	This function returns formatted value and is used by other functions. value – int
its4you_formatNumberFromPDF	[CUSTOMFUNCTION its4you_formatNumberFromPDF value CUSTOMFUNCTION]
	This function returns converted value into integer and is used by other functions.
	value - int

Table 6-1 its4you functions

6.2.1 "AFTER" custom functions

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

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

Custom functions:	After 💽	Please select	Insert into template
	Before		
	After		

Picture 6.4 Custom function groups

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

Important note: Always use CUSTOFUNCTION_AFTER for fields "Recipient variables (To)".

F	Recipient variables (To):	Contacts	•	Mailing Co	ountry	•		
ſ	Example: Mailing Country is	\$contacts-mailingcou	intry\$.				EM	AIL Template
	[CUSTOMFUNCTION its4you_if	\$contacts-mailingco	untry\$ ==	Slovakia Call us: +	42151123456 Ple	ase contact us via	email. CUSTOMF	JNCTION]
1	[CUSTOMFUNCTION_AFTER]it	ts4you_if \$contacts-m	ailingcour	ntry\$ == Slovakia C	all us: +42151123	3456 Please conta	ct us via email. CU	STOMFUNCTION_AFTER]
X	Example: Mailing Country is	\$contacts-mailingcou	intry\$.			(Compose	E-Mail view
	Please contact us via email.							
	[CUSTOMFUNCTION_AFTER]it	ts4you_if \$contacts-m	ailingcour	ntry\$ == Slovakia C	all us: +42151123	3456 Please conta	ct us via email. CU	STOMFUNCTION_AFTER]
K	Example: Mailing Count	ry is Slovakia.					Fin	al sent email
	Please contact us via ema	il.						
	Call us: +42151123456							

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

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

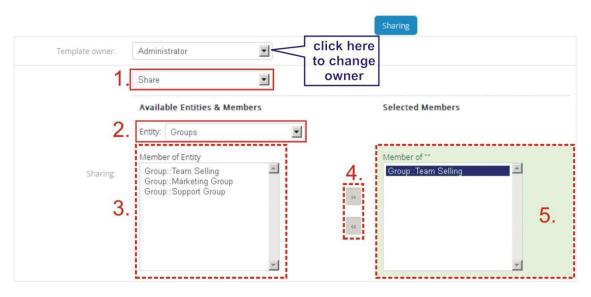
	Related modules:	Contacts	•	Mailing Country		•	
	Example: Mailing Count						EMAIL Template
/							Please contact us via email.[CUSTOMFUNCTION] 1123456[Please contact us via email.[CUSTOMFUNCTION_AFTER]
X	Example: Mailing Count		id-contact	ta maningeodnit yap-polo	variajoan do.	14215	Compose E-Mail view
	Call us: +42151123456	,					Compose E-Mail New
1	[CUSTOMFUNCTION_AF	rER its4you_if Slovakia	== Slovaki	ia Call us: +42151123456	Please conta	ct us vi	a email.[CUSTOMFUNCTION_AFTER]
K	Example: Mailing Co	ountry is Slovakia.					Final sent email
()	Call us: +4215112345	-					
	Call us: +4215112345	56					

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

6.3 Sharing

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

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



Picture 6.7 Sharing

6.4 Support of the PDF Maker

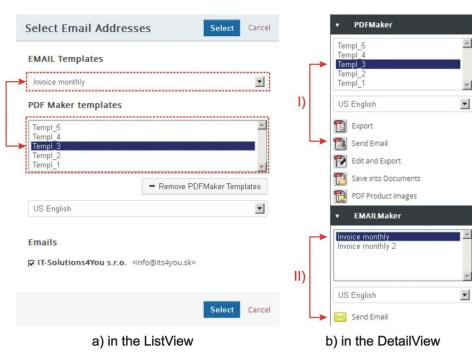
The PDF Maker extension tool designed for vtiger CRM powerful and flexible tool which allows users of vtiger CRM to create own pdf templates. The PDF Maker and EMAIL Maker are supported each other. It means that:

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

PDF file by Browse_ (see chapter 5.2.3).

For details about PDF Maker tool please refer to

http://www.its4you.sk/images/pdf_maker/pdf_maker_for_vtiger6_crm.pdf.



Picture 6.8 Support of the PDF Maker

6.5 Support of Workflow

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

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

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

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

To create Workflow for EMAIL Maker please provide following steps:

• Go to the CRM Settings -> Workflows

🕱 Calendar Leads Organizations	tacts Opportunities Products Documents Tickets Cashflow4You	Credit Notes 4 You Preinvoice PDF Maker EMAIL Maker All -	🖌 🕖 🔯 ITS4You -
⊚vtiger•	All Records	1	1. CRM Settings +
Settings	Summary		Manage Users
 User & Access Control 			
▶ Studio	2	21	41
 Templates 	Users	Workflows	Modules
 Other Settings 			
 Integration 	Settings Shortcuts		
Extension Store	Users Manage users who can access vtiger CRM	Module Manager Picklist Editor Manage module behavior inside vitger CRM Customize Picklist values in each mo	dule
	Create and edit workflows		

Picture 6.9 Create Workflow

Click on
 How Workflow
 button

Vorkflows		Last scanned at 24-09-2014 4:15:02pm& time taken :0sec
+ New Workflow	All	1 to 20 🗯 < 🔁 🕨
Summary	Module	Execution Condition
UpdateInventoryProducts On Every Save	Invoice	Every time the record is saved
Send Email to user when Notifyowner is True	Organizations	Until the first time the condition is true
Send Email to user when Notifyowner is True	Contacts	Until the first time the condition is true
Send Email to user when Portal User is True	Contacts	Until the first time the condition is true
Send Email to users on Potential creation	Opportunities	Only on the first save
Workflow for Contact Creation or Modification	Contacts	Every time the record is saved
Ticket Creation From Portal : Send Email to Record Owner and Contact	Tickets	Only on the first save
Send Email to Contact on Ticket Update	Tickets	Every time the record is saved

Picture 6.10 Add new Workflow

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

2 Add Conditions 3 Add Task	ks		
ils of the Workflow			
Opportunities 🔹	Opportunities		
Description	Quotes		
Only on the first save	Purchase Order		
Outil the first time the condition is true	Sales Order		
Every time the record is saved	Campaigns PBXManager		
Every time a record is modified	Services		
Schedule		1	
	ils of the Workflow Opportunities Description Only on the first save Only on the first time the condition is true Every time the record is saved Every time a record is modified	Is of the Workflow Opportunities Opportunities Opportunities Outors Purchase order Sales Order Until the first time the condition is true Every time the record is saved Every time a record is modified	is of the Workflow Opportunities Opportunities Opportunities Outors Outors Undit the first save Every time the record is saved Every time a record is modified

Picture 6.11 First step to set Workflow

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

Creating WorkFlow	
1 Schedule Workflow 2 Add Conditions 3 Add Tasks	
Choose filter conditions	
All Conditions (All conditions must be met)	
Add Condition	
Any Conditions (At least one of the conditions must be met)	
Add Condition	
	Back Next Cancel

Picture 6.12 Set conditions of Workflow

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

Creating WorkFlow	
1 Schedule Workflow 2 Add	Conditions 3 Add Tasks
Add To Do 🔻	
Send Mail	Task Title
Invoke Custom Function	
Create Todo	
Create Event	No Task
Update Fields	1012
Create Entity	
SMS Task	
Send Email with PDF Maker attachments	Back Finish
Save Document from PDF Maker	
Send Email from EMAIL Maker	

Picture 6.13 Add To Do

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

Add Task f	or Workflow -> Send Email from EMAIL Ma	ker	×
Task Title*	Send Email from Email Maker	Status 💿 Active 🔘 In Active	
Email det	ails Email content		_
From	\$(general : (VtigerMeta) supportName)<\$(general : ('	Helpdesk Support Email-Id 🔹	
To*	,\$email1	Primary Email	
	Add Cc Add Bcc		
		Save	ncel

Picture 6.14 Add Task for Workflow

Choose your template for chosen module and click on
 Save button

Add Task for W	orkflow -> Send Email from EMAIL Maker	×
Task Title*	Send Email from Email Maker Status Active In Active	
Execute Task		
Email details	Email content	
EMAIL Template Email language	Orga Campaing US English Image: A start of the start	
	Save	ancel

Picture 6.15 Choose your Template

Finally, please click on
 Finish
 button to finalize your Workflow

Creating WorkFlow

 1 Schedule Workflow
 2 Add Conditions
 3 Add Teaks

 Add To Do

 finish
 Send Email from EMAIL Maker
 Send Email from EMAIL Maker

 finish



• Here is your Workflow located

Workflows		Last scanned at 24-09-2014 4:30:03pm& time taken :0sec
+ New Workflow	All	21 to 24 🖸 🔇 🖉 🕨
Summary	Module	Execution Condition
Send Email to Organization on Ticket Update	Tickets	Every time the record is saved
Ticket Creation From CRM : Send Email to Organization	Tickets	Only on the first save
Ticket Creation From CRM : Send Email to Contact	Tickets	Only on the first save
Description	Organizations	Only on the first save 💉 🕯

Picture 6.17 Location of your Workflow

6.6 Birthday Email cron

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

Action	ns –	+ Add template + Add theme				4 -
# S	Select	Template name	Module	Description	Status	Action
		Accounts	Organizations	Showing description after mouseover	Active	Edit Duplicate
		Product	Products		Active	Edit Duplicate
		BIRTHDAY_EMAIL_CRON	Contacts		Active	Edit Duplicate
		paypal	Invoice		Active	Edit Duplicate
		org tickets	Organizations		Active	Edit Duplicate
	1	unsubscribe	Contacts		Active	Edit Duplicate

Picture 6.18 BIRTHDAY_EMAIL_CRON template

🛇 vtiger [.]		All Records • Type	keyword and press enter Q Advanc	ed			1.
Settings		Scheduler					
 User & Access Control 							
		Sequence	Cron Job	Frequency(H:M)	Status	Last scan started	Last scan ended
Studio		1.1	Workflow	00:15	Active	3 months	3 months
Templates		2	RecurringInvoice	12:00	Active	3 months	3 months
		3	SendReminder	00:15	Active	3 months	3 months
Other Settings	2.	5	MailScanner	00:15	Active	3 months	3 months
nnouncement		6	Scheduled Import	00:15	In Active		
lutgoing Server		7	ScheduleReports	00:15	Active	3 months	3 months
enventory: Terms and Conditions		8	ITS4YouCalculateFields	00:15	Active	3 months	3 months
urrencies		9	 EMAILMaker - Birthday email 	24:00	In Active		
ustomize Record Numbering		10	EMAILMaker - Send emails	00:15	Active		
ax Calculations							
Aail Converter			EMAIL	Maker - Birthday email	X	1	
/orkflows				Status Active	▼ 5.		
Configuration Editor							
icheduler	3.			Frequency 24	hours *		
lebforms			Sand or	mail template with pame "PIRTUDAY	EMAIL_CRON* to all contacts having birthday.		
ustomer Portal			Jender	inan compare mer name bis more,	contracts name and the second s		
alculate Fields							
					6 Save Cancel		

Picture 6.19 Activate Birthday Email cron

7 Settings

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

- Profiles manage user-specific Email Maker access to different roles
- <u>Self-defined labels</u> manage your own labels
- <u>Product block templates</u> manage your own product block templates
- License settings manage all settings related to your license
- Extensions extensions for EMAIL Maker
- <u>Uninstall Email Maker</u> remove EMAIL Maker completely from your vtiger

Records List	
Email Campaigns	
 Settings 	
Profiles	
Self-defined labels	
Product block templates	
License settings	
Extensions	
Uninstall EMAIL Maker	

Picture 7.1 EMAIL Maker settings

7.1 Manage profiles

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

Records List	Profiles			
Settings	Manage user-specific EMAIL Maker access to diffe	rent Roles.		-
Profiles				ſ
Product block temp	Define EMAIL Maker privilegies for all pro	ofiles:		/
icense settings mail buttons	Profiles	Create/Edit	View	Delete
	Administrator	1	~	f
	Sales Profile	~	~	-
	Support Profile	~	~	-
Records List	Guest Profile Profiles	*	~	1
Records List			*	
Settings	Profiles Manage user-specific EMAIL Maker access to differ	ent Roles.	~	
Settings Profiles Product block temp	Profiles	ent Roles.		
Settings Profiles Product block temp Jicense settings	Profiles Manage user-specific EMAIL Maker access to differ	ent Roles.	View	Delete
	Profiles Manage user-specific EMAIL Maker access to differ Define EMAIL Maker privilegies for all pro	ent Roles. files:		
Settings Profiles Product block temp Jcense settings	Profiles Manage user-specific EMAIL Maker access to differ Define EMAIL Maker privilegies for all pro Profiles	ent Roles. files: Create/Edit	View	Delete
Settings Profiles Product block temp Jicense settings	Profiles Manage user-specific EMAIL Maker access to differ Define EMAIL Maker privilegies for all pro Profiles Administrator	rent Roles. files: Create/Edit Ø	View F	Delete

Picture 7.2 Manage profiles

7.2 Self-defined labels

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

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

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

	pels available for all users:						<u>1.</u>	
Delete Labe	l key	Current langu	age value (US English)			Other languages va	Add C	anc
	eeting_1	Kind regards				Other values 3		
Delete				<u> </u>		+	Add C	and
	Add new custom label (US	English)	×	C_greeting_1		×		
	Label key C_ greetin	<u>_1</u>		ES Mexico	Enter custom label value			
	Label value Kind rega	rds	2.	Swedish	Enter custom label value	4.		
		Save	Cancel		\geq			
			-	DE Deutsch	mit freundlichen Grüßen			
				SK Slovenčina	Enter custom label value			

7.3 How to define self-defined labels

7.3 Product block templates

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

roduct block templates anage your own product block templates								
fine own product block template	s available for all use	3.						+ Add C
Template name	Body							
	Pos	%G_Qty%	Text	%G_LBL_LIST_PRICE%	%G_Subtotal%	%G_Discount%		
	#PRODUCTBLOC_STAR	WT						
	\$PRODUCTPOSITIONS	SPRODUCTQUANTITYS SPRODUCTUSAGEUNI	s sproductnames	#PRODUCTLISTPRICE#	\$PRODUCTTOTAL\$	\$PRODUCTDISCOUNT\$	#PRODUC	
	#PRODUCTBLOC_END#							
	%G_LBL_NET_PRICE%	vithout TAX						
	NG_DiscountN							
Product block for group tax	Total without TAX							Dupli
	%G_Tax% \$VATPERCEN	T# % %G_LBL_LIST_OF% #TOTALAFTERDISCOUNT#						
	Total with TAX							
	%G_LBL_SHIPPING_AM	D_HANDLING_CHARGES%						
	%G_LBL_TAX_FOR_SHI	PPING_AND_HANDLING%						
	%G_Adjustment%							
	%G_LBL_GRAND_T	OTAL% (SCURRENCYCODES)						

Picture 7.4 Product block templates management

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

- 1. Define product block template name.
- 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.

New template					4	Save	Cance
Properties Labels							
*Template name: 1	My own product block for inv	roice					
Product block: 2	Block end	•	Insert into template				
*Common fields for Products & Services:	Product No/Service No	•	Insert into template				
*Available fields for Products:	Product Mame	•	Insert into te 3plate				
*Available fields for Services:	Septice Name	•	Insert into template				
* fields are placed into Product block. Proc	uce block will be shown for every p	roduct/s	ervice in PDF.				
💿 Source 🔏 🗅 🖺 🗵) C / 1 1 1 1 1 1	99 DIV	M R4 98 98	= 🥹 🤇	2 ⊨ ?		
Styles - Format - Font	- Size - B I L	1 -	X ₂ X ² 🔤 📰		9 II- II	- 20 - 20	
¥	3.						
#PRODUCTBLOC START#							
#PRODUCTBLOC_END#							

4. Click on Save button.



7.4 License settings

7.4.1 Deactivate license

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

1. Click on Deactivate license button

Manage your EMAIL Maker License Key:	
EMAIL Maker License	
Your vtiger url:	
License Key:	Reactivate license Deactivate license

Picture 7.6 Deactivate Email Maker

2. Confirm deactivation using Yes button

Do you really want to deactivate your license key?	
	No Yes

Picture 7.7 Deactivate Email Maker

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

ñ	PDF Maker	EMAIL Maker	Cashflow 4 You	u Pre	einvoice	Credit	Notes 4 You	Descriptions 4 Y	ou Calenda	r Leads	Organizations	Contacts	Opportunities	Products	Documents	Tickets	All -	/ 0	•	Administrator	
	Solutions4You			All F	Records	5	▼ Type key	/word and press e	nter	٩	Advanced										ŀ
	Records List	:		<	Act	ions –				In	n order to use yo	ur EMAILMa	iker properly, yo	u need to (re	e)activate your	license.				¥ -	
	Settings				#	Select	Template	name			Mc	dule				Descr	ription				
Р	rofiles				1		Holidays				Cor	ntacts									
Р	roduct block temp	lates			2		Orga				Org	anizations									
U	cense settings												EMAIL Mak	er Deactivate	600.6.0 :: IT-Sol	utions4You	1				
E	ktensions																				
U	pgrade EMAILMak	er																			
U	ninstall EMAIL Mal	ker																			
•	Tools																				

Picture 7.8 Deactivated Email Maker

EMAIL Maker License	Manage your EMAIL Maker License Key:		
Your vriger url	EMAIL Maker License		
Tour viger un.		Your vtiger url:	the field of the second second
License Key: Activate		License Key:	Activate

Picture 7.9 Activate Email Maker

7.4.2 Reactivate license

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

1. Click on Reactivate licen	se			
Manage your EMAIL Maker License Key:				
EMAIL Maker License				
	Your vtiger url:			
	License Key:	Reactivate license	Deactivate license	
2. Confirm with Save	Picture 7.10 Ki	eactivate license		
	Reactivate license		×	
	License Key			
		Save	Cancel	

Picture 7.11 Reactivate license

7.5 Extensions

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

🐔 PDF Maker Calendar Leads Organi	zatoris Contacts Opportunities Quotes Tickets SalesOrder Cashflow4You Credit Notes 4 You Preinvolce EMAIL Maker All -	🖌 🗿 🗔 ПS4You -
🐵 vtiger	All Records Type keyword and press enter Advanced Advanced	+
Records List	€ Extensions	
Email Campaigns	Available extensions for the EMAIL Maker:	
✓ Settings	Workflow	
Profiles Self-defined labels	Allows you send email by using the EMAIL Maker within the Workflow settings.	
Product block templates License settings	Workflows are already installed.	
Extensions Uninstall EMAIL Maker	Unsubscribe email	Download
	For some kind of the email templates (campaign, advertising) You can insert into your email template "Unsubscribe from emails" link. This link allows recipient to unsubscribe himself from receiving such multiple emails just by one click. Show Instructions	

7.5.1 Workflow

Allows you send email by using EMAIL Maker within the Workflow settings. For more info please check chapter <u>Support of Workflow</u>.

7.5.2 Unsubscribe email

Workflow	
Allows you send email by using the EMAIL Maker within the Workflow settings.	
Workflows are already installed.	
Unsubscribe email	Download
For some kind of the email templates (campaign, advertising) You can insert into your email template "Unsubscribe from emails" link. This link allows recipient to unsubscribe himself from receiving such multiple emails just by one click.	



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

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

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

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

← → C 🗋 demo610.vtigercrm.sk index.php?r	module=Users&vi	ew=PreferenceD	etail&reco	ord=5				
😚 PDF Maker Calendar Leads Organiza	tions Contacts	Opportunities	Quotes	Tickets	Sales Order	Cashflow4You	Credit Notes 4 You	All
	ds • Type	e keyword and pres	s enter	٩	Advanced			
🔻 User Login & Role								
User Name	standarduser					Primary Email	standarduser@its4you.	sk
First Name						Last Name	standarduser	
Admin	No					Role	CEO	
Default Lead View	Today					Status	Active	
User Advanced Options			_					
Access Key	Vf8QbMYKU6tlcwC							
<pre>14 \$server path = 'http://demo610.vt; 15 \$user name = 'standarduser';</pre>	igercrm.sk';		Cor	ntent	of			
16 Juser ccess key = Vf80bMYKU6EIcw	ery 두	Uns	ubscr	ibeE	mail.ph	р		
76 if (Supdate) 77 echo<"Your email address has 1				s are wr	ong.";			
<pre>81 echo "";</pre>								

Picture 7.13 Edit of UnsubscribeEmail.php

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

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

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

		EditVie	14/
We would like to inform you about		Editvie	vv
If you don't want to receive emails, pl	ease click on below link.		
[CUSTOMFUNCTION_AFTER]its4yo Unsubscribe email[CUSTOMFUNCT	u_unsubscribeemail \$accounts-crmid\$ \$contacts-crmi ION_AFTER]	d\$ http://demoweb.vtigercrm.sk/UnsubscribeEmail.ph	pl
Best regards			i
IT-Solutions 4 You s.r.o.			
Hello,	Received		
We would like to inform you	about Email		
If you don't want to receive o	emails, please click on below link.		
Unsubscribe email			
Best regards	< 0 · · · · · · · · · · · · · · · · · ·	UnsubscribeEmail.php?u=863&c=1bf45d	
		Webnade	
IT-Solutions 4 You s ro		Webpage	
IT-Solutions 4 You s.r.o.	Your email :	address has been unsubscribed.	
IT-Solutions 4 You s.r.o.	Your email :		
IT-Solutions 4 You s.r.o.	I		
IT-Solutions 4 You s.r.o.	Contact Information		
IT-Solutions 4 You s.r.o.	Contact Information	address has been unsubscribed.	
IT-Solutions 4 You s.r.o.	Contact Information	address has been unsubscribed.	
IT-Solutions 4 You s.r.o.	Contact Information First Name Last Name	address has been unsubscribed.	
IT-Solutions 4 You s.r.o.	Contact Information First Name Last Name Organization Name	nddress has been unsubscribed.	
IT-Solutions 4 You s.r.o.	Contact Information First Name Last Name Corpanization Name Lead Source Lead Source	nddress has been unsubscribed.	
IT-Solutions 4 You s.r.o.	Centact Information First Name Cryanization Name Lead Study Title Title Company Comp	nddress has been unsubscribed.	
IT-Solutions 4 You s.r.o.		nddress has been unsubscribed.	
IT-Solutions 4 You s.r.o.	Contact Information First Name Last Name Organization Name Lead Source Tile Department Email	nddress has been unsubscribed.	
IT-Solutions 4 You s.r.o.		nddress has been unsubscribed.	

Picture 7.14 Process of unsubscribing from emails

7.5.3 Styles4You

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

To install Styles4You please provide following steps:

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

🗟 Calendar Leads Organizations	Contacts Opportunities Products Documents Tolents EMAI, Malker All -	🖌 🥑 🤤 vtiger650
🕲 vtiger	All Records Type keyword and press enter Q Advanced	•
Records List	< Extensions	
Email Campaigns	Available extensions for the EMAIL Maker:	
* Settings		
Profiles	Workflow	
Self-defined labels	Allows you send email by using the EMAIL Maker within the Workflow settings.	
Product block templates		
License settings Extensions	Unsubscribe email	Download
Upgrade EMAILMaker	For some kind of the email templates (campaign, advertising) You can insert into your email template "Unsubscribe from emails" link. This link allows recipient to unsubscribe himself from receiving such multiple emails just by one click.	
Uninstall EMAIL Maker	Show Instructions	
	Styles 4 You	3. Download
	This extension allows you to manage your style in one place and then use it for template(s) that you want.	
	To install this extensions please use download button on right side and then install it by using install button or Va module manager.	

Picture 7.15 How to install Styles4You

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

vtiger	All Res	cords	* T	ype keyword and press enter	Q Advano	ed						
Records List	<	Actions	- +	Add template + Add the	me							1-
Email Campaigns		# Sele	ct Templa	ate name	Module	Category	Description	Sharing	Template owner	Workflow	Status	Action
					Select an Op *			Select a *	Select an Option	Select a *	Select a *	Search
Styles		1 🗉	Teststyl	les	Invoice			Public	vtiger650 Administrator	No	Active	Edit Duplica
Settings							EMAIL Maker Professional 600.15.2 :: IT-					
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f-defined labels												
duct block templates												
ense settings												
ense settings ensions grade EMAILMaker												

Picture 7.16 Styles4You

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

🕅 Calendar Leads Organization	is Contacts	Opportunitie	is Products Documents Tickets All -							/ 0	🕸 vtiger650
🛇 vtiger [.]	A	II Records	Type keyword and press enter	Q Advanced							-
Records List	•	Actions ~	+ Add Record		₩ All Styles 4 You			*		< -) > <i>F</i> -
 Recently Modified 		A	B C D E F	G H I	J K I	L M N	O P	QR	S T U	V W X	Y Z
			Name	Created Time		Modified	Time		Assigned To		
										Sea	ch
					Ν	lo Style found. Crea	te Style				

Picture 7.17 How to add new style

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

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2 color regis 3 text-decardion nong 4 2 6 body (7 position particular; 9 signa 2.5mg 9 signa 2.5mg 10 color signa 2.5mg 11 color signa 2.5mg 12 color signa 2.5mg 13 color signa 2.5mg 14 color signa 2.5mg 15 color signa 2.5mg 16 color signa 2.5mg 17 color signa 2.5mg 18 color signa 2.5mg 19 color signa 2.5mg 10 color signa 2.5mg 11 color signa 2.5mg 12 color signa 2.5mg 13 color signa 2.5mg 14 color signa 2.5mg 15
System information * Angreed To * Angreed To * Angreed To * Angreed To
* Assigned To vtger650 Administrator *

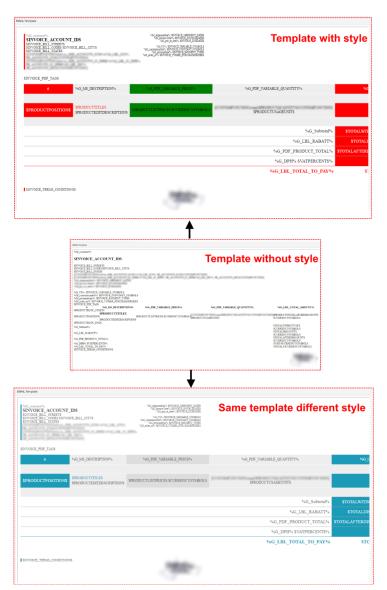
Picture 7.18 How to create Style4You

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

acts Opportunities Products Documents Tickets EMAIL Malker All -	🛍 🍖 🖌 🛈 🗘 vtiger650 -
All Records v Type keyword and press enter Q Advanced	+
Teststyles Module Imore	Edit Duplicate Delete
	Properties
+ Add Style Select Style	Documents Email Campaigns
Name Priority Assigned To	Email Workflows
	Styles
<text><text><text></text></text></text>	
	A Beccel Type hyverd and prove entry A Advecel Image: States Style Image: States Style Image: States Style Image: None Pricture 7.19 How to add style to template Style button to select style or Image: Add Style Styles You-Google Chome Styles You-Google Chome Image: Styles You Image: Styles You-Google Chome Image: Styles You Image: Styles You Styles You-Google Chome Image: Styles You Image: Styles You

Picture 7.20 Select styles

Now, your style has been added to your template.



Picture 7.21 Styles4You

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

Edit "Teststyles"					Apply Sav	e Cancel
Properties Module information Other inform	ation Labels Product block Settin	gs Sharing Display conditions				
*Template name:	Teststyles	escription:				
Recipient variables (To):	Please select	* Select	*	Insert into template		
Email subject:			Select	w.		
Body CSS Style						
style2-red						=/
<pre>1 #Gent-race { 2 #Gent-race { 3 #Gent-race { 3</pre>						



7.6 Uninstall

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

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

>vtiger	All Records	s Tickets Sales Order Cashflow4You Credit Not and press enter Q Advanced	tes 4 You Preinvoice EMAIL Maker All -		2 O Q n
Records List	Actions - + Add template	+ Add theme			<i>F</i> -
Email Campaigns	# Select Template name	Module	Description		Edit Fields Edit Picklist Values
Settings	1 🔲 Orga Campaing	Organizations			e Profiles
ofiles	2 Ausstellerunterlager				e Self-defined labels
if-defined labels	3 test	Organizations			Product block templates
oduct block templates	4 Invoice	Invoice	test		License settings
ense settings	5 invoice silmple listvi 6 organization	ew block Invoice Organizations			Extensions
tensions	o E organization	O Builtarious			Uninstall EMAIL Maker
ninstall EMAIL Maker			EMAIL Maker Professional 600.4.0 :: IT-Solutions4You		
Tools					
		7.23 Uninstall	EMAIL Maker – step 1		
	Ininstall EMAIL Mak	or the second			
 Click on 	innstan LMAIL Mak	er button			
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• Confirm ur	vTi	ger.: hinstall EMAIL Maker Uninstall EMAIL M 7.24 Uninstall	r laker		
• Confirm ur	vTi	ger.: hinstall EMAIL Maker Uninstall EMAIL M 7.24 Uninstall	r laker		
• Confirm ur	vTi	ger.: hinstall EMAIL Maker Uninstall EMAIL M 7.24 Uninstall	r laker		
• Confirm ur	vTi	ger.: hinstall EMAIL Maker Uninstall EMAIL M 7.24 Uninstall ^{(es} button	r faker EMAIL Maker – step 2		
• Confirm ur	vTi Ur Install with	ger.: hinstall EMAIL Maker Uninstall EMAIL M 7.24 Uninstall ^{(es} button	r laker		
• Confirm ur	vTi	ger.: hinstall EMAIL Maker Uninstall EMAIL M 7.24 Uninstall ^{(es} button	r faker EMAIL Maker – step 2		

7.25 Uninstall EMAIL Maker – step 3

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

Change log of Email Maker

October 2016:600.15.0 - 600.15.2

- <u>Styles4You</u>
- new variable "Modified by User", "Created by User" available (Other information)
- minor improvements and bug fixes

July 2016: 600.14.0 - 600.14.1

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

June 2016: 600.12.0 – 600.13.0

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

April 2016: 600.11.3

• "Select all records" issue fixed

April 2016: 600.11.0 - 600.11.2

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

October – December 2015: 600.10.1 – 600.10.4

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

August 2015: 600.10.0

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

July 2015: 600.9.0

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

June 2015: 600.8.0

• compatibility with Vtiger 6.3

May 2015: 600.7.0

- bug fixes
- Unsubscribe email available for Leads

April 2015: 600.6.4 – 600.6.6

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

20th March 2015: 600.6.0

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

19th December 2014: **600.5.1**

• upgrade option

December 2014: 600.5.0

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

October 2014: 600.4.0

- Unsubscribe function (chapter Unsubscribe email)
- Bug fixes

November 2014: 600.3.0

• available option to Uninstall EMAIL Maker (chapter Uninstall)

30th September 2014: **600.2.0**

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

6th June 2014: **600.1.11**

• minor improvements and bug fixes

April - June 2014: 600.1.2 - 600.1.10

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

22th April 2014: **600.1.0**

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

Change log of Manual for Email Maker

November 2016: manual based on EMAIL Maker version 600.15.2

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

June 2016: manual based on EMAIL Maker version 600.13.0

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

April 2016: manual based on EMAIL Maker version 600.11.2

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

August 2015: manual based on EMAIL Maker version 600.10.0

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

20th March 2015:

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

19th December 2014: manual based on EMAIL Maker version 600.5.1

• updated chapter: How to upgrade EMAIL Maker

November 2014: manual based on EMAIL Maker version 600.4.0

• new chapters: 7.2 Self-defined labels, 7.5 Extensions, 7.6 Uninstall

30th September 2014: **600.2.0**

• new chapters: What's new? <u>5.3 Email Campaigns</u>, <u>6.5 Support of Workflow</u>

18th June 2014: based on **600.1.11**

• first initiate version for vtiger 6