



EMAIL MAKER FOR VTIGER CRM

Introduction

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

The Email Maker benefits are:

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

What's new?

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

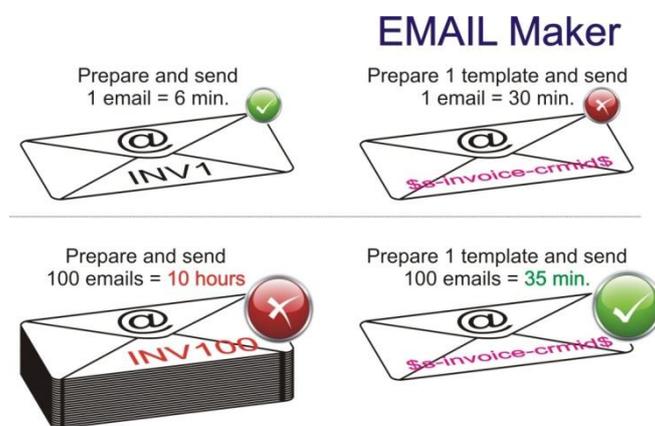
- using ListView blocks in templates (see chapter 4.6)
- new "after" custom functions (see chapter 6.2.1)
- direct sending emails from module Campaigns (see chapter 5.3)

Who needs EMAIL Maker?

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

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

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



Content

Introduction.....	1
What's new?.....	1
Who needs EMAIL Maker?	2
License agreement	5
Terms and conditions	5
Private policy	5
1 How to install EMAIL Maker	6
2 How to start EMAIL Maker	9
3 Work area	10
3.1 ListView.....	10
3.2 DetailView	11
3.3 EditView.....	12
3.3.1 Properties	13
3.3.2 Other information	13
3.3.3 Product block.....	14
3.3.4 Settings	14
3.3.5 Sharing.....	15
3.4 Email Maker block	16
4 Editing email templates.....	17
4.1 Create new email template	17
4.2 Inserting images	19
4.3 Creating tables.....	20
4.4 Using a product blocks	21
4.4.1 Insert and edit product block template.....	21
4.4.2 Create new product block	23
4.5 Using related blocks	24
4.5.1 Create and insert related block	24
4.5.2 Insert related block.....	27
4.6 Using ListView block	28
4.7 Attach documents into templates.....	29
5 Sending emails.....	30
5.1 Select Email IDs.....	31

5.2	Compose E-Mail.....	32
5.2.1	Recipients To, CC, BCC.....	33
5.2.2	Attachments	35
5.2.3	Show variables.....	35
5.2.4	Select Email Template	36
5.3	Sending emails within module campaigns	37
6	Additional features	38
6.1	Export and import templates	38
6.2	Custom functions.....	39
6.2.1	“AFTER” custom functions.....	41
6.3	Sharing.....	42
6.4	Unsubscribe from emails.....	43
6.5	Support of the PDF Maker.....	45
7	Settings	46
7.1	Email buttons.....	47
7.2	Manage profiles.....	47
7.3	Templates in block.....	48
7.4	Deactivate/Reactivate license key.....	49
7.5	Upgrade of the EMAIL Maker	50
8	Tips & tricks	51
8.1	How to disable Send Mail buttons/links.....	51
8.2	How to use already created template for another module	52
9	FAQs.....	53

License agreement

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

Terms and conditions

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

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

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

Private policy

During installation it is necessary to exchange following information:

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

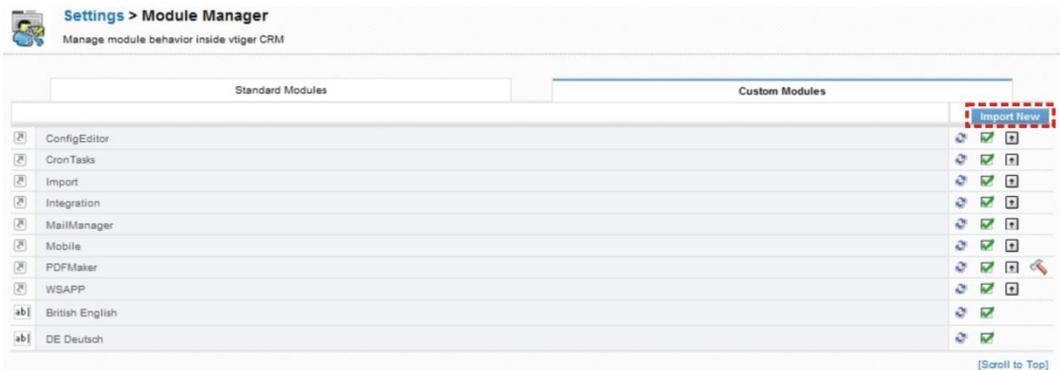
1 How to install EMAIL Maker

Please provide following steps in order to install EMAIL Maker:

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

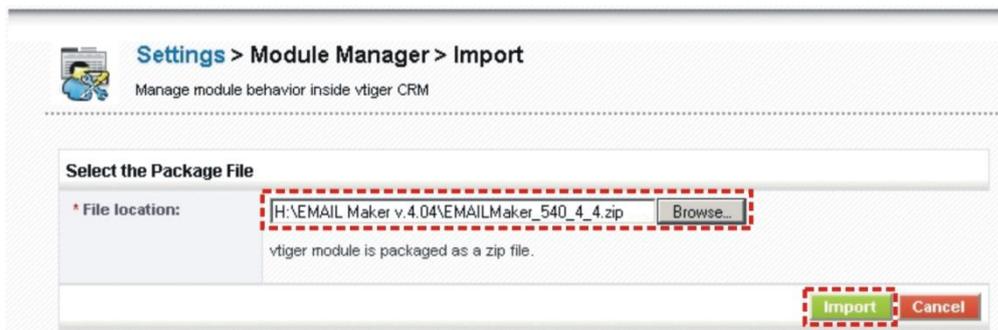
- vtigerCRM version (e.g. 5.4.0)
- EMAIL Maker version (e.g. 540.04.04)
- Date and time
- Domain in md5 coding format (e.g. 916b25c201a77a6721003c0030977f3b)
- Action provided by you (INSTALL, REACTIVATE, DEACTIVATE)

1. Install the .zip package of the EMAIL Maker module via Settings -> Module Manager. Select the *Custom Modules* tab and click on the **Import New** button.



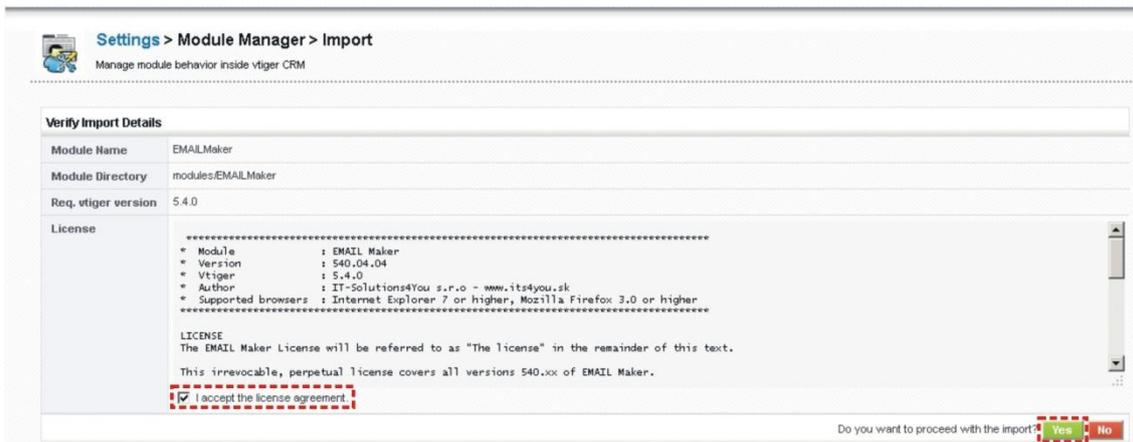
Picture 1.1 Installation of EMAIL Maker – step 1

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



Picture 1.2 Installation of EMAIL Maker – step 2

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



Picture 1.3 Installation of EMAIL Maker – step 3

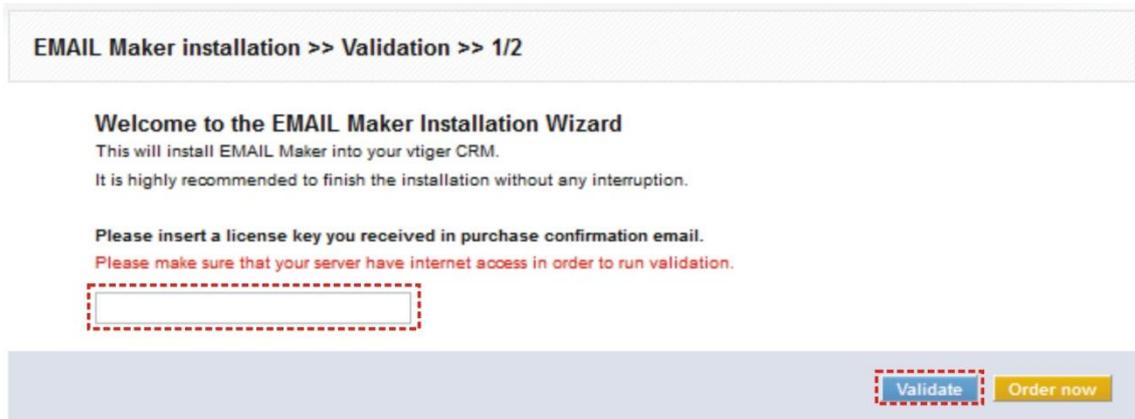
- Click on **Finish** to complete the module import.



Picture 1.4 Installation of EMAIL Maker – step 4

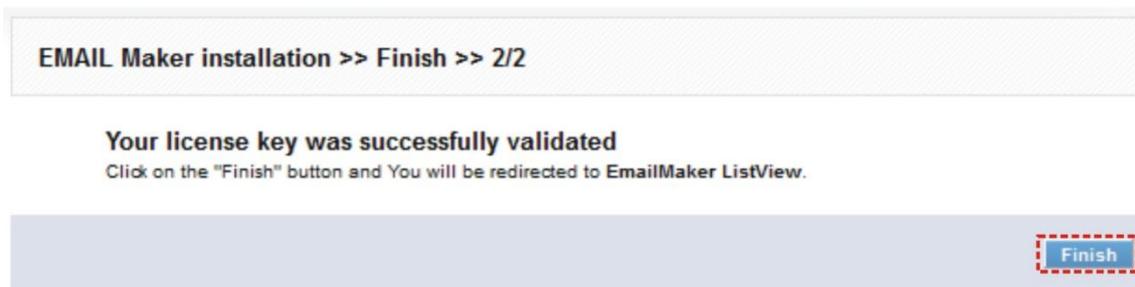
In order to finish installation, please provide following validation steps.

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



Picture 1.5 Validation step 1

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

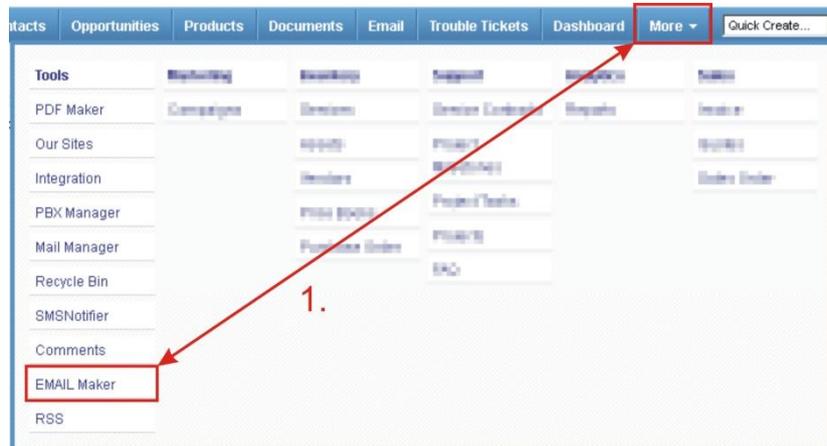


Picture 1.6 Validation step 2 – Finish installation

2 How to start EMAIL Maker

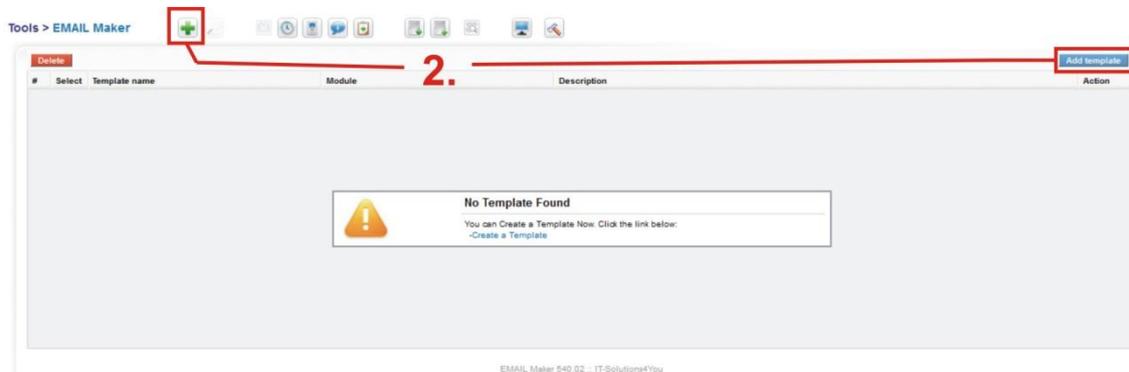
In order to start the EMAIL Maker tool please provide following steps:

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



Picture 2.1 Start EMAIL Maker

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



Picture 2.2 Add template in ListView

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

3 Work area

The Work Area of EMAIL Maker consists of:

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

3.1 ListView

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



Picture 3.1 EMAIL Maker ListView

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

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

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

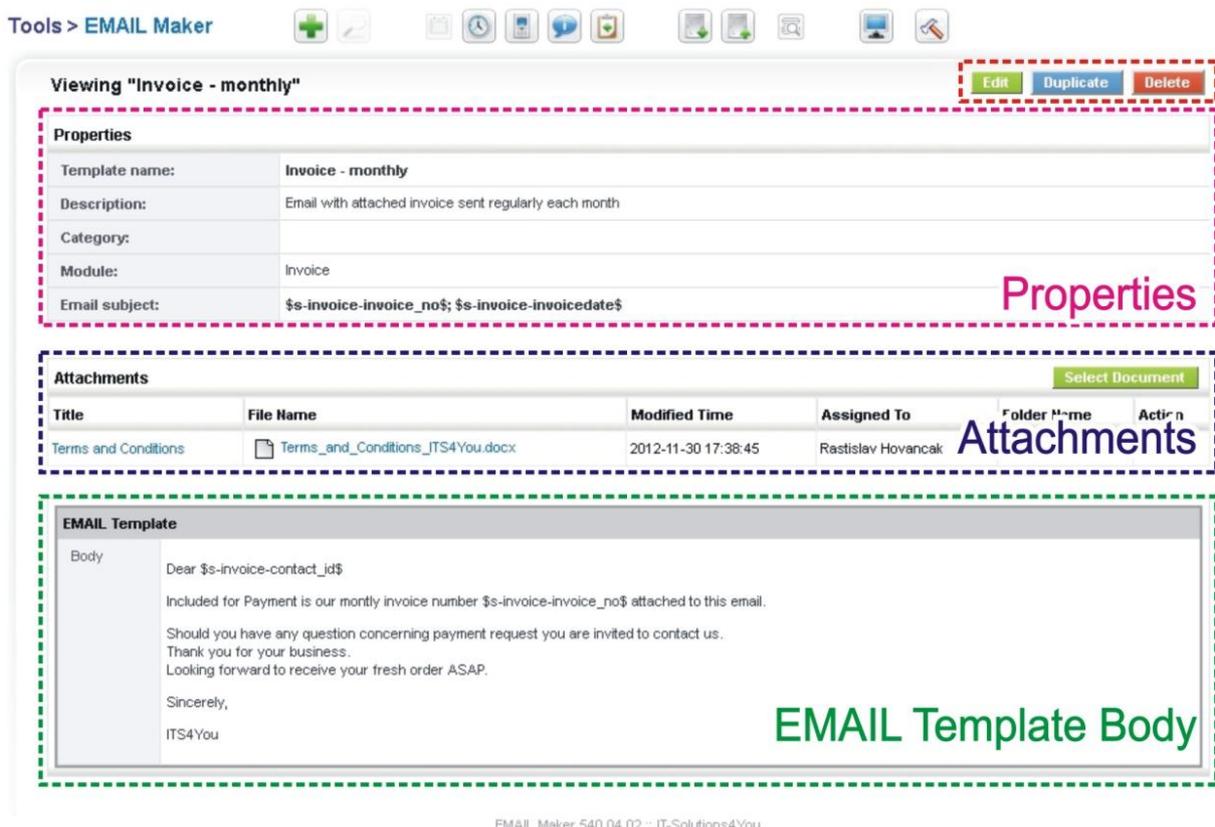
There are three additional buttons above the list of email templates:

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

3.2 DetailView

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

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

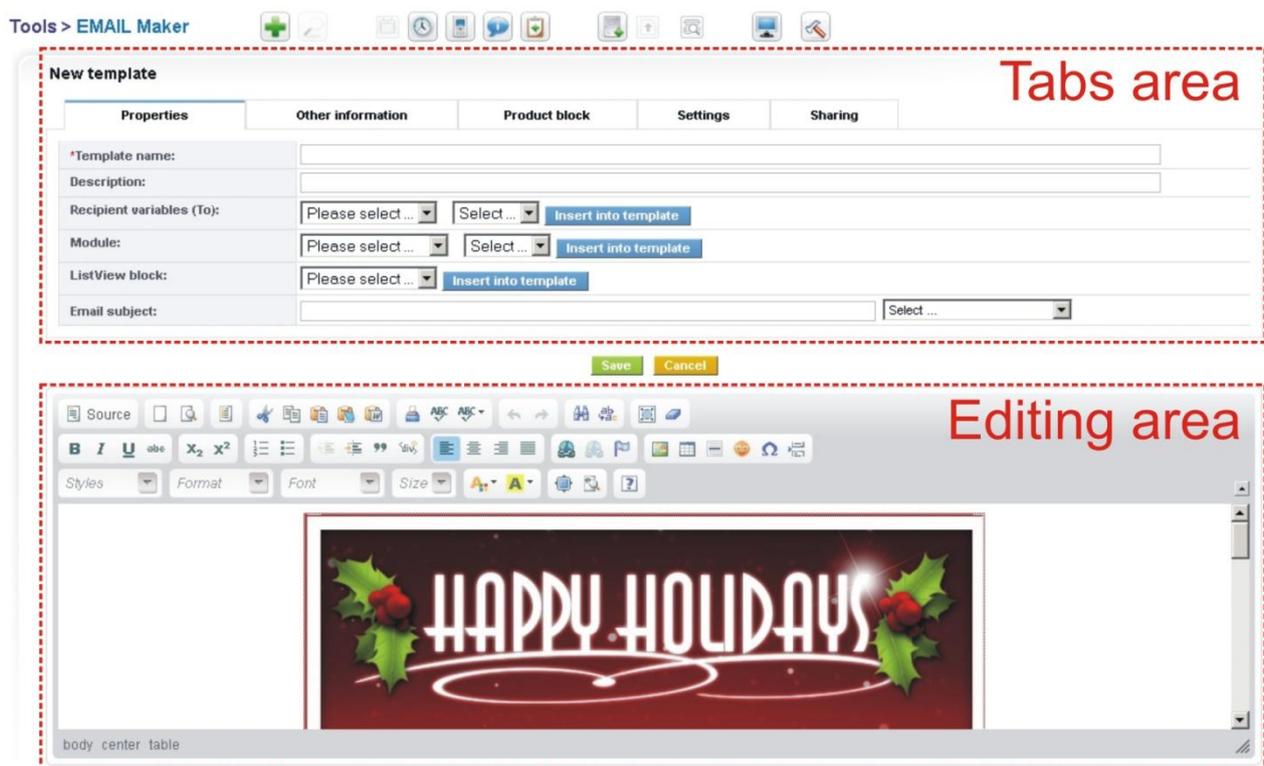


Picture 3.2 DetailView

3.3 EditView

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

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



Picture 3.3 EditView

3.3.1 Properties

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

Properties	Other information	Product block	Settings	Sharing
*Template name:	<input type="text"/>			
Description:	<input type="text"/>			
Recipient variables (To):	Please select ...	Select ...	<input type="button" value="Insert into template"/>	
Module:	Invoice	Subject	<input type="button" value="Insert into template"/>	
Related modules:	Sales Order	SalesOrder No	<input type="button" value="Insert into template"/>	
Related blocks:	<input type="button" value="Insert into template"/>			
ListView block:	Please select ...	<input type="button" value="Insert into template"/>		
Email subject:	<input type="text"/>			Select ...

Picture 3.4 Properties tab

Name	Description
Template name	The name of the template. It is mandatory field for template creation.
Description	The description of the email template.
Recipient variables (To)	Variables related to recipient.
Module	Template will be based and available only for one selected module and its fields.
Related modules	If exists related module(s) to selected module, it is possible here to select and use fields from any related modules.
Related blocks	Related block(s) to selected module, with buttons to insert, create, edit or delete related block. For details please refer to chapter 4.5.
ListView block	Allows to add ListView block. For details please refer to chapter 4.6.
Email subject	The subject of the email. You can use simple text, predefined common fields or fields related to primary module if exists.

Table 3-1 Properties tab

3.3.2 Other information

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

Properties	Other information	Product block	Settings	Sharing
Company and User information:	Please select ...	<input type="button" value="Insert into template"/>		
Terms and Conditions:	Please select ...	<input type="button" value="Insert into template"/>		
Current date:	dd.mm.yyyy	<input type="button" value="Insert into template"/>		
Custom functions:	if-else	<input type="button" value="Insert into template"/>		

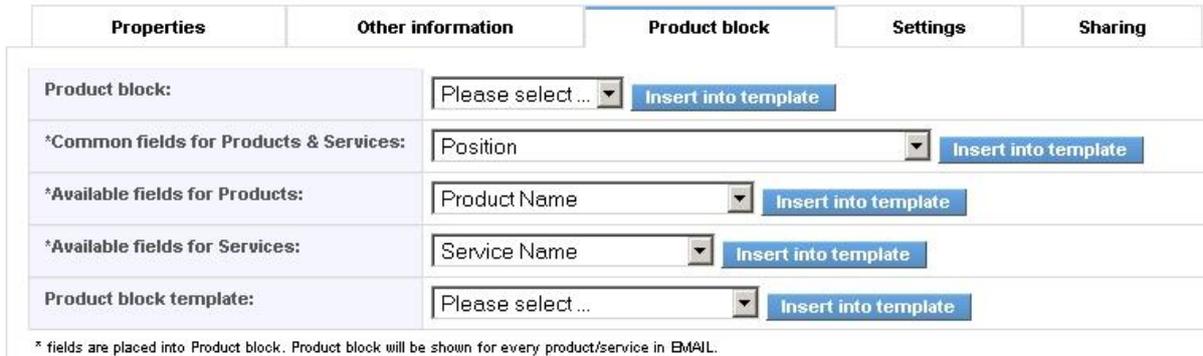
Picture 3.5 Other information tab

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

Table 3-2 Other information tab

3.3.3 Product block

The product block tab allows inserting product block template and editing it. In addition, you can create your own product block using “Block start”, “Block end” and fields for products and services. How to insert, edit and create product block is described in chapter 4.4.



Picture 3.6 Product block tab



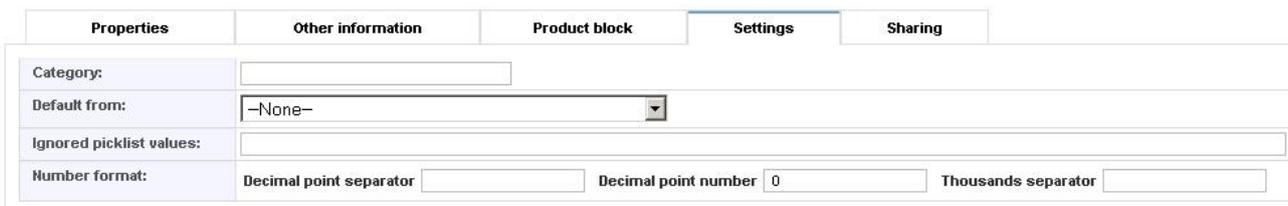
Picture 3.7 Empty product block tab

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

Table 3-3 Product block tab

3.3.4 Settings

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



Picture 3.8 Settings tab

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

Table 3-4 Settings tab

3.3.5 Sharing

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

Picture 3.9 Sharing tab

Picture 3.10 Sharing tab for private/public template

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

Table 3-5 Sharing tab

3.4 Email Maker block

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

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



Picture 3.11 EMAIL Maker block

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

4 Editing email templates

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

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

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

4.1 Create new email template

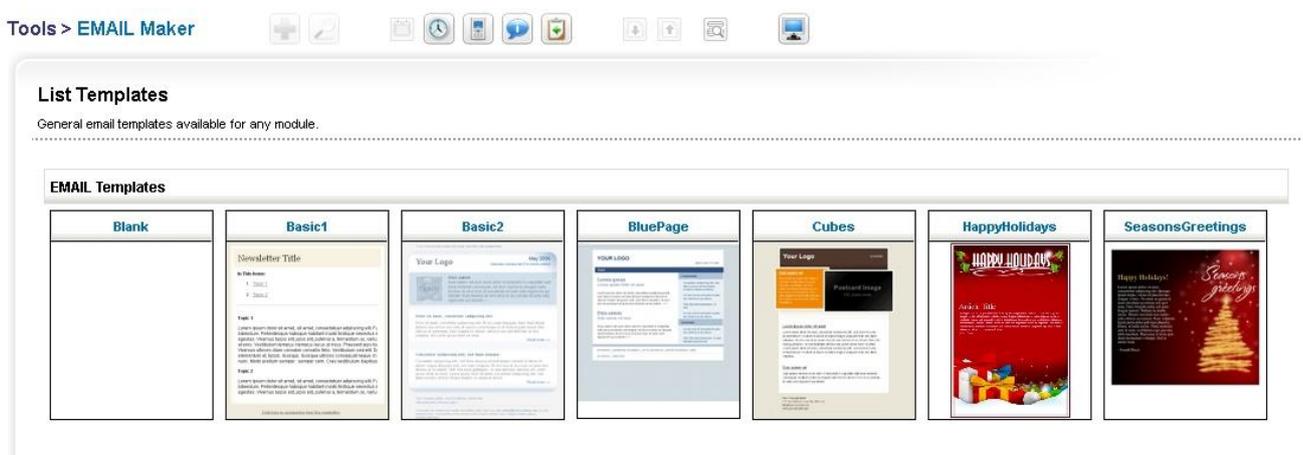
As was already described in the chapter 2, you can initiate creation of the new email template via buttons

[Add template](#) or  (see below picture).



Picture 4.1 Add new email template

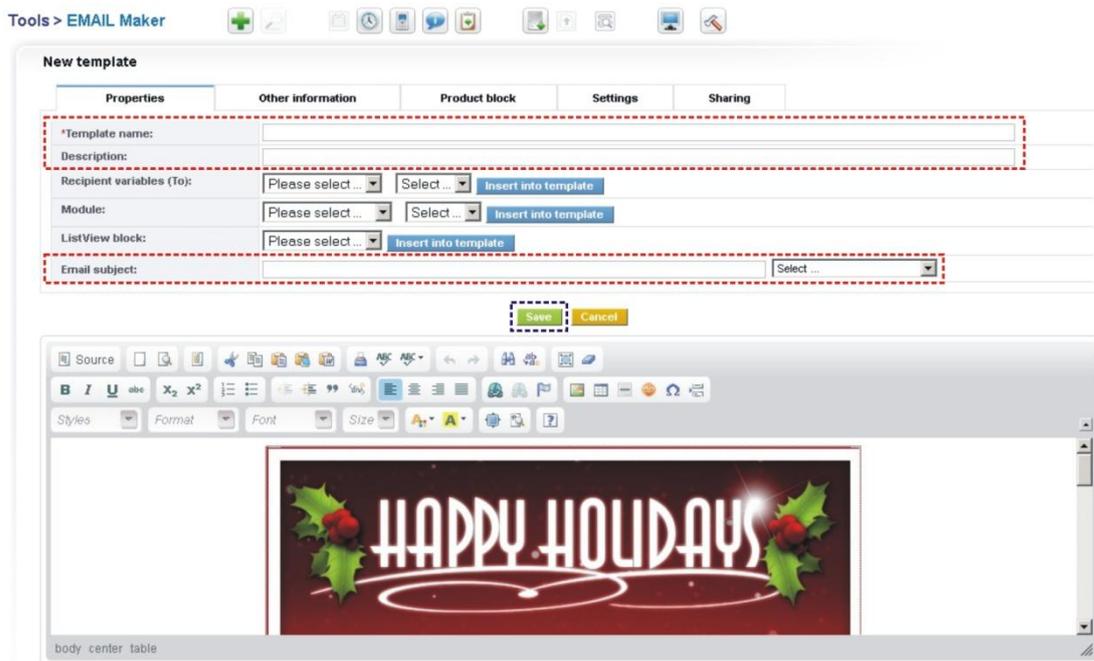
The list of general email templates will appear on the screen. These templates don't contain fields, it means that they are available for any module. In order to continue, please select general email template according to your needs.



Picture 4.2 General email templates

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

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



Picture 4.3 New template creation

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

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

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

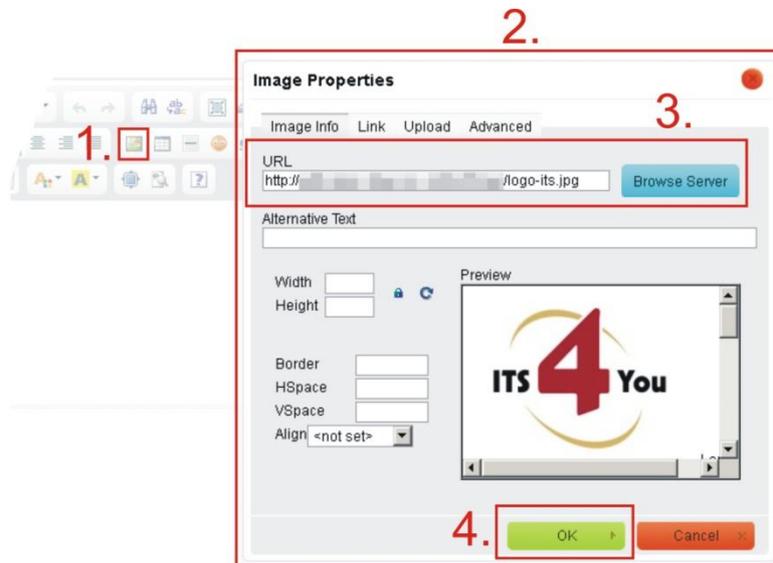
Please refer to following chapters related to details about editing email templates and using available fields or blocks in your email templates.

4.2 Inserting images

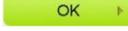
Images can improve the design of your documents. CKEditor is used inside the EMAIL Maker and it allows you to add images into your documents in an easy and intuitive way.

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

1. Press the image button  on the toolbar.



Picture 4.4 Insert image

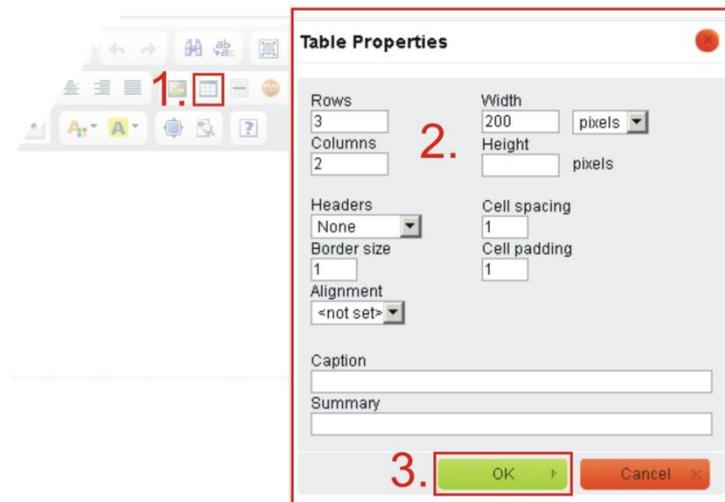
2. A pop-up window called "Image Properties" will appear. It includes four tabs that group image options.
3. Define the URL address of the image. You may also use button  in order to browse the files. Set up other properties of the image.
4. Click  to add image into template.

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

4.3 Creating tables

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

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



Picture 4.5 Creating tables

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

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

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

4.4 Using a product blocks

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

4.4.1 Insert and edit product block template

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

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

The screenshot shows the 'Product block' tab in the EditView interface. The 'Product block' dropdown menu is open, showing options like 'product block for group tax', 'Please select ...', 'product block for individual tax', and 'product block for group tax'. The 'Insert into template' button is highlighted in blue. A red dashed box highlights the 'Product block' dropdown menu and the 'Insert into template' button next to it, with a red arrow pointing to the 'Insert into template' button in the 'Product block template' section. Another red dashed box highlights the 'Product block template' dropdown menu, which is open, showing options like 'product block for group tax', 'Please select ...', 'product block for individual tax', and 'product block for group tax'. A red arrow points from the 'Insert into template' button in the 'Product block template' section to the 'Product block' dropdown menu. A third red dashed box highlights the 'Product block' dropdown menu, with a red arrow pointing to the 'Insert into template' button in the 'Product block' section. Below the 'Product block' tab, there is a rich text editor with a toolbar and a table containing product block templates. The table has columns for 'Pos', '%G_Qty%', 'Text', '%G_LBL_LIST_PRICES%', '%G_LBL_SUB_TOTAL%', '%G_Discount%', and '%G_LBL_NET_PRICE%'. The table contains several rows of templates, including '#PRODUCTBLOC_START#', '\$PRODUCTPOSITION\$ \$PRODUCTQUANTITY\$ \$PRODUCTUSAGEUNIT\$ \$PRODUCTNAMES \$PRODUCTLISTPRICE\$ \$PRODUCTTOTAL\$ \$PRODUCTDISCOUNT\$ \$PRODUCTSTOTALAFTERDISCOUNT\$', '#PRODUCTBLOC_END#', '%G_LBL_TOTAL%', '\$TOTALWITHOUTVAT\$', '%G_Discount%', '\$TOTALDISCOUNT\$', '%G_LBL_NET_TOTAL%', '\$TOTALAFTERDISCOUNT\$', '%G_Tax:\$ \$VATPERCENT\$ % \$G_LBL_LIST_OF\$ \$TOTALAFTERDISCOUNT\$', '\$VAT\$', 'Total with TAX', '\$TOTALWITHVAT\$', '%G_LBL_SHIPPING_AND_HANDLING_CHARGES\$', '\$SHTAXAMOUNT\$', '%G_LBL_TAX_FOR_SHIPPING_AND_HANDLING\$', '\$SHTAXTOTAL\$', '%G_Adjustment\$', '\$ADJUSTMENTS\$', and '%G_LBL_GRAND_TOTAL\$(\$CURRENCYCODE\$)', '\$TOTAL\$'.

Picture 4.6 Insert product block template

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

Pos	%G_Qty%	Text	%G_LBL_LIST_PRICE%	%G_LBL_SUB_TOTAL%	%G_Discount%	%G_LBL_NET_PRICE%
#PRODUCTBLOC_START#						
\$PRODUCTPOSITION\$	\$PRODUCTQUANTITY\$	\$PRODUCTUSAGEUNITS	\$PRODUCTNAME\$	\$PRODUCTLISTPRICE\$	\$PRODUCTTOTAL\$	\$PRODUCTDISCOUNT\$
#PRODUCTBLOC_END#						
%G_LBL_TOTAL%					\$TOTALWITHOUTVAT\$	
%G_Discount%					\$TOTALDISCOUNT\$	
%G_LBL_NET_TOTAL%					\$TOTALAFTERDISCOUNT\$	
%G_Tax% \$VATPERCENT\$ % %G_LBL_LIST_OF% \$TOTALAFTERDISCOUNT\$					\$VAT\$	
Total with TAX					\$TOTALWITHVAT\$	
%G_LBL_SHIPPING_AND_HANDLING_CHARGES%					\$SHTAXAMOUNT\$	
%G_LBL_TAX_FOR_SHIPPING_AND_HANDLING%					\$SHTAXTOTAL\$	
%G_Adjustment%					\$ADJUSTMENTS\$	
%G_LBL_GRAND_TOTAL% (\$CURRENCYCODE\$)					\$TOTAL\$	

Picture 4.7 Edit product block template – insert new row(s)

Module: Invoice

Related modules: Sales Order

Related blocks: Insert into template

List View block: Please select ...

Email subject:

Terms & Conditions

Terms & Conditions

Description Information

Description

Details

- Currency
- Currency symbol
- Currency code
- Subtotal
- Total discount
- Total discount (%)
- Total without VAT
- VAT
- VAT (%)
- VAT block
- Total with VAT
- Shipping & Handling taxes
- Shipping & Handling amount
- Adjustment
- Grand total

Pos	%G_Qty%		PRICE%	%G_LBL_SUB_TOTAL%	%G_Discount%	%G_LBL_NET_PRICE%
#PRODUCTBLOC_START#						
\$PRODUCTPOSITION\$	\$PRODUCTQUANTITY\$	\$PRODUCTUSAGEUNITS	\$PRODUCTNAME\$	\$PRODUCTLISTPRICE\$	\$PRODUCTTOTAL\$	\$PRODUCTDISCOUNT\$
#PRODUCTBLOC_END#						
%G_LBL_TOTAL%					\$TOTALWITHOUTVAT\$	
%G_Discount%					\$TOTALDISCOUNT\$	
%G_LBL_NET_TOTAL%					\$TOTALAFTERDISCOUNT\$	
%G_Tax% \$VATPERCENT\$ % %G_LBL_LIST_OF% \$TOTALAFTERDISCOUNT\$					\$VAT\$	
Total with TAX					\$TOTALWITHVAT\$	
%G_LBL_SHIPPING_AND_HANDLING_CHARGES%					\$SHTAXAMOUNT\$	
%G_LBL_TAX_FOR_SHIPPING_AND_HANDLING%					\$SHTAXTOTAL\$	
%G_Adjustment%					\$ADJUSTMENTS\$	
%G_LBL_GRAND_TOTAL% (\$CURRENCYCODE\$)					\$TOTAL\$	

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

4.4.2 Create new product block

In case that product block templates are not sufficient for you, it is easy to create your own product block:

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

The image shows two parts of the user interface. The top part is a configuration panel with tabs: Properties, Other information, Product block, Settings, and Sharing. The 'Product block' tab is active. It contains several sections: 'Product block:' with a dropdown menu and an 'Insert into template' button; '*Common fields for Products & Services:' with a dropdown menu and an 'Insert into template' button; '*Available fields for Products:' with a dropdown menu and an 'Insert into template' button; '*Available fields for Services:' with a dropdown menu and an 'Insert into template' button; and 'Product block template:' with a dropdown menu and an 'Insert into template' button. A red arrow labeled '1.' points from the first dropdown menu to the rich text editor below. A blue arrow labeled '2.' points from the second dropdown menu to the rich text editor. Below the configuration panel are 'Save' and 'Cancel' buttons. The bottom part of the image shows a rich text editor with a toolbar. The editor content is:

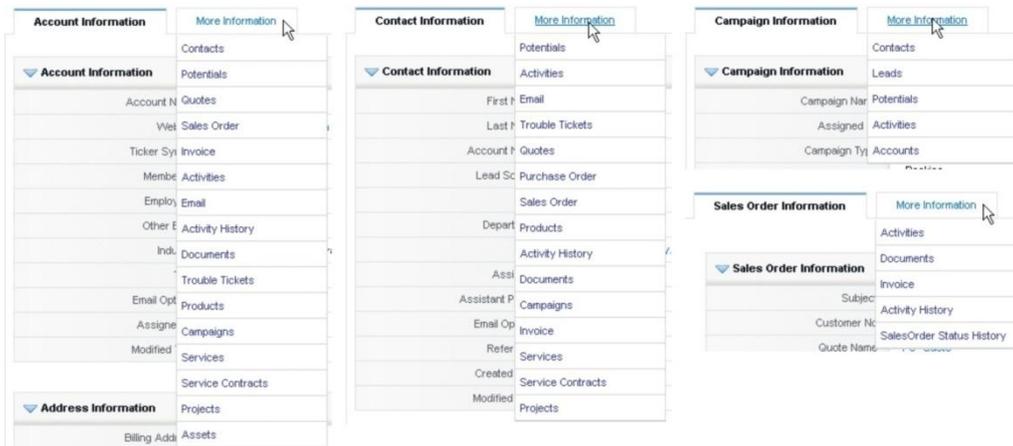
```
#PRODUCTBLOC_START#  
$products-productname$ $products-unit_price$  
#PRODUCTBLOC_END#
```

 A red arrow labeled '1.' points to the first line, and a blue arrow labeled '2.' points to the second line.

Picture 4.9 Create product block

4.5 Using related blocks

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

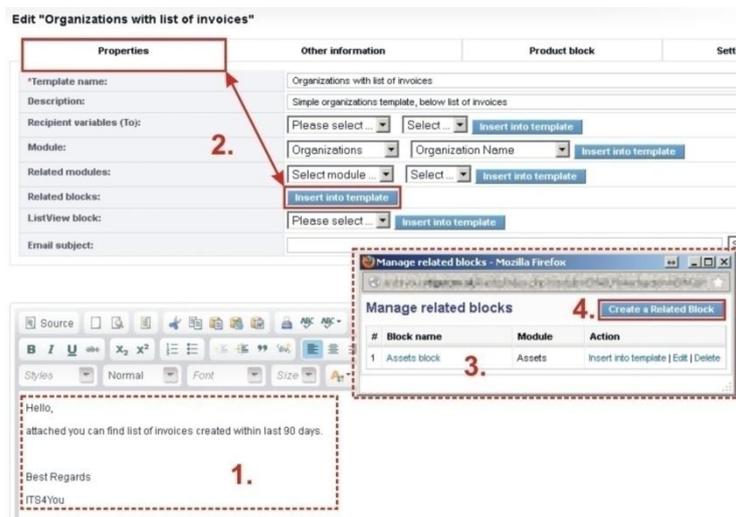


Picture 4.10 More information tabs

4.5.1 Create and insert related block

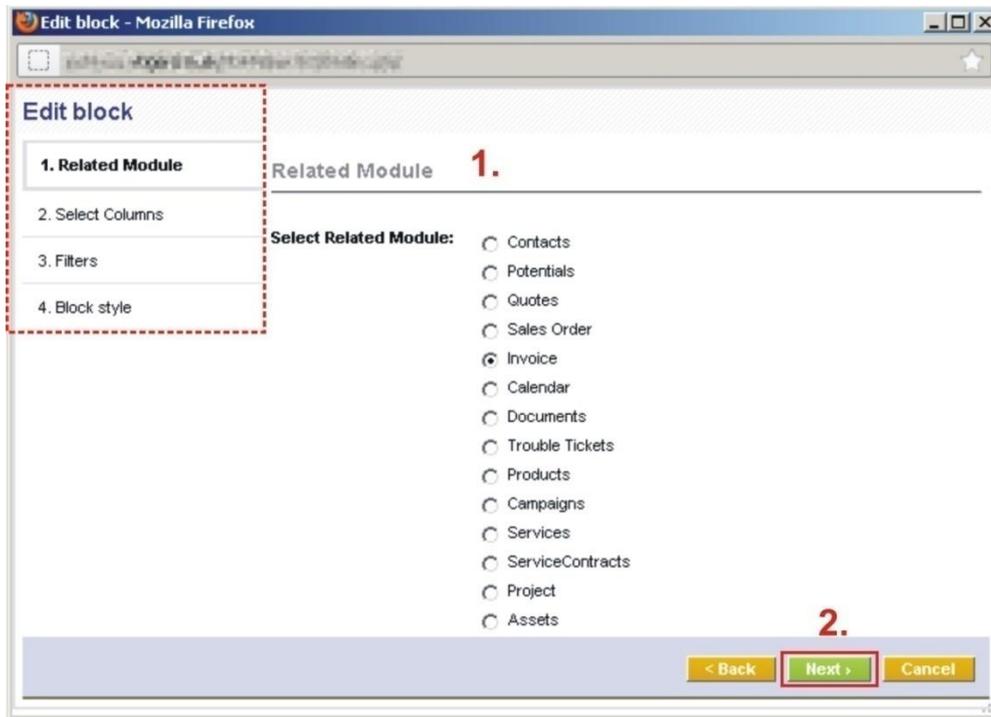
How to create and insert related block will be shown on example based on “Organizations” module. Let’s suppose that we would like to create simple email template based on module “Organizations”, and we need to list all invoices for particular organization which were created within last 90 days. In order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

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



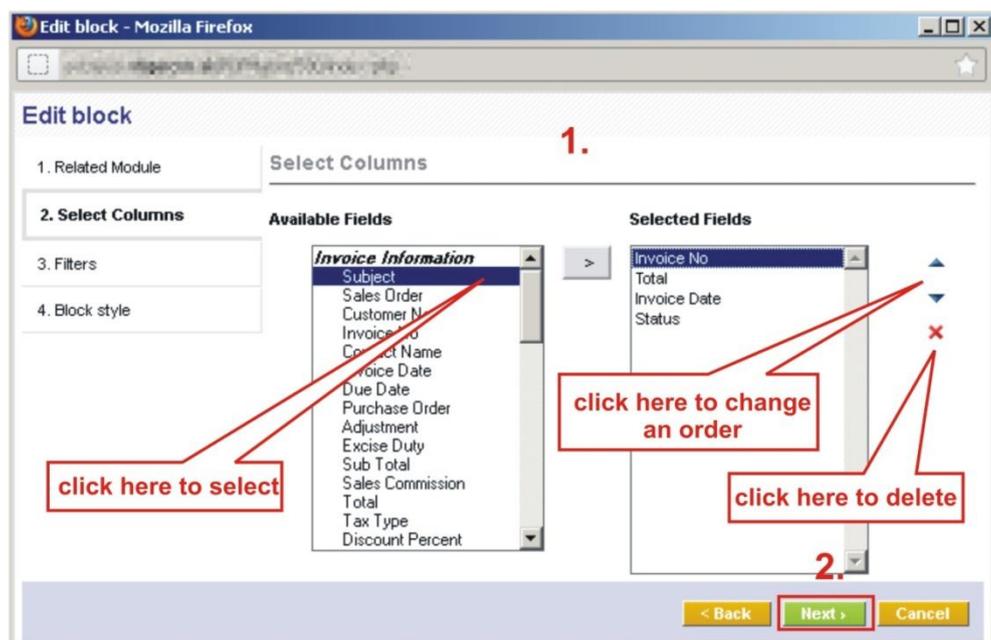
Picture 4.11 Start creation of the related block

As you can see in the next picture, 4 steps are necessary to create the related block. In this window also all related entity modules for primary module are shown. First step is to select one related module from the available list (1.). Please select “Invoice” and click on **Next >** button.



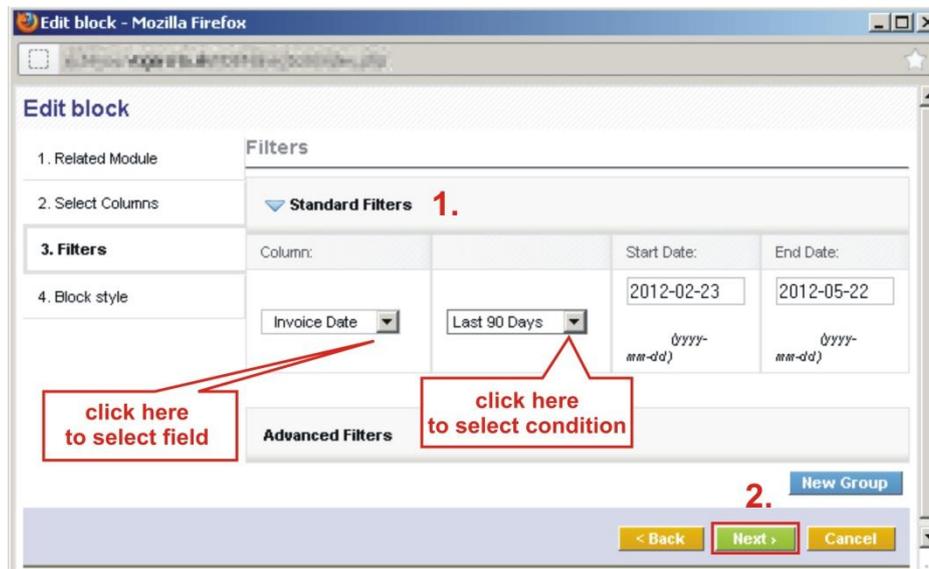
Picture 4.12 Creation of the related block – step 1

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



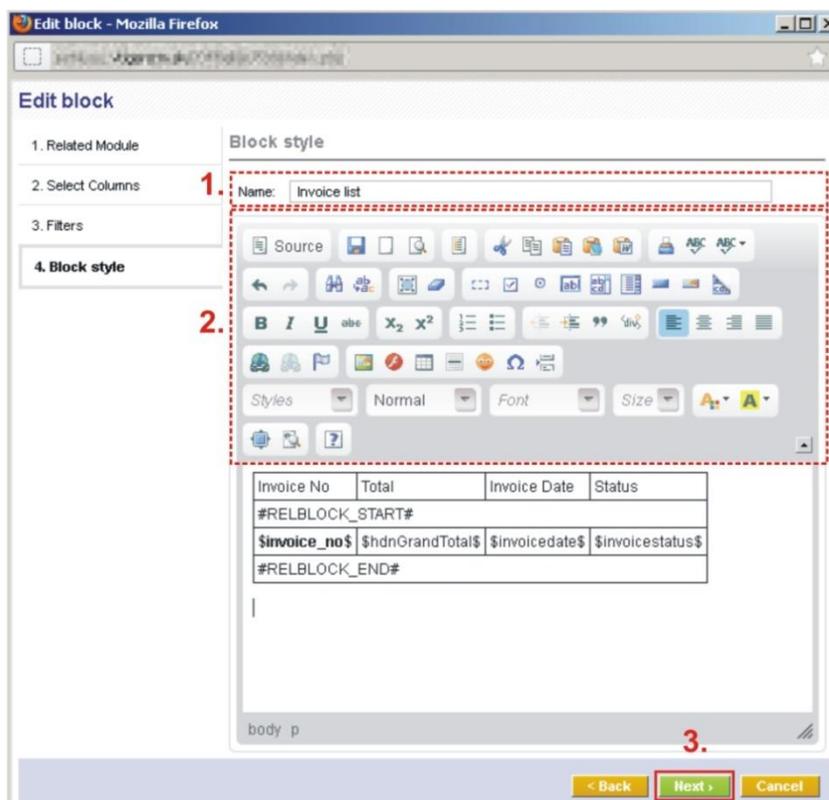
Picture 4.13 Creation of the related block – step 2

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



Picture 4.14 Creation of the related block – step 3

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



Picture 4.15 Creation of the related block – step 4

4.5.2 Insert related block

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

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

The image illustrates the steps to insert a related block into an email template. It is divided into five numbered sections:

- 2.** The **Properties** tab of the template editor. The **Related blocks:** section shows an **Insert into template** button.
- 3.** The **Manage related blocks** window, which lists existing blocks. The **Invoice list** block has an **Insert into template** button highlighted.
- 1.** A preview of the email template showing a table with columns: Invoice No, Total, Invoice Date, and Status. The table content is:

Invoice No	Total	Invoice Date	Status
#RELBLOCK5_START#			
\$invoice_no\$	\$hdnGrandTotal\$	\$invoicedate\$	\$invoicestatus\$
#RELBLOCK5_END#			
- 5.** The **Compose E-Mail** window showing the final email content. The email body contains the same table as in step 1, with the following data rows:

Invoice No	Total	Invoice Date	Status
INV30	€ 53761.000	2012-10-23	Paid
INV32	€ 53761.000	2012-10-23	Sent
INV31	€ 56000.000	2012-11-04	AutoCreated

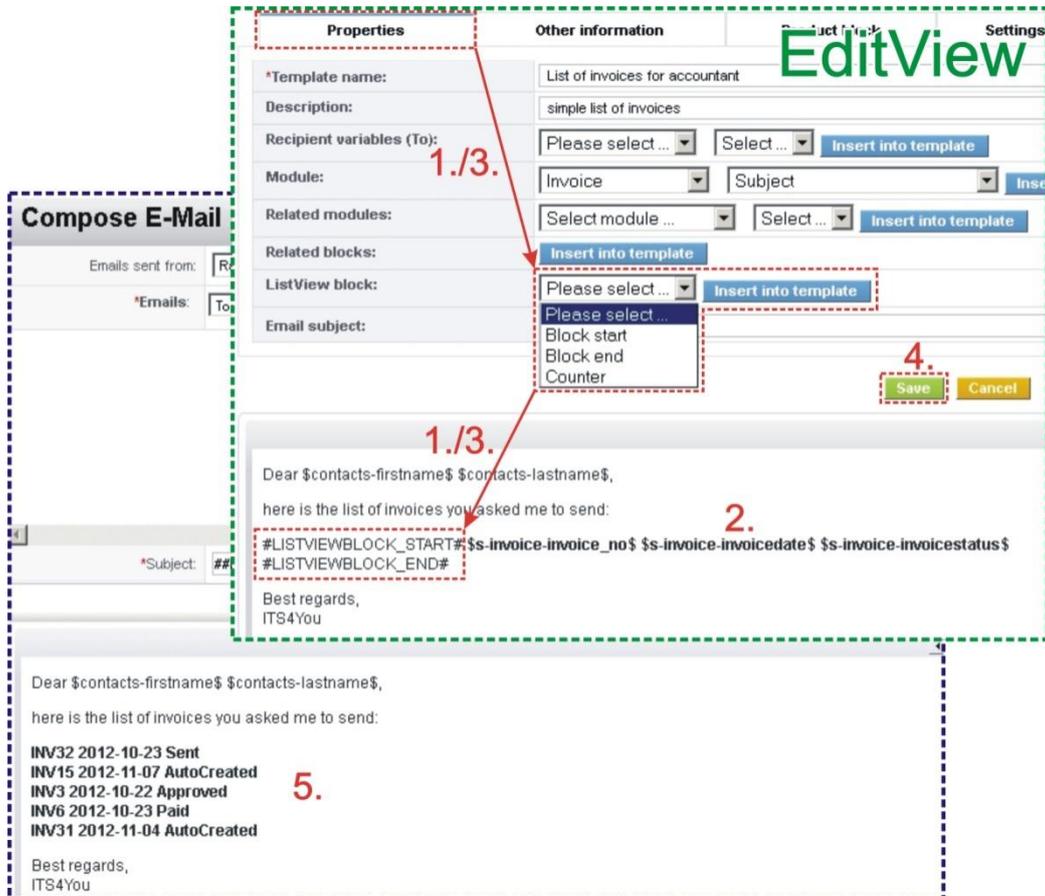
Picture 4.16 Insert related block

4.6 Using ListView block

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

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

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



Picture 4.17 ListView block

4.7 Attach documents into templates

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

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

The screenshot illustrates the process of attaching a document to an email template in the vtiger system. It is divided into three main sections:

- Module Information:** Shows 'Module: Invoice' and 'Email subject: \$s-invoice-invoice_no\$; \$s-invoice-invoicedate\$'.
- Attachments Table:** A table with columns: Title, File Name, Modified Time, Assigned To, Folder Name, and Action. A 'Select Document' button is located in the top right corner of this section.
- Documents Search Window:** A pop-up window titled 'Documents' with a search bar and a table of documents. The table has columns: Title, File Name, Assigned To, and Folder Name. The document 'Terms and Conditions' is highlighted.
- EMAIL Template:** Shows the template body with the text: 'Dear \$s-invoice-contact_id\$ %G_SHOULD BE EQUAL%' and 'Included for Payment is our montly invoice number \$s-invoice-invoice_no\$ attached to this email.' A 'Delete' link is visible in the 'Action' column of the 'Attachments' table below, with a red arrow pointing to it and the text 'Click to delete'.

Title	File Name	Modified Time	Assigned To	Folder Name	Action
Terms and Conditions	Terms_and_Conditions ITS4You.docx	2012-11-30 17:38:45	Rastislav Itsfouryou	Default	Delete
Price list 2012	Price_list.docx		Rastislav Itsfouryou	Default	

Picture 4.18 How to attach documents into email template

5 Sending emails

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

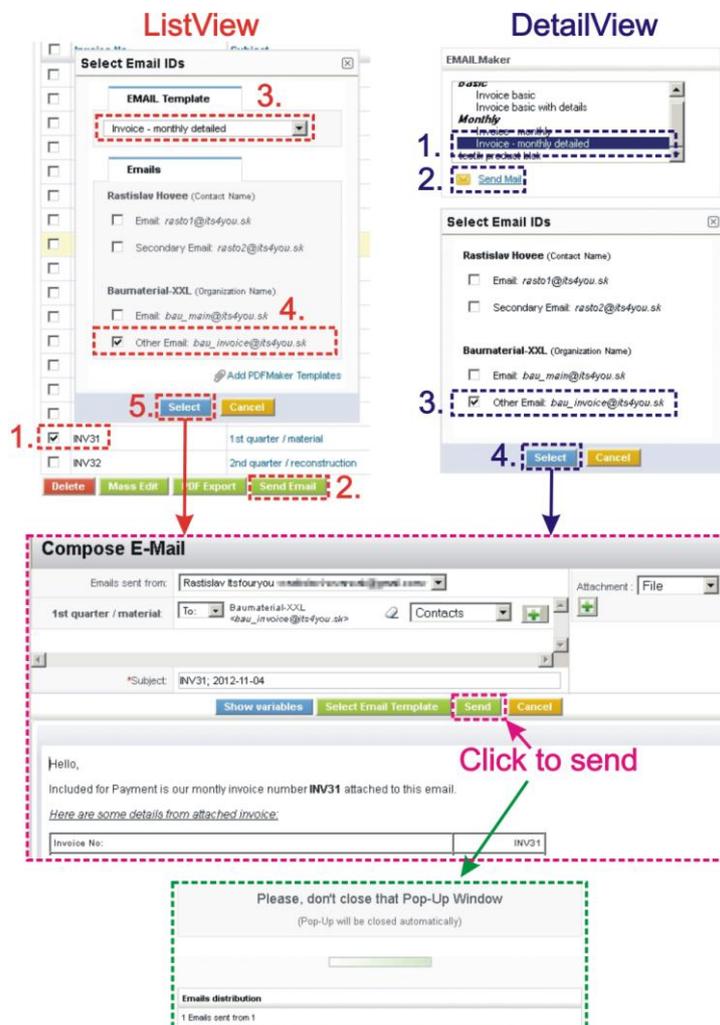
ListView:

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

DetailView:

1. Select EMAIL template in the EMAIL Maker block.
2. Click on link  [Send Mail](#).
3. Select EMAIL address/es.
4. Click on **Select** button.

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



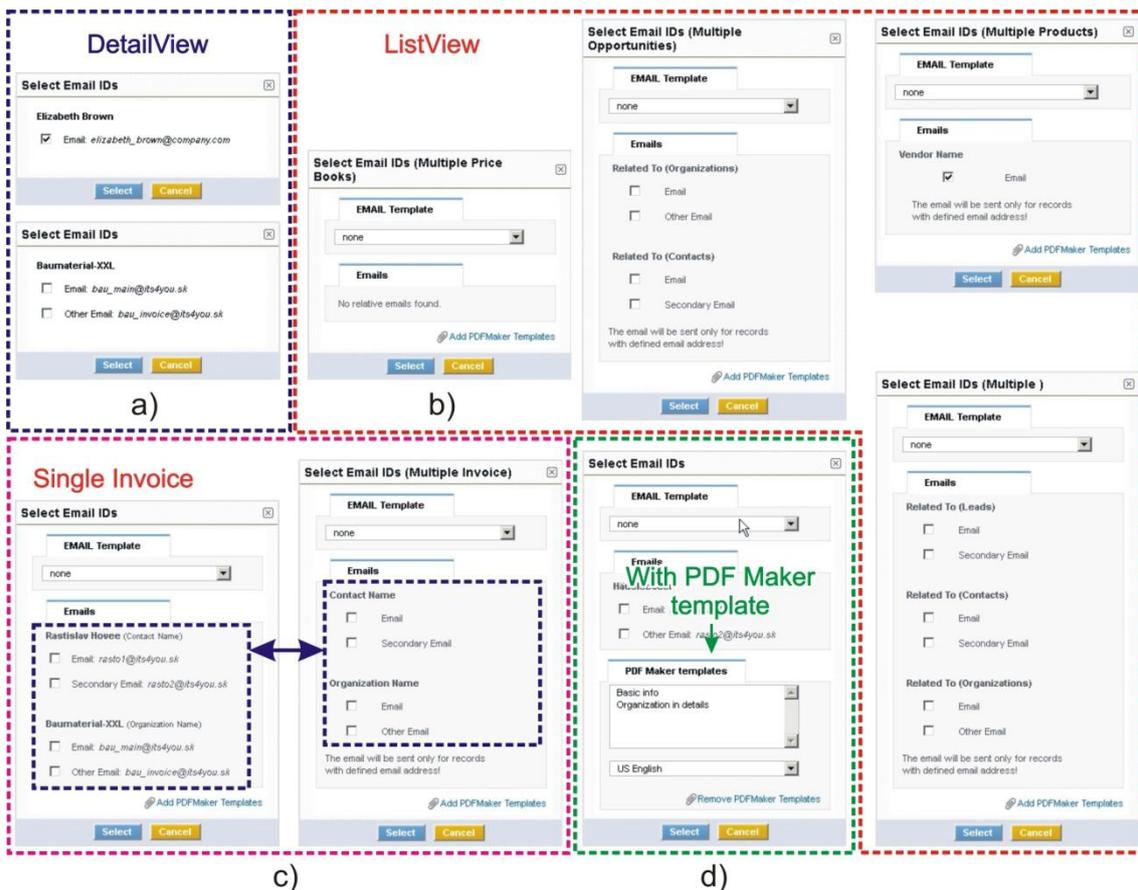
Picture 5.1 How to send email

5.1 Select Email IDs

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

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

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

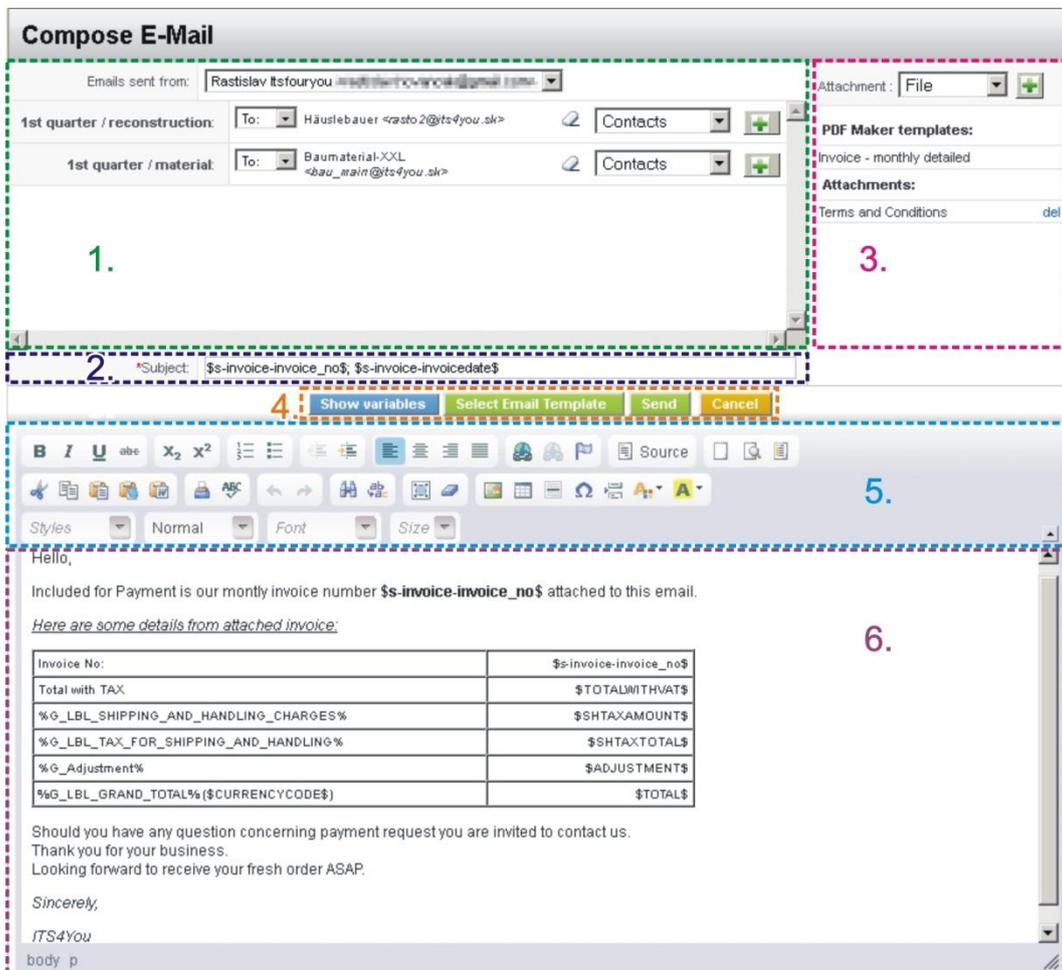


Picture 5.2 Select Email IDs

5.2 Compose E-Mail

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

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



Picture 5.3 Compose E-Mail window

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

5.2.1 Recipients To, CC, BCC

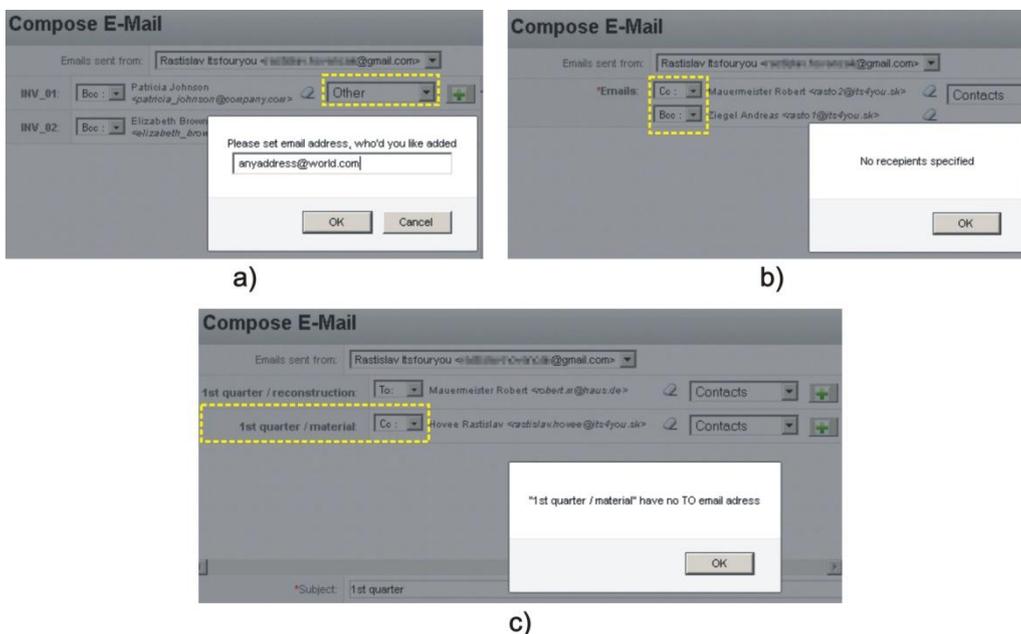
Within this chapter is described one of the main parts of Compose E-Mail window related to email recipients. As described in the picture below you can provide here following actions:

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



Picture 5.4 Actions related to recipients

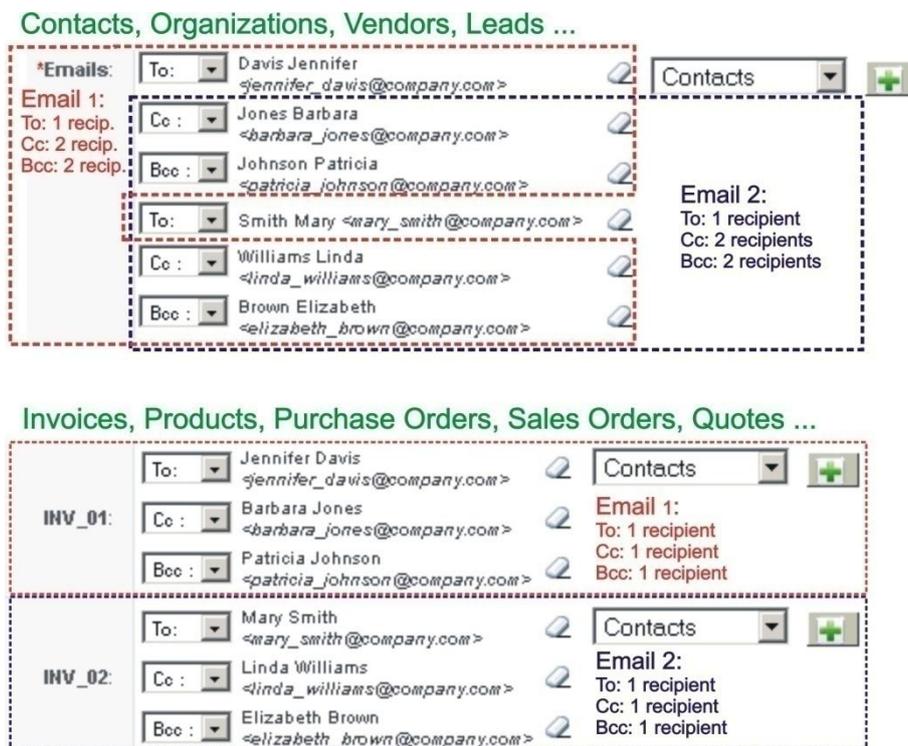
The picture below shows some examples of pop-up windows. You will be informed using these pop-up windows in case that email addresses are missing (Picture 5.5 b),c)).



Picture 5.5 Compose E-Mail pop-up windows

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

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



Picture 5.6 Compose E-Mail window parts related to recipients

5.2.2 Attachments

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

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



Picture 5.7 Compose E-Mail – part Attachment

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

5.2.3 Show variables

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

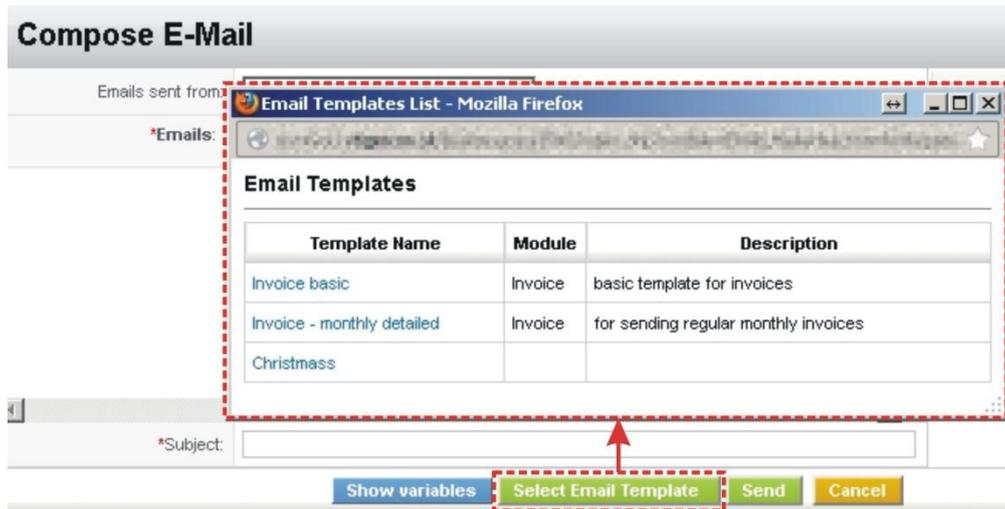


Picture 5.8 Show variables forms

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



Picture 5.9 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 Sending emails within module campaigns

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

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



Picture 5.10 Sending emails from module campaigns

6 Additional features

6.1 Export and import templates

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

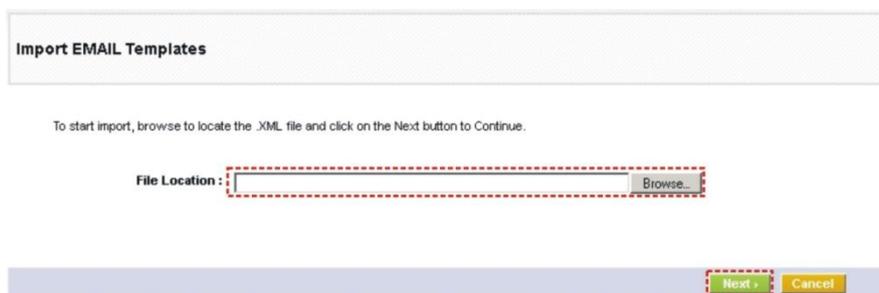
In order to export EMAIL templates to external sources in EMAIL Maker tool do following steps:

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



Picture 6.1 Export of the templates

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



Picture 6.2 Import EMAIL templates page

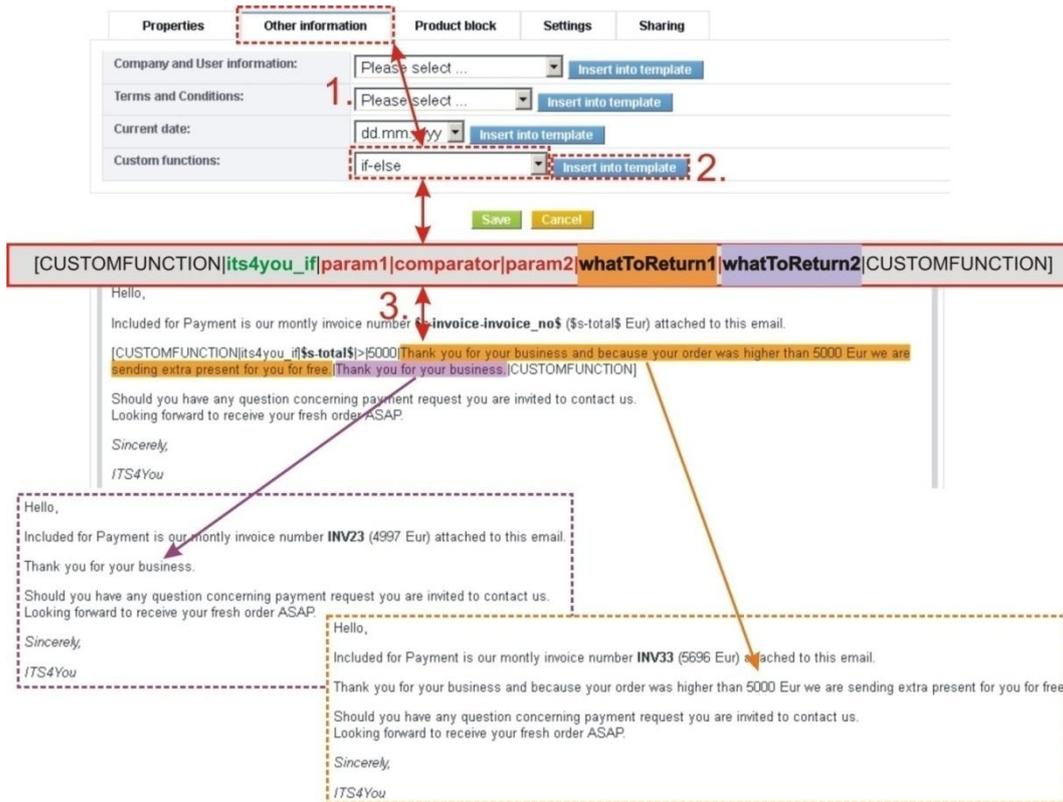
In the Import EMAIL templates page, use the button to browse the EMAIL Maker template-related data in *.xml format and then click the button. It will take a few seconds to complete the import. The imported templates can be found in EMAIL Maker ListView page.

6.2 Custom functions

If you need a special treatment of vtiger data in your template, you can use custom (your own) functions. There is a folder „*functions*“ under `[vTigerROOT]/modules/EMAILMaker`, where you can place your own .php file with functions which would you like to use. This file will be included automatically. Inside this folder is file „*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/functions` and place here your functions. In order to insert custom function into template provide following:

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

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



Picture 6.3 Custom functions

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

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

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

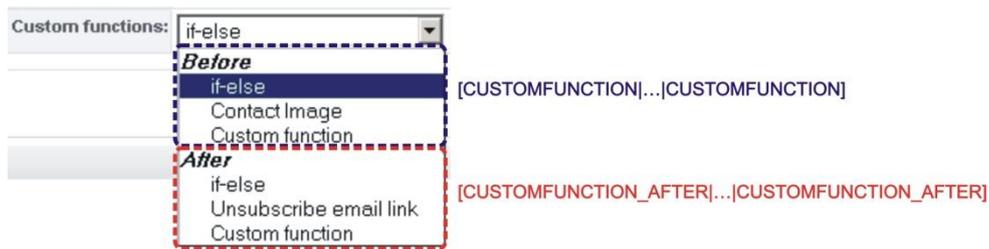
Name	Description
its4you_if	<i>[CUSTOMFUNCTION its4you_if param1 comparator param2 whatToReturn1 whatToReturn2 CUSTOMFUNCTION]</i> This function executes if-else statement based on given parameters: param1 first parameter of comparison comparator comparison sign - one of ==, !=, <, >, <=, >= param2 second parameter of comparison whatToReturn1 value returned when comparison succeeded whatToReturn2 value returned when comparison didn't succeed
its4you_unsubscribeemail	<i>[CUSTOMFUNCTION_AFTER its4you_unsubscribeemail \$accounts-crmid \$contacts-crmid\$ URL_ADDRESS Unsubscribe email CUSTOMFUNCTION_AFTER]</i> This function is used for unsubscribing. Please refer to details in separate chapter 6.4.
its4you_getTemplated	<i>[CUSTOMFUNCTION its4you_getTemplated CUSTOMFUNCTION]</i> This function returns id of current template.
its4you_getContactImage	<i>[CUSTOMFUNCTION its4you_getContactImage id width height CUSTOMFUNCTION]</i> Please note that function has to be executed after sending email. So please use notation <i>CUSTOMFUNCTION_AFTER</i> This function returns image of contact. id – as parameter use \$s-contacts-crmid\$ width - width of returned image (10%, 100px) height - height of returned image (10%, 100px)
its4you_sum	<i>[CUSTOMFUNCTION its4you_sum arg1 arg2 CUSTOMFUNCTION]</i> This function returns sum of input values: arg1+arg2+...+argN. Function is inserted with two arguments by default but you can edit it and add more arguments.
its4you_deduct	<i>[CUSTOMFUNCTION its4you_deduct arg1 arg2 CUSTOMFUNCTION]</i> This function returns deducted value arg1-arg2-...-argN (all following values are deducted from the first one). Function is inserted with two arguments by default but you can edit it and add more arguments.
its4you_multiplication	<i>[CUSTOMFUNCTION its4you_multiplication arg1 arg2 CUSTOMFUNCTION]</i> This function returns multiplication of all input values: arg1*arg2*...*argN. Function is inserted with two arguments by default but you can edit it and add more arguments.
its4you_divide	<i>[CUSTOMFUNCTION its4you_divide arg1 arg2 CUSTOMFUNCTION]</i> This function returns divided value arg1/arg2/.../argN. Function is inserted with two arguments by default but you can edit it and add more arguments.
its4you_formatNumberToPDF	<i>[CUSTOMFUNCTION its4you_formatNumberToPDF value CUSTOMFUNCTION]</i> This function returns formatted value and is used by other functions. value – int
its4you_formatNumberFromPDF	<i>[CUSTOMFUNCTION its4you_formatNumberFromPDF value CUSTOMFUNCTION]</i> 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]`
 - custom function is executed before sending email
 - the result of the custom function is visible i.e. inside Compose E-Mail window in case of one recipient was selected
- AFTER - `[CUSTOMFUNCTION_AFTER|functionname|param1|...|paramN|CUSTOMFUNCTION_AFTER]`
 - custom function is executed after click on button **Send** in Compose E-Mail window
 - the result of the custom function is not visible before sending email, i.e. you have to check outgoing emails to see result if you needed



Picture 6.4 Custom function groups

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

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



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

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

Related modules: Contacts Mailing Country

EMAIL Template
 Example: Mailing Country is $\$r-contactid-contacts-mailingcountry\$$.
 [CUSTOMFUNCTION|its4you_if $\$r-contactid-contacts-mailingcountry\$$]=[Slovakia|Call us: +42151123456|Please contact us via email.|CUSTOMFUNCTION]
 [CUSTOMFUNCTION_AFTER|its4you_if $\$r-contactid-contacts-mailingcountry\$$]=[Slovakia|Call us: +42151123456|Please contact us via email.|CUSTOMFUNCTION_AFTER]

Compose E-Mail view
 Example: Mailing Country is Slovakia.
 Call us: +42151123456
 [CUSTOMFUNCTION_AFTER|its4you_ifSlovakia]=[Slovakia|Call us: +42151123456|Please contact us via email.|CUSTOMFUNCTION_AFTER]

Final sent email
 Example: Mailing Country is Slovakia.
 Call us: +42151123456
 Call us: +42151123456

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

6.3 Sharing

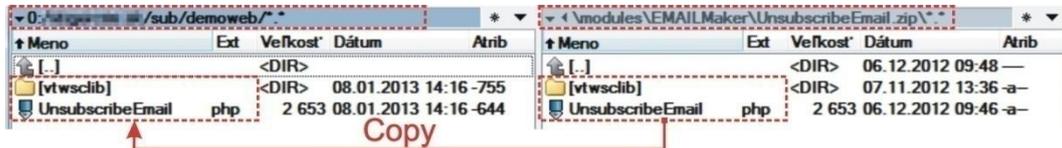
Using *Sharing tab* you can define template owner and how to share your template between you and other users or groups. You can setup sharing for different entities & members. In order to share your template:

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

Picture 6.7 Sharing

6.4 Unsubscribe from emails

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



Picture 6.8 Copying content of UnsubscribeEmail.zip

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

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

```

14 $server_path = 'http://demo.vtigercrm.sk';
15 $user_name = 'standarduser';
16 $user_access_key = 'mGnVSWtkkMnVcmDe';

76 if ($update)
77     echo "Your email address has been unsubscribed.</b></center>";
78 else
79     echo "Your email address has not been unsubscribed. Set parrameters are wrong.";
80
81 echo "</b></center>";
    
```

Content of UnsubscribeEmail.php

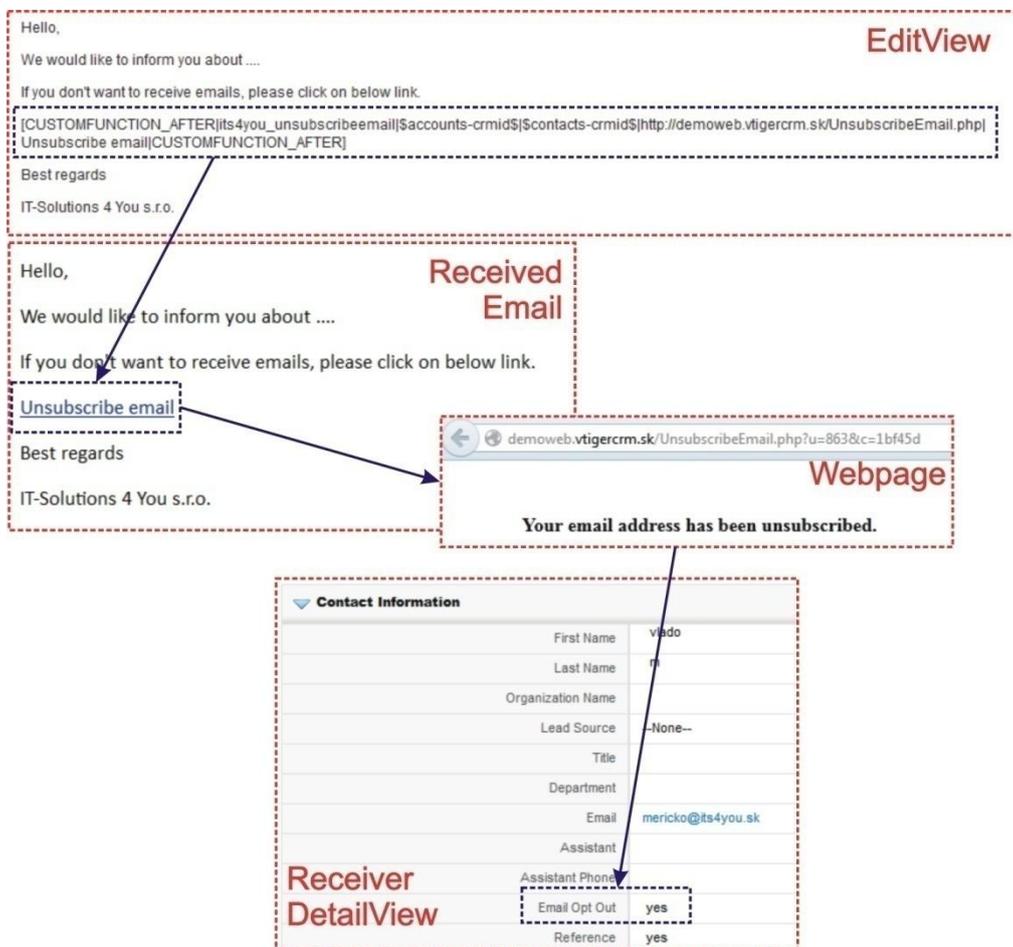
Picture 6.9 Edit of UnsubscribeEmail.php

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

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

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

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



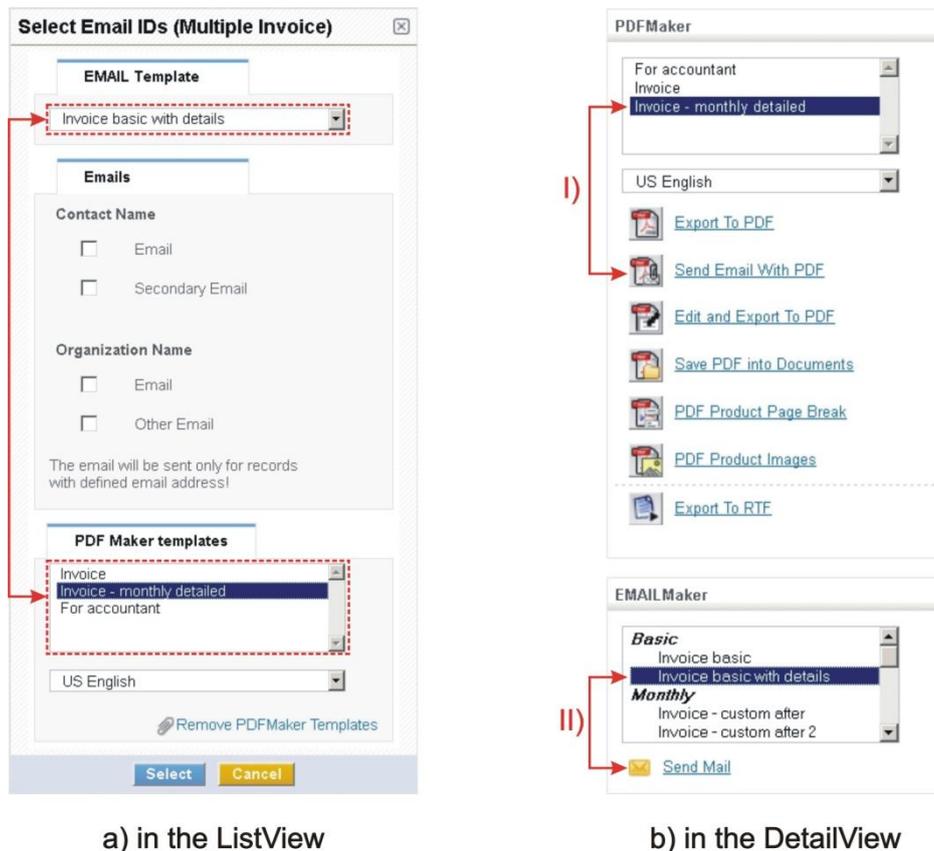
Picture 6.10 Process of unsubscribing from emails

6.5 Support of the PDF Maker

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

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

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



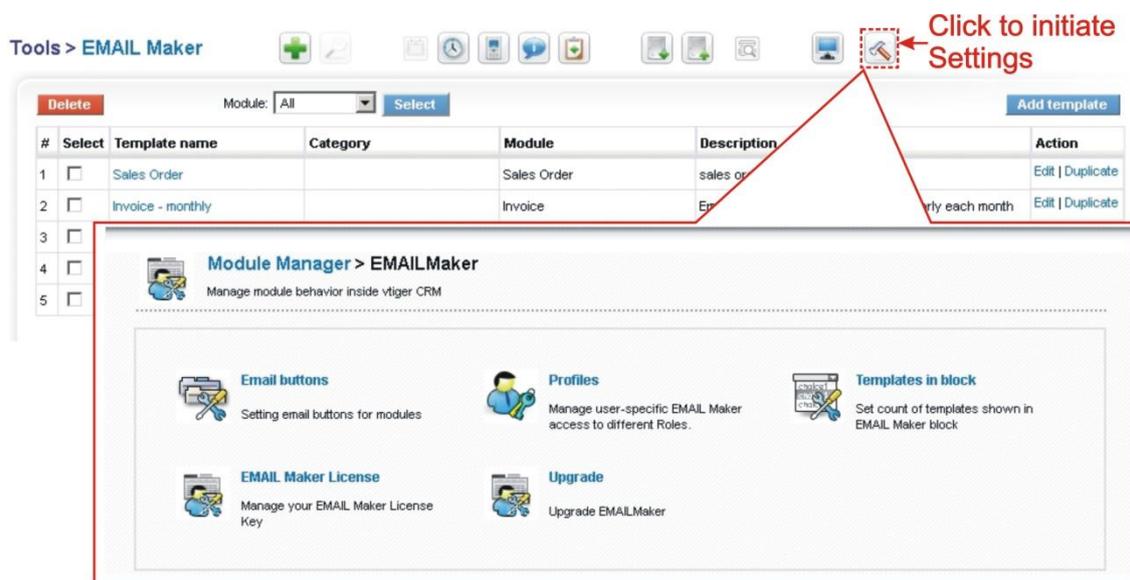
Picture 6.11 Support of the PDF Maker

7 Settings

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

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

Please refer to following chapters for details.



Tools > EMAIL Maker

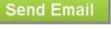
#	Select	Template name	Category	Module	Description	Action
1	<input type="checkbox"/>	Sales Order		Sales Order	sales or	Edit Duplicate
2	<input type="checkbox"/>	Invoice - monthly		Invoice	Ep	ry each month Edit Duplicate
3	<input type="checkbox"/>					
4	<input type="checkbox"/>					
5	<input type="checkbox"/>					

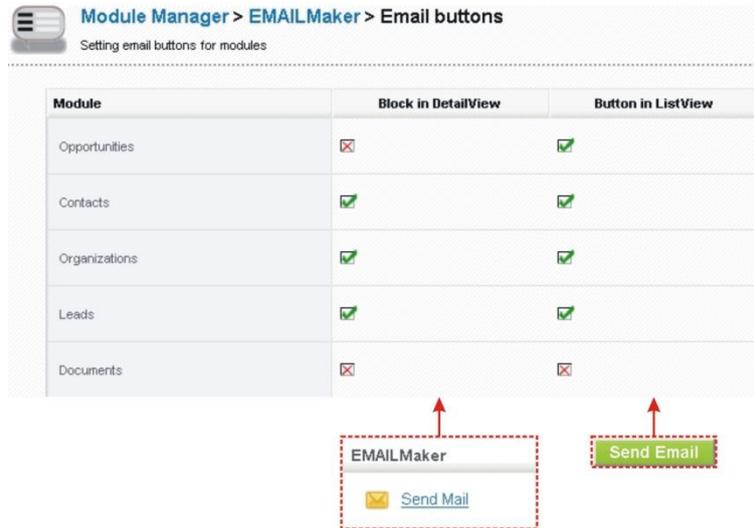
Module Manager > EMAILMaker
Manage module behavior inside vtiger CRM

- Email buttons**
Setting email buttons for modules
- Profiles**
Manage user-specific EMAIL Maker access to different Roles.
- Templates in block**
Set count of templates shown in EMAIL Maker block
- EMAIL Maker License**
Manage your EMAIL Maker License Key
- Upgrade**
Upgrade EMAILMaker

Picture 7.1 How to initiate EMAIL Maker settings

7.1 Email buttons

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



Picture 7.2 Setting email buttons and EMAIL Maker block for modules

7.2 Manage profiles

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



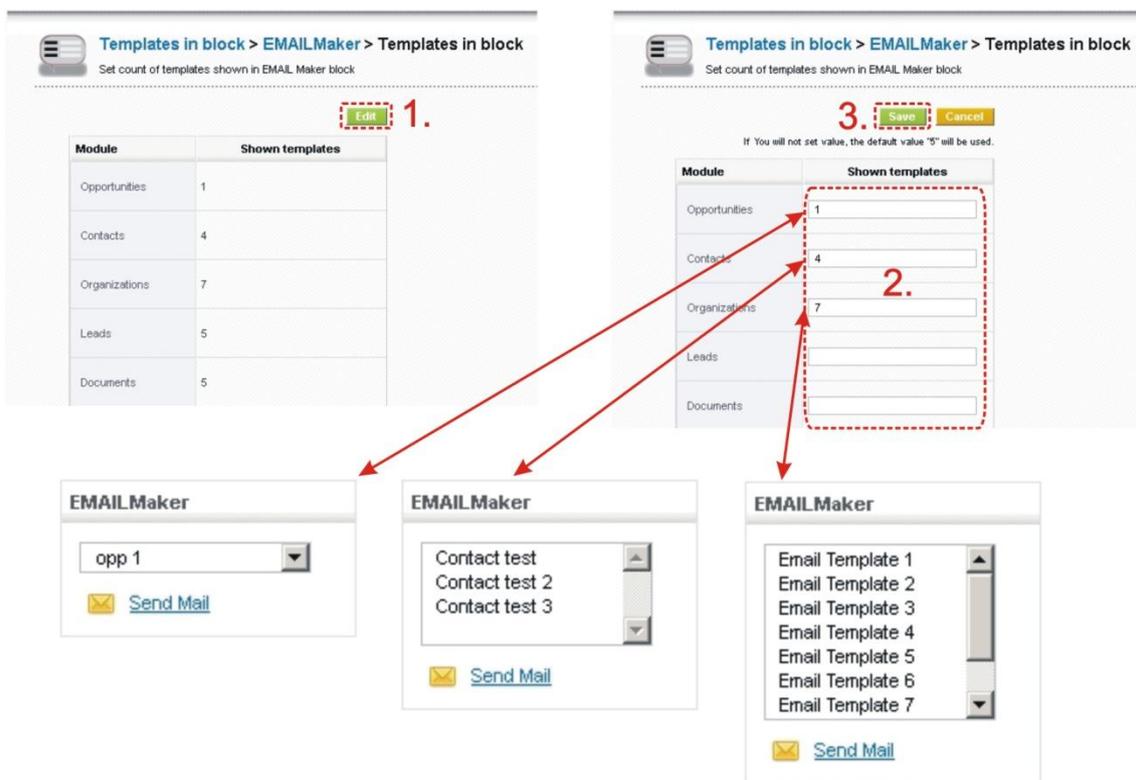
Picture 7.3 Manage profiles

7.3 Templates in block

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

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

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

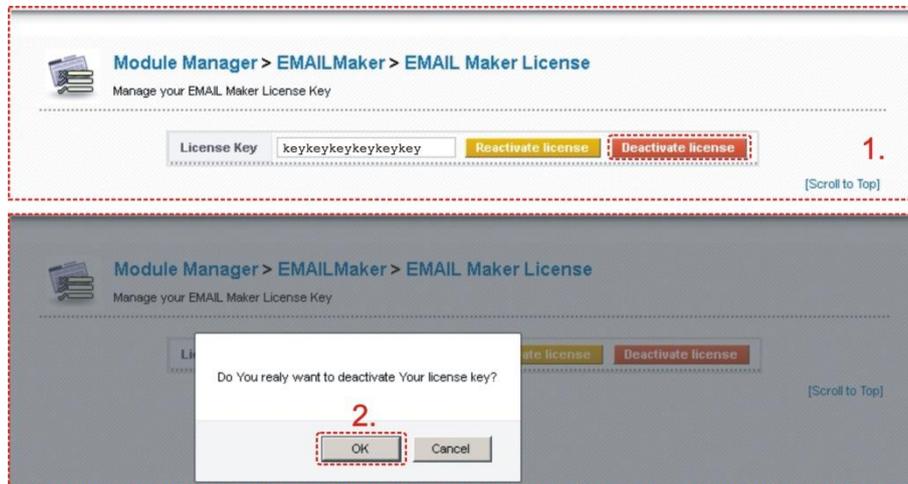


Picture 7.4 Templates in EMAIL Maker block

7.4 Deactivate/Reactivate license key

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

1. Click on **Deactivate license**.
2. Confirm deactivation using **OK** button in next window.



Picture 7.5 Deactivate license

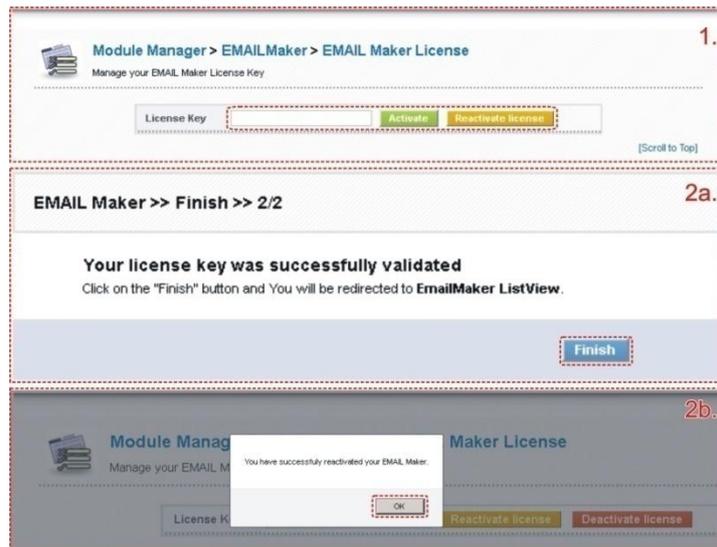
After deactivation of license you can list or export your email templates, but you cannot add, edit, delete or use them. The buttons or links to work with templates are inactive or not visible in the ListView and DetailView (Picture 7.6). EMAIL Maker block is not visible either.



Picture 7.6 ListView after license deactivation

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

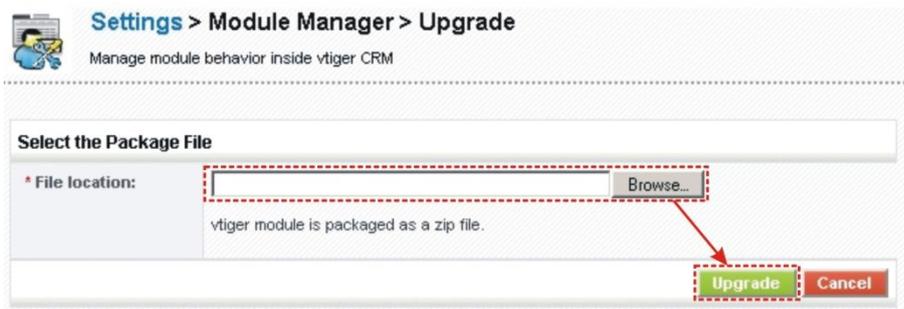
1. Insert the license key and click on button **Activate** if you are reactivating license after previous deactivation, or click on button **Reactivate license** if you are reactivating license after previous migration of the server.
2. If license key is correct you will be informed about successful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



Picture 7.7 Re/activate license

7.5 Upgrade of the EMAIL Maker

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



Picture 7.8 Upgrade of EMAIL Maker

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



Picture 7.9 Upgrade failure

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

8 Tips & tricks

8.1 How to disable Send Mail buttons/links

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



Picture 8.1 Disabling Send Mail button and link

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



Picture 8.2 How to edit ListViewEntries.tpl

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



Picture 8.3 How to edit DetailView.tpl

8.2 How to use already created template for another module

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

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

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

9 FAQs

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

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

Q: *How can I migrate to latest vtiger CRM version with installed EMAIL Maker extension?*

ITS4You: Please provide following steps:

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

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

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

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

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

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

ITS4You: The trial version is not available, but you can use our demo

<http://demo.vtigercrm.sk/index.php?module=EMAILMaker&action=index> to try it. You can download a FREE version too.

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

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

Q: *Can I use custom fields?*

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

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

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

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

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

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

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

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

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