PDF MAKER FOR VTIGER CRM

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

The PDF Maker benefits are:

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

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

- Template for Header/Footer

Since version 600.18.0 the main new features are:

- Watermark functionality
- Lock PDF file with Password

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

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

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

Terms and conditions

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

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

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

Private policy

During installation it is necessary to exchange following information:

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

Please provide following steps in order to install PDF Maker:

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

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

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

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

Picture 1.1 Installation of PDF Maker – step 1

Picture 1.2 Installation of PDF Maker – step 2
3. Verify the import details parsed from the .zip (package) file. Please check that you accepted the license agreement and click to proceed or to cancel.

Picture 1.3 Installation of PDF Maker – step 3

4. Click on button to complete the module import.

Picture 1.4 Installation of PDF Maker – step 4

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

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

Picture 1.5 Validation step 1
2. PDF Maker Download. Click on button to download and install mpdf script.

![PDF Maker installation](image1)

**Picture 1.6 Validation step 2**

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

![PDF Maker installation](image2)

**Picture 1.7 Validation step 3 – Finish installation**
1.1 How to upgrade PDF Maker

The upgrade of the PDF Maker is initiated in the same way as PDF maker installation or click on Upgrade link in ListView of PDF Maker (Picture 1.8). So please refer to above installation part for details how to initiate the import of the module from the file. As can be seen on the Picture 1.10 you will be notified that the PDF Maker module already exists. The upgrade will start immediately when you click on the button. After upgrade the notification about successful upgrade is shown and click on button.
2 Quick start

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

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

2.1 Create the simple PDF template

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

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

![Picture 2.1 Start PDF Maker](image)

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

![Picture 2.2 Add template in the ListView](image)
3. In the EditView (Picture 2.3), go to Properties tab and define the template name and the description.

![Picture 2.3 Creation of the template in EditView](image)

4. Choose the module from the list (i.e. Invoice).
5. Choose one of the all available fields from the selected module (i.e. Invoice No) and click on the button.
6. Repeat the steps 5. and 6. to finish your PDF template according to your needs.
7. Finally click on the button.
2.2 Create the simple Header/Footer template

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

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

![Picture 2.4 Location of PDF Maker module – PDF Maker Vtiger 6]

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

![Picture 2.5 Add Header/Footer template – PDF Maker Vtiger 6]
3. In the EditView, go to Properties tab and define the template name.

4. Select the type of template from the list (i.e. Header).

5. Choose the module from the list (i.e. Invoice) if you want.

6. Choose one of the all available fields from the selected module (i.e. Invoice No – if module is selected) or create universal template without module’s variables and click on the $button to insert it into template.

7. Repeat the steps 6. and 7. to finish your Header/Footer template according to your needs.

8. Finally click on the Save button.

For more info about creation of your Header/Footer templates, click here.

How to use your Header/Footer template in PDF template you can read here.
2.3 Generate the PDF file

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

**ListView**

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

**DetailView**

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

![Generate the PDF file](http://www.its4you.sk/en/)

**Picture 2.7 Generate the PDF file**
3 Work area

The Work Area of PDF Maker consists of:

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

3.1 ListView

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

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

There is group of buttons in the above part:

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

Note: How to import or export PDF template is described in the chapter 6.2.
3.2 ListView of Header/Footer

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

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

![ListView of Headers/Footers](Picture 3.2ListView of Header/Footers – PDF Maker Vtiger 6)

There is group of buttons in the above part:

- **Actions** contains actions for delete, import and export of the Header/Footer templates
- **Add template** is used to add new PDF template
- **Add Header/Footer** is used to add new Header/Footer template
- **Settings** is settings part of PDF Maker. You can find here Extensions, Profiles, Self-defined labels, Product block templates, License setting, Upgrade PDF Maker and option to Uninstall PDF Make
3.3 DetailView

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

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

![Picture 3.3 DetailView](http://www.its4you.sk/en/)
3.4 DetailView of Header/Footer

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

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

![Picture 3.4 DetailView of Headers/Footers – PDF Maker Vtiger 6](http://www.its4you.sk/en/)
3.5 EditView

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

- Tabs area – allows user to insert into template different kind of values, fields, labels and to set up properties, sharing and other common settings of the PDF template. Tabs area consists of following tabs, which are described in the following subchapters:
  - Basic informations
  - Other informations
  - Labels
  - Product block
  - Header/Footer
  - Properties
  - Settings
  - Sharing
  - Display conditions

- Editing area – is mainly used for inserting/editing your own text, tables, images etc. and to make some design adjustment of the template like font change, color, format, size, background color of the text etc. This editing can be initiated via many toolbars located inside three tabs (Body, Header and Footer) in the above part of Editing area. Please refer to the chapter 4 for the details related to editing.

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

![Picture 3.5 EditView of PDF Maker for Vtiger 6](http://www.its4you.sk/en/)

http://www.its4you.sk/en/
3.5.1 Basic informations

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

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

Table 3-1 Basic information tab
3.5.2 Other information

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

![Picture 3.7 Other information tab]

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

Table 3.2 Other informations tab

3.5.3 Labels

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

![Picture 3.8 Labels tab]

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global language</td>
<td>Global labels.</td>
</tr>
<tr>
<td>Module language</td>
<td>Labels related only to selected module.</td>
</tr>
<tr>
<td>Self-defined labels</td>
<td>Labels defined by user.</td>
</tr>
</tbody>
</table>

Table 3.3 Labels tab
3.5.4 Product block
The product block tab allows inserting product block template and editing it. In addition, you can create your own product block using “Block start”, “Block end” and fields for products and services. How to insert, edit and create product block is described in chapter 4.5.

![Product block tab]

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product block template</td>
<td>Insert predefined and created product block templates. For details please refer to chapter 4.5.</td>
</tr>
<tr>
<td>Product block</td>
<td>Block start, Block end. Each product block has to start with “Block start” and ends with “Block end”</td>
</tr>
<tr>
<td>Common fields for Products &amp; Services</td>
<td>Fields common for products &amp; services. You can find same fields for products and services separately as well, but it is recommended to prefer common fields in the templates.</td>
</tr>
<tr>
<td>Available fields for Products</td>
<td>Fields for products.</td>
</tr>
<tr>
<td>Available fields for Services</td>
<td>Fields for services.</td>
</tr>
</tbody>
</table>

Table 3-4 Product block tab

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

![Header / Footer tab]

http://www.its4you.sk/en/
### Header / Footer

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

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

#### How it works you can find also here

### 3.5.6 Properties

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

![Properties tab](image)

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

![Table 3-6 Properties tab](image)
3.5.7 Settings
The Settings tab allows defining file name, new functionality PDF Password, description, page settings and other settings from usage of template point of view.

![Settings Tab](Picture 3.12 Settings tab)

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>File name</td>
<td>File name in different formats. Please refer to chapter 4.9.1 for details.</td>
</tr>
<tr>
<td>PDF Password</td>
<td>Allows you lock PDF file with static password or password created by values from module or related modules. Read more: PDF Password</td>
</tr>
<tr>
<td>Description</td>
<td>The description of the PDF template.</td>
</tr>
<tr>
<td>Ignored picklist values</td>
<td>Define picklist values which will be ignored in the final PDF document like None, none, keine etc. Entered values have to be separated with comma.</td>
</tr>
<tr>
<td>Status</td>
<td>Active / Inactive</td>
</tr>
<tr>
<td>Number format</td>
<td>Decimal point separator – comma, dot (but any symbol can be used)</td>
</tr>
<tr>
<td></td>
<td>Number of decimal points - 0-3</td>
</tr>
<tr>
<td></td>
<td>Thousands separator – comma, dot, space (but any symbol can be used)</td>
</tr>
<tr>
<td>Set as default</td>
<td>Set/unset as default for DetailView and ListView. For details please refer to chapter 4.9.3.</td>
</tr>
<tr>
<td>Set for Customer Portal</td>
<td>Set/unset for customer portal. For details please refer to chapters 4.9.4 and 7.1.1.</td>
</tr>
</tbody>
</table>

Table 3-7 Settings tab
3.5.8 Sharing

The *Sharing* tab changes depend on whether PDF template is shared (Picture 3.13) or public/private (Picture 3.14). Using this tab you can define how to share your template between you and other users or groups. Please refer to chapter 6.3 to see details.

**Table 3-8 Sharing tab**

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Template owner</td>
<td>Select template owner from the list.</td>
</tr>
<tr>
<td>Sharing</td>
<td>Select “Public”, “Private”, “Share”</td>
</tr>
</tbody>
</table>

3.5.9 Display conditions

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

**Picture 3.15 Display conditions tab**
3.6 EditView of Header/Footer

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

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

- Tabs area – allows user to insert into template different kind of values, fields and labels and to set up properties, and other common settings of the PDF template. Tabs area consists of following tabs which are described in the following subchapters:
  - Basic information
  - Other informations
  - Labels
- Editing area – is mainly used for inserting/editing your own text, tables, images etc. and to make some design adjustment of the template like font change, color, format, size, background color of the text etc.

![Picture 3.16 EditView of Header/Footer – PDF Maker Vtiger 6](http://www.its4you.sk/en/)

3.6.1 Basic informations of Header/Footer

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

![Picture 3.17 Basic information tab of Header/Footer template](http://www.its4you.sk/en/)
<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Template name</strong></td>
<td>The name of the template. It is mandatory field for template creation.</td>
</tr>
<tr>
<td><strong>Type</strong></td>
<td>Type of template. Header or Footer template</td>
</tr>
<tr>
<td><strong>Module</strong></td>
<td>You can select module if want add module fields. If you do not choose module template will be available for all PDF templates.</td>
</tr>
<tr>
<td><strong>Related modules</strong></td>
<td>If you select module and if exists related module(s) to selected module, it is possible here to select and use fields from any related modules.</td>
</tr>
<tr>
<td><strong>Header/Footer variables</strong></td>
<td>Current page, All pages, Page/pages</td>
</tr>
<tr>
<td><strong>Company information</strong></td>
<td>Comprises group of fields from Company information.</td>
</tr>
<tr>
<td><strong>User information</strong></td>
<td>Assigned to User, Logged in User, Modified by User and Created by User information</td>
</tr>
</tbody>
</table>

Table 3-9 Basic information of Header/Footer template

### 3.6.2 Other Informations of Header/Footer

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

![Picture 3.18 Basic information of Header/Footer template](image)

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

Table 3-10 Other Informations of Header/Footer

### 3.6.3 Labels of Header/Footer

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

![Picture 3.19 Labels of Header/Footer](image)
<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global language</td>
<td>Global labels</td>
</tr>
<tr>
<td>Module language</td>
<td>Labels related only to selected module</td>
</tr>
<tr>
<td>Self-defined labels</td>
<td>Labels defined by user</td>
</tr>
</tbody>
</table>

Table 3-11 Labels of Header/Footer
3.7 PDF Maker block

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

a) PDF Maker block just inform that there is no PDF template inside the selected module for logged user (this block is visible when you inactive or delete all templates for particular module)

b) Standard layout of the PDF Maker block.

c) Extended layout of the PDF Maker block available for modules Invoice, Sales Order, Purchase Order, Quotes.

![PDF Maker block](http://www.its4you.sk/en/)

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http://www.its4you.sk/en/ 29
4 Editing

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

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

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

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

1. Press the button on the toolbar.

2. A pop-up window called "Image Properties" will appear. It includes four tabs that group image options.

3. Define the URL address of the image. You may also use the Browse Server in order to browse the files. Set up other properties of the image.

4. Click to add image into Templates.

For more info visit following site: http://docs.ckeditor.com/CKEditor_3.x/Users_Guide/Rich_Text/Images
4.2 Creating tables

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

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

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

3. Click on button.

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

Please refer also to the chapter 4.10.1 for more details.

For more info visit following site: http://docs.cksource.com/CKEditor_3.x/Users_Guide/Rich_Text/Tables
4.3 Inserting barcodes and QR codes

There is a “Barcodes, QR code” field in the Other information tab. Barcodes are divided into group. Detailed description of the barcodes can be found in the attached document (just click on 3).

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

1. Choose your barcode type.
2. Click on [insert barcode into template] button.
3. Barcode is inserted into template.
4. Replace “YOURCODE” with static number/string (4a) for making the barcode or you can use the variables from the actual template (4b).
How to insert QR code shows next picture:

1. In Other information tab please select QR field from “Barcodes, QR code” and click on button.

2. In inserted part [BARCODE|QR=YOURCODE|BARCODE] replace “YOURCODE” with your QR code value.

![Picture 4.5 How to insert QR code]
4.3.1 Formatting barcodes and QR codes

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

a) additional attributes – add one or more supported attributes into barcode/QR syntax like:

   \[[\text{BARCODE}| \text{CODE}=\text{YOURCODE}| \text{ATT1}=\text{value1}|...| \text{ATTN}=\text{valueN}|\text{BARCODE}]\]

   Example: \[[\text{BARCODE}| \text{EAN13}=789| \text{SIZE}=1.5| \text{HEIGHT}=0.5|\text{BARCODE}]\]

b) Cascading Style Sheets (CSS) – define CSS style within PDF template and put it into barcode/QR syntax like: \[[\text{BARCODE}| \text{CODE}=\text{YOURCODE}| \text{CLASS}=\text{name\_of\_style}|\text{BARCODE}]\]

   Example:

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

4.4 Inserting labels

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

![Picture 4.7 Labels tab](http://www.its4you.sk/en/)

Please refer to example below used for invoice PDF template. Instead of having two (or more) templates the labels are used as much as possible. For example the label %G_Phone% used in the template will be replaced in final PDF file in german language as “Telefon” and in final PDF file in English language as “Phone” automatically based on your language selection. So it is not necessary to create duplicate templates for another language, just use labels and select language before exporting into PDF. The global labels use notation %G_*****%, module labels use %M_*****% and self-defined labels use notation %C_*****%.

![Picture 4.8 Inserting labels](http://www.its4you.sk/en/)

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

The product blocks are simple but powerful parts of your PDF templates. They are used to display all products/services from modules Invoices, Quotes, Sales Order and Purchase Order in your PDF files regardless of the number of products/services for particular record. Below you can find simple example where invoice contains three products which are automatically seen in the final PDF exported file. You don’t need to create template for three rows in the table, just define start and stop of the product block and product fields according to your needs. Next chapter describes how to create your own product block. In addition, we also introduced some default product block templates as well as tool for managing them (7.4).

4.5.1 Create new product block in EditView

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

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

There are already created product block templates which you can insert from product block tab and later edit if needed. These templates are available only for modules Invoices, Quotes, Sales Order and Purchase Order that displays product block. The product block templates created within product block tool (7.4) can be added in the same way. You can simply add the whole product block template into your template by:

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

When the product block template is inserted you can modify it according to your needs. For example you can add new cells / rows / columns, change font, change the background color, etc. You can edit layout like a table or you can add some new variables / labels as well.
4.5.3 Separate Block for Products and for Services
Since release 600.12.0 you are able to create separate Block for Products and for Services. To create separate Block please provide following steps:

1. Go to Product block tab and insert product block start variable (#PRODUCTBLOC_PRODUCTS_START# or #PRODUCTBLOC_SERVICES_START#) and product block end (#PRODUCTBLOC_PRODUCTS_END# or #PRODUCTBLOC_SERVICES_END#).

2. Add all necessary product/service fields according to your needs between (#PRODUCTBLOC_PRODUCTS_START# or #PRODUCTBLOC_SERVICES_START#) and (#PRODUCTBLOC_PRODUCTS_END# or #PRODUCTBLOC_SERVICES_END#) and provide formatting if needed.

![Picture 4.12 - Separate Block for Products and for Services](image-url)
4.6 Using related blocks
You can create related blocks for modules based on each related module and use it inside PDF template. Please refer to next chapters to see how to create, insert, edit or delete related blocks.

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

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

Picture 4.13 Start creation of the related block
As you can see in the next picture, 5 steps are necessary to create the related block. In this window also all related entity modules for primary module are shown. First step is to select one related module from the available list (1.). Please select “Invoice” and click on Next button.

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.).
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.

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.

http://www.its4you.sk/en/
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 button to finish.

![Picture 4.18 Creation of the related block – step 5](http://www.its4you.sk/en/)
4.6.2 Insert related block
If the related block is created you can continue with editing your template. In order to insert related block provide following actions:

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

![Picture 4.19 Insert related block](image-url)
4.6.3 Edit related block

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

![Picture 4.20 Edit related block]

4.6.4 Delete related block

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

![Picture 4.21 Delete related block]
4.7 Using ListView block

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

1. Go to Properties tab and select the “Block start” and click [Insert into template].
2. Insert fields you would like to have in ListView block ($s-invoice-invoice_no$..).
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 PDF file using following steps:

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

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

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

![Mapping product block with Vtiger form](image)

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

Table 4-1 Mapping values for result prices available in Invoices, Quotes, Sales and Purchase Order
<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Record ID</td>
<td>Record ID</td>
</tr>
<tr>
<td>Product No / Service No</td>
<td>Number of product / service</td>
</tr>
<tr>
<td>Position</td>
<td>Number of position (1,2,3, ...)</td>
</tr>
<tr>
<td>Currency</td>
<td>Euro, Dollar</td>
</tr>
<tr>
<td>Currency code</td>
<td>EUR, USD</td>
</tr>
<tr>
<td>Currency symbol</td>
<td>€, $</td>
</tr>
<tr>
<td>Name</td>
<td>Name and description of the product or service</td>
</tr>
<tr>
<td>Name of product/service</td>
<td>Only the name of the product or service</td>
</tr>
<tr>
<td>Description of product/service</td>
<td>Description of the product/service from module Product/Service</td>
</tr>
<tr>
<td>Comment for product/service</td>
<td>Comment for products/service from Invoice/SO/PO/Q form</td>
</tr>
<tr>
<td>Quantity</td>
<td>Quantity defined in Invoice/SO/PO/Q</td>
</tr>
<tr>
<td>Unit</td>
<td>Unit of product/service from module Product/Service</td>
</tr>
<tr>
<td>List price</td>
<td>List Price from Invoice/SO/PO/Q</td>
</tr>
<tr>
<td>Total price</td>
<td>List price x Unit</td>
</tr>
<tr>
<td>Discount</td>
<td>Discount amount for each product/service</td>
</tr>
<tr>
<td>Discount (%)</td>
<td>Discount in % for each product/service</td>
</tr>
<tr>
<td>Total after discount</td>
<td>Total price after discount without TAX</td>
</tr>
<tr>
<td>TAX</td>
<td>TAX amount for each product/service</td>
</tr>
<tr>
<td>TAX (%)</td>
<td>TAX in % for each product/service</td>
</tr>
<tr>
<td>Total price with TAX</td>
<td>Total price with TAX for each product/service</td>
</tr>
</tbody>
</table>

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

4.9.1 File name

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

![File name settings](Picture 4.24 File name settings)
4.9.2 Status
You can set status as active or inactive for each template. Please take into account that this can be set separately per logged user, it means this setting is not global. The inactive templates will not appear in the list of available templates in the PDF maker block. You can find status of existing templates in:

a) ListView (Picture 4.25) – “Status” column
b) DetailView (Picture 4.26) – Template informations

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

a) ListView (Picture 4.25) – the template default for DetailView is marked with text “(default for DetailView)”, template default for ListView is marked with text “(default for ListView)”. If the template is default for DetailView as well as for ListView, then in the template name column text “(default)” is written.

b) DetailView (Picture 4.26) – Properties tab

c) PDF Maker block – the default template is highlighted and automatically selected in PDF Maker block. PDF template is also highlighted and selected in case that only one PDF template exists for module (see Picture 4.28).

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

1. Using Tools links “Set as default” and “Unset as default” in the DetailView (Picture 4.26). Click on “Set as default” to set the template as default for DetailView as well as for ListView. If you click on “Unset as default”, the template will be unset as default for DetailView and for ListView.

2. Using Settings tab in EditView – check/uncheck the checkboxes to change this setting (Picture 4.27) separately for EditView and ListView.
Please take into account that templates using ListView block cannot be in parallel set as default for DetailView. The checkbox “for DetailView” in “Settings” tab is automatically inactive if you check checkbox “ListView block” in “Properties” tab (Picture 4.29)

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

Picture 4.29 Setting default vs. ListView block

Picture 4.30 Setting the PDF template as template for Customer Portal
4.9.5 Watermark

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

To set Watermark please provide following steps:

1. Open your template in EditView and open Properties tab

   ![Image](image1.png) Picture 4.31 Watermark - PDF Maker Vtiger 6

2. Now choose image or text

   ![Image](image2.png) Picture 4.32 Watermark type – PDF Maker Vtiger 6

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

   ![Image](image3.png) Picture 4.33 Image Watermark – PDF Maker Vtiger 6
• If you select text you can set static text or dynamic based on values of module or related modules. And also you can set Alpha property.

![Set Value](image)

**Picture 4.34 Watermark text setting – PDF Maker Vtiger 6**

4.35 Watermark text – PDF Maker Vtiger 6

### 4.9.6 PDF Password

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

To lock your PDF file please provide following steps:

1. Open your template in EditView and open Settings tab

![Settings](image)

**Picture 4.36 PDF password – PDF Maker Vtiger 6**
2. You can set static password or dynamic password based on values of module or related modules.

![Set Value](http://www.its4you.sk/en/)  

**Picture 4.37 PDF password – PDF Maker Vtiger 6**

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

![Organization](http://www.its4you.sk/en/)  

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

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

![Password](http://www.its4you.sk/en/)  

**Picture 4.39 Organization mail like PDF password – PDF Maker Vtiger 6**
4.10 Advanced editing

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

![Picture 4.40 The structure of the table]

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

Restrictions of the subtotal values usage:
- can be used only in the foot of the tables, it means within tags <tfoot>, </tfoot>
- it is not allowed to use them together with tag <rowbreak />
Please refer to the following table with list of the variables for subtotal values and their description. Please note, that variables $TOTALAFTERDISCOUNT_SUBTOTAL$ and $TOTALSUM_SUBTOTAL$ are same in case you are using group tax.

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>$TOTAL_SUBTOTAL$</td>
<td>Sum of the “Subtotal”, i.e. sum of the (List Price * Qty)</td>
</tr>
<tr>
<td>$TOTALAFTERDISCOUNT_SUBTOTAL$</td>
<td>Sum of the Net Price without TAX after Discount</td>
</tr>
<tr>
<td>$TOTALSUM_SUBTOTAL$</td>
<td>Sum of the Total Price (Net Price without TAX + TAX)</td>
</tr>
</tbody>
</table>

Table 4-3 Subtotal values

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

![Subtotal values](image-url)

Picture 4.41 Subtotal values
4.10.3 `<rowbreak />` in tables

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

![Image of table example](image-url)
5 PDF Maker block actions
The PDF Maker block (3.6) contains links to initiate several actions:

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

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

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

1. Go to the detail view of given Module and on the left side of detail view, in the PDF Maker block, choose your PDF Template. The template is selected automatically in case the only one exists for given module or in case the default template is already defined (see chapter 4.9.3).

2. Click on Export and export will be done. Please note that next step depends on used web browser.

![Picture 5.1 Export to PDF](http://www.its4you.sk/en/)
5.2 Print

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

You need to only click on Print button and then choose your printer and print.
5.3 Send email with PDF
PDF Maker allows you to send your PDF documents via email in few easy steps:

1. Go to the detail view of given Module and on the left side of detail view, in the PDF Maker block, choose your PDF Template. The template is selected automatically in case the only one exists for given module or in case the default template is already defined (see chapter 4.9.3).

2. Click on Send Email.

3. A popup window “Compose Email” will appear on the screen with already attached PDF file. Please add subject and text according to your needs. You can add additional recipients if necessary as well.

4. Click on Send button to send email with attached file(s).

Picture 5.3 Send Email with PDF – Compose E-Mail
5.4 Edit and Export to PDF

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

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

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

1. Go to the detail view of given Module and on the right side of detail view, in the PDF Maker block, choose your PDF Template.
2. Click on the Save into Documents link. A popup window will appear on the screen.
3. In the part "Documents" please write the title of the document and select the storage folder. You can also add a note.
4. Click on the Save button to save the PDF file into Documents.
5. After that the document can be find under module Documents.
5.6 PDF Product Page Break
Product blocks are available for some modules (Invoice, SO, PO, Q). PDF Product Page Break action allows you to setup additional settings according your needs. You can define:

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

5.6 Product break settings
Also good option is modify subtotal before page break. You can edit it if you edit `#PRODUCTBLOC_START#` in your template (Picture 5.6).
5.7 PDF Product Images

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

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

5.7.1 PDF Product Images in product templates

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

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

Depending on your selection 4 different situations can happen:

a) If more pictures are available only selected picture will be used.
b) If only one picture is available it is used automatically.
c) If picture is not available then no changes will be visible in the final document.
d) In case you don’t want to use picture you are able to switch it off.
5.7.2 PDF Product Images in product blocks
The PDF Product Images also allows defining images which will be used in final exported PDF files within product blocks.

1. Start editing of your PDF template. Go to the Product block tab, from “Available fields for Products” select “Product Image” and click on button.

2. As can be seen below, it is required to insert the variable $PRODUCTS_IMAGENAME$ between #PRODUCTBLOC_START# end #PRODUCTBLOC_END#. 

[Image of PDF template with instructions and placeholders]

Picture 5.9 PDF Product images
Let’s assume that your PDF template including product image variable is correctly prepared and saved. In order to apply PDF product images settings:

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

2. Click on PDF Product Images link.

3. A popup window “PDF Product images” will appear on the screen. It displays all available pictures for each product from the selected record (for example invoice). The system selects automatically the first available picture but you can select which picture will be used in final PDF document, as well as its size. Depending on your selection 4 different situations can happen:
   a) If more pictures are available only selected picture will be used.
   b) If only one picture is available it is used automatically.
   c) If picture is not available the cell in the PDF document remains empty.
   d) In case you don’t want to use picture you are able to switch it off.

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

4. Click on Save button to save your setting.

5. Now, PDF product images settings are saved and will be used for additional actions, like export to PDF, send email with PDF etc.
6 Additional features

6.1 Mass export and merging templates

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

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

![Mass export](image1)

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

![Merging templates](image2)
If you combine mass export and merging templates you will obtain final PDF document as is shown in the next picture.

6.1.1 Sorting within mass export

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

6.5 Manage records in PDF

6.6 Manage records in PDF
6.2 Export and import templates

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

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

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

![Export of the templates](image)

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

![Import PDF templates page](image)

In the Import PDF templates page, browse the PDF Maker template-related data in *.xml format and then click the Next button. It will take a few seconds to complete the import. The imported templates can be found in PDF Maker ListView page.
6.3 Sharing
Using Sharing tab you can define template owner and how to share your template between you and other users or groups. You can setup sharing for different entities & members. In order to share your template:

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

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

1. Go to EditView, and in Other information tab select custom function from selectbox „Custom functions“. You can choose one of our functions (its4you_*), or your own function.
2. Click button. It adds function in form
[CUSTOMFUNCTION|functionname|param1|param2|...|CUSTOMFUNCTION].
3. Finally you have to define parameters of the function as shown in the Picture 6.10.
In the above example function with 5 parameters was used, i.e. [CUSTOMFUNCTION|functionname|param1|param2|param3|param4|param5|CUSTOMFUNCTION]. It is possible to use functions without parameters as well. In this case use just notation [CUSTOMFUNCTION|functionname|CUSTOMFUNCTION].

Important note: It is not allowed to use one custom function inside another one, i.e. to use custom function as parameter of another custom function.
Following table contains short description of our its4you_* functions which you can use in your PDF templates.

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>its4you_if</td>
<td>```[CUSTOMFUNCTION</td>
</tr>
<tr>
<td>its4you_getTemplateId</td>
<td>```[CUSTOMFUNCTION</td>
</tr>
<tr>
<td>its4you_getContactImage</td>
<td>```[CUSTOMFUNCTION</td>
</tr>
<tr>
<td>its4you_sum</td>
<td>```[CUSTOMFUNCTION</td>
</tr>
<tr>
<td>its4you_deduct</td>
<td>```[CUSTOMFUNCTION</td>
</tr>
<tr>
<td>its4you_multiplication</td>
<td>```[CUSTOMFUNCTION</td>
</tr>
<tr>
<td>its4you_divide</td>
<td>```[CUSTOMFUNCTION</td>
</tr>
<tr>
<td>its4you_formatNumberToPDF</td>
<td>```[CUSTOMFUNCTION</td>
</tr>
<tr>
<td>its4you_formatNumberFromPDF</td>
<td>```[CUSTOMFUNCTION</td>
</tr>
</tbody>
</table>

Table 6-1 its4you functions
6.5 Mass print
Allows you print from ListView more documents. Only you need to do is that choose records, click on button and then choose PDF Export. In pop-up window, choose PDF Maker template, click on, choose your printer and click on Print.

Picture 6.11 Mass print
6.6 Template for Header/Footer

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

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

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

![Picture 6.12 Custom Header/Footer in PDF template – PDF Maker Vtiger 6](image6.12)

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

![Picture 6.13 Header template used – PDF Maker Vtiger 6](image6.13)

![Picture 6.14 Footer template used – PDF Maker Vtiger 6](image6.14)

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

![Picture 6.15 Header and Footer templates are used – PDF Maker Vtiger 6](image6.15)
How to use Header/Footer template

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

- First at all you need to create your Header/Footer template ([Create the simple Header/Footer template](#))
- Then your template is available in ListView of Header/Footer ([ListView of Header/Footer](#))
- Open your PDF template and select Header/Footer tab
- Choose Header or (and) Footer template for your PDF Maker template from list of Headers/Footers ([Header/Footer](#))
- Now you can generate PDF file with your Header/Footer template
- If you need to provide changes in header you do not need edit all PDF templates just your Header or Footer template
7 Settings
The PDF Maker settings are accessible directly from the ListView and consist of (Picture 7.1):

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

![Picture 7.1 PDF Maker settings](http://www.its4you.sk/en/)

7.1 Extensions

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

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

![Picture 7.2 Customer portal](http://www.its4you.sk/en/)
7.1.2 Workflows

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

Creating Workflow

![Workflow creation interface](image)

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

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

Picture 7.5 Send email with PDF maker attachments for workflows
### 7.1.3 Export to RTF

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

To export RTF file please click on button in PDF Maker block in your record.
7.1.4 Styles 4 You

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

To install Styles4You please provide following steps:

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

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

Here you can also add, edit and delete your styles. To add style please click on + Add Record button.
Fill name, choose priority and insert your style. Priority is used when you add more styles to one template. PDF Maker takes CSS with smaller number.

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

Now, click on button to select style or on to create new style.

Now, your style has been added to your template.
Style used in your template you can also find in edit view of template in CSS Style tab.
7.2 Profiles
You may define PDF Maker privileges for all profiles. You may define Create/Edit, View and Delete privileges. In order to change privileges click on \textit{Edit}, use the checkboxes and click on \textit{Save} button to save changes.

\begin{center}
\includegraphics[width=\textwidth]{profile.png}
\end{center}

\textbf{Picture 7.16 Manage profiles}

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

1. Click on \textit{Add} button.
2. Define label key \texttt{C_*****} and value for your current language. Click on \textit{Save} button.
3. In order to define values for other installed languages click on “Other values” link.
4. Define label value for additional languages and click on \textit{Save} button.

You can also find here button \textit{Delete} which allows you to delete unnecessary labels.
7.4 Product block templates

As can be seen in the picture below, you can simply add - , edit - , duplicate - or delete - product block templates. 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 .

When you click on button , following window will appear on your screen (Picture 7.19). In order to create and save your own product block template please provide following steps:

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

Picture 7.19 Create new product block template
7.5 License settings

7.5.1 Deactivate license

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

1. Click on Deactivate license button

![Picture 7.20 Deactivate PDF Maker]

2. Confirm deactivation using Yes button

![Picture 7.21 Deactivate PDF Maker]

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

![Picture 7.22 Deactivated PDF Maker]

![Picture 7.23 Activate PDF Maker]
7.5.2 Reactivate license

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

1. Click on Reactivate license

2. Confirm with Save
7.6 Uninstall

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

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

7.26 Uninstall PDF Maker – step 1

- Click on Uninstall PDFMaker button

7.27 Uninstall PDF Maker – step 2

- Confirm uninstall with Yes button

7.28 Uninstall PDF Maker – step 3

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

8.1 How to define background image

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

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

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

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

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

![Picture 8.1 Background image](http://www.its4you.sk/en/)

http://www.its4you.sk/en/ 91
8.2 How to print labels, envelopes and more

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

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

8.3 Movable PDF Maker block

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

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

August 2018: 600.18.0
- Watermark
- PDF Password
- Minor Improvements and bug fixes

July 2018: 600.17.0
- Template for Header/Footer
- Minor Improvements and bug fixes

November 2016: 600.16.0
- Styles4You
- More user-friendly create/edit of template (movable PDF Maker block in EditView)
- Minor Improvements and bug fixes

August 2016: 600.15.0 – 600.15.1
- Save PDF into Documents in Edit and Export

July 2016: 600.14.0
- Export to RTF functionality
- Minor Improvements and bug fixes

June 2016: 600.13.0
- Searching in ListView (3.1 ListView)
- Owner and Sharing in ListView of PDF Maker (Picture 3.1 ListView)
- New variables for “Modified by User” and “Created by User” available
- Brazilian Portuguese translation of PDF Maker
- Since release 600.13.0 is in installation process new mpdf (mpdf6) installed
- Issue with ListView export language fixed
- Fixed its4you_getContactImage custom function

March 2016: 600.12.0 – 600.12.1
- Issue with Custom Currency fields fixed
- Fixed issue with wrong display & in QR code
- Template owner is user who creates template
- Option to create separate Block for Products and for Services
- Fixed issue with printing from ListView
- Minor Improvements and bug fixes

January 2016: 600.11.0 – 600.11.1
- Faster loading EditView of template and Create template page

December 2015: 600.10.1
- Vat block displays also when VAT is 0%
- Issue with Currency fields fixed
- $site_URL available in template by $siteurl$

November 2015: 600.10.0
- Finnish translation of PDF Maker
- Available option to add custom Company Info into template
- Showing description of template after mouse rollover in PDF Maker block
- Product block where is chosen column List Price is possible to select only for module PriceBook

**October 2015: 600.9.1 – 600.9.3**
- bug fixes
- fixed bug with showing $PRODUCTS_IMAGENAME$

**August 2015: 600.9.0**
- option to add conditions to show/hide templates in PDF Maker block

**Jun 2015: 600.8.0 – 600.8.2**
- Compatibility with Vtiger 6.3

**May 2015: 600.7.0 – 600.7.2**
- Print PDF option available

**May 2015: 600.6.0**
- sorting of templates in PDF Maker block by name
- privileges for DETAIL/EDIT/DELETE of templates
- bug fixes

**17th December 2014: 600.5.3**
- Upgrade option added
- bug fixes

**10th December 2014: 600.5.1 – 600.5.2**
- fixed sorting in related blocks

**27th November 2014: 600.5.0**
- fixed export in Calendar module
- sorting within mass export

**November 2014: 600.4.3 – 600.4.5**
- correction release
- fixed saving PDF Templates
- removed the limit for the selection in related blocks
- correction filing discount in PDF

**24th October 2014: 600.4.0 – 600.4.2**
- add option to create page break in product block
- compatibility with Cashflow4You
- support of “Comments”
- bug fixes

**8th October 2014: 600.3.8 – 600.3.9**
- minor improvements and bug fixes
  - available option to Uninstall PDF Maker
  - fixed bug “assigned to”

**3rd June 2014: 600.3.3**
- change formatting for ui$type 72
- correction for inserting (total, subtotal...) in the EditView for Invoice, Quotes, SalesOrder and PurchaseOrder

**28th May 2014: 600.3.2**
- introduction of Basic version of PDF Maker

22nd May 2014: 600.3.1
- improvements related to support EMAIL Maker

13th May 2014: 600.3.0
- added support for Workflows

30th April 2014: 600.2.0
- added support for Customer portal

January - April 2014: 600.1.1 – 600.1.10
- minor improvements and bug fixes related to movement of the PDF Maker to Vtiger 6

11th December 2013: 600.1.0
- first initiate version for Vtiger 6 based on main functionalities of PDF Maker for Vtiger 5.x
Change log of Manual for PDF Maker

August 2018: manual based on PDF Maker version: 600.18.0
- new chapter: Watermark, PDF Password, Header/Footer template

November 2016: manual based on PDF Maker version: 600.16.0
- new chapter: 7.1.3 Export to RTF, 7.1.4 Styles 4 You, 8.3 Movable PDF Maker block
- updated chapter: 5.4 Edit and Export to PDF

July 2016: manual based on PDF Maker version: 600.13.0
- updated picture: Picture 3.1 ListView, Picture 1.6 Validation step 2
- updated chapter: 3.1 ListView

April 2016: manual based on PDF Maker version: 600.12.1
- new chapter: 4.5.3 Separate Block for Products and for Services

November 2015: manual based on PDF Maker version: 600.10.0
- update chapter: How to install PDF Maker, License settings

August 2015: manual based on PDF Maker version: 600.9.0
- new chapter: 5.2 Print, 6.5 Mass print, 3.5.9 Display conditions

17th December 2014: manual based on PDF Maker version: 600.5.3
- updated chapter: How to upgrade PDF Maker

27th November: manual is based on PDF Maker version 600.5.0
- minor changes: 6.1.1 Mass export and merging templates

24th October 2014: manual is based on PDF Maker version 600.4.2
- new chapter: 5.5 PDF Product Page Break

8th October 2014: manual is based on PDF Maker version 600.3.9
- new chapter: 7.6 Uninstall

23rd June 2014: manual is based on PDF Maker version 600.3.3
- new chapters: What’s new?; 4.9.4 Set template for Customer Portal; 7.1.1 Customer portal; 7.1.2 Workflows; 8.2 How to print labels, envelopes and more;
- updated chapters: 4.4 Inserting labels; 4.5 Using a product blocks; 4.7 Using ListView block
- minor changes: License agreement; 3.5.2 Other information; 4 Editing; 4.3 Inserting barcodes and QR codes; 7.2 Profiles

27th March 2014: based on 600.1.7
- first initiate version for Vtiger 6