

1.Introduction to the PDF Maker

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

The PDF Maker benefits are:

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

4.Quick start

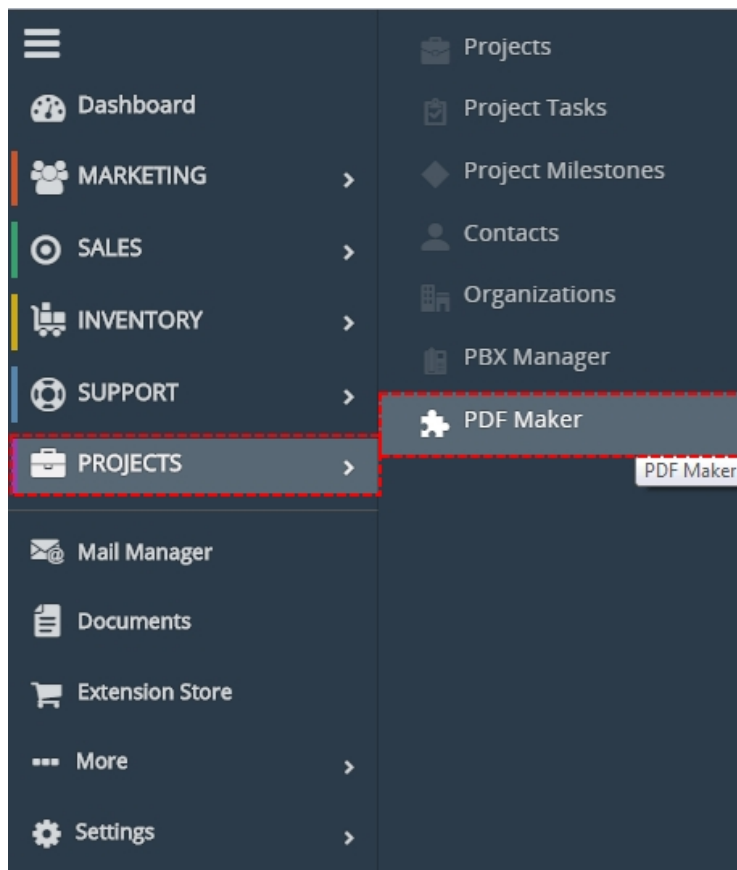
In the following section you can find short description how to create your first simple PDF template for vtiger CRM using PDF Maker.

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

4.1.Create the simple PDF template

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

1. In vtiger CRM menu please go to Projects and click on PDF Maker (since vtiger 7 there is no Tools part so records which used to be in Tools tab are in Projects tab now)



Location of PDF Maker module

- The screenshot below shows PDF Maker ListView. You can click on [+Add template] button to add new template.

[+ ADD TEMPLATE](#)
[+ ADD HEADER/FOOTER](#)
[CUSTOMIZE](#)

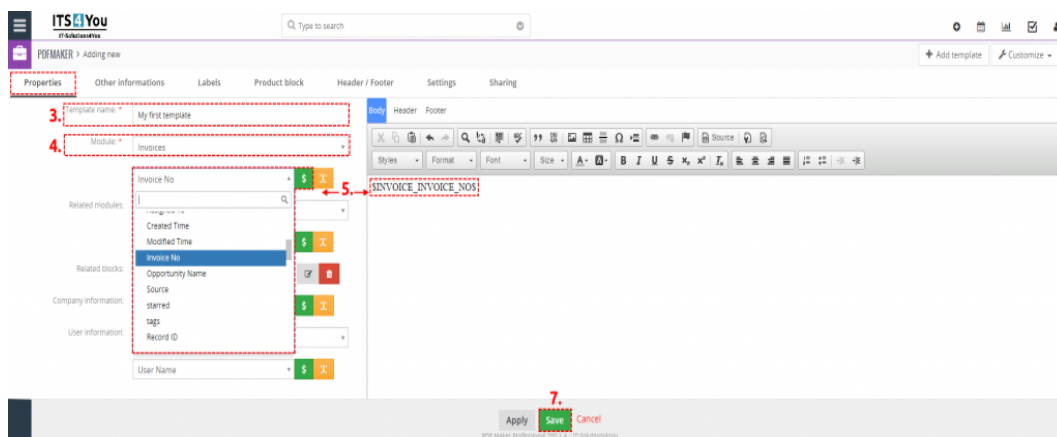
Actions ▾

	Template name	Module	Description	Sharing	Template owner	Status
<input type="text" value="Search"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Invoice	Invoices	Template for Invoice	Public	Administrator	Active
<input type="checkbox"/>	SalesOrder	Sales Orders	Template for SalesOrder	Public	Administrator	Active
<input type="checkbox"/>	PurchaseOrder	Purchase Orders	Template for PurchaseOrder	Public	Administrator	Active
<input type="checkbox"/>	Quotes	Quotes	Templates for Quotes	Public	Administrator	Active

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Add PDF template – PDF Maker Vtiger 7

- In the EditView, go to Properties tab and define the template name and the description.



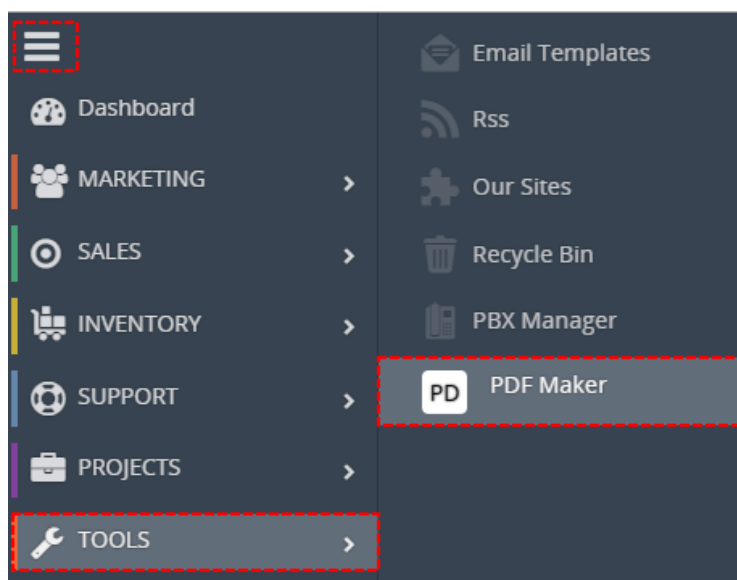
Creation of the template in EditView

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 to insert it into template.
6. Repeat the steps 5. and 6. to finish your pdf template according to your needs.
7. Finally click on the [Save] button.

4.2.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 Projects (since Vtiger 7.1.0 again in Tools) as seen below on the picture.

1. In vtiger CRM menu please go to Projects and click on PDF Maker (since vtiger 7 there is no Tools part so records which used to be in Tools tab are in Projects tab now)



Location of PDF Maker module – PDF Maker Vtiger 7

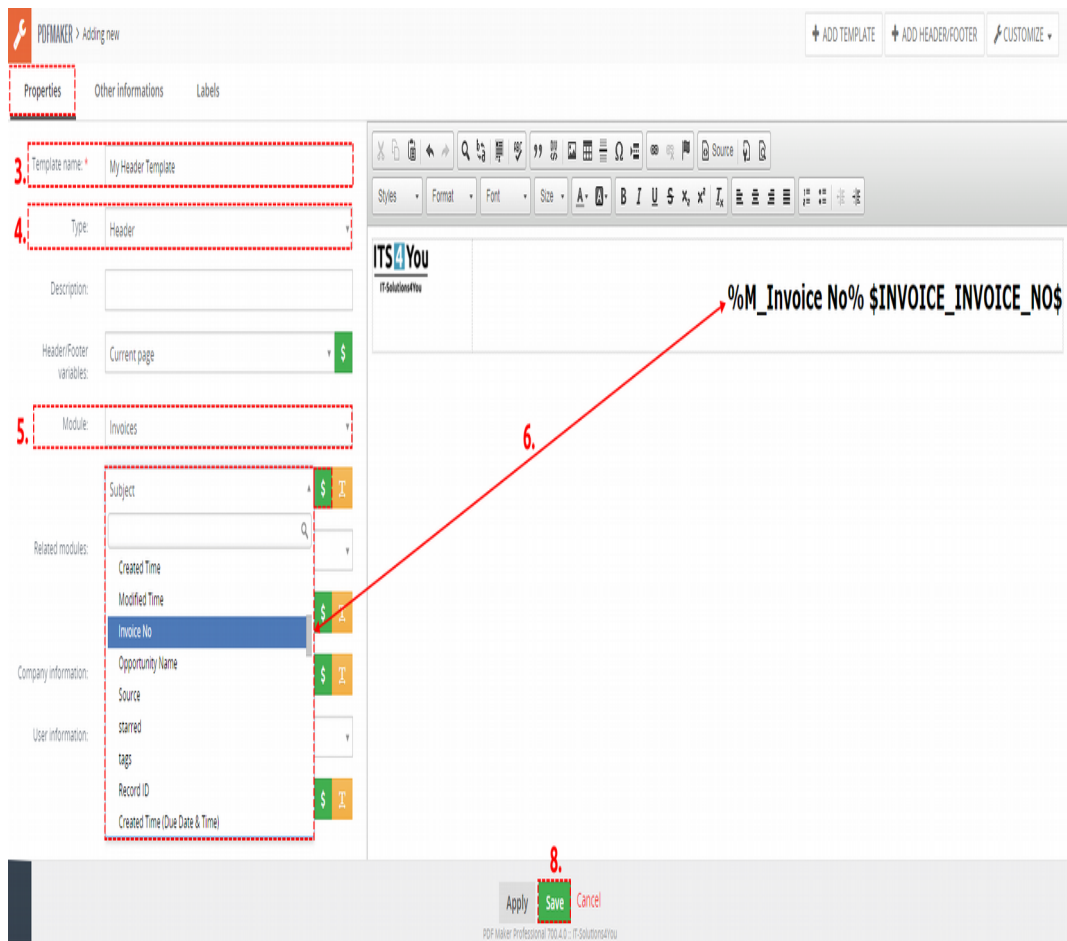
- The screenshot below shows PDF Maker ListView. You can click on [+ ADD HEADER/FOOTER](#) button to add new Header/Footer template.

<div> <div>Actions ▾</div> <div> <div>+ ADD TEMPLATE</div> <div>+ ADD HEADER/FOOTER</div> <div>CUSTOMIZE ▾</div> </div> </div>						
<input type="checkbox"/>	Template name	Module	Description	Sharing	Template owner	Status
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Invoice	Invoices	Template for Invoice	Public	Administrator	Active
<input type="checkbox"/>	SalesOrder	Sales Orders	Template for SalesOrder	Public	Administrator	Active
<input type="checkbox"/>	PurchaseOrder	Purchase Orders	Template for PurchaseOrder	Public	Administrator	Active
<input type="checkbox"/>	Quotes	Quotes	Templates for Quotes	Public	Administrator	Active
<input type="checkbox"/>	Invoice with Header	Invoices	Template for Invoice	Public	Administrator	Active



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Add Header/Footer template – PDF Maker Vtiger 7

- In the EditView, go to Properties tab and define the template name.



Creation of the Header/Footer template in EditView – PDF Maker Vtiger 7

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  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

4.3.How to generate PDF file with PDF Maker template

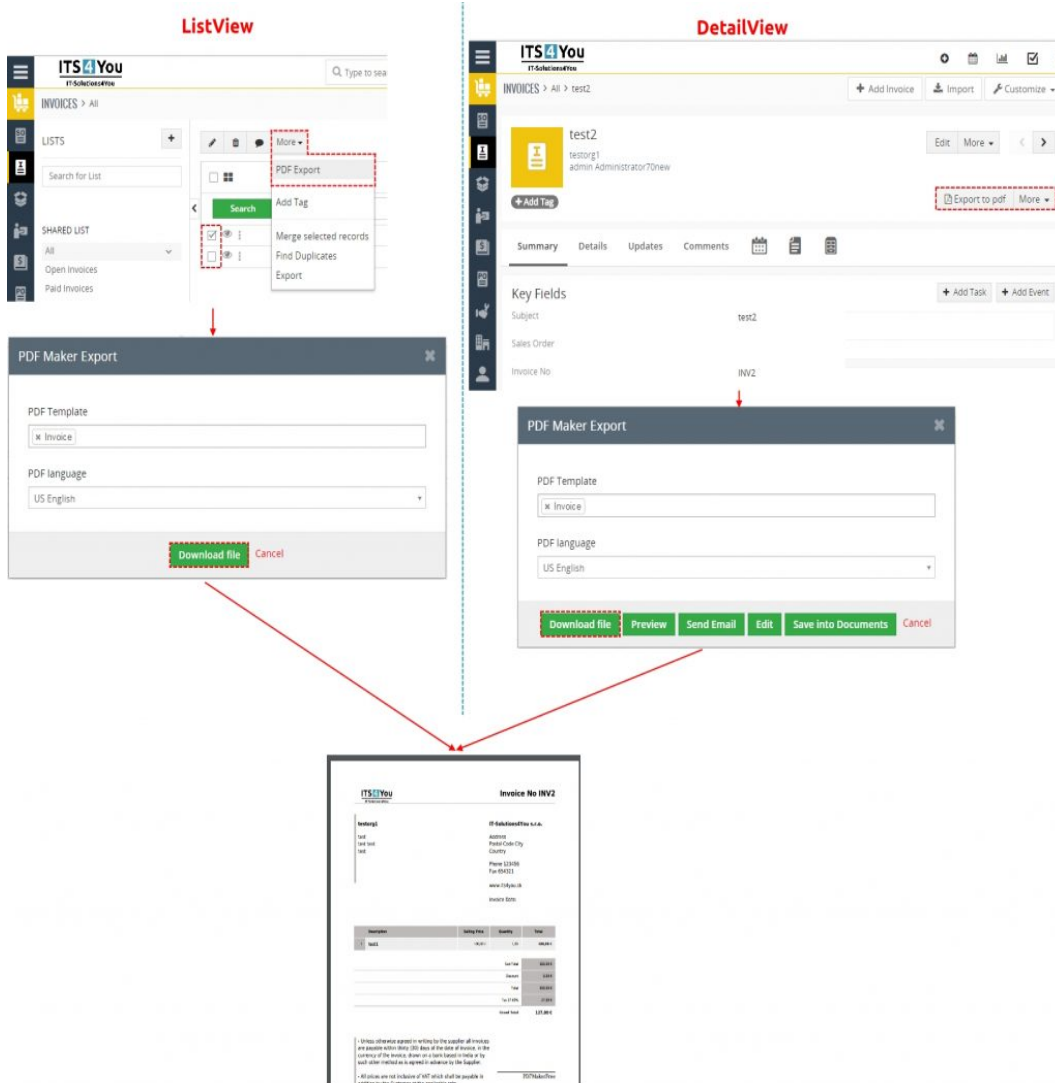
In the following picture you can see how to generate PDF file in the ListView or DetailView using PDF Maker:

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 [Download file].
6. Dialog box will/won't appear on the screen depending on your web browser. The PDF file is generated.

DetailView

1. Click on [Export to pdf]
2. Select the PDF template(s).
3. Select the language.
4. Click on [Download file].
5. Dialog box will/won't appear on the screen depending on your web browser. The PDF file is generated.



Generate the PDF file

5. 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

- ListView of Header/Footer – used for common tasks like add new template of Header or Footer, import, export or delete templates
- DetailView – shows already created PDF template in details
- EditView – allows the preparation of the new PDF template or editing existing templates
- EditView of Header/Footer – allows the preparation of the new Header/Footer template or editing existing templates
- PDF Maker block – mainly used for export records to PDF file
- Preview – preview window with options to Download, Print, Send Email, Edit and Save into Documents

5.1.ListView of PDFMaker

The common tasks like add/delete template, import/export templates or start editing have to be initiated via PDF Maker ListView. Go to Projects → 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 info, template owner and its status. In the list you can also select one or more templates and consequently delete or export the selected group of templates using

button **Actions**. As shown in the picture, it is also possible to edit or duplicate already created PDF templates directly from the ListView. Also there is option to search templates in your ListView.

	Template name	Module	Description	Sharing	Template owner	Status
<input type="checkbox"/>	Invoice	Invoices	Template for Invoice	Public	Administrator	Active
<input type="checkbox"/>	SalesOrder	Sales Orders	Template for SalesOrder	Public	Administrator	Active
<input type="checkbox"/>	PurchaseOrder	Purchase Orders	Template for PurchaseOrder	Public	Administrator	Active
<input type="checkbox"/>	Quotes	Quotes	Templates for Quotes	Public	Administrator	Active

ListView – PDF Maker Vtiger 7

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 PDF template

+ ADD HEADER/FOOTER

is used to add new Header/Footer template

CUSTOMIZE

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 Maker

How to import or export PDF template is described in the Export and Import templates.

How to create Header/Footer is described in the DetailView of Header/Footer.

5.2.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 Projects → 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 **Actions**. 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 – PDF Maker Vtiger 7

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

CUSTOMIZE

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 Maker

5.3.DetailView of PDF Maker

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
 - [More] –
 - [Delete] – allows you to delete template
 - [Duplicate] – create duplicate of the template and start editing
- Tools – for changing default and status of the shown template
 - Set as default / Unset as default – setting of default
 - Set as inactive / Set as active – change status
- Display conditions – allows you to set conditions when template is shown or hidden
- CSS Styles – allows to you manage your CSS styles and assigned it to templates

The screenshot displays the 'Invoice' module's DetailView. On the left, the 'Template information' section lists details for the 'Invoice' template, which is active and set as default for both DetailView and ListView. Below this, the 'Display conditions' section indicates the template is shown when 'All : Status is Paid'. The 'CSS Styles' section shows a single style named 'Mystyle' with a priority of 1. The main area on the right is a preview of the PDF template, which includes a header with company and invoice information, a body with a table of products, and a footer with totals. Action buttons for editing and deleting the template are located in the top right corner.

DetailView of PDF Maker

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.

Creating New Conditions

This display conditions was created in older look. Conditions created in older look cannot be edited. You can recreate the conditions.

Old Conditions:
Display conditions have not been defined

Displayed: if:

All Conditions (All conditions must be met)

Add Condition

Any Conditions (At least one of the conditions must be met)

Add Condition

Save

Cancel

Display conditions

CSS Styles

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

Add Style

Name *

MyStyle

Assigned To *

admin Administrat... ▼

Style

```

1 table{
2   width: 100%;
3   border-collapse: collapse;
4   border-spacing: 0;
5   margin-bottom: 20px;
6 }

```

Priority *

1

Create

Cancel

Styles4You

5.4.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
 - [More] –
 - [Delete] – allows you to delete template
 - [Duplicate] – create duplicate of the template and start editing



DetailView of Headers/Footers – PDF Maker Vtiger 7

5.5.EditView of PDF Maker

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

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



Properties





Template name: *



Module:



Related modules:

Related blocks:    

Company information:  

User information:

PDF Maker Properties tab

Name	Description
Template name	The name of the template. It is mandatory field for template creation.
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.
Company information	Comprises group of fields from Company information.
User information	Assigned to User, Logged in User, Modified by User and Created by User information

5.5.2.Other information

As shown below **Other information tab** contains several fields and functions:

Basic information

Other information

Labels

Product block

Heac

☐ ListView block:
 Please select ...
 \$

Terms and Conditions:
 Please select ...
 \$

Current date:
 Second
 \$

Barcodes:
 EAN13
 \$
 i

Custom functions:
 Please select ...
 \$

Font Awesome:
 fa-500px
 500
 i

Is Signature:
 PDF Signature
 \$

Other information tab – PDF Maker Vtiger 7

<i>Name</i>	<i>Description</i>
ListView block	Create list view blocks
Terms and Conditions	Terms and Conditions.
Current date	Current date and times in several formats.
Barcodes, QR code	Several types of Barcodes and QR code
Custom functions	If you need a special treatment of Vtiger data in your template, you can use custom (or your own) functions.
Font Awesome	Insert Font Awesome icons into your template
Is Signature	Insert variable \$PDF_SIGNATURE\$ to place PDF Signature block

5.5.3.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.

Labels

Global language:

Before Event
▼
T

Module language:

Action
▼
T

Self-defined labels:

Select ...
▼
T

PDF Maker Labels tab

<i>Name</i>	<i>Description</i>
Global language	Global labels.
Module language	Labels related only to selected module.
Self-defined labels	Labels defined by user.

5.5.4.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.

Product block

Product block template:

Please select ...
▼
\$

Product block:

Please select ...
▼
\$

*Common fields for Products & Services:

Record ID
▼
\$

*Available fields for Products:

Product Name
▼
\$

*Available fields for Services:

Service Name
▼
\$

* fields are placed into Product block. Product block will be shown for every product/service in PDF.

PDF Maker Product block tab

<i>Name</i>	<i>Description</i>
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Product block template	Insert predefined and created product block templates.
Product block	Products and Services Block start, Products and Services Block end. Products Block start, Products Block end. Services Block start, Services 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.

5.5.5.Header/Footer

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

Header / Footer

Header:

From list ▼

My own Invoice Header template ▼

Footer:

Custom ▼

Header/Footer variables:

Current page ▼

\$

Display header:

All pages ☒
First page ☒
Other pages ☒

Display footer:

All pages ☒
First page ☒
Other pages ☒
Last page ☒

Header/Footer tab – PDF Maker Vtiger 7

<i>Name</i>	<i>Description</i>
Header	Allows you use custom or select from your Header templates
Footer	Allows you 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](#)

5.5.6.Properties

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

Page format:	A4 ▼	
Page orientation:	Portrait ▼	
Margins:	Top	1.0
	Bottom	1.0
	Left	1.0
	Right	1.0

Number format:	Decimal point separator	,
	Decimal point number	2
	Thousands separator	.
	Truncate Trailing Zeros	<input type="checkbox"/>

Currency format:	Is Active	<input type="checkbox"/>
	Decimal point separator	,
	Decimal point number	2
	Thousands separator	.

Watermark:	Type	none ▼
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Properties Tab – PDF Maker Vtiger 7

Name	Description
------	-------------

Page format	A3, A4, A5, A6, Letter, Legal or Custom. Custom page format allows to define width and height of the page in mm. Maximum values are 2000 mm x 2000 mm and minimum values are 1mm x 1mm.
Page orientation	Portrait or landscape.
Margins	Margins in cm. Maximum value is 9.9 cm and minimum value is 0 cm.
Number format	<p>This format is used as default when Currency format is not checked for all values. Otherwise it can be used for Quantity or Percentage values ONLY if the Currency format is checked.</p> <p>Decimal point separator – comma, dot (<i>but any symbol can be used</i>) Decimal point number – 0-3 recommended (<i>can be more based on your needs</i>) Thousands separator – comma, dot, space (<i>but any symbol can be used</i>) Truncate Trailing Zeros – removes trailing zeros from decimal numbers</p>
Currency format	<p>When checked, this formatting is applied only on currency values.</p> <p>Is Active – activate this formatting only for currency fields Decimal point separator – comma, dot (<i>but any symbol can be used</i>) Decimal point number – 0-3 recommended (<i>can be more based on your needs</i>) Thousands separator – comma, dot, space (<i>but any symbol can be used</i>)</p>
Watermark	Allows you set text or image like watermark. Text should be static or based on module or related modules variables. Read more: Watermark

5.5.7.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.

File name:

PDF Password:

Description:

Ignored picklist values:

Status:

Set as default: ☐ for Detail view ☐ for List view

Set for Customer Portal: ☐

Settings Tab – PDF Maker Vtiger 7

Name	Description
File name	File name in different formats.
PDF Password	Allows you lock PDF file with static password or password created by values from module or related modules. Read more: PDF Password
Description	The description of the pdf template.
Ignored picklist values	Define picklist values which will be ignored in the final pdf document like None, none, keine etc. Entered values have to be separated with comma.
Status	Active / Inactive
Set as default	Set/unset as default for DetailView and ListView.
Set for Customer Portal	Set template of Invoice/Quotes for customer portal

5.5.8.Sharing

The Sharing tab changes depend on whether PDF template is shared or public/private. Using this tab you can define how to share your template between you and other users or groups.

Sharing

Template owner:

admin Administrator70new ▼

Sharing:

Private ▼

PDF Maker Sharing tab

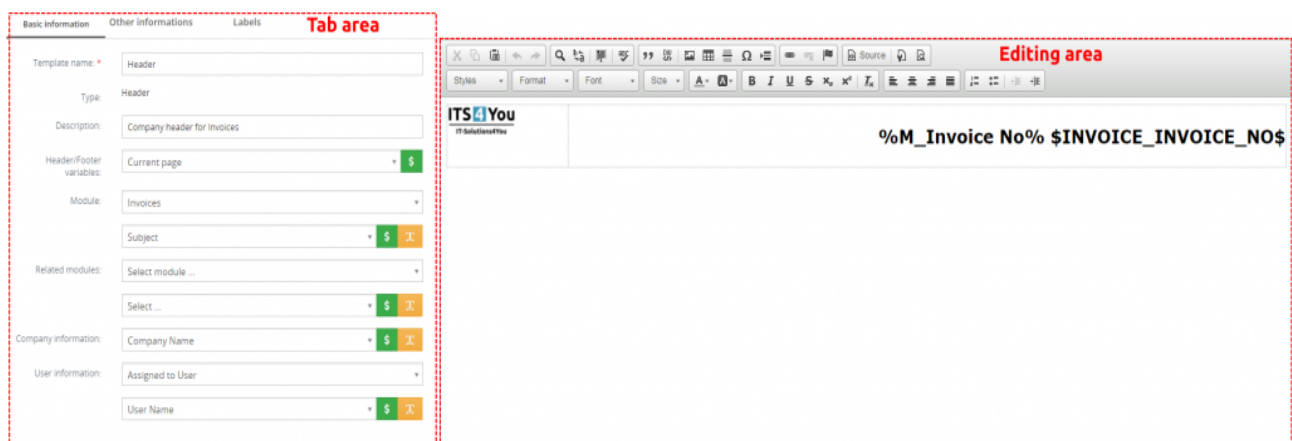
<i>Name</i>	<i>Description</i>
Template owner	Select template owner from the list.
Sharing	Select “Public”, “Private”, “Share”

5.6.EditView of Header/Footer

Since **PDF Maker 700.4.0** 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.



EditView of Header/Footer – PDF Maker Vtiger 7

5.6.1. Basic information of Header/Footer

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

Properties	Other informations	Labels
Template name: *	<input type="text"/>	
Type:	<input type="text" value="Header"/>	
Description:	<input type="text"/>	
Header/Footer variables:	<input type="text" value="Current page"/>  	
Module:	<input type="text" value="Please select ..."/>	
	<input type="text" value="Select ..."/>  	
Related modules:	<input type="text" value="Select module ..."/>	
	<input type="text" value="Select ..."/>  	
Company information:	<input type="text" value="Company Name"/>  	
User information:	<input type="text" value="Assigned to User"/>	
	<input type="text" value="User Name"/>  	

Properties tab – PDF Maker Vtiger 7

Name	Description
Template name*	The name of the template. It is mandatory field for template creation.
Type	Type of template. Header or Footer template
Description	Description of your template
Header/Footer variables	Current page, All pages, Page/pages
Module	You can select module if want add module fields. If you do not choose module template will be available for all PDF templates.
Related modules	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.

Company information	Comprises group of fields from Company information.
User information	Assigned to User, Logged in User, Modified by User and Created by User information

5.6.2. Other Informations of Header/Footer

As shown below **Other information tab** contains several fields and functions:

Basic information

Other information

Labels

Terms and Conditions:

Please select ...

\$

Current date:

dd.mm.yyyy

\$

Barcodes:

EAN13

\$

i

Custom functions:

Please select ...

\$

Font Awesome:

fa-500px

500

i

Is Signature:

PDF Signature







\$

Other information tab – PDF Maker Vtiger 7

<i>Name</i>	<i>Description</i>
Terms and Conditions	Terms and Conditions.
Current date	Current date and times in several formats.
Barcodes, QR code	Several types of Barcodes and QR code
Custom functions	If you need a special treatment of Vtiger data in your template, you can use custom (or your own) functions.
Font Awesome	Insert Font Awesome icons into your template
Is Signature	Insert variable \$PDF_SIGNATURE\$ to place PDF Signature block

5.6.3.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.

Properties	Other informations	Labels
Global language:	Before Event	 
Module language:	Select ...	 
Self-defined labels:	Select ...	 

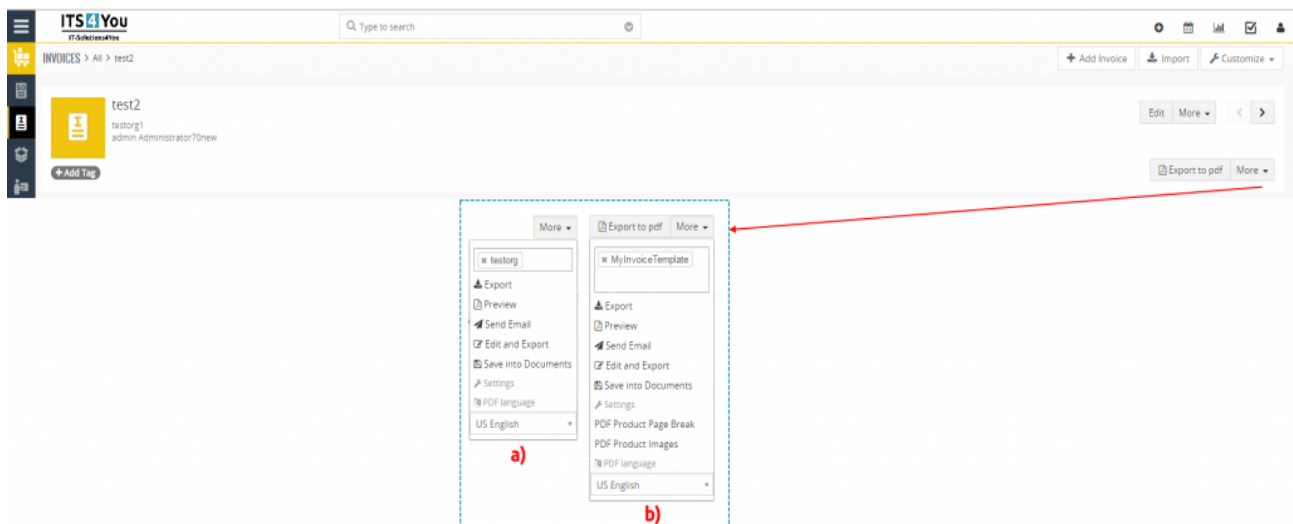
Labels tab – PDF Maker Vtiger 7

<i>Name</i>	<i>Description</i>
Global language	Global labels.
Module language	Labels related only to selected module.
Self-defined labels	Labels defined by user.

5.7.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**) :

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



PDF Maker block for vtiger 7

5.8.Preview

Preview window contains of PDF file preview and also you can find here options to Download file, Print, Send Email, Edit and Save into Documents.

It is useful to see how looks your PDF file.



ITS4You
IT-Solutions4You

Invoice No INV3

ORG name

test
test test
test

IT-Solutions4You s.r.o.

Address
Postal Code City
Country

Phone 123456
Fax 654321

www.its4you.sk

Invoice Date: 05-06-2017

	Description	Selling Price	Quantity	Total
1	test1	100,00 €	1,00	100,00 €
2	test1	50,00 €	1,00	50,00 €
3	test1	37,00 €	1,00	37,00 €
Sub Total				187,00 €
Discount				0,00 €
Total				187,00 €
Tax 27,00%				50,49 €

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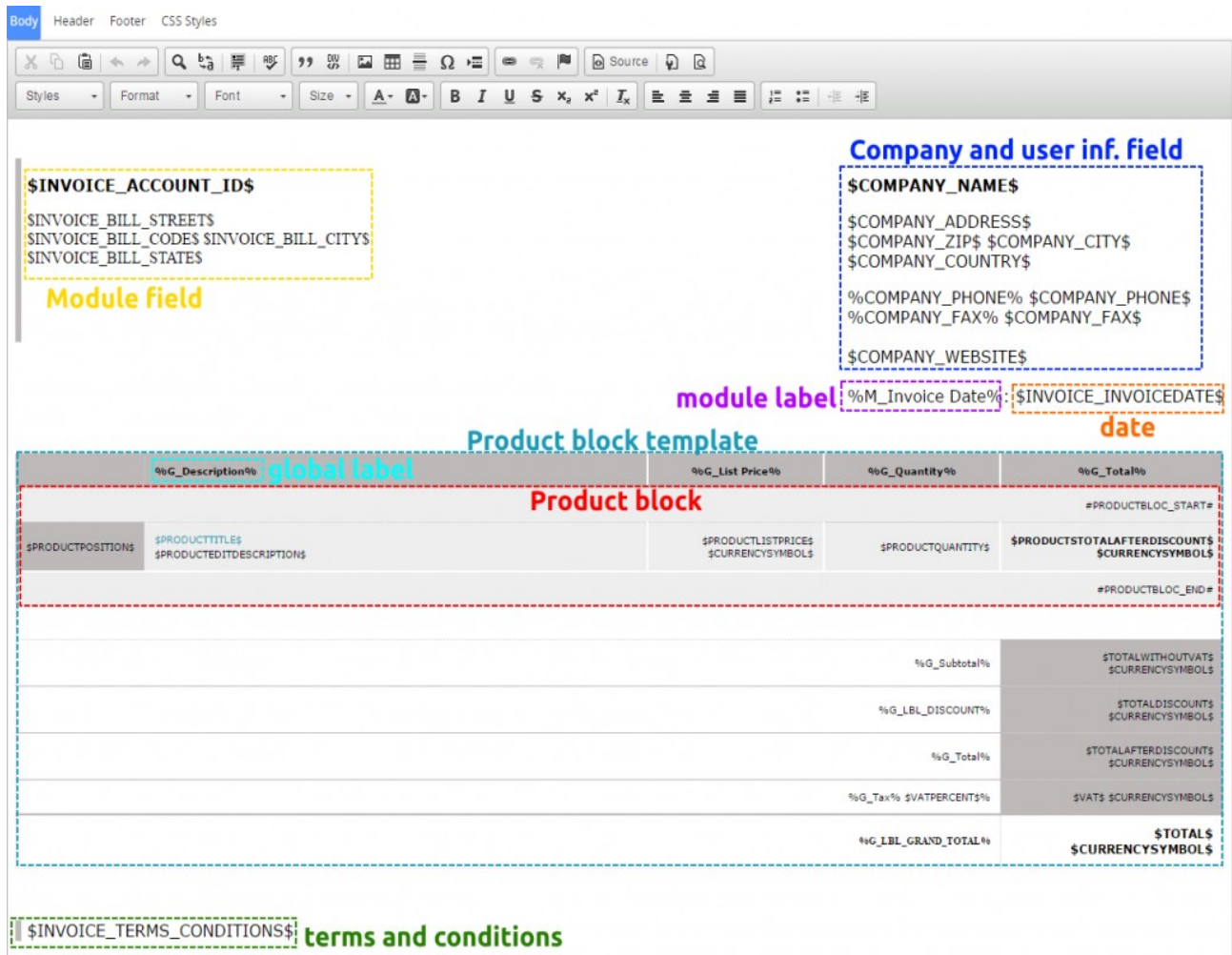
6.Editing

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.

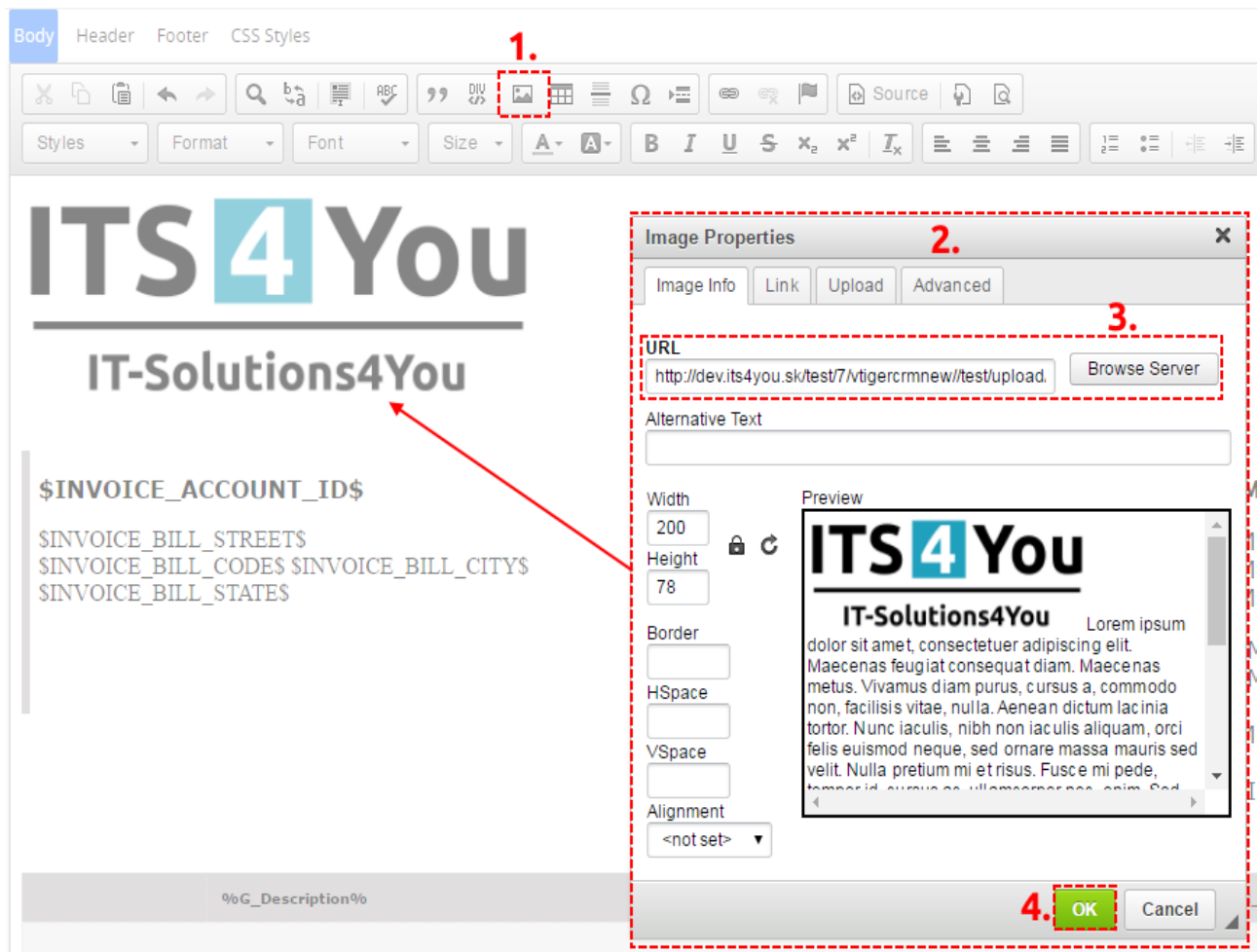
Common templates – templates can be used in all modules. Inside common templates is not recommended to use primary module fields, related module fields, products block templates, related blocks or listview blocks. The reason is that values for such fields should be not available for particular modules 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.



6.1.Inserting images

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




Insert Image

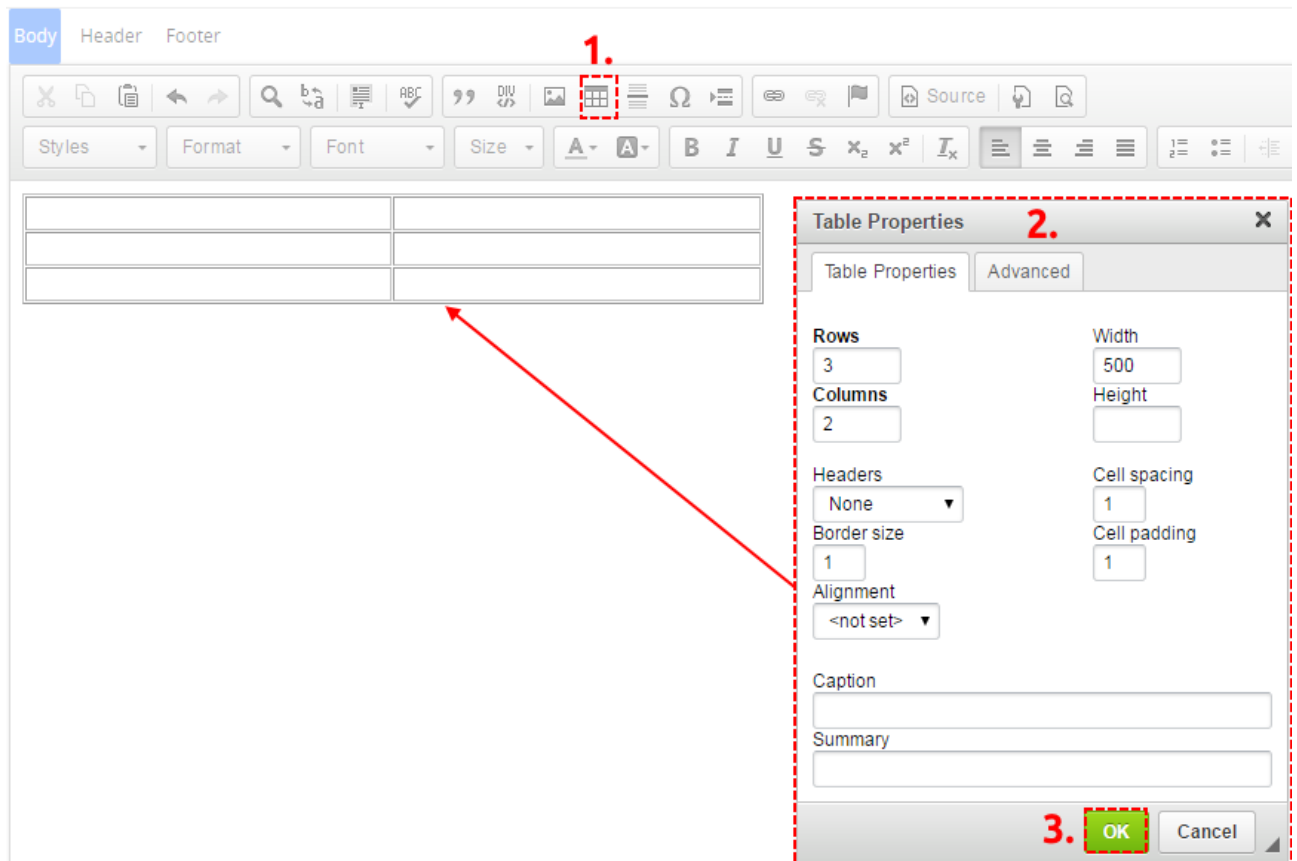
2. A pop-up window called "Image Properties" will appear. It includes four tabs that group image options.
3. Define the URL address of the image. You may also use the [Browse Server] in order to browse the files. Set up other properties of the image.
4. Click [Ok] to add image into Templates.

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

6.2.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.



Creating tables

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

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


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

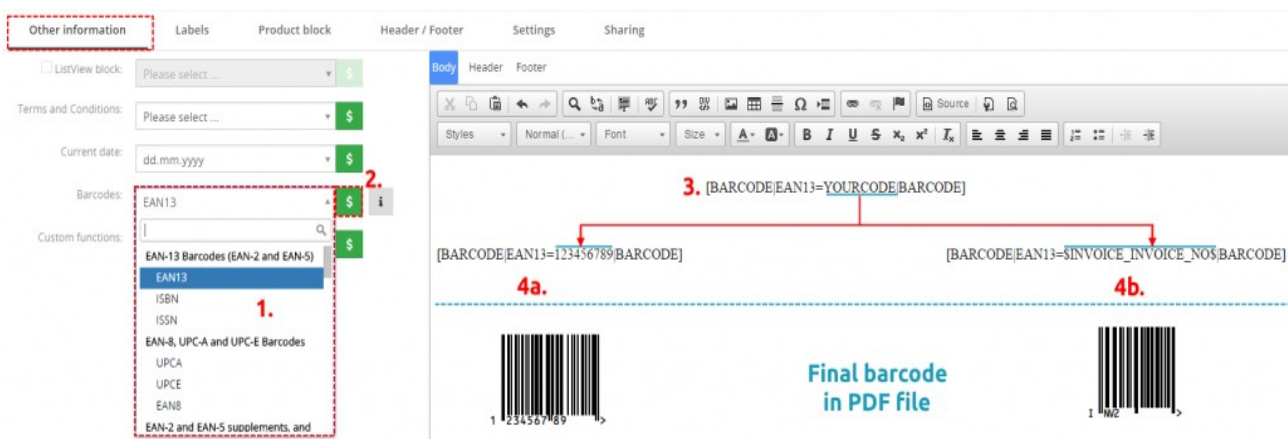
6.3.Inserting barcodes and QR codes

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 )

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


1. Choose your barcode type.
2. Click on  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).

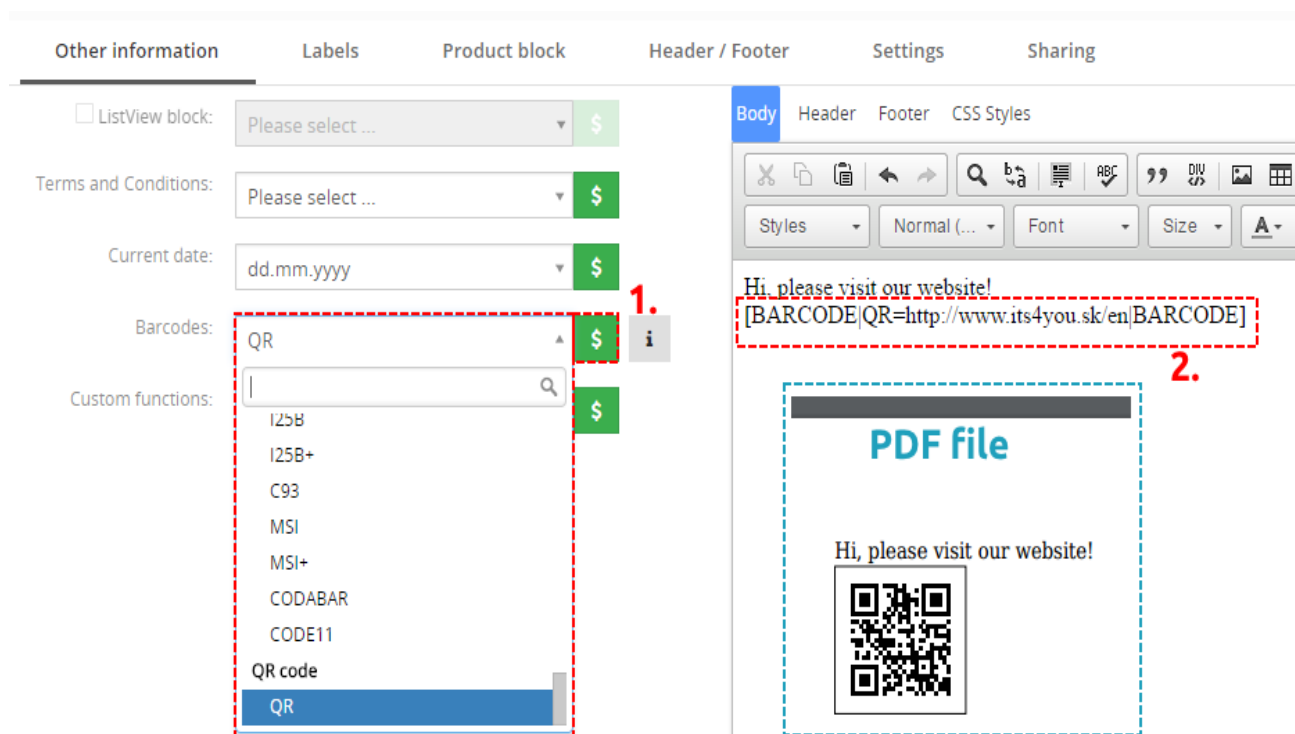


The screenshot shows the 'Other information' tab in the software interface. On the left, there is a 'Barcodes' section with a dropdown menu. A red dashed box highlights the dropdown, and a red '1.' points to it. A green button with a dollar sign is next to the dropdown, with a red '2.' pointing to it. The dropdown menu is open, showing a list of barcode types: EAN13, ISBN, ISSN, EAN-8, UPC-A and UPC-E Barcodes, UPCA, UPCE, EAN8, and EAN-2 and EAN-5 supplements, and. A red '1.' points to the 'EAN13' option. On the right, the 'Body' section shows the template code: `[BARCODE|EAN13=YOURCODE|BARCODE]`. A red '3.' points to this code. Below the code, there are two examples of barcode insertion: '4a.' shows a barcode with the number '1 234567 89' and '4b.' shows a barcode with the number '1 1111 1111'. A blue text 'Final barcode in PDF file' is centered between the two examples.

Barcode selection

How to insert QR code shows next picture:

1. In Other information tab please select QR field from “Barcodes, QR code” and click on  button.
2. In inserted part `[BARCODE|QR=YOURCODE|BARCODE]` replace “YOURCODE” with your QR code value.



How to insert QR code

6.3.1. Formatting barcodes and QR codes

The inserted barcodes or QR codes can be formatted using:

- A. additional attributes – add one or more supported attributes into barcode/QR syntax like
[BARCODE|CODE=YOURCODE|ATT1=value1|...|ATTN=valueN|BARCODE]

Example:

[BARCODE|EAN13=789|SIZE=1.5|HEIGHT=0.5|BARCODE]

- B. Cascading Style Sheets (CSS) – define CSS style within PDF template and put it into barcode/QR syntax like: [BARCODE|CODE=YOURCODE|CLASS=name_of_style|BARCODE]

Example:

[BARCODE|EAN13=123|CLASS=barcodestyle|BARCODE]

You are able to change colors, sizes and other styles with barcodes. See on the image down below:

```

<html> [BARCODE|CODE=YOURCODE|ATT1=value1|...|ATTN=value2|BARCODE]
<head>
  <title></title>
</head>
<body>
<style type="text/css">.barcodestyle{
  padding: 5px;
  margin: 3px;
  color: red;
  background-color:blue;
  vertical-align: middle;
}
</style>
<table style="width:100%">
  <tbody>
    <tr>
      <td>[BARCODE|EAN13=123|CLASS=barcodestyle|BARCODE]</td>
      <td>[BARCODE|EAN13=456|SIZE=0.8|BARCODE]</td>
      <td>[BARCODE|EAN13=789|SIZE=1.5|HEIGHT=0.5|BARCODE]</td>
    </tr>
  </tbody>
</table>
</body>
</html>

```



Formatting barcodes and QR codes

Please refer to mPDF library manual, barcode part for the details:

<https://mpdf.github.io/reference/html-control-tags/barcode.html>

6.3.2. Custom barcodes

This feature was added in version 4.26 of PDF Maker.

date:

des:

ons:

me:

ure:

\$

i

\$INVOICE_SUBJECT\$

EAN13:

Custom barcodes

Example: [BARCODE|TYPE=YOURCODE|BARCODE]

TYPE: Replace with barcode type supported by mPDF.

Supported barcodes for mPDF

YOURCODE: Replace with supported value.

Barcodes info

Example: [BARCODE|TYPE=YOURCODE|size=1|height=1|text=1|BARCODE]

You can also add parameters such as size, height, text.

Custom bar codes

Custom barcodes

Example: **[BARCODE|TYPE=YOURCODE|BARCODE]**

TYPE: Replace with barcode type supported by mPDF.

[Supported barcodes for mPDF](#)

YOURCODE: Replace with supported value.

[Barcodes info](#)

Example: **[BARCODE|TYPE=YOURCODE|size=1|height=1|text=1|BARCODE]**

You can also add parameters such as size, height, text.

6.4.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 5.3.3, labels can be inserted into templates via Labels tab. In order to insert any global related label, module related label or self-defined label just click on Labels tab, select from dropdown list any label and click on [Insert into template] button.



The screenshot shows a tab labeled "Labels" with a horizontal line underneath. Below the tab are three rows, each with a label on the left and a dropdown menu on the right. Each dropdown menu has an orange button with a white 'T' icon to its right.

	Labels
Global language:	Before Event
Module language:	Action
Self-defined labels:	Select ...

Labels tab

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_****%.

PDF template

%G_Description%	%G_List Price%	%G_Quantity%	%G_Total%
#PRODUCTBLOC_START#			
\$PRODUCTPOSITIONS	\$PRODUCTTTITLE\$ \$PRODUCTEDTDDESCRIPTION\$	\$PRODUCTLISTPRICE\$ \$CURRENCYSYMBOL\$	\$PRODUCTTOTALAFTERDISCOUNT\$ \$CURRENCYSYMBOL\$
#PRODUCTBLOC_END#			
		%G_Subtotal%	\$TOTALWITHOUTVAT\$ \$CURRENCYSYMBOL\$
		%G_LBL_DISCOUNT%	\$TOTALDISCOUNT\$ \$CURRENCYSYMBOL\$
		%G_Total%	\$TOTALAFTERDISCOUNT\$ \$CURRENCYSYMBOL\$
		%G_Tax% \$VATPERCENT\$%	\$VAT\$ \$CURRENCYSYMBOL\$
%G_LBL_GRAND_TOTAL%		\$TOTAL\$ \$CURRENCYSYMBOL\$	

Export to pdf More ▾

✕ MyInvoiceTemplate

Export

Preview

Send Email

Edit and Export

Save into Documents

Settings

PDF Product Page Break

PDF Product Images

PDF language

US English

DE Deutsch

SK Slovenčina

**Exported PDF template
(US English selected)**

Description	Selling Price	Quantity	Total
1 test1	100.00 €	1.00	100.00 €
		Sub Total	100.00 €
		Discount	0.00 €
		Total	100.00 €
		Tax 27.00%	27.00 €
Grand Total		127.00 €	

**Exported PDF template
(DE Deutsch selected)**

Beschreibung	Verkaufspreis	Menge	Gesamtsumme
1 test1	100.00 €	1.00	100.00 €
		Zwischensumme	100.00 €
		Rabatt	0.00 €
		Gesamtsumme	100.00 €
		MwSt. 27.00%	27.00 €
Summe		127.00 €	

Inserting labels

If the global and module related labels are not sufficient for you, it is possible to define self-defined labels. In order to define self-defined please follow instructions described in the chapter 9.2.

6.5.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 (9.3).

%G_Description%		%G_List Price%	%G_Quantity%	%G_Total%
#PRODUCTBLOC_START#				
\$PRODUCTPOSITION\$	\$PRODUCTTITLE\$ \$PRODUCTITDESCRIPTION\$	\$PRODUCTLISTPRICE\$ \$CURRENCYSYMBOL\$	\$PRODUCTQUANTITY\$	\$PRODUCTTOTALAFTERDISCOUNT\$ \$CURRENCYSYMBOL\$
#PRODUCTBLOC_END#				

EditView of PDF template

Item Details		Invoice products
*Item Name	Quantity	
test1	1	
test1	1	
test1	1	

PDF file			
	Description	Selling Price	Quantity
1	test1	100,00 €	1,00
2	test1	50,00 €	1,00
3	test1	25,00 €	1,00

Product block usage

6.5.1.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.

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.

6.5.3. Separate block for Products and for Services

There is also the option to create a 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.

Pos	%Q_Qty%	Text	%Q_LBL_LIST_PRICE%		%Q_Discount%	%Q_LBL_NET_PRICE%	
Block of Products							
#PRODUCTBLOC_PRODUCTS_START#							
SPRODUCTPOSITIONS	SPRODUCTQUANTITY%	SPRODUCTUSAGEUNITS	SPRODUCTNAMES	SPRODUCTLISTPRICES	SPRODUCTTOTALS	SPRODUCTDISCOUNTS	SPRODUCTSTOTALAFTERDISCOUNT
#PRODUCTBLOC_PRODUCTS_END#							
Block of Services							
#PRODUCTBLOC_SERVICES_START#							
SPRODUCTPOSITIONS	SPRODUCTQUANTITY%	SPRODUCTUSAGEUNITS	SPRODUCTNAMES	SPRODUCTLISTPRICES	SPRODUCTTOTALS	SPRODUCTDISCOUNTS	SPRODUCTSTOTALAFTERDISCOUNT
#PRODUCTBLOC_SERVICES_END#							
%Q_LBL_TOTAL%						TOTALWITHOUTVAT	
%Q_Discount%						TOTALDISCOUNT	

Source
Format
Font
Size
B
I
U
X₁
X₂

Pos	Quantity	Text	List Price		Discount	Net Price
Block of Products						
1	100.00	product1	10.00	1.000.00	0.00	1.000.00
2	250.00	product2	20.00	5.000.00	0.00	5.000.00
Block of Services						
3	1.00	service2	20.00	20.00	0.00	20.00
4	1.00	service1	10.00	10.00	0.00	10.00
Total						6.030.00
Discount						0.00

Separate Block for Products and for Services

6.5.4.Duplicates handling block

There is also an option to create blocks which will handle duplicate records.

What does it mean? It means that duplicated records will be shown just one time in the list/table.

It can be used if you need to create a list of products in the invoice, if some products have the same name, they will be displayed only once.

For this you need to use variables:

- #PRODUCTBLOC_UNIQUE_START#
- #PRODUCTBLOC_UNIQUE_END#

In our Invoice we have:

- 2 x : Windows 10 Pro SK 64-bit (OEM)
- 1 x : GIGABYTE X299X AORUS MASTER

Item Details		Currency: Euro(€)	Tax Mode: Group	
*Item Name	Quantity	Selling Price	Total	Net Price
Windows 10 Pro SK 64-bit (OEM)	1	133.25 (-) Discount: Total After Discount:	133.25 0 133.25	133.25
Windows 10 Pro SK 64-bit (OEM)	1	133.25 (-) Discount: Total After Discount:	133.25 0 133.25	133.25
GIGABYTE X299X AORUS MASTER	1	411.58 (-) Discount: Total After Discount:	411.58 0 411.58	411.58

PDF Maker for Vtiger CRM – Duplicates Handling product block

To create Duplicates handling block please provide following steps:

1. Go to Product block tab.
2. From the Product block list add variables:
#PRODUCTBLOC_UNIQUE_START# and #PRODUCTBLOC_UNIQUE_END#
3. Between these variables, use other variables you like to show in the list.
4. Provide additional edit steps and save the template.

Basic information Other information Labels **Product block** Header / Footer Properties Settings Sharing

Product block template: Please select ... \$

Product block: Please select ... \$

*Common fields for Products & Services: Please select ... \$

*Available fields for Products: Products and Services \$

*Available fields for Services: Block start \$

* fields are placed into Product block: Unique Start \$

Unique End \$

Products only \$

Block start \$

Block end \$

Body Header Footer CSS Styles

Styl Formát Pismo Vel... A A B I U S x x I

List of items in the Invoice:

Product name:	List price:
=PRODUCTBLOC_UNIQUE_START=	
\$PRODUCTTITLES	\$PRODUCTLISTPRICES
=PRODUCTBLOC_UNIQUE_END=	€

Variables you want in the list

PDF Maker for Vtiger CRM – Duplicates Handling product block

Next, go to your Record and Export or Preview the template. Results in our case will be:

List of items in the Invoice:

Product name:	List price:
Windows 10 Pro SK 64-bit (OEM)	133,25 €
GIGABYTE X299X AORUS MASTER	411,58 €

PDF Maker for Vtiger CRM – Duplicates Handling product block

Comparison between (#PRODUCTBLOC_START#/END#) and (#PRODUCTBLOC_UNIQUE_START#/END#)

List of items in the Invoice:

#PRODUCTBLOC_START#
#PRODUCTBLOC_END#

Product name:	List price:
Windows 10 Pro SK 64-bit (OEM)	133,25 €
Windows 10 Pro SK 64-bit (OEM)	133,25 €
GIGABYTE X299X AORUS MASTER	411,58 €

#PRODUCTBLOC_UNIQUE_START#
#PRODUCTBLOC_UNIQUE_END#

List of items in the Invoice:

Product name:	List price:
Windows 10 Pro SK 64-bit (OEM)	133,25 €
GIGABYTE X299X AORUS MASTER	411,58 €


PDF Maker for Vtiger CRM – Duplicates Handling product block

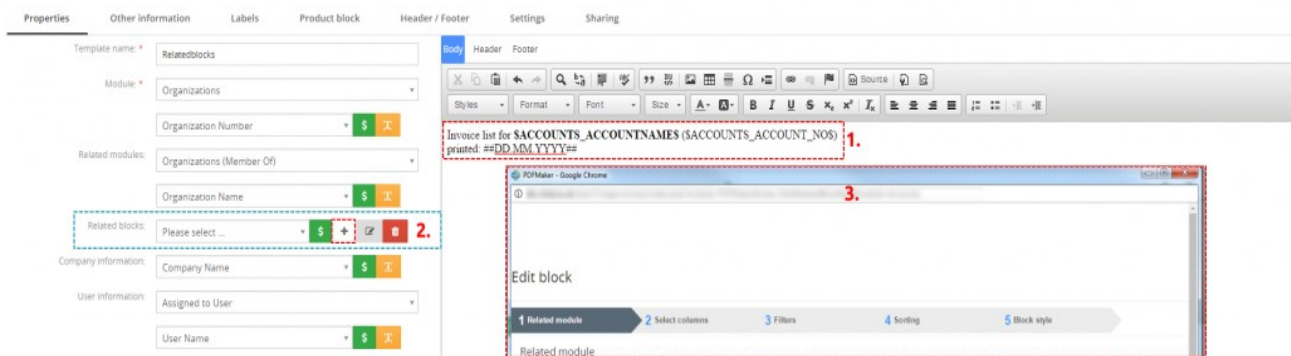
6.6.Using related blocks

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.

6.6.1.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:

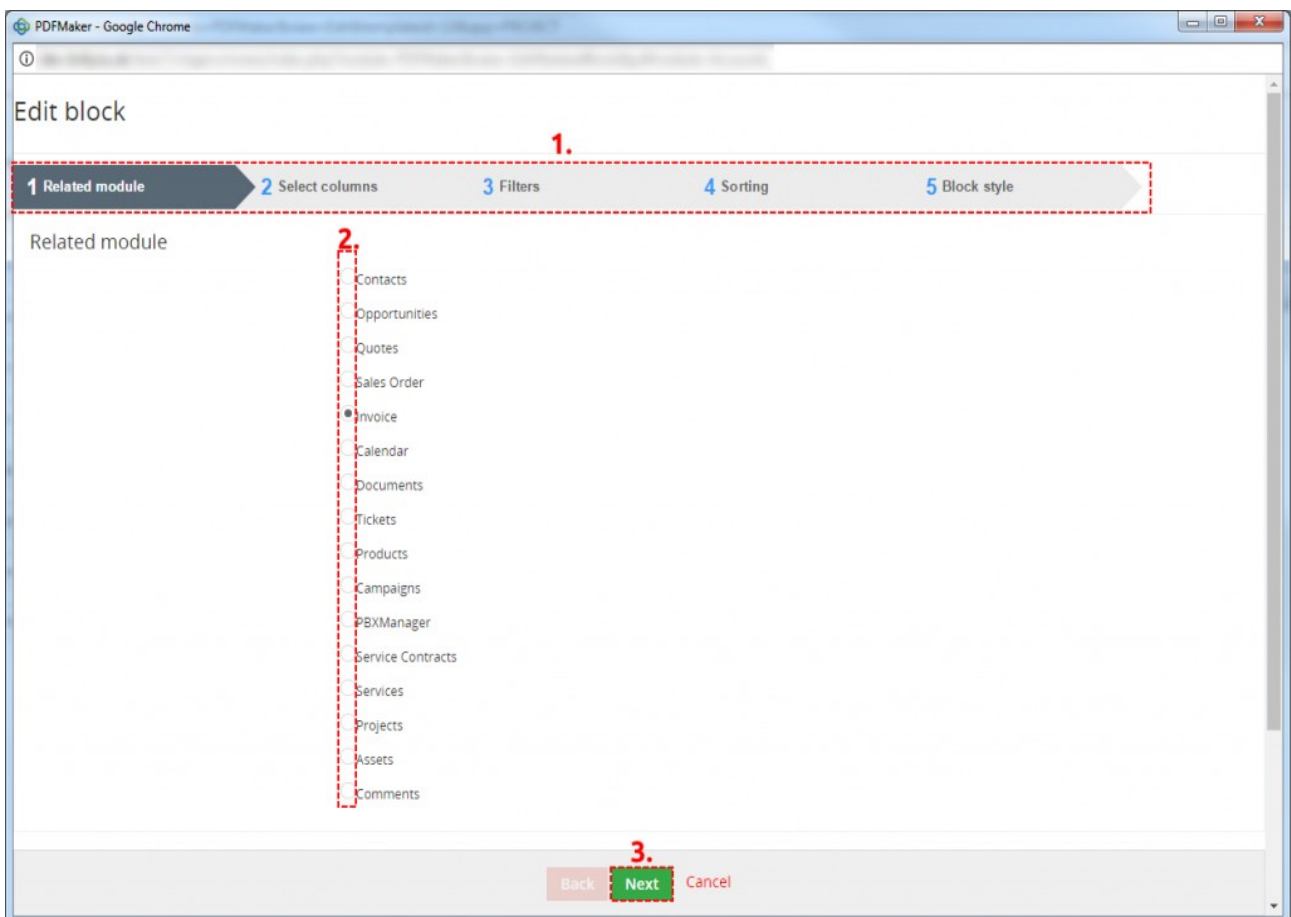
1. Create new template based on Organizations module and put your variables/text into the body of the template.
2. Go to the Properties tab and click on  button.
3. Edit block window will appear on the screen.
4. Start creation of the related block



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.



Creation of the related block – step 1

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

Edit block

1 Related module **2 Select columns** 3 Filters 4 Sorting 5 Block style

Select Columns *

click here to delete **click here to add**

drop and move

click here to select

Invoice Details

- Subject
- Sales Order
- Customer No
- Contact Name
- Due Date
- Purchase Order
- Adjustment
- Excise Duty

Back **Next** Cancel

Creation of the related block – step 2

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

Edit block

1 Related module

2 Select columns

3 Filters

4 Sorting

5 Block style

Filters

click here to select field

All Conditions (All conditions must be met)

(Invoices) Invoice Date

click here to select condition

Last 90 Days

29-03-2017,26-06-2017

+ Add Condition

Any Conditions (At least one of the conditions must be met)

+ Add Condition

Back

Next

Cancel

Creation of the related block – step 3

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

Edit block

1 Related module

2 Select columns

3 Filters

4 Sorting

5 Block style

Sorting

Sort by

Invoice Date

None

None

Sort Order

☒ Ascending ☐ Descending

☐ Ascending ☐ Descending

☐ Ascending ☐ Descending

Back

Next

Cancel

Creation of the related block – step 4

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

Edit block

- Related module
- Select columns
- Filters
- Sorting
- Block style**

Block style

Name* Invoice list for ogr last 90 days


%R_INVOICE_Invoice No%	%R_INVOICE_Total%	%R_INVOICE_Invoice Date%	%R_INVOICE_Status%
#RELBLOCK_START#			
\$invoice_no\$	\$ShdnGrandTotal\$	\$invoicedate\$	\$invoicestatus\$
#RELBLOCK_END#			

body

Back Next Cancel

If the related block is created you can continue with editing your template. In order to insert related block

1. Click to editing area where would you like to have related block.

- Using dropdown list select your related block.
- Click on  button.
- Related block is inserted. You can continue with editing of the related block if necessary.
- Example of the final PDF document is shown below.

Properties Other information Labels Product block Header / Footer Settings Sharing

Template name: * Relatedblocks

Module: Organizations

Organization Name \$ T

Related modules: Select module ...

Select ... \$ T

Related blocks: Invoice list for ogr last 90 da... \$ + [edit] [delete]

Company information: Company Name \$ T

User information: Assigned to User

User Name \$ T

Body Header Footer CSS Styles

Invoice list for \$ACCOUNTS_ACCOUNTNAMES (\$ACCOUNTS_ACCOUNT_NOS\$)
printed: ##DD.MM.YYYY##

1.

%R_INVOICE_Invoice No%	%R_INVOICE_Total%	%R_INVOICE_Invoice Date%	%R_INVOICE_Status%
#RELBLOCK1_START#			
\$invoice_no\$	\$ShdnGrandTotal\$	\$invoice date\$	\$invoice status\$
#RELBLOCK1_END#			

4.

5.

Invoice No	Total	Invoice Date	Status
INV1	€127.00	20-06-2017	Sent
INV2	€222.26	25-06-2017	Paid

Insert related block

6.6.3.Edit related block

In order to edit already existing related block, just select it (1.) in the Properties tab and click on  button.

Please notice that you can change only filters, sorting and formatting of the already existing related blocks.

Properties Other information Labels Product block Header / Footer Settings Sharing

Template name: * Relatedblocks

Module: Organizations

Organization Name \$ T

Related modules: Select module ...

Select ... \$ T

Related blocks: 1. Invoice list for ogr last 90 da... \$ + 2. [icon] [icon]

PDFMaker - Google Chrome

3. Edit block

1 Filters 2 Sorting 3 Block style

Filters

All Conditions (All conditions must be met)

(Invoices) Invoice Date Last 90 Days 29-03-2017,26-06-2017

+ Add Condition

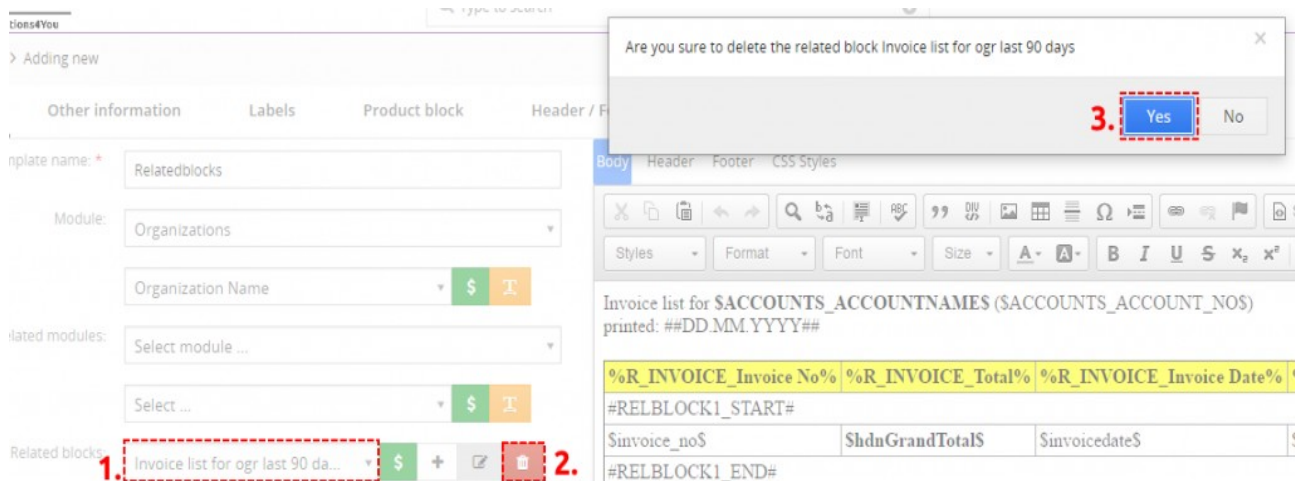
Any Conditions (At least one of the conditions must be met)

+ Add Condition

Edit related block

6.6.4.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 [icon] button (2) and finally confirm deletion (3).





Delete related block

6.7.Using List view block

In case you need a PDF file which consists of the several records and some related fields you can use List view 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 a 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 Edit view:

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

Other information Labels Product block Header / Footer Settings Sharing

☒ ListView block: Please select ... \$
Terms and Conditions: Please select ... \$
Current date: 1 Block start \$
 3 Block end \$
Barcodes: Counter \$ i
Custom functions: Please select ... \$

Body Header Footer CSS Styles

List of Invoices printed: ##DD.MM.YYYY##

=LISTVIEWBLOCK_START=

\$CRIDXS	\$INVOICE INVOICE NOS	\$TOTALWITHVATS	2. \$INVOICE INVOICEDATES	\$INVOICE INVOICESTATUS
----------	-----------------------	-----------------	---------------------------	-------------------------


=LISTVIEWBLOCK_END=

List view block – Edit view

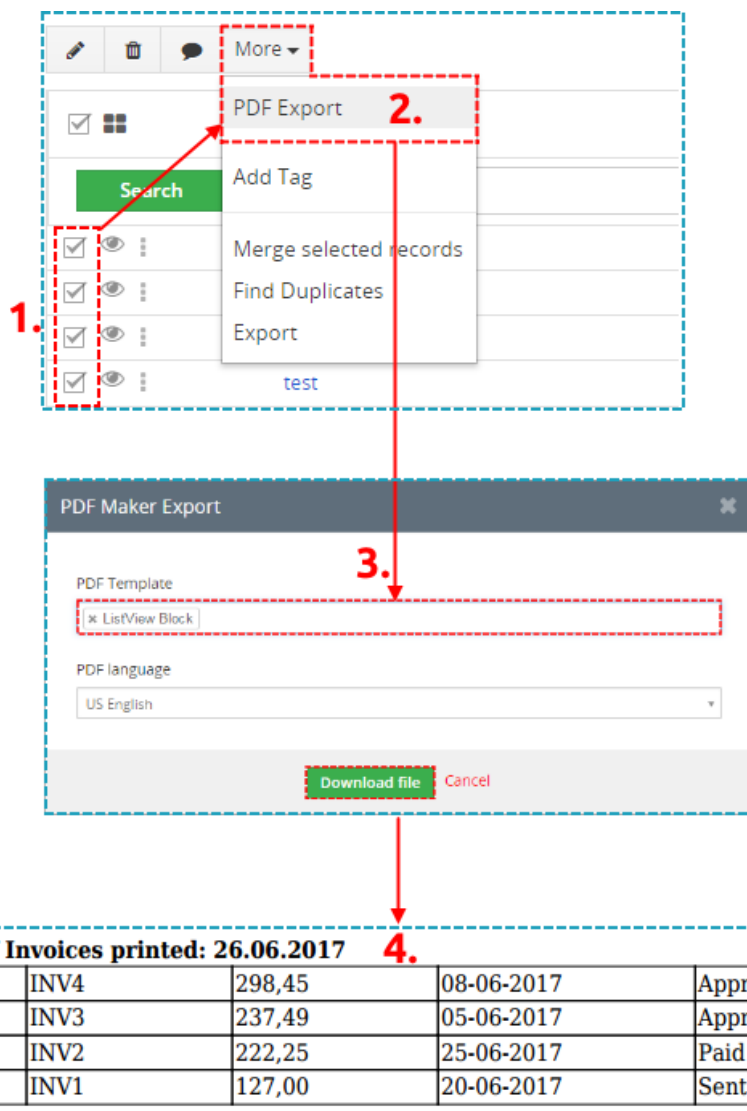
Provide additional edit steps and save the template. When the template is ready you can use it within List view (ONLY!) to prepare mail using following steps:

1. Go to List view of particular module and select 1 to N records.

2. Click on  and select PDF Export.

3. Select List view block template (language) and click on .

4. Final PDF file with correspondent List view block is created.



List view block

Note: Each List view block must start with "Block start" (#LISTVIEWBLOCK_START#) and must end with "Block end" (#LISTVIEWBLOCK_END#). The list view block template can be set as a default only for List view; for Detail view it is not applicable.

6.7.1.List view group by "x"

Since PDF Maker version 4.5, you can also group list view records by "values/variables".

It is working via added a variable to the template: [LISTVIEWGROUPBY|Group by label|LISTVIEWGROUPBY]

- Group by label = is replaced with the text you want or variable in our example it will be "PRODUCTS_PRODUCTCATEGORY\$"

For example: Products module, group products by Category.

On the image below you see records where 1 record has a Software category and 3 records with Hardware category.



  More ▾

Select all Products (4) 1 to 4 of ? < >

 	Product Name	Product Number	Product Active	Product Category	Unit Price
 	GIGABYTE X299X AORUS MASTER	PR05	Yes	Hardware	€411.50
 	Windows 10 Pro 64-bit (OEM)	PR04	Yes	Software	€133.25
 	Intel Core i7-9700K	PR02	Yes	Hardware	€395
 	MSI GeForce RTX 2080 SUPER GAMING X TRIO	PR01	Yes	Hardware	€879

PDF Maker for Vtiger CRM – Products with different category

Firstly, in the PDF Maker Edit view:

1. Go to Other information and select the "Block start" and click .
2. Next, select the "Group by label" and click .
3. Replace the text "Group by label" with your variable, in our case it is: PRODUCTS_PRODUCTCATEGORY\$
4. Select other variables you want to show in the list.

✓ ListView block: Please select ...

Terms and Conditions: Please select ...

Current date: Block start 1
Block end

Barcodes: Counter
Group by label 2

Custom functions: Please select ...

Font Awesome: fa-500px

Body
Header
Footer
CSS Styles

Styl
Formát
Pismo
Vel...

A
B
I
U
S
x
x²
I_x

List of products from the list view, grouped by Category: 1

Your variable: \$PRODUCTS_PRODUCTCATEGORY\$

#LISTVIEWBLOCK_START#

[LISTVIEWGROUPBY\$PRODUCTS_PRODUCTCATEGORY\$LISTVIEWGROUPBY] 2

\$PRODUCTS_PRODUCTNAMES
\$PRODUCTS_UNIT_PRICES €

#LISTVIEWBLOCK_END#

3 →

4 → Add other variables you want to show in the list

PDF Maker for Vtiger CRM – Group by label, edit template

Provide additional edit steps and save the template. **When the template is ready you can use it within List view (ONLY!).**

The result will be:

List of products from the list view, grouped by Category:

Hardware

GIGABYTE X299X AORUS MASTER	411,58 €
Intel Core i7-9700K	395,00 €
MSI GeForce RTX 2080 SUPER GAMING X TRIO	879,00 €

Software

Windows 10 Pro SK 64-bit (OEM)	133,25 €
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PDF Maker for Vtiger CRM – List view group by

6.8.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 can not 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 following Tables.

The image illustrates the process of mapping variables from a vtiger form to a PDF template. It shows two screenshots of the vtiger interface. The left screenshot shows the 'Product block' tab with a list of available fields for products and services. The right screenshot shows the 'Other information' tab with a list of available fields for other information. Below these screenshots, a table shows the resulting PDF template structure, with columns for 'Item Details', 'Currency : Euro(€)', and 'Tax Mode : Group'. The table includes rows for 'test1' and 'test2' with various fields like 'Quantity', 'Selling Price', 'Discount', 'Total After Discount', 'Total', and 'Net Price'. A red box highlights the 'Items Total' and 'Grand Total' rows in the table.

Item Details		Currency : Euro(€)	Tax Mode : Group		Net Price
*Item Name	Quantity	Selling Price	Total		
test1	1	148.00 (-) Discount : Total After Discount :	148.00 37.00 111.00		111.00
test1	1	50.00 (-) Discount : Total After Discount :	50.00 0.00 50.00		50.00
test1	1	37.00 (-) Discount : Total After Discount :	37.00 0.00 37.00		37.00

Items Total	198.00
(-) Overall Discount	29.70
(+) Charges	120.00
Pre Tax Total	288.30
(+) Tax	45.44
(+) Taxes On Charges	32.40
(-) Deducted Taxes	0.00
Adjustment	0.00
Grand Total	366.14
Received	0.00
Balance	366.14

Mapping product block with vtiger form

Name	Description
Currency	Euro, Dollar
Currency symbol	€, \$
Currency code	EUR, USD
Subtotal	Price without TAX before discount, by Tax Mode: group = Net Total
Total discount	Final Discount amount

Total discount (%)	Final Discount in %
Total without TAX	Total price without TAX after discount
TAX	Total TAX amount
TAX (%)	Total TAX in %
TAX block	This is useful for some countries, that need to have the detail amount of TAX
Charge block	This is useful if you require to have additional charges applied
Total with TAX	Total price with TAX
Shipping & Handling taxes	Final taxes for Shipping & Handling
Shipping & Handling amount	Final amount for Shipping & Handling
Adjustment	Adjustment from vtiger form
Grand Total	Grand Total from vtiger form

PDF Maker Other information tab

<i>Name</i>	<i>Description</i>
Record ID	Record ID
Product No / Service No	Number of product / service
Position	Number of position (1,2,3, ...)
Currency	Euro, Dollar
Currency code	EUR, USD
Currency symbol	€, \$
Name	Name and description of the product or service
Name of product/service	Only the name of the product or service
Description of product/service	Description of the product/service from module Product/Service
Comment for product/ service	Comment for products/service from Invoice/SO/PO/Q form
Quantity	Quantity defined in Invoice/SO/PO/Q
Unit	Unit of product/service from module Product/Service
List price	List Price from Invoice/SO/PO/Q
Total price	List price x Unit

Discount	Discount amount for each product/service
Discount (%)	Discount in % for each product/service
Total after discount	Total price after discount without TAX
TAX	TAX amount for each product/service
TAX (%)	TAX in % for each product/service
Total price with TAX	Total price with TAX for each product/service

Mapping values for product block template item available in Invoices, Quotes, Sales Orders and Purchase Orders

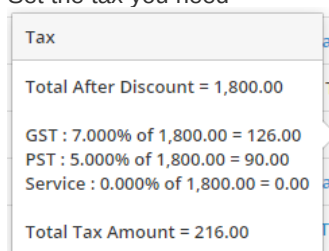
6.8.1.Tax block

Tax block is a useful feature of PDF Maker if you need see all taxes you are using in your Invoices, Quotes and other modules which are using item details blocks.

You can manage your taxes in Vtiger CRM settings under **INVENTORY – Tax management**.

How to add Tax block to your PDF Maker template

1. Go to your module for example we can use Invoice module
2. Set the tax you need



Tax
Total After Discount = 1,800.00
GST : 7.000% of 1,800.00 = 126.00
PST : 5.000% of 1,800.00 = 90.00
Service : 0.000% of 1,800.00 = 0.00
Total Tax Amount = 216.00

3. If tax is added to your Invoice then go to your PDF Maker template

- In the template edit window add tax block via module variables

Template name: * Invoice 599

Module: Invoices

Related modules:

Related blocks:

Company information:

User information:

Subject

tax

Details

Total without TAX

TAX

TAX (%)

TAX block

Deducted taxes block

Deducted Taxes Total

Total with TAX

Shipping & Handling taxes

User Name

- The tax block is added to your template now and you can see block like this:

	Tax %	Sum	TAX
#VATBLOCK_START#			
<u>\$VATBLOCK_LABELS</u>	<u>\$VATBLOCK_VALUES</u>	<u>\$VATBLOCK_NETTOS</u>	<u>\$VATBLOCK_VATS</u>
#VATBLOCK_END#			

You can change the style of tax block if you know HTML and CSS via source code of template or remove, add columns (for example, many customers are removing Sum columns).

- Tax block was added to the template and this is the Export final preview of Invoice:

	Tax %	Sum	TAX
GST	7,00	1 800,00	126,00
PST	5,00	1 800,00	90,00
Service	0,00	1 800,00	0,00

6.8.2.Charges block

Charges block is a useful feature of PDF Maker if you need have additional charges for your Invoices, Quotes and other modules which are using item details block.

You can manage your Charges in Vtiger CRM settings under **INVENTORY – Tax management – Charges (& its taxes) tab**.

How to add Charge block to your PDF Maker template

1. Go to your module for example we can use Invoice module
2. Set the charges you need (You can do this in Tax management too)

Charges
Total After Discount = 1,800.00
Shipping & Handling = 5.00
CNF = 10.00
CIF = 15.00
Charges Total = 0.00

3. If charges are added to your Invoice then go to your PDF Maker template
4. In the template edit window add charge block via module variables

Template name: *

Module:

Related modules:

Related blocks:

Charges block

TAX block

Charges block

Deducted taxes block

Company information:

User information:

5. The charges block is added to your template now and you can see block like this:

	Sum
#CHARGESBLOCK_START#	
\$CHARGESBLOCK_LABEL\$	\$CHARGESBLOCK_VALUES\$
#CHARGESBLOCK_END#	

You can change the style of charge block if you know HTML and CSS via source code of template or remove, add columns (for example, many customers are removing Sum columns or changing the columns title).

6. Charges block was added to the template and this is the Export final preview of Invoice with Charges block:

	Sum
Shipping & Handling	5,00
CNF	10,00
CIF	15,00

6.9.Template settings

6.9.1.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:	\$#DD-MM-YYYY#-\$-INVOICE_INVOICE_NO\$-INVOICE_ACCOI	
Description:	<div>Subject</div> <input type="text"/>	
Page format:	<div>Template name</div> <div>Current date (dd-mm-yyyy)</div> <div>Current date (mm-dd-yyyy)</div> <div>Current date (yyyy-mm-dd)</div>	Common
Page orientation:		
Ignored picklist values:	<div>Invoice Details</div> <div>Subject</div> <div>Sales Order</div> <div>Customer No</div> <div>Due Date</div> <div>Purchase Order</div> <div>Sales Commission</div> <div>Excise Duty</div> <div>Organization Name</div> <div>Status</div>	Module related
Margins:		

File name settings

6.9.2.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:

- ListView – “Status” column
- DetailView – Template information

PDFMAKER

Listview of PDF Maker

Actions ▾

Search

	Template name	Module	Description	Sharing	Template owner	Status
<input type="checkbox"/>	Invoice	Invoices	Template for Invoice	Public	admin Administrator70new	Active
<input type="checkbox"/>	SalesOrder	Sales Orders	Template for SalesOrder	Public	admin Administrator70new	Active
<input type="checkbox"/>	PurchaseOrder	Purchase Orders	Template for PurchaseOrder	Public	admin Administrator70new	Active
<input type="checkbox"/>	Quotes	Quotes	Templates for Quotes	Public	admin Administrator70new	Active
<input type="checkbox"/>	testprivate	Invoices		Private	admin Administrator70new	Active
<input type="checkbox"/>	MyInvoiceTemplate (default for DetailView)	Invoices	Template for Invoice	Public	admin Administrator70new	Active
<input type="checkbox"/>	testorg	Organizations		Public	PDFMakerFree	Active
<input type="checkbox"/>	testmanual	Invoices		Private	PDFMakerFree	Inactive
<input type="checkbox"/>	Relatedblocks	Organizations		Private	PDFMakerFree	Inactive
<input type="checkbox"/>	Listview Block (default for Listview)	Invoices		Private	PDFMakerFree	Active

PDFMAKER > Invoice

Detailview of PDF Maker

Invoice

Module: Invoices

Template information

Template name

Invoice

Description

Template for Invoice

Module

Invoice

Status

Active

Set as default

for DetailView ✕ for Listview ✕

PDFMAKER > Relatedblocks

Detailview of PDF Maker

Relatedblocks

Module: Organizations

Template information

Template name

Relatedblocks

Description

Module

Organizations

Status

Inactive

Set as default

for DetailView ✕ for Listview ✕

Status of template in Listview and Editview

To set PDF template as active / inactive you need to use Settings tab in Editview and select status from listbox.

Properties

Other information

Labels

Product block

Header / Footer

Settings

File name:

Select ...

Description:

Status:

Inactive

Active

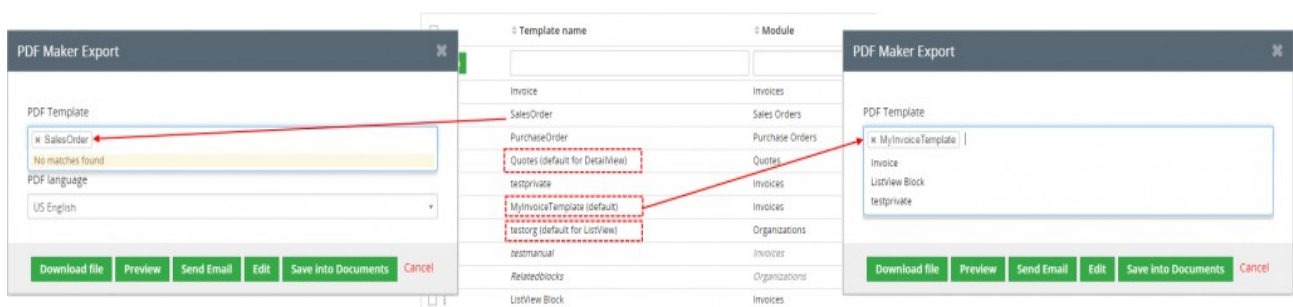
Inactive

How to set status of PDF template

6.9.3.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:

- ListView – 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.
- DetailView – Properties tab
- 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.



The default template in the PDF Maker block

To set PDF template as default you need to use Settings tab in EditView – check/uncheck the checkboxes to change this setting separately for EditView and ListView.

Properties	Other information	Labels	Product block	Header / Footer	Settings
<p>File name: <input type="text"/></p> <p>Select ... <input type="text"/></p> <p>Status: <input type="text" value="Active"/></p> <p>Set as default: for DetailView <input type="checkbox"/> for ListView <input checked="" type="checkbox"/></p> <p>Set for Customer Portal: <input type="checkbox"/></p>					

Setting default PDF template

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

The screenshot shows two panels of the PDF template settings. The left panel, titled 'Properties', has tabs for 'Properties', 'Other information', 'Labels', and 'Product block'. The 'Other information' tab is active, showing a checked 'ListView block' checkbox, 'Terms and Conditions' dropdown, and 'Current date' dropdown. The right panel, titled 'Settings', has tabs for 'Properties', 'Other information', 'Labels', 'Product block', 'Header / Footer', and 'Settings'. The 'Settings' tab is active, showing 'File name' input, a 'Select ...' dropdown, 'Status' dropdown (set to 'Active'), and 'Set as default' checkboxes for 'for DetailView' (unchecked) and 'for ListView' (checked). A red dashed box highlights the 'Set as default' section, and a red arrow points from the 'ListView block' checkbox in the 'Properties' panel to the 'for ListView' checkbox in the 'Settings' panel.

Setting default vs. ListView block

6.9.4. 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”. Please note that this setting is available only for modules/templates Invoice and Quotes.

The screenshot shows the 'Settings' tab of the PDF template settings. It features a 'File name' input field, a 'Select ...' dropdown, and a 'Status' dropdown (set to 'Active'). Below these, there are 'Set as default' checkboxes for 'for DetailView' (unchecked) and 'for ListView' (unchecked). A red dashed box highlights the 'Set for Customer Portal' checkbox, which is checked. A large red text overlay reads 'Check to set template as default for Customer portal'.

Setting the PDF template as template for Customer Portal

6.9.5. Watermark

Since PDF Maker **700.5.0**, 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

The screenshot shows the 'Properties' tab in the PDF Maker interface. The 'Basic information' section includes 'Page format' (A4), 'Page orientation' (Portrait), and 'Margins' (Top: 2.0, Bottom: 2.0, Left: 2.0, Right: 2.0). The 'Number format' section includes 'Decimal point separator' (.), 'Decimal point number' (2), and 'Thousands separator' (.). The 'Watermark' section shows 'Type' set to 'none'. The right panel shows a preview of the invoice template with various fields like '\$INVOICE_ACCOUNT_ID\$', '\$INVOICE_BILL_STREETS\$', '\$INVOICE_BILL_CODES\$', '\$INVOICE_BILL_CITY\$', '\$INVOICE_BILL_STATES\$', '\$SHTAXAMOUNT\$', '\$SHTAXAMOUNTS\$', '\$SHTAXTOTAL\$', '\$SHTAXTOTALS\$', '\$%G_Description%', '\$PRODUCTPOSITION\$', '\$PRODUCTTITLES\$', and '\$PRODUCTEDITDESCRIPTION\$'.

Watermark – PDF Maker Vtiger 7

2. Now choose image or text

The screenshot shows the 'Watermark' section with 'Type' set to 'none'. A dropdown menu is open, showing the following options: 'none', 'Image', and 'Text'. The 'Image' option is highlighted in blue.

Watermark type – PDF Maker Vtiger 7

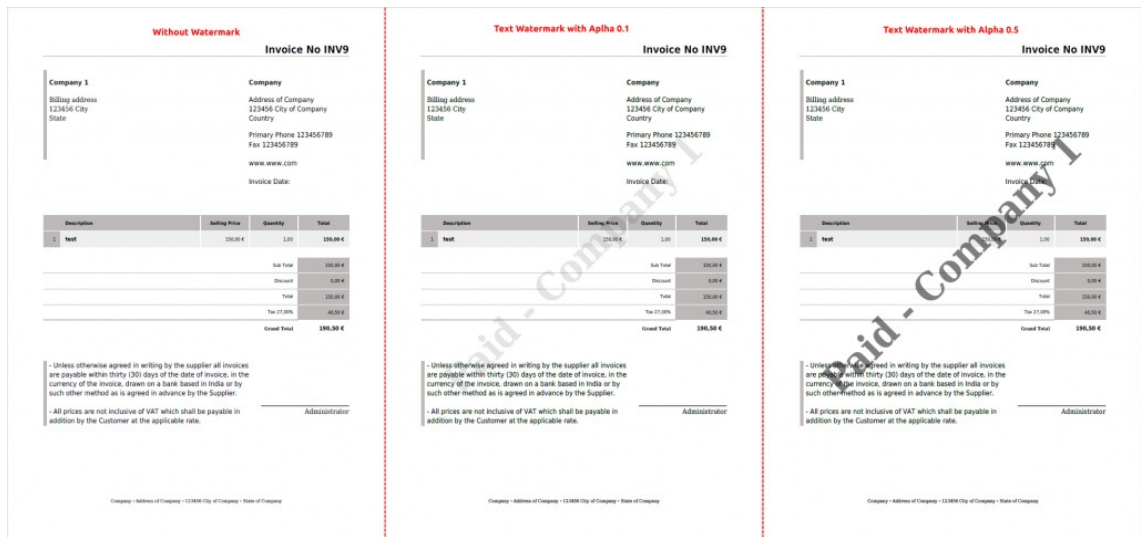
- If you select **image**, please upload your image and set Alpha (The Alpha property specifies the opacity/transparency of an element).
Default Alpha is 0.1 and possible values are from 0.1 to 1.0.



Image Watermark – PDF Maker Vtiger 7

- 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.



6.9.6.PDF Password

Since PDF Maker **700.5.0**, 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

The screenshot shows the PDF Maker settings interface. The 'Settings' tab is selected, displaying various configuration options. On the left, there are fields for 'File name', 'PDF Password', 'Description' (set to 'Template for Invoice'), 'Ignored picklist values', 'Status' (set to 'Active'), 'Set as default' (with checkboxes for 'Detail view' and 'List view'), and 'Set for Customer Portal'. On the right, a preview of the PDF content is shown, featuring variables like `$INVOICE_ACCOUNT_ID$`, `$INVOICE_BILL_STREETS`, `$INVOICE_BILL_CODES`, `$INVOICE_BILL_CITY$`, and `$INVOICE_BILL_STATES`.

2. You can set static password or dynamic password based on values of module or related modules.

Set Value

Module: Subject \$

Related modules: Organization Name (Organizations) \$

\$R_ACCOUNTID_EMAIL1\$

Save Cancel

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

Company 1

website2.com
987654321
emailtounlockpdf@its4you.sk
Show Map

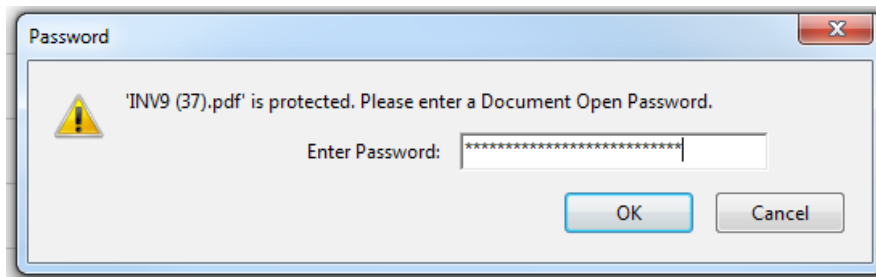
+ Add Tag

Summary Details Updates

Organization Details

Organization Name	Company 1	Organization Number	ACC1
Website	website2.com	Primary Phone	987654321
Ticker Symbol		Fax	
Member Of		Secondary Phone	
Employees	0	Primary Email	emailtounlockpdf@its4you.sk
Secondary Email		Ownership	

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



Organization mail like PDF password – PDF Maker Vtiger 7

7.PDF Maker block actions


The PDF Maker block contains links to initiate several actions:

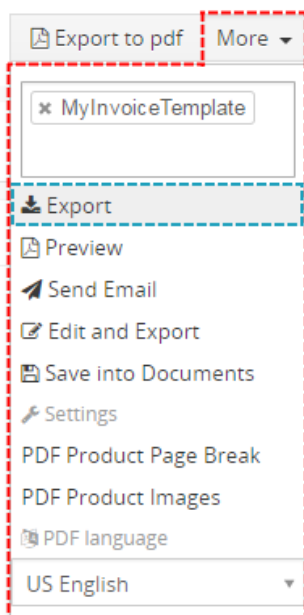
- Export
- Preview
- Send Email
- *Edit and Export*
- Save into Documents
- Settings
 - PDF Product Page Break
 - PDF Product Images
- PDF language

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.

7.1.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 ride side of DetailView, click on  button and 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.
2. Click on Export and export will be done. Please note that next step depends on used web browser.



Export to PDF

ITS 4 You
IT-Solutions4You

Invoice No INV3

ORG name

test
test test
test

IT-Solutions4You s.r.o.

Address
Postal Code City
Country

Phone 123456
Fax 654321

www.its4you.sk

Invoice Date: 05-06-2017

	Description	Selling Price	Quantity	Total
1	test1	100,00 €	1,00	100,00 €
2	test1	50,00 €	1,00	50,00 €
3	test1	37,00 €	1,00	37,00 €

Sub Total 187,00 €


Discount 0,00 €

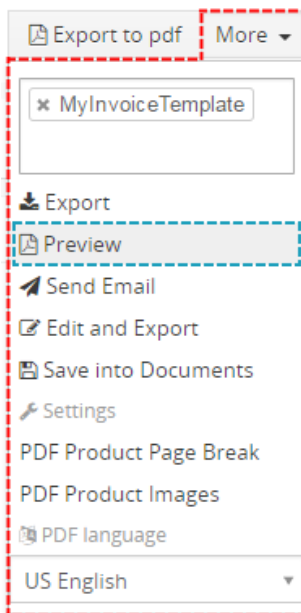
Total 187,00 €

Tax 27,00% 50,49 €

[Download file](#)[Print](#)[Send Email](#)[Edit](#)[Save into Documents](#)[Cancel](#)

7.2.Preview


1. Go to the detail view of given Module and on the ride side of DetailView, click on  button and 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.
2. Click on Preview and Preview window will appear. Here you can also find helpful options like Download file, Print, Send Email, Edit and Save into Documents.



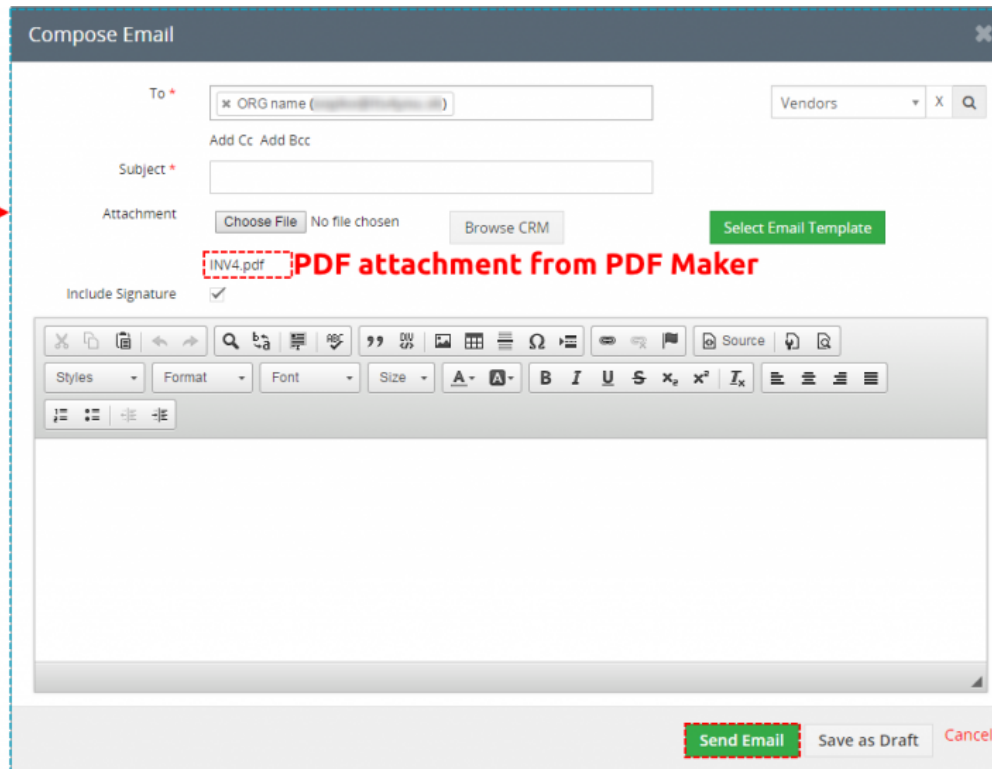
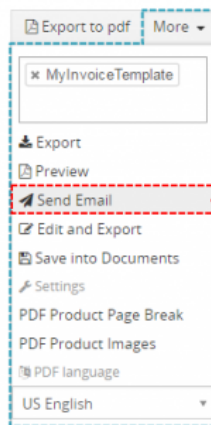
Preview of PDF file

7.3.Send Email

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 ride side of DetailView, click on  button and 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.
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 Email** button to send email with attached file(s).



Send Email with PDF – Compose E-Mail

7.4.Edit and Export

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 *Edit and Export* 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 ride side of DetailView, click on **More** button and 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.
2. Click on *Edit and Export* link.

- [Download file](#)

Export to pdf More

MyInvoiceTemplate

Export

Preview

Send Email

Edit and Export

Save into Documents

Settings

PDF Product Page Break

PDF Product Images

PDF language

US English

Download file

7.5. Save 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 ride side of DetailView, click on **More** button and in the PDF Maker block, choose your PDF Template(s). The template is selected automatically in case the only one exists for given module or in case the default template is already defined.
2. Click on **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 **Create** button to save the PDF file into Documents.
5. After that the document can be find under module Documents.

The screenshot illustrates the process of saving a PDF into the Documents module. It shows the 'More' button in the PDF Maker block, the 'Save into Documents' option in the dropdown menu, the 'Save Into Documents' form with fields for Title, Assigned To, Folder Name, and Note, and the 'Create' button. A success message 'PDF has been saved into Documents' is displayed. Below, the 'DOCUMENTS' list shows the saved document with title 'Title of document' and filename 'INV4.pdf'.

Save PDF into Documents

7.6.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 (blue line)
- Show table header after page break – a repetition of the table's header on the next page (red line)
- Show subtotal before page break – a subtotal value at the end of the page (before page break) (yellow line)

PDF Product Page Break

Global settings

- ☒ Show table header after page break
- ☒ Show subtotal before page break

Item Details

Item Name
<input type="checkbox"/> vov prod 2
<input type="checkbox"/> vov prod 1
<input type="checkbox"/> Product one
<input type="checkbox"/> WithLogo
<input checked="" type="checkbox"/> vov prod 2
<input type="checkbox"/> vov prod 1
<input type="checkbox"/> Product one
<input type="checkbox"/> WithLogo

Invoice No INV14

Pos	Quantity	Text	List Price	Sub Total	Discount	Net Price without TAX	Tax (%)	Tax (EUR)	Total
1	1,00	Box vov prod 2	200,00	200,00	0,00	200,00	27,00	54,00	254,00
2	1,00	Box vov prod 1	100,00	100,00	0,00	100,00	27,00	27,00	127,00
3	1,00	Product one Description of Product one	124,00	124,00	0,00	124,00	27,00	33,48	157,48
4	1,00	WithLogo	150,00	150,00	0,00	150,00	27,00	40,50	190,50
5	1,00	Box vov prod 2	200,00	200,00	0,00	200,00	27,00	54,00	254,00
Sub Total									774,00

2/2

Pos	Quantity	Text	List Price	Sub Total	Discount	Net Price without TAX	Tax (%)	Tax (EUR)	Total
6	1,00	Box vov prod 1	100,00	100,00	0,00	100,00	27,00	27,00	127,00
7	1,00	Product one Description of Product one	124,00	124,00	0,00	124,00	27,00	33,48	157,48
8	1,00	WithLogo	150,00	150,00	0,00	150,00	27,00	40,50	190,50
Subtotals									1148,00
Discount									0,00
Total with TAX									1457,96
Shipping & Handling Charges									0,00
Taxes For Shipping and Handling									0,00
Adjustment									0,00
Grand Total (EUR)									1457,96

Product break settings

Also good option is modify subtotal before page break. You can edit it if you edit #PRODUCTBLOC_START# in your template.

ITS4You

IT-Solutions4You

\$INVOICE_ACCOUNT_ID\$

\$INVOICE_BILL_STREET\$
 \$INVOICE_BILL_CODE\$ \$INVOICE_BILL_CITY\$
 \$INVOICE_BILL_STATES

%G_Invoice No% \$INVOICE_INVOICE_NO\$

Pax	%_City%	Text	%_Lst_List_PRICE%	%_Subtotal%	%_Discount%	%_Lst_NET_PRICE% without TAX	%_Tax% (%)
\$PRODUCTBLOC_START\$							
\$PRODUCTPOSITION\$	\$PRODUCTQUANTITY\$	\$PRODUCTUSAGE/LAY%\$	\$PRODUCTUNITS\$	\$PRODUCTLSTPRICE\$	\$PRODUCTDISCOUNT\$	\$PRODUCTTOTAL\$	\$PRODUCTVATPERCENT\$
\$PRODUCTBLOC_END\$							

\$COMPANY_NAMES

\$COMPANY_ADDRESS\$
 \$COMPANY_ZIP\$ \$COMPANY_CITY\$
 \$COMPANY_COUNTRIES

Telefon: \$COMPANY_PHONES
 Telefax: \$COMPANY_FAX\$

\$COMPANY_WEBSITES

%M_Invoice Date%: \$INVOICE_INVOICEDATES

Invoice No INV14


Pos	Quantity	Text	List Price	Sub Total	Discount	Net Price without TAX	Tax (%)	Tax (EUR)	Total
1	1.00	new prod 2	200.00	200.00	0.00	200.00	27.00	54.00	254.00
2	1.00	new prod 1	100.00	100.00	0.00	100.00	27.00	27.00	127.00
3	1.00	Product one description of Product one	124.00	124.00	0.00	124.00	27.00	33.48	157.48
4	1.00	W03Lago	150.00	150.00	0.00	150.00	27.00	40.50	190.50
5	1.00	new prod 2	200.00	200.00	0.00	200.00	27.00	54.00	254.00
Sub Total									724.00

Edit page break subtotal

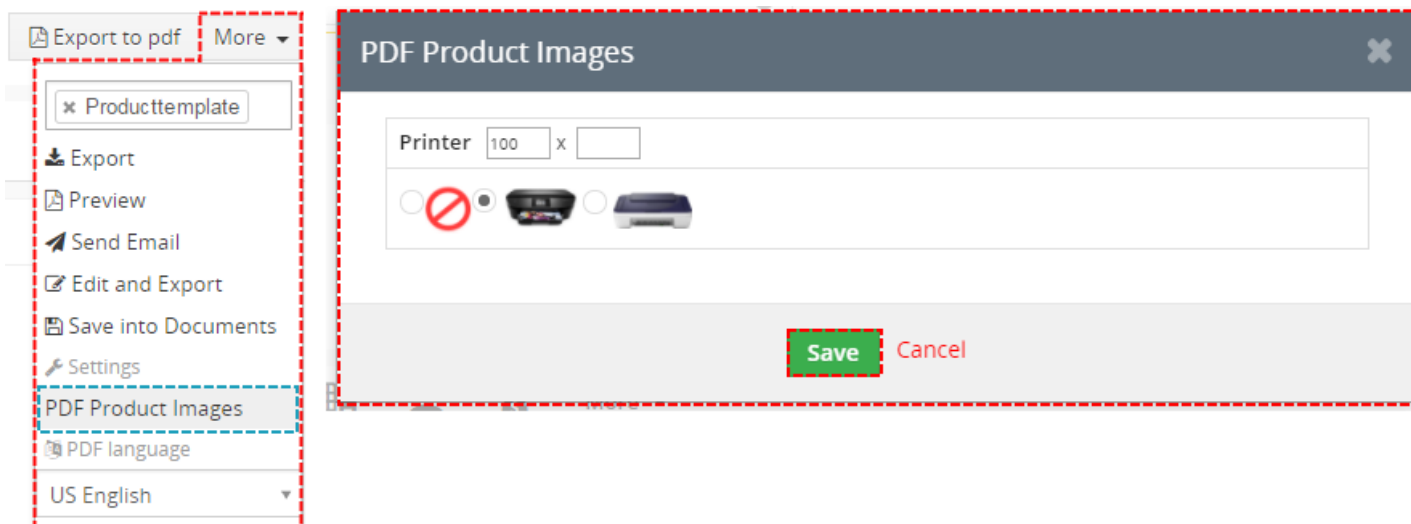
PDF Product Images action allows you to define some settings related to product images:

Note: Please update your PDF Maker to version 700.13.2 in order to use this feature without any issues.

7.7.1.PDF Product Images in product templates

1. Go to the detail view of given Module and on the side of DetailView, click on  button and in the PDF Maker block, choose your PDF Template(s). The template is selected automatically in case the only one exists for given module or in case the default template is already defined.
2. Click on *PDF Product Images* link.
3. PDF Product Images window will appear on the screen.

4. Select the picture and click on **Save** button.



PDF Product Images in product templates

Depending on your selection 4 different situations can happen:

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

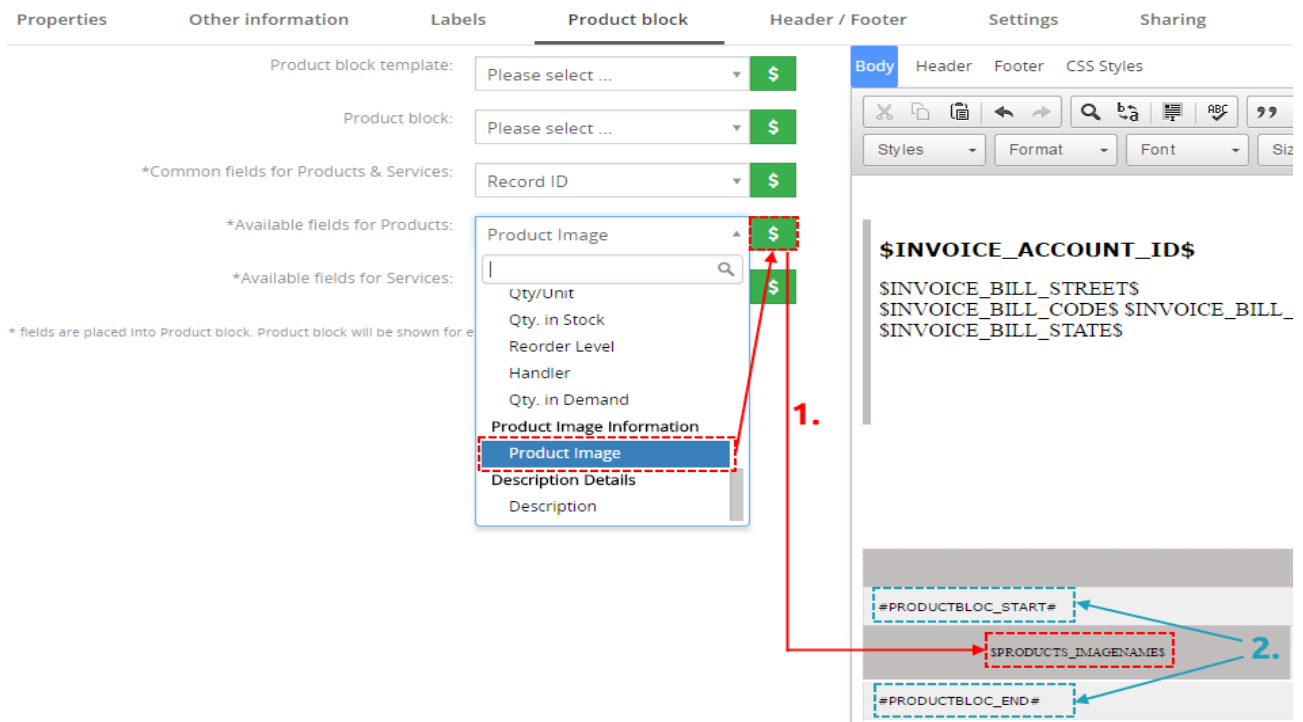
i Note: Please update your PDF Maker to version 700.13.2 in order to use this feature without any issues.
This version was uploaded on 16 December 2019.

7.7.2.PDF Product Images in product blocks

i Note: Please update your PDF Maker to version 700.13.2 in order to use this feature without any issues.
This version was uploaded on 16 December 2019.

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

- Start editing of your PDF template. Go to the Product block tab, from "Available fields for Products" select "Product Image" and click on **\$** button.
- As can be seen below, it is required to insert the variable \$PRODUCTS_IMAGENAME\$ between #PRODUCTBLOC_START# end #PRODUCTBLOC_END#.



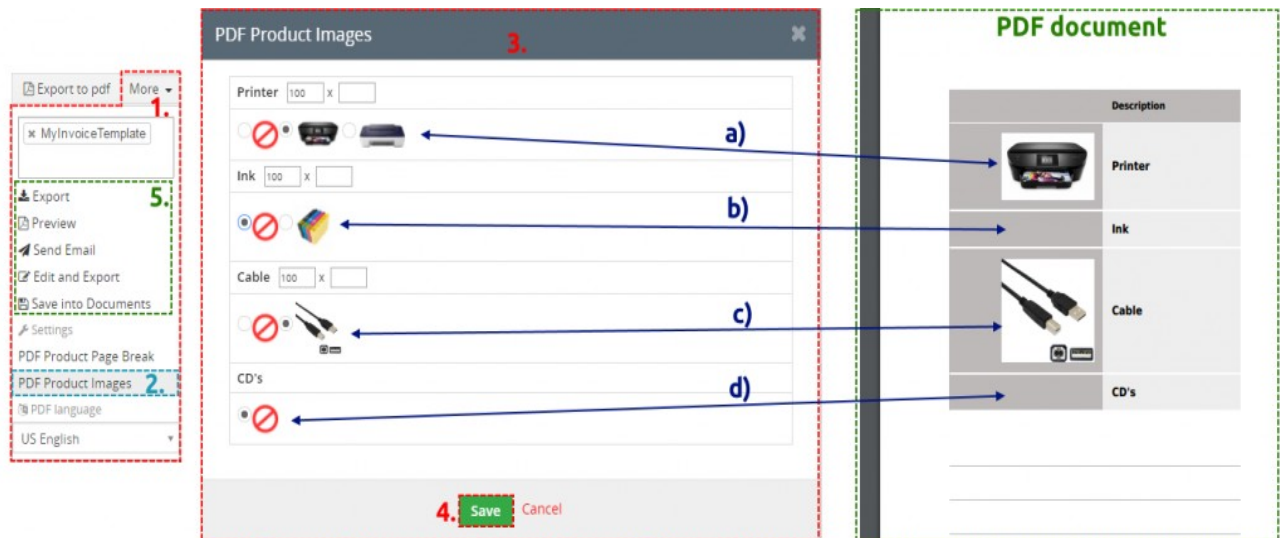
PDF Product images

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 and on the right side of DetailView, click on [More](#) button and in the PDF Maker block, choose your PDF Template(s). The template is selected automatically in case the only one exists for given module or in case the default template is already defined.
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. In case you don't want to use picture you are able to switch it off.
 - c. If only one picture is available it is used automatically.
 - d. If picture is not available the cell in the PDF document remains empty.

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.



PDF Product images settings

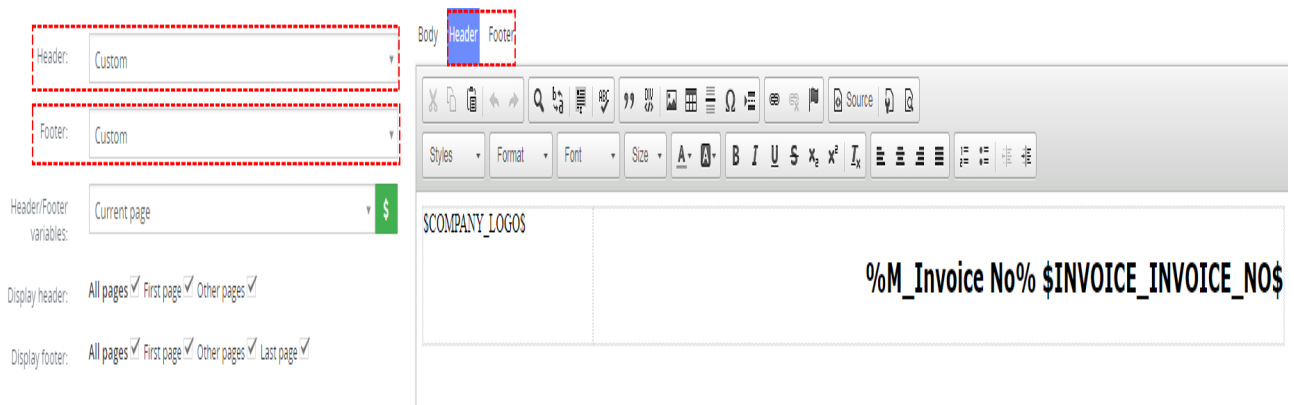
8. Additional features

8.1. Template for Header/Footer

Since **PDF Maker 700.4.0** 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.

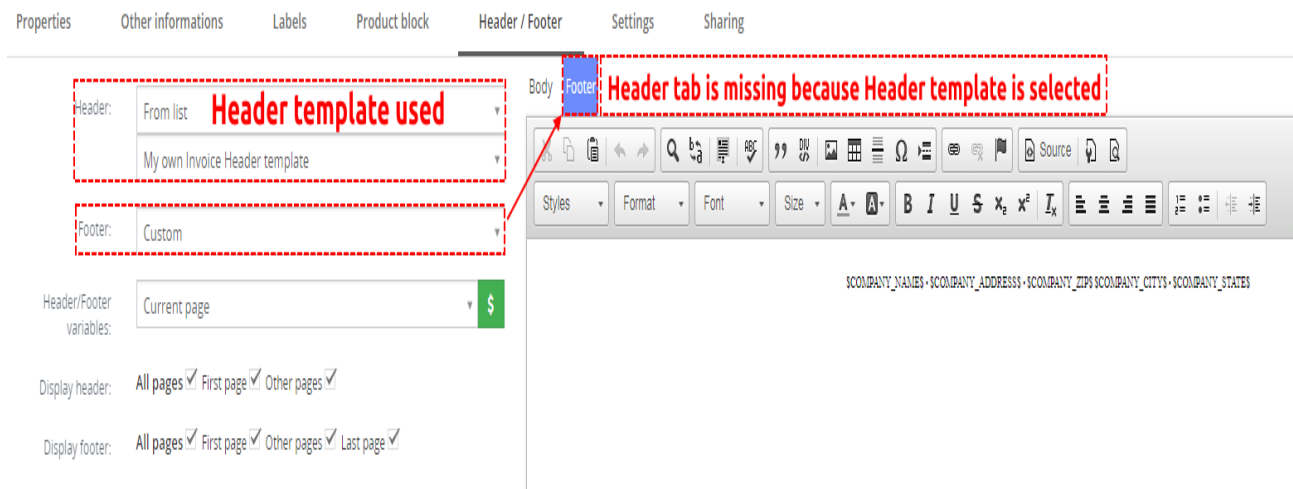
It is useful functionality that allows you create Header/Footer template and use it in PDF template. Then if you need to provide any change in Header or Footer you just provide changes in Header/Footer template and this changes will be applied in all PDF templates where you use Header/Footer template.

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.

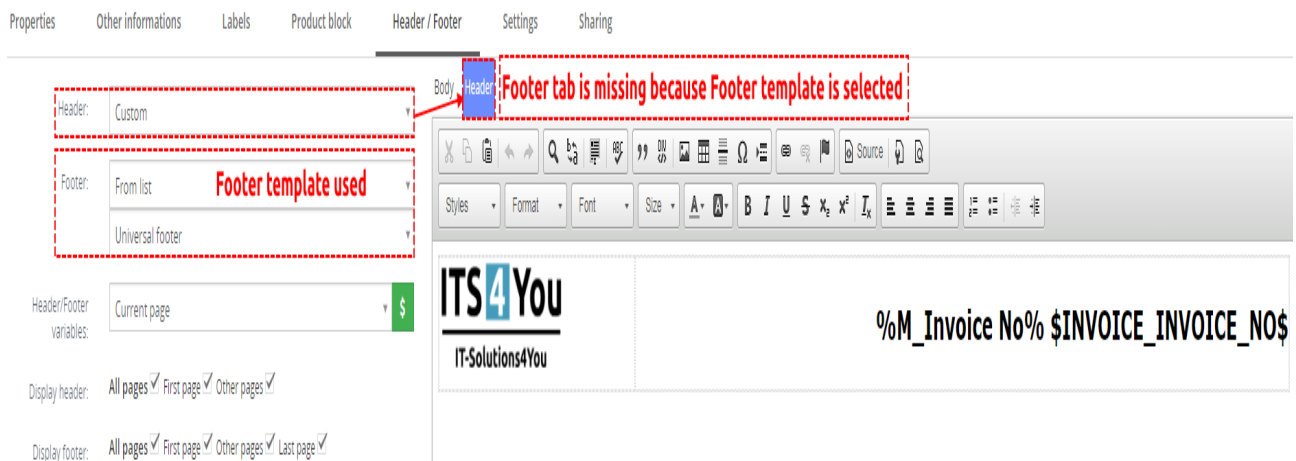


Custom Header/Footer in PDF template – PDF Maker Vtiger 7

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.

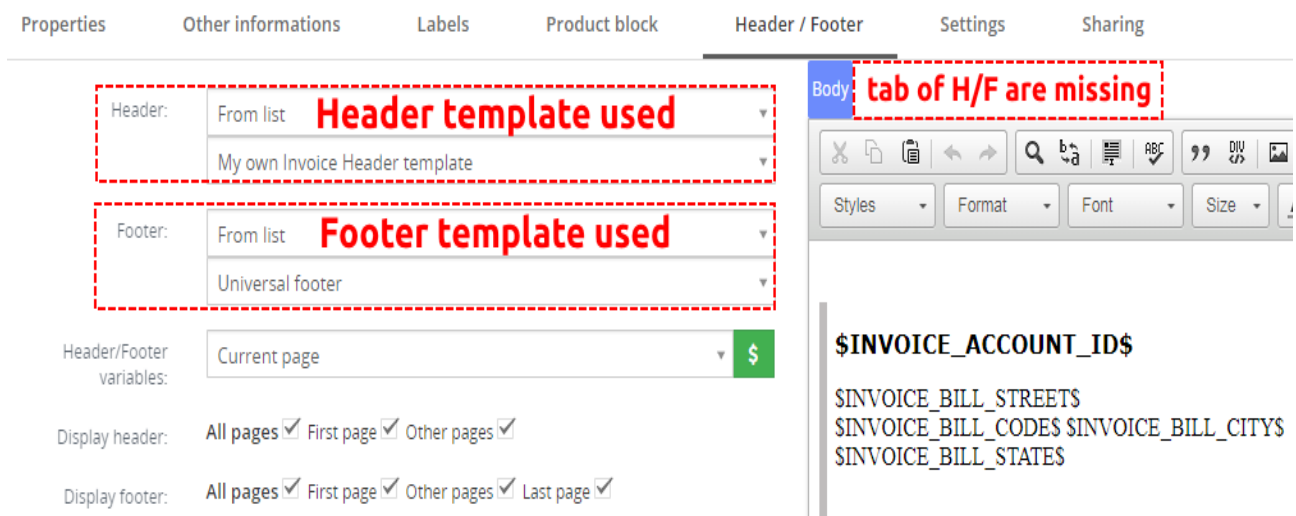


Header template used – PDF Maker Vtiger 7



Footer template used – PDF Maker Vtiger 7

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



Header and Footer templates are used – PDF Maker Vtiger 7

How to use Header/Footer template

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

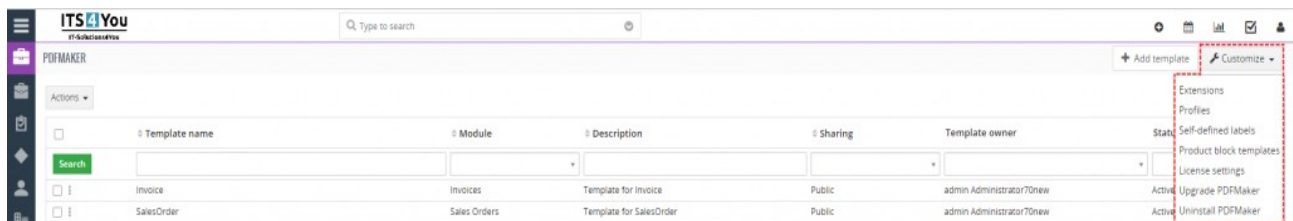
1. First at all you need to create your Header/Footer template ([Create the simple Header/Footer template](#))
2. Then your template is available in ListView of Header/Footer ([ListView of Header/Footer](#))
3. Open your PDF template and select Header/Footer tab

4. Choose Header or (and) Footer template for your PDF Maker template from list of Headers/Footers ([Header/Footer](#))
5. Now you can generate PDF file with your Header/Footer template
6. If you need to provide changes in header you do not need edit all PDF templates just your Header or Footer template

9.Settings


The PDF Maker settings are accessible directly from the ListView and consist of:

- Extensions – manage extensions: Customer Portal, Workflows, Styles4You
- 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



PDF Maker settings

9.1.Extensions


PDFMAKER

Extensions

Available extensions for the PDF Maker:

Customer Portal
Download

Allows you to use one of the PDF Maker templates as a standard Customer Portal template for modules Invoice and Quotes.

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 CustomerPortal.

Otherwise, follow the custom installation process described in **Customer Portal.txt**

Workflow

Allows you to create PDF files by using the PDF Maker within the Workflow settings.

Workflows are already installed.

Styles 4 You
Download

This extension allows you to manage your style in one place and then use it for template(s) that you want.

Styles 4 You are already installed.

Available extensions for the PDF Maker

9.1.1.Customer portal

Customer portal new versions are no longer compatible with our PDF Maker on Vtiger 7.x.

For any more questions, please contact us at : info@its4you.sk

9.1.2.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.

Workflow Actions

Add Action ▾

Send Mail

Invoke Custom Function

Create Task

Update Fields

Create Record

SMS Task

Send Email with PDF Maker attachments

Save Document from PDF Maker

Action Type	Action Title
No Actions	

Save

Cancel

PDF Maker tasks for workflows

“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”.

Add Action for Workflow -> Save Document from PDF Maker

Action Title*

Save Document from PDF Maker

Document title*

Title

Document description

Folder name

Default

PDF Template

MyInvoiceTemplate

PDF language

US English

Save

Cancel

Save Document from PDF Maker for workflows

“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 .

Add Action for Workflow -> Send Email with PDF Maker attachments

Action Title*

From Assigned To : (Users) Primary Email

Reply To

To* Contact Name : (Contacts) Primary Email

Subject*

Add Field General Fields

PDF Template **Invoice** **click to select template**

PDF language **Choose language of PDF File**

MyInvoiceTemplate | Invoice | invoicesubject | Invoicewithpictures | standardInvoice | table | Templ_1 | Templ_2 | Templ_3 | Templ_4

Text of Email

body

Save **Cancel**

Send email with PDF maker attachments for workflows

9.1.2.1.Merge templates/documents

Since version 4.26 you can merge selected templates when creating an action Send Email with PDF Maker attachments.

Select templates you need (A), and then confirm the checkbox Merge documents (B). Selected templates will be merged into one pdf file.

Add Action for Workflow -> Send Email with PDF Maker attachments

Action Title* PDFMaker Merge Templates

From Select

Reply To Select

To* frantisek.michlik@its4you.sk Select

Add Cc Add Bcc

Subject* PDFMaker Merge Templates Select

Add Field Select General Fields Select

EMAILMaker templates Select an Option

PDF Template

✖ Invoice - WF01

✖ Invoice - WF02

A

PDF language

US English

Merge documents



← B

PDFMaker Merge Templates

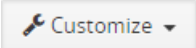
PDF Maker – merge templates in the workflow

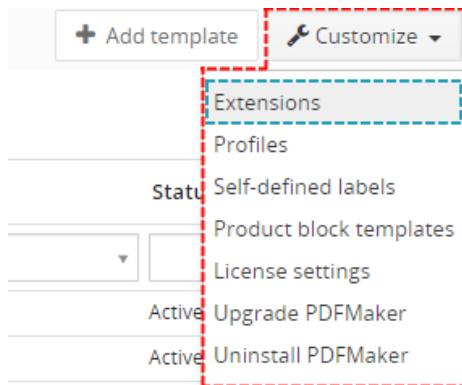
9.1.3.Styles 4 You

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

To install Styles4You please provide following steps:

1. Open PDF Maker

2. Click on  button and choose Extensions



How to install Styles4You

3. Download zip file by Download button
4. Install Styles4You via module manager or Install button

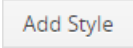
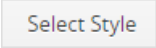
Styles 4 You

This extension allows you to manage your style in one place and then use it for template(s) that you want.

To install this extensions please use download button on right side and then install it by using Install button or via module manager.

How to install Styles4You

Now Styles4You has been installed into PDF Maker.

Here you can also add new Style or select your created Style. To add your Style to template please open your template click on  button or click on  button to select style.



Template with Styles4You

Module: Invoices

Template informations

Template name	Template with Styles4You
Description	
Module	Invoice
Status	Active
Set as default	for DetailView ✖ for ListView ✖

Display conditions

Display conditions have not been defined

Edit Conditions

CSS Styles

Add Style

Select Style

No Related Styles

How to add style to template

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

Add Style

Name *

MyStyle2

Assigned To *

admin Administrat...

Style

1 a {

2 color: red;

3 text-decoration: none;

4 }

5

6 body {

7 position: relative;

8 width: 21cm;

9 height: 29.7cm;

10 margin: 0 auto;

11 color: black;

12 background: #FFFFFF;

13 font-size: 14px;

14 font-family: SourceSansPro;

15 }

16

17 #header {

18 padding: 10px 0;

19 margin-bottom: 0px;

20 border-bottom: 1px solid #AAAAAA;

21 }

22

23 #logo {

24 float:left;

25 margin: 0px;

26 width: 250px;

27 }

28

29 #logo img {

30 height: 70px;

31 }

Priority *

1

Create

Cancel

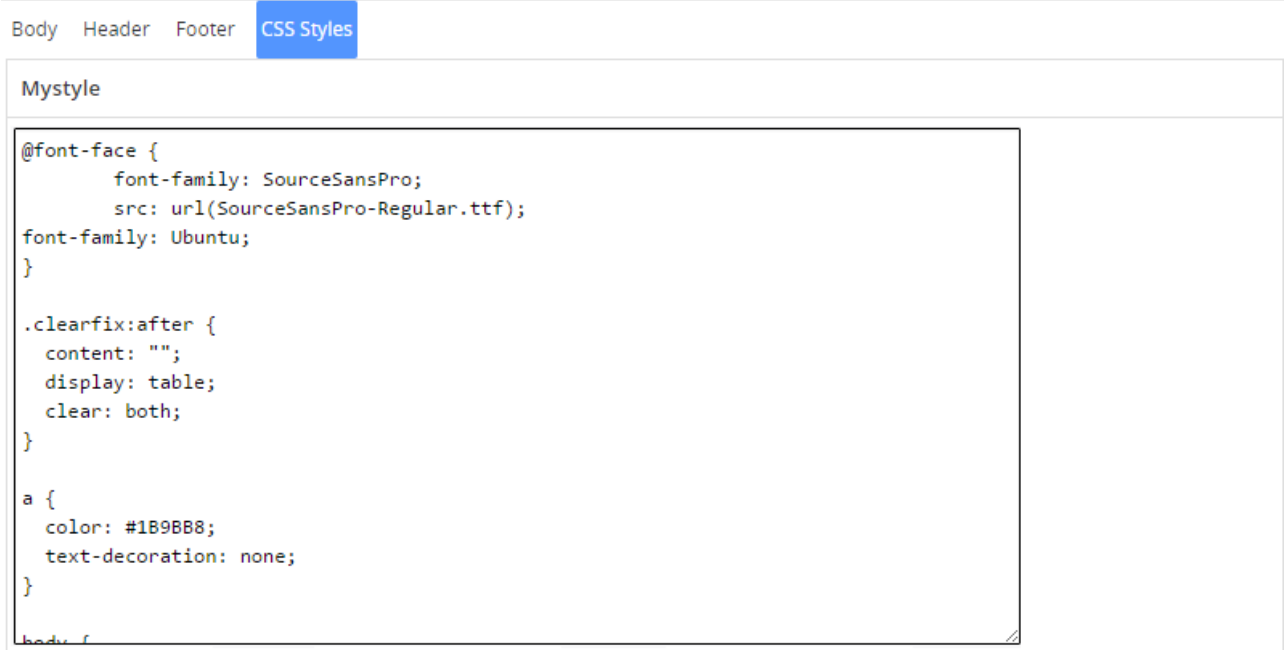
How to create Styles4You

Now, your style has been added to your template.

pagina 94 van 103

[illegible][illegible][illegible]

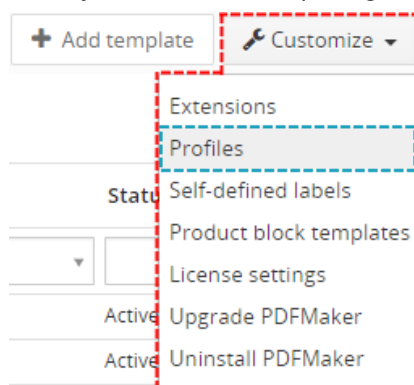
Style used in your template you can also find in edit view of template in CSS Style tab.



Style in EditView of template

9.2.Profiles

You may define PDF Maker privileges for all profiles. You may define Create/Edit, View and Delete privileges.



How to set profiles for PDF Maker

In order to change privileges click on **Edit**, use the checkboxes and click on **Save** button to save changes.

PDFMAKER

Profiles
Manage user-specific PDF Maker access to different Roles.

Define PDF Maker privileges for all profiles:

Profiles	Create/Edit	View	Delete
Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sales Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Support Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Guest Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

PDFMAKER

Profiles
Manage user-specific PDF Maker access to different Roles.

Define PDF Maker privileges for all profiles:

Profiles	Create/Edit	View	Delete
Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sales Profile	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Support Profile	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Guest Profile	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

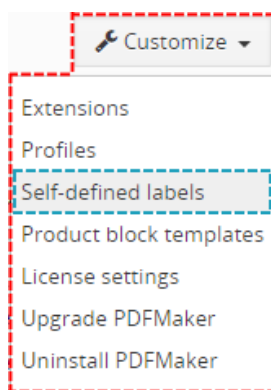
Save **Cancel**

Manage profiles

9.3. 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. In customize choose Self-defined labels



How to define self-defined labels

2. Click on **Add** button.

Self-defined labels
Manage your own labels and make your PDF templates completely language independent.

Define own labels available for all users:

Label key	Current language value (US English)	Other languages
No item has been found.		

How to define self-defined labels

3. Define label key C_**** and value for your current language. Click on **Save** button.

Add new custom label (US English)

Label key*

C_ mylabel

Label value



My Label for English

Save

Cancel

How to define self-defined labels

4. In order to define values for other installed languages click on “Edit Other Translations” link.

		Add	Cancel
Label key	Current language value (US English)	Other languages values	
C_mylabel	My Label for English	 	<div>Edit Other Translations</div>
		Add	Cancel

How to define self-defined labels

5. Define label value for additional languages and click on **Save** button.

C_mylabel

HU Magyar

Magyar translation

ES Spanish

Spanish translation

Turkce Dil Paketi

Enter custom label value

NL-Dutch

Enter custom label value

SK Slovenčina

Enter custom label value

Save

Cancel

How to define self-defined labels

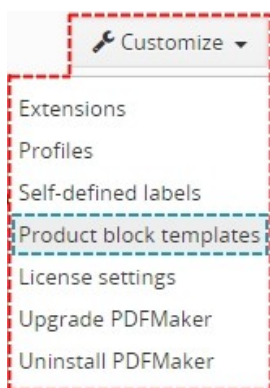
You can also find here button which allows you to delete unnecessary labels.

Label key		Current language value (US English)	Other languages values
C_mylabel		My Label for English	<div> <div>Edit Other Translations</div> </div>



click here to delete label

How to delete label

9.4.Product block templates



Product block template

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

Product block templates
Manage your own product block templates.

Define own product block templates available for all users:

Template name	Body							
	Pos	Qty%	Text	NG_LBL_LIST_PRICE%	NG_Subtotal%	NG_Discount%	NGM Totals%	
Product block for group tax	#PRODUCTBLOC_START#							<div> <div>Add</div> <div>Cancel</div> <div>Duplicate</div> <div></div> </div>
	\$PRODUCTQUANTITY	\$PRODUCTUSAGEUNITS	\$PRODUCTNAMES	\$PRODUCTUNITPRICE	\$PRODUCTTOTALS	\$PRODUCTDISCOUNTS	\$PRODUCTTOTALAFTERDISCOUNTS	
	#PRODUCTBLOC_END#							
	NG_LBL_NET_PRICE% WITHOUT TAX						\$TOTALWITHOUTTAX	
	NG_DISCOUNT%						\$TOTALDISCOUNTS	
	TOTAL WITHOUT TAX						\$TOTALAFTERDISCOUNTS	
	NG_TAX% SUBTAXPERCENT% IN NG_LBL_LIST_PRICE% TOTALAFTERDISCOUNTS						\$TAX	
	TOTAL WITH TAX						\$TOTALWITHTAX	
	NG_LBL_SHIPPING_AND_HANDLING_CHARGES%						\$SHIPPINGANDHANDLING	
	NG_LBL_TAX_FOR_SHIPPING_AND_HANDLING%						\$SHIPPINGANDHANDLINGTAX	
	NG_Adjustments						\$ADJUSTMENTS	
	NG_LBL_GRAND_TOTAL% (CURRENCYCODE%)						\$TOTAL	

Product block templates management

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

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

New template

4. **Save** Cancel

Properties Labels

*Template name: 1.

Product block: Please select ... 2.

*Common fields for Products & Services: Record ID

*Available fields for Products: Product Name 3.

*Available fields for Services: Service Name

* fields are placed into Product block. Product block will be shown for every product/service in PDF.

Styles Font **A** *I* U ~~S~~ ^{x₂} _{x₂} *I_x*

#PRODUCTBLOC START# 2.
 SPRODUCTNAMES 3.
 #PRODUCTBLOC END# 2.

Create new product block template

10. Tips & tricks

10.1. How to define background image

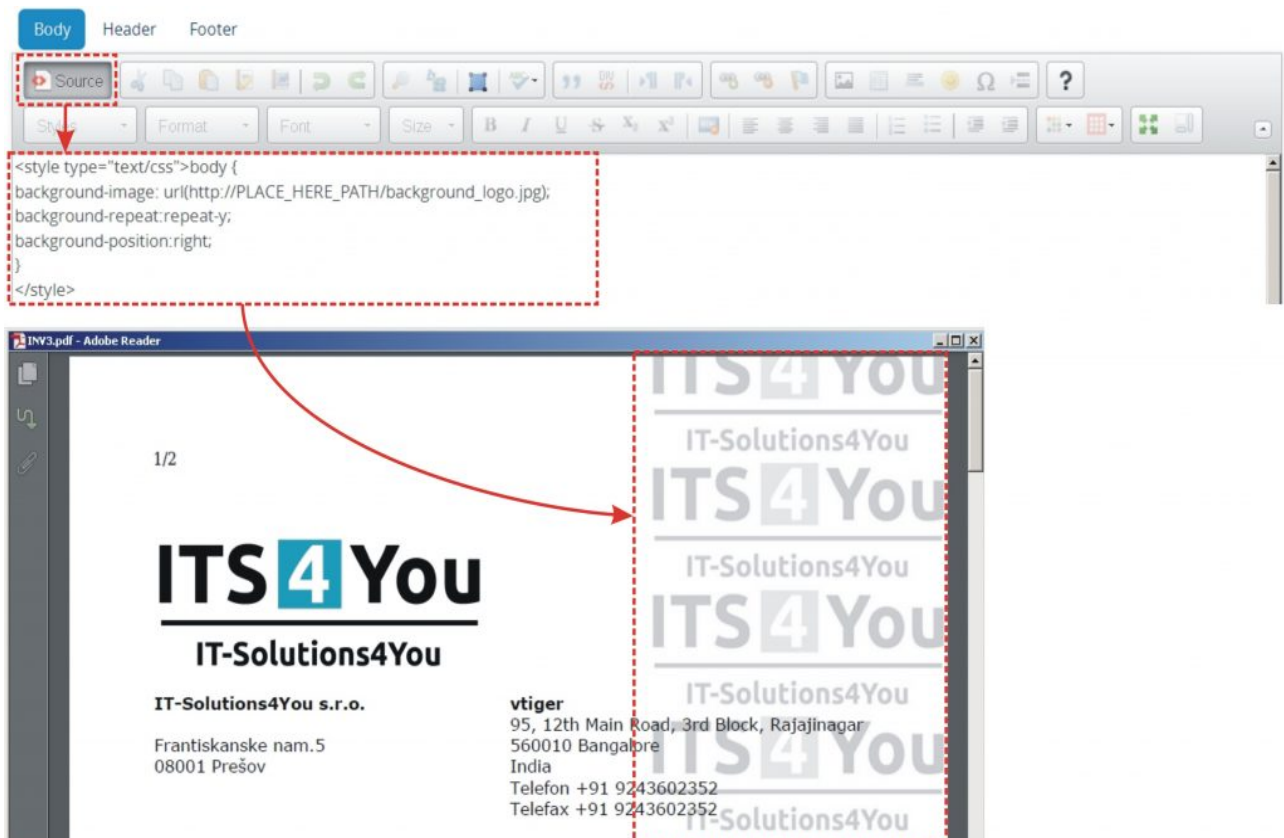
It is possible to define background image for PDF template as shown in the picture below. Just click on and insert following code (see Picture 8.1):

```
body {background-image: url(https://PATH_TO_IMAGE/picture.name);
background-repeat:repeat-y;}
background-position:right;
```

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".



Background image

10.2.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 (100×100 mm).
3. Use option "Multiple" for Page sizing & Handling according to your needs.

Properties

Other informations

Labels

Product block

Header / Footer

Settings

Sharing

File name:

Template name

Description:

Page format:

Custom

Width (mm)

100

Height (mm)

100

Body

Header

Footer

✂

📄

📋

↶

↷

🔍

🔗

📏

ABC

”

Styles

Format

Font

S

SACCOUNTS_ACCOUNTNAMES

SACCOUNTS_BILL_STREET\$

SACCOUNTS_BILL_CITY\$

SACCOUNTS_BILL_COUNTRY\$

Page Sizing & Handling

Size

Poster

Multiple

Booklet

Pages per sheet:

6

by

Page order:

Horizontal

☐ Print page border

☐ Print on both sides of paper

Orientation:

☒ Portrait

☐ Landscape

☐ Auto-rotate pages within each sheet

Page Setup...

11,69 x 8,27 Inches

<

📄

>

Page 1 of 1 (1)

Print

Cancel

Envelope/labels printing with PDF Maker