

PDF Maker Free Version for vtiger CRM

I. Create the simple PDF template

After install PDF Maker Free Version, go to Tools->PDF Maker. Select the module you want to create a template.

The screenshot shows the vtiger CRM interface with the 'TOOLS' menu selected. The 'PDF Maker' option is highlighted in the top navigation bar. Below the navigation, the page title is 'Tools > PDF Maker'. A table lists available modules for PDF creation:

#	Module
1	Invoice
2	Sales Order
3	Purchase Order
4	Quotes

Below the table, it says 'PDF Maker free version 1.0 :: IT-Solutions4You'. At the bottom of the page, the version 'vtiger CRM 5.2.1' and copyright information '© 2004-2011 vtiger.com | Read License | Privacy Policy' are visible.

After that you can choose all available Fields from selected Module (including custom fields). It's also possible to choose Related Module (i.e. Invoice has as Related Module: SO, Contacts, Accounts) and its all fields (including custom fields).

Properties tab:

Properties	Other informations	Labels	Product bloc	Settings
Module:	Subject	<input type="button" value="Insert into template"/>		
Related modules:	Select module ...	Select ...	<input type="button" value="Insert into template"/>	
Product bloc template:	Please select ...	<input type="button" value="Insert into template"/>		

Module: contains all fields from module (Invoice, Quotes, Sales Order or Purchase Order)

Related Modules: contains all fields from Related Module to main Module

Product block template: contains definitely templates for products/services

Other informations tab:

Properties	Other informations	Labels	Product bloc	Settings
Company and User information:	Please select ...	<input type="button" value="Insert into template"/>		
Terms and Conditions:	Please select ...	<input type="button" value="Insert into template"/>		
Current date:	dd.mm.yyyy	<input type="button" value="Insert into template"/>		
Barcodes:	EAN13	<input type="button" value="Insert Barcode into template"/>		

Company and User information: specify company information from Settings > Company Details, contains data about Logged and Assigned to User from User settings.

Terms and Conditions: this variable insert T&C data defined from vtiger Settings > Terms & Conditions. You can also use variable for T&C used in Invoice, Q, SO or PO module from Properties tab.

Current date: insert current date in different format

Barcodes: insert barcodes into your template, more information in chapter „VII. Barcode“

Labels tab:

You can choose variable from Global vtiger language file, or variable from chosen Module. During export file into pdf this variable will be replaced by relevant translated string.

Properties	Other informations	Labels	Product bloc	Settings
Global language:	and			
Module language:	A record number must be specified to delete the vtiger_account.			
<input type="button" value="Apply"/> <input type="button" value="Save"/> <input type="button" value="Cancel"/>				

Global language: contains all vtiger global language expressions

Module language: contains all main module language expressions

Product block tab:

In this section you can insert product/service variable used by productblock between PRODUCTBLOCK START and END tag. For more information please read chapter „VI. Mapping products block with vtiger form“

Properties	Other informations	Labels	Product bloc	Settings
Product bloc:	Please select ... <input type="button" value="Insert into template"/>			
*Common fields for Products & Services:	Record ID <input type="button" value="Insert into template"/>			
*Available fields for Products:	Product Name <input type="button" value="Insert into template"/>			
*Available fields for Services:	Service Name <input type="button" value="Insert into template"/>			
Product bloc template:	Please select ... <input type="button" value="Insert into template"/>			

Product block: manually to define productblock start and end

Common fields for Products & Services: contains data (like unite price, quantity, discount, description, ..) for Products or Services from Invoice, Quote, Sales or Purchase Order

Available fields for Products: contains all available fields from Products Module (like Product Category, Vendor, ...)

Available fields for Services: contains all available fields from Services Module (like Product Category,...)

Product block template: includes default productblock templates, that you can modify according to your needs

Settings tab:

In this section you can define various settings, regarding Page Format, Margins, Decimal Points etc.

Properties	Other informations	Labels	Product bloc	Settings
Page format:	A4			
Page orientation:	Portrait			
Ignored picklist values:				
Margins:	Top 2.0 Bottom 2.0 Left 2.0 Right 2.0			
Number format:	Decimal point separator , Decimal point number 2 Thousands separator			

Page format: you can select Page Format (from these types A3, A4, A5, A6, Letter, Legal)

Page orientation: select page orientation (Portrait or Landscape)

Ignored picklist values: enter the picklist values separated by comma, which will be ignored in

pdf templates. (i.e. --None--, --none--, --keine--)

Margins: you can define Margins of page (Top, Bottom, Left, Right)

Number format:

dec_point - Sets the separator for the decimal point.

decimals - Sets the number of decimal points.

thousands_sep - Sets the thousands separator.

You can now write some text into Body, Header or Footer section. Set the cursor into position, choose your variable and click on „Insert into template“ button. At the end you can make some design adjustments. After you have finished your template, click on Save button.

The screenshot shows a PDF template editor with three tabs: Body, Header, and Footer. The Body tab is active, displaying a form with the following variables:

```

$INVOICE_ACCOUNT_ID$
$INVOICE_BILL_STREET$
$INVOICE_BILL_CODE$ $INVOICE_BILL_CITY$
$INVOICE_BILL_STATE$

$COMPANY_NAME$
$COMPANY_ADDRESS$
$COMPANY_ZIP$ $COMPANY_CITY$
$COMPANY_COUNTRY$

Telefon $COMPANY_PHONE$
Telefax $COMPANY_FAX$

$COMPANY_WEBSITE$

%M_Invoice Date%: $INVOICE_INVOICEDATE$
    
```

Below the form, there is a section titled "%G_Invoice No% \$INVOICE_INVOICE_NO\$".

Pos	%Q_Qty%	Text	%G_LBL_LIST_PRICE%	%G_LBL_SUB_TOTAL%	%G_Discount%	%G_LBL_NET_PRICE%	%G_Tax%
#PRODUCTBLOC_START#							
\$PRODUCTPOSITIONS	\$PRODUCTQUANTITIES	\$PRODUCTUSAGELIMITS	\$PRODUCTNAMES	\$PRODUCTLISTPRICES	\$PRODUCTTOTALS	\$PRODUCTDISCOUNTS	\$PRODUCTTOTALAFTERDISCOUNTS
#PRODUCTBLOC_END#							
%G_LBL_TOTAL%							
%G_Discount%							
%G_LBL_NET_TOTAL%							
%G_Tax% SVATPERCENTS % %G_LBL_LIST_OF% TOTALAFTERDISCOUNTS							
Total with TAX							
%G_LBL_SHIPPING_AND_HANDLING_CHARGES%							
%G_LBL_TAX_FOR_SHIPPING_AND_HANDLING%							
%G_Adjustment%							
%G_LBL_GRAND_TOTAL% (\$CURRENCYCODE\$)							
SVATBLOCKS							
\$INVOICE_TERMS_CONDITIONS\$							

II. Generate and sending PDF

1/To generate PDF file, go to detailview of given Module. On the right side, you can find new PDF Maker block. Choose your PDF Template and click on „Export to PDF“ link.

Edit Duplicate Delete ◀ 📄 ▶

Sales Order	SO_vtiger
Invoice No	INV1
Invoice Date	2011-09-23
Purchase Order	
Sales Commission	
Status	Created
Created Time	2011-05-12 12:36:14

Shipping Address	f
Shipping PO Box	
Shipping City	
Shipping State	
Shipping Postal Code	
Shipping Country	

PDFMaker

US English

- [Export To PDF](#)
- [Send Email With PDF](#)
- [PDF Product Page Break](#)
- [PDF Product Images](#)

Tools

- [Export To PDF](#)
- [Send Email With PDF](#)

TAG CLOUD

Tag it

2/ You can send this template or merged templates with email by click on „Send Email With PDF“

Purchase Order	
Sales Commission	
Status	Created
Created Time	2011-05-12 12:36:14

Shipping Address	f
Shipping PO Box	
Shipping City	
Shipping State	
Shipping Postal Code	
Shipping Country	

Paid Amount	

PDFMaker

US English

- [Export To PDF](#)
- [Send Email With PDF](#)

Select Email IDs

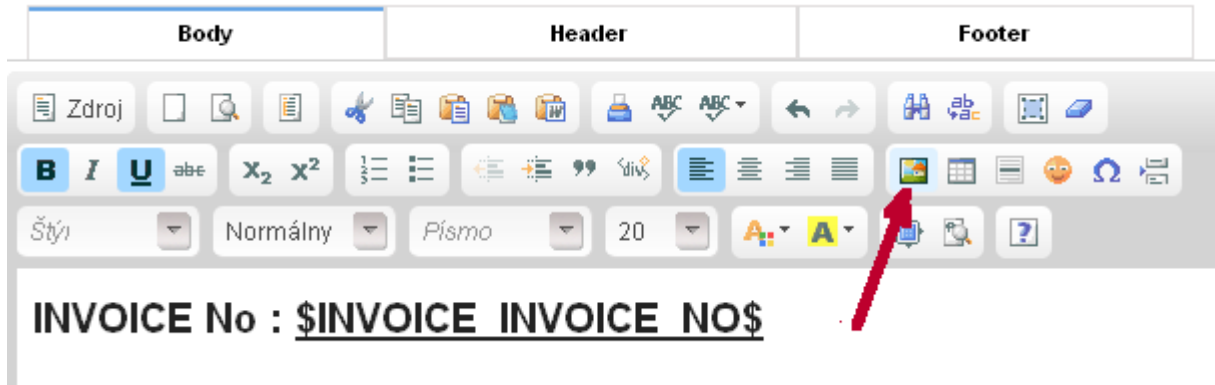
vtigeruser has the following Email IDs associated. Please Select the Email IDs to which, the mail should be sent.

- Email**
email@email.com
- Other Email**

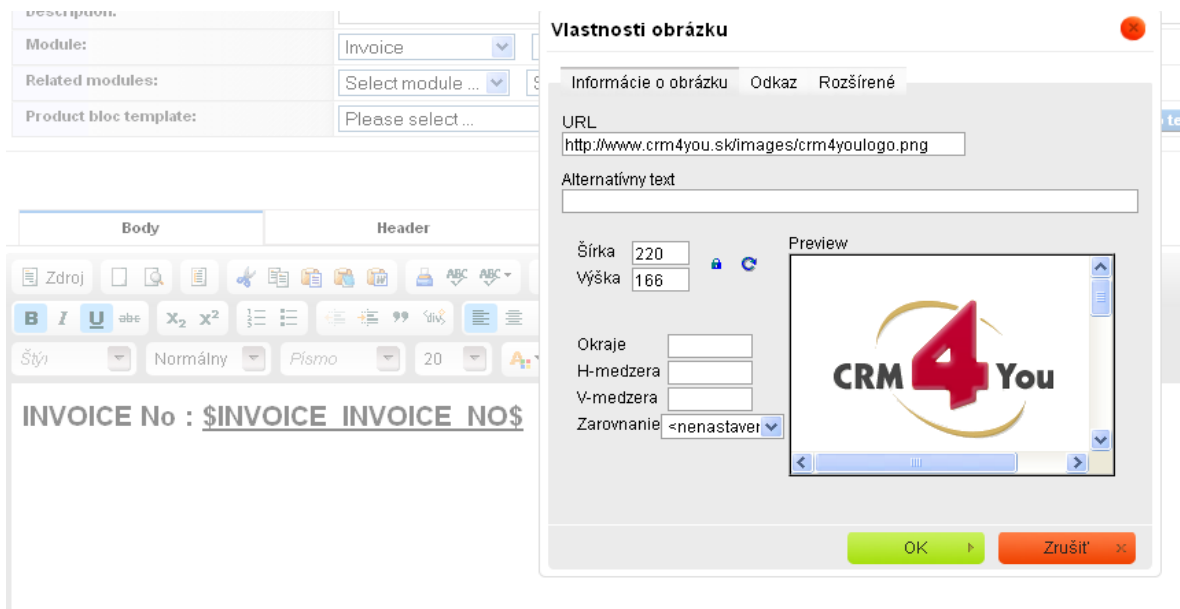
Select Cancel

III. Inserting Images into template

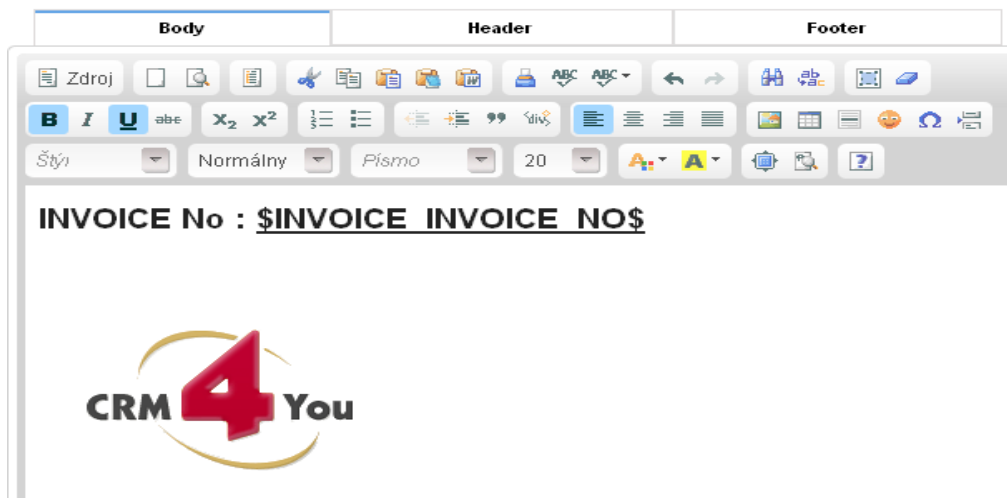
1/ Press the „image“ button on the toolbar. A popup window called "Image Properties" will appear.



2/ URL: define the URL address of the image. You may also use the "Browse Sever" in order to browse the files.



3/ Click OK to add image into Templates.

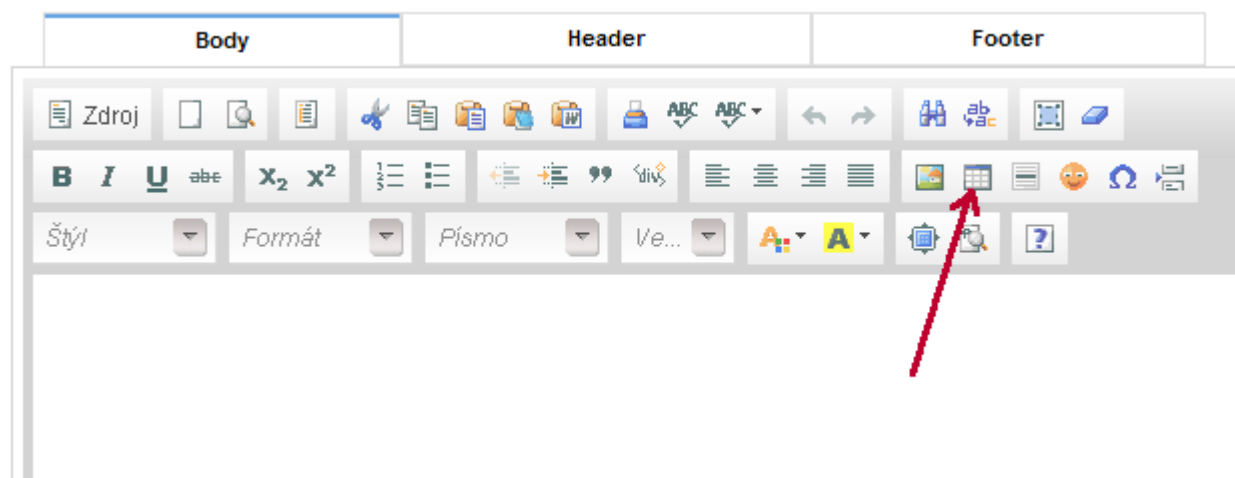


For more info visit following site:

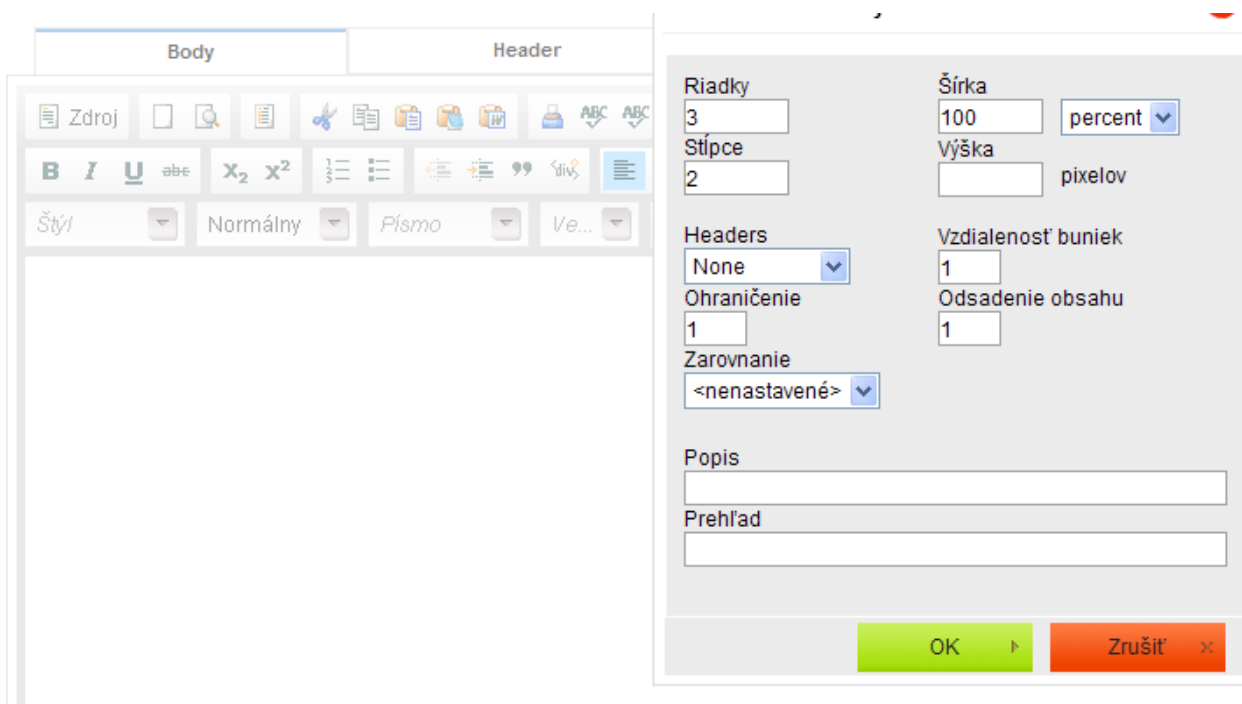
http://docs.cksource.com/FCKeditor_2.x/Users_Guide/Common_Tasks/Inserting_Images

IV. Creating a table

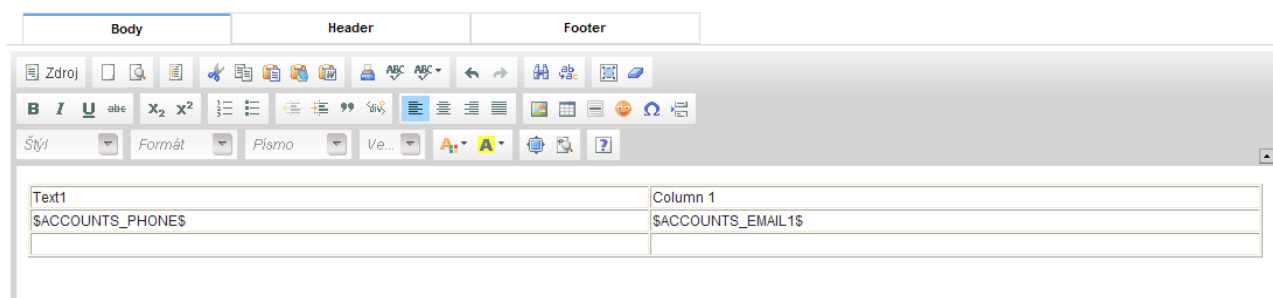
1/ Press the "Insert/Edit Table" button on the toolbar. After that a popup window called "Table Properties" will appear.



2/ Set a basic table properties like width, height, column and rows count.



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



For more info visit following site:

http://docs.cksource.com/FCKeditor_2.x/Users_Guide/Common_Tasks/Tables

V. Using a products block template

1/ There is "Product block templates" item available for some modules that display product block. It contains predefined templates for proper display of products in the Invoices, Quotes, Sales Order and Purchase Order. You can simply add the whole product block template into your template and modify it according to your needs.

The screenshot shows the configuration interface for product block templates. The 'Module:' is set to 'Subject'. The 'Product block template:' dropdown is open, showing options: 'Please select...', 'Please select...', 'product block for individual tax', and 'product block for group tax'. Below the form is a preview of an invoice template with a table structure and various variables like %G_Invoice No%, \$INVOICE_INVOICE_NO\$, and %G_LBL_TOTAL%.

2/ You can make some changes in the selected templates, like add cell or row, change the background color. You can edit layout like a table.

The screenshot shows a table editor interface. A context menu is open over a table, showing options like 'Cut', 'Copy', 'Paste', 'Cell', 'Row', 'Column', 'Delete Table', and 'Table Properties'. The table has columns for 'Pos', '%G_Qty%', 'Text', '%G_LBL_LIST_PRICE%', '%G_Discount%', and '%G_LBL_NET_PRICE%'. The table content includes variables like \$PRODUCTPOSITIONS, \$PRODUCTQUANTITIES, \$PRODUCTUSAGEUNITS, \$PRODUCTNAMES, \$PRODUCTLISTPRICES, \$PRODUCTDISCOUNTS, and \$PRODUCTSTOTALAFTERDISCOUNTS.

3/ After adding new cell you can add some new variables

The screenshot shows the configuration interface for product block templates. The 'Module:' is set to 'Invoice'. The 'Product block template:' dropdown is open, showing a list of variables like 'Shipping & Handling amount', 'Shipping City', 'Billing State', 'Shipping State', 'Billing Postal Code', 'Shipping Postal Code', 'Billing Country', 'Shipping Country', 'Billing PO Box', 'Shipping PO Box', 'Terms & Conditions', 'Description Information', 'Details', 'Sum', 'Total without VAT', 'Total discount', 'Total discount (%)', 'Total after discount', 'VAT', 'VAT (%)', 'Tax block', 'Total with VAT', 'Adjustment', 'Total', 'Shipping & Handling taxes', 'Shipping & Handling amount', 'Currency', 'Currency symbol', and 'Currency code'. The table content includes variables like \$PRODUCTPOSITIONS, \$PRODUCTQUANTITIES, \$PRODUCTUSAGEUNITS, \$PRODUCTNAMES, \$PRODUCTLISTPRICES, \$PRODUCTDISCOUNTS, and \$PRODUCTSTOTALAFTERDISCOUNTS.

VI. Mapping products block with vtiger form

1/ Mapping values for result pricer available in Invoices, Quotes, Sales and Purchase Order .

The screenshot shows the 'Product bloc' tab in the vtiger form. A dropdown menu is open, listing various fields for mapping. The background shows a table with item details and a summary table.

Item Name	Qty In Stock	Qty	List Price	Total	Net Price
002 Vtiger 5 Users Pack	53559.000	2.000	2200.000	4400	
			(-) Discount :	200.000	
			Total After Discount :	4200	
			(+) Tax :	0.00	4200
003 Vtiger 10 Users Pack	13664.000	1.000	4300.000	4300	
			(-) Discount :	300.000	
			Total After Discount :	4000	
			(+) Tax :	0.00	4000
				Net Total	8200.000
				(-) Discount	100.000
				(+) Shipping & Handling Charges	50.000
				(+) Taxes For Shipping and Handling	0
				Adjustment	100.000
				Grand Total	8250.000

Currency – Euro, Dollar

Currency symbol - €, \$

Currency code – EUR, USD

Subtotal – Price without TAX before discount, by Tax Mode: group = Net Total

Total discount – Final Discount amount

Total discount (%) - Final Discount in %

Total without TAX – Total price without TAX after discount

TAX – Total TAX amount

TAX(%) - Total TAX in %

TAX block – This is useful for some countries, that need to have the detail amount of TAX

Total with TAX – Total price with TAX

Shipping & Handling taxes – Final taxes for Shipping & Handling

Shipping & Handling amount – Final amount for Shipping & Handling

Adjustment – Adjustment from vtiger form

Grand Total - Grand Total from vtiger form

2/ Mapping values for product bloc templates item available in Invoices, Quotes, Sales Orders and Purchase Orders.

The screenshot shows the 'Product bloc' tab in the vtiger form. A dropdown menu is open, listing various fields for mapping. The background shows a table with item details and a summary table.

Item Name	Qty In Stock	Qty	List Price	Total	Net Price
002 Vtiger 5 Users Pack	53559.000	2.000	2200.000	4400	
			(-) Discount :	200.000	
			Total After Discount :	4200	
			(+) Tax :	0.00	4200
003 Vtiger 10 Users Pack	13664.000	1.000	4300.000	4300	
			(-) Discount :	300.000	
			Total After Discount :	4000	
			(+) Tax :	0.00	4000
				Net Total	8200.000
				(-) Discount	100.000
				(+) Shipping & Handling Charges	50.000
				(+) Taxes For Shipping and Handling	0
				Adjustment	100.000
				Grand Total	8250.000

Position – Number of position (1,2,3,...)
 Currency – Euro, Dollar
 Currency symbol - €, \$
 Currency code – EUR, USD
 Name – Name and description of product/service
 Name of product/service – Only the name of product/service
 Description of product/service – Description of product/service from module Product/Service
 Comment for product/ service – Comment for products/service from Invoice/SO/PO/Q form
 PDF Configurator description - Descriptions field from PDF Configurator extension (crm-now)
 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 with TAX – Total price with TAX for each product/service

VII. Barcode

1/ In “Other informations” tab, there is “Barcode” field. Chosse your barcode type and insert into templates

PDF Maker > New template

General pdf templates available for any modul.

Properties	Other informations	Labels	Product bloc	Settings
Company and User information:		Please select ...	Insert into template	
Terms and Conditions:		Please select ...	Insert into template	
Current date:		Timestamp	Insert into template	
Barcodes:		EAN13	Insert Barcode into template ?	

Body

Zdroj

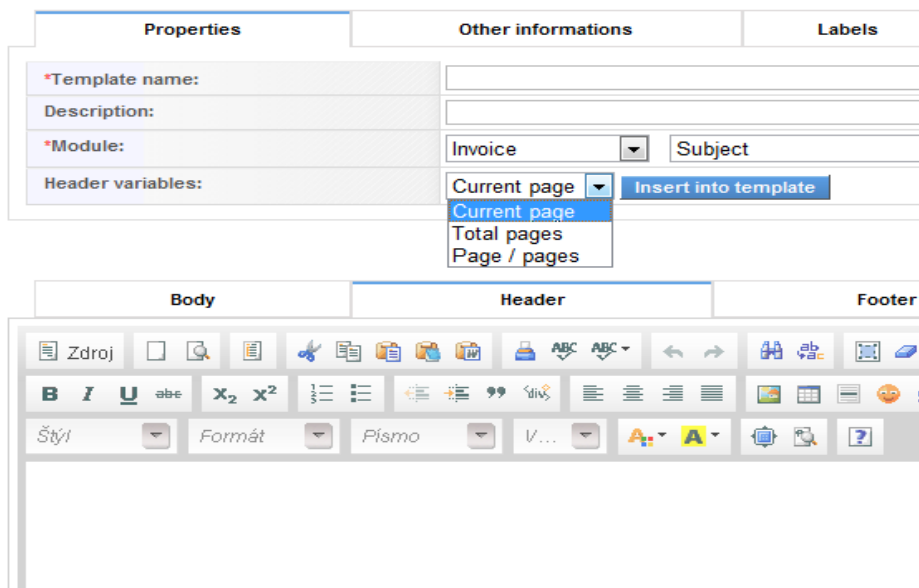
B I U abe **x₂ x²**

Štýl Formát Písr

ISBNP5
 ISSNP5
 UPCAP5
 UPCEP5
 EAN8P5
EAN-8, UPC-A and UPC-E Barcodes
 IMB
 RM4SCC
 KIX
 POSTNET
 PLANET
Variable width Barcodes
 C128A
 C128B
 C128C
 EAN128C
C39
 C39+
 C39E
 C39E+

VIII. Header and Footer variables

1/ When you switch to header/footer tab, there are under "Properties" new Field Header/Footer variables like Current page, Total pages, Page/Pages. You can use this variables in header/footer section. You can also use all variables available in chosen module.



IX. Product page break

1/ For some modules (Invoice, SO, PO, Q) that display product block, we use "Product block templates" item. If you would like to define a new page after some product, click on „PDF Product Page Break” link and the new frame will be displayed. You have to choose a product after which new page will begin. You can also set a repetition of header of table on the next page or to set displaying of subtotal value at the end of the page (before page break).

Invoice No: INV1

Pos	Qty	Text	List Price EUR	Discount	Net Price EUR
1	1,00	Each Vtiger 5 Users Pack This is test comment for product of PurchaseOrder	2200,00	200,00	2000,00
2	1,00	Each abcd1234 This is test comment for product of Invoice	4300,00	300,00	4000,00
Subtotal					6000,00

Pos	Qty	Text	List Price EUR	Discount	Net Price EUR
3	5,00	Each Brother Ink Jet Cartridge	255,00	0,00	1275,00
Total					7275,00
Discount					100,00
Net Total					7175,00
Tax 0,00 % of 7175,00					0,00
Adjustment					100,00
Grand Total					7175,00

PDF Product Page Break

- Global settings
- Show table header after page break
- Show subtotal after page break

Products

- Vtiger 5 Users Pack
- abcd1234
- Brother Ink Jet Cartridge

Save Cancel

X. Product images

1/ In the "Product block templates" it is possible to use the products images too.

2/ The variable \$PRODUCTS_IMAGENAME\$ must be use between #PRODUCTBLOC_START# end #PRODUCTBLOC_END#.

%G_Invoice No% \$INVOICE_INVOICE_NO\$

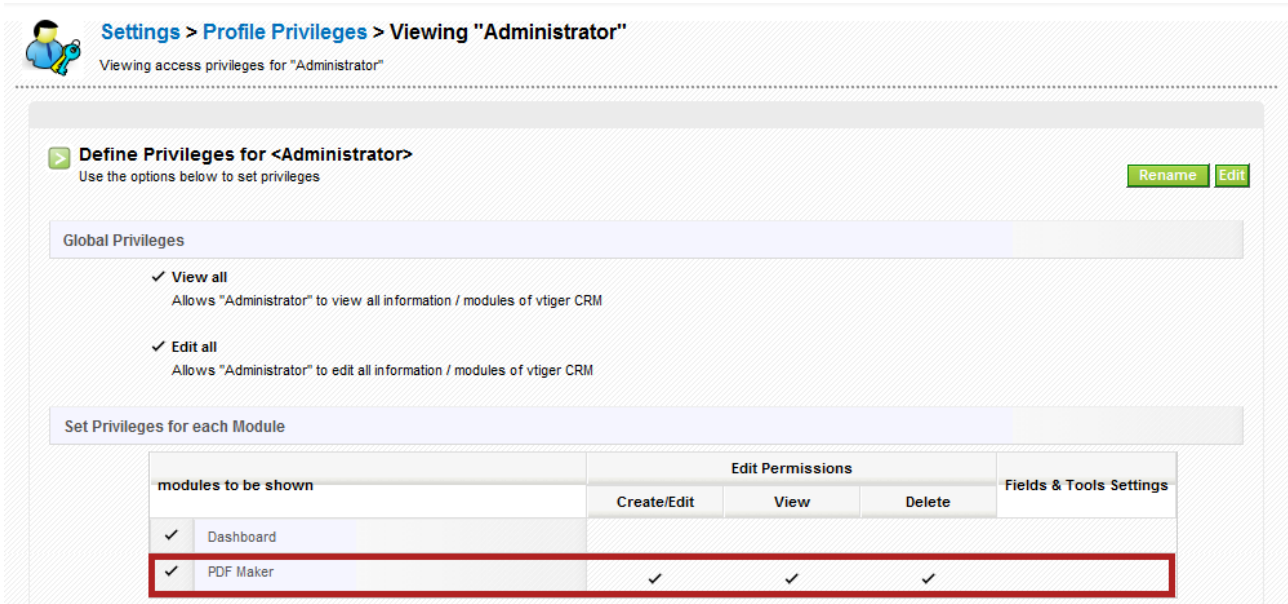
#	Text	%G_Qty%	%G_LBL_NET_PRICE%
#PRODUCTBLOC_START#			
\$PRODUCTPOSITIONS	\$PRODUCTS_IMAGENAMES	\$PRODUCTQUANTITY\$	\$PRODUCTUSAGEUNITS\$
#PRODUCTBLOC_END#			
		%G_LBL_NET_TOTAL%	\$TOTALAFTERDISCOUNTS\$ \$CURRENCYSYMBOLS\$
		%G_LBL_VAT% (\$VATPERCENTS%)	\$VATS \$CURRENCYSYMBOLS\$
		%G_LBL_TOTAL%	\$TOTALWITHVAT\$ \$CURRENCYSYMBOLS\$

3/ Click on „PDF Product images“ link and the new frame will be displayed. You can choose a products images which should be generated in the PDF template. 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.

#	Text	Qty
1		4,00 Each
2		6,00 Hours
3		5,00 Each
4		4,00 Each
5		3,00 Each
6		6,00 Each
Net Total		
VAT (0.00%)		
Total		

XI. Profile Privileges

Click the Profiles menu to open the list view of your profiles. Click the name of a profile to see the details. You may change the profile by clicking the "Edit" button. Then you can configure the profile related access privileges for PDF Maker module. You may select Create/Edit, View and Delete privileges. Click "Finish" to save your profile at the CRM system. After making modifications, go to Settings → Sharing Access and press Recalculate button to apply the changes.



Settings > Profile Privileges > Viewing "Administrator"
Viewing access privileges for "Administrator"

Define Privileges for <Administrator>
Use the options below to set privileges [Rename](#) [Edit](#)

Global Privileges

- View all**
Allows "Administrator" to view all information / modules of vtiger CRM
- Edit all**
Allows "Administrator" to edit all information / modules of vtiger CRM

Set Privileges for each Module

modules to be shown	Edit Permissions			Fields & Tools Settings
	Create/Edit	View	Delete	
<input checked="" type="checkbox"/> Dashboard				
<input checked="" type="checkbox"/> PDF Maker	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	