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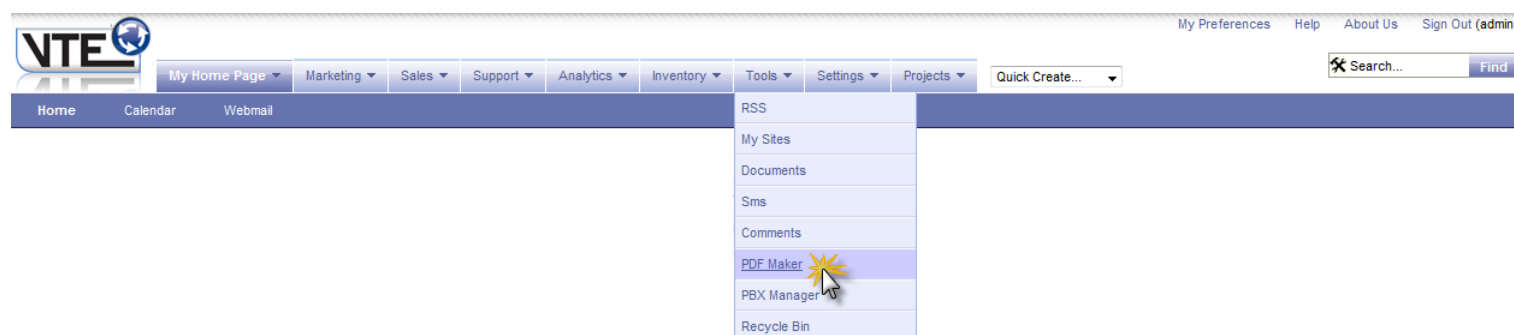
PDF Maker for VTE CRM

Index:

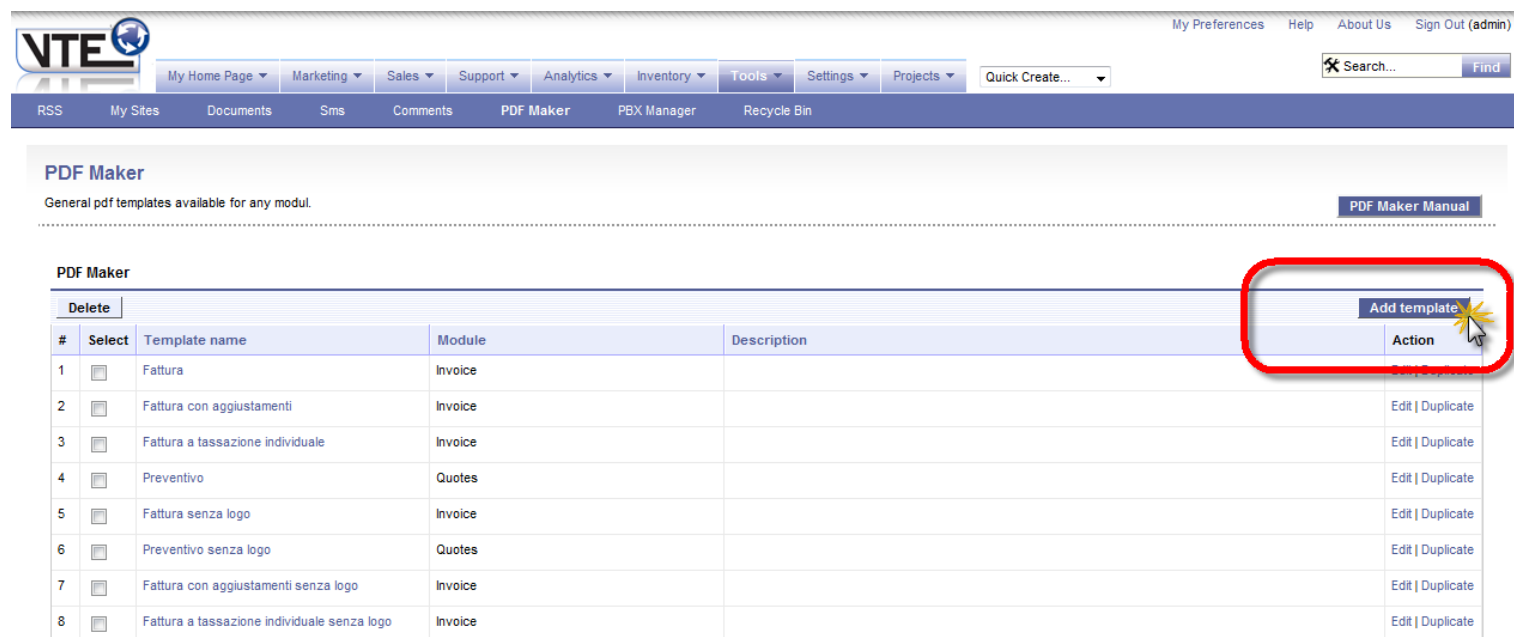
- I. Create the simple PDF template
- II. Generate and sending PDF
- III. Inserting Images into template
- IV. Creating a table
- V. Using a products block template
- VI. Mapping products block with VTE form
- VII. Barcode
- VIII. Header and Footer variables
- IX. Product page break
- X. Product images
- XI. Custom functions
- XII. File name
- XIII. Profile Privileges
- XIV. Mass export to PDF from list view – Batch print

I. Create the simple PDF template

1/ Acces to PDF Maker Module:



2/ Click on "Add template":





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3/ Define Template name and description

PDF Maker > New template

General pdf templates available for any modul.

Properties	Other informations	Labels	Product bloc	Settings
*Template name:	Standard Quote			
Description:	Quote without price per line.			
*Module:	Please select ...	Select ...	Insert into template	
Related modules:	Select module ...	Select ...	Insert into template	

4/ Choose module

PDF Maker > New template

General pdf templates available for any modul.

Properties	Other informations	Labels	Product bloc	Settings
*Template name:	Standard Quote			
Description:	Quote without price per line.			
*Module:	Please select ...			
Related modules:	Select ...			

Invoice

Leads

ModComments

PBX Manager

Potentials

Price Books

Products

ProjectMilestone

ProjectPlan

Projects

ProjectTask

Purchase Order

Quotes

Sales Order

ServiceContracts

Services

Sms

Interventions

Vendors

Visitreport



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5/ After that you can choose all available Fields from selected Module (including custom fields)

PDF Maker > New template

General pdf templates available for any modul.

The screenshot shows the 'PDF Maker > New template' interface. The 'Properties' tab is active, displaying fields for 'Template name', 'Description', 'Module', 'Related modules', and 'Product bloc template'. A dropdown menu for 'Module' is open, showing a list of fields under 'Quote Information' and 'Address Information'. The 'Body' tab is also visible, showing a rich text editor with various formatting options.

6/ You can now write some text into Body, Header or Footer section

The screenshot shows the 'PDF Maker > New template' interface. The 'Properties' tab is active, displaying fields for 'Template name', 'Description', 'Module', 'Related modules', and 'Product bloc template'. The 'Body' tab is also visible, showing a rich text editor with various formatting options. The 'Header' and 'Footer' tabs are also visible, showing empty text areas for headers and footers.



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6a/ Set the cursor into position, choose your variable and click on „Insert into template” button

Properties	Other informations	Labels	Product bloc	Settings
*Template name:	Standard Quote			
Description:	Quote without price per line.			
*Module:	Quotes	Quote No	Insert into template	
Related modules:	Select module ...	Select ...	Insert into template	
Product bloc template:	Please select ...			Insert into template

Save Cancel

Body	Header	Footer
<div>Codice Sorgente</div> <div></div> <div>Quote N°: </div>		



Properties	Other informations	Labels	Product bloc	Settings
*Template name:	Standard Quote			
Description:	Quote without price per line.			
*Module:	Quotes	Quote No	Insert into template	
Related modules:	Select module ...	Select ...	Insert into template	
Product bloc template:	Please select ...			Insert into template

Save Cancel

Body	Header	Footer
<div>Codice Sorgente</div> <div></div> <div>Quote N°: \$QUOTES_QUOTE_NOS </div>		



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General pdf templates available for any modul.

[Edit](#) [Duplicate](#)

Template name:	Standard Quote
Description:	Quote without price per line.
Module:	Quotes
PDF Template	
Header	
Body	Quote N°: \$QUOTES_QUOTE_NO\$
Footer	

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.

Sales > Quotes



[QUO1] test francesca - Quote Information Updated today (14 Feb 2011)

Quote Information

Edit Duplicate Delete

Quote Information

Subject	Quote test	Potential Name	
Quote No	QUO1	Quote Stage	Created
Valid Till		Contact Name	
Carrier	FedEx	Shipping	
Inventory Manager	admin	Account Name	azienda prova
Assigned To	admin	Created Time	14-02-2011 11:43:51
Modified Time	14-02-2011 11:43:51		

Address Information

Billing Address	via Ciro Menotti, 3	Shipping Address	via Ciro Menotti, 3
Billing PO Box		Shipping PO Box	
Billing City		Shipping City	
Billing State		Shipping State	
Billing Postal Code		Shipping Postal Code	
Billing Country		Shipping Country	






Actions

-  [Generate Invoice](#)
-  [Generate Sales Order](#)

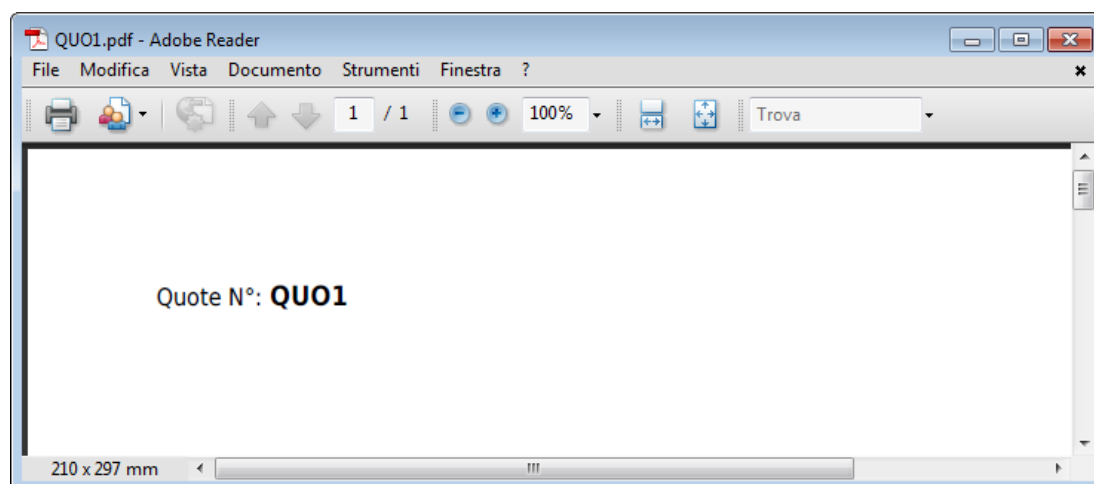
Please select the pdf template

- Preventivo
- Preventivo senza logo
- Standard Quote **(1)**

US English


-  [Export To PDF](#) **(2)**
-  [Send Email With PDF](#)
-  [Save PDF into Documents](#)
-  [PDF Product Page Break](#)
-  [PDF Product Images](#)


2/ After that your PDF files is generated.





Actions


 [Generate Invoice](#)


 [Generate Sales Order](#)


Please select the pdf template


Preventivo senza logo


Standard Quote

 [Export To PDF](#) (2)

 [Send Email With PDF](#)

 [Save PDF into Documents](#)

 [PDF Product Page Break](#)

 [PDF Product Images](#)

Compose Mail - Mozilla Firefox

http://192.168.1.119/vtebeta/index.php?module=Emails&action=EmailsAjax&file=EditView&pmodule=Quotes&pid=43&commontemplateid=12;&

Compose E-Mail (2)

*To:

To:

Cc:

Bcc:

*Subject:

Attachment: Files Maximum 6

Select Email Template

external Receiver ☐ PDF Maker Attachment.pdf

US English

Export To PDF

Send Email With PDF (1)

Save PDF into Documents

PDF Product Page Break

PDF Product Images

TAG CLOUD

Tag it



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5/ You can save the template or merged templates into module Documents. Click on „Save PDF into Documents”, write the title for new document, choose the folder name and write some description.

Please select the pdf template

Preventivo
Preventivo senza logo
Standard Quote

US English

Export To PDF
Send Email With PDF
Save PDF into Documents

Save PDF into Documents

Documents

*Title

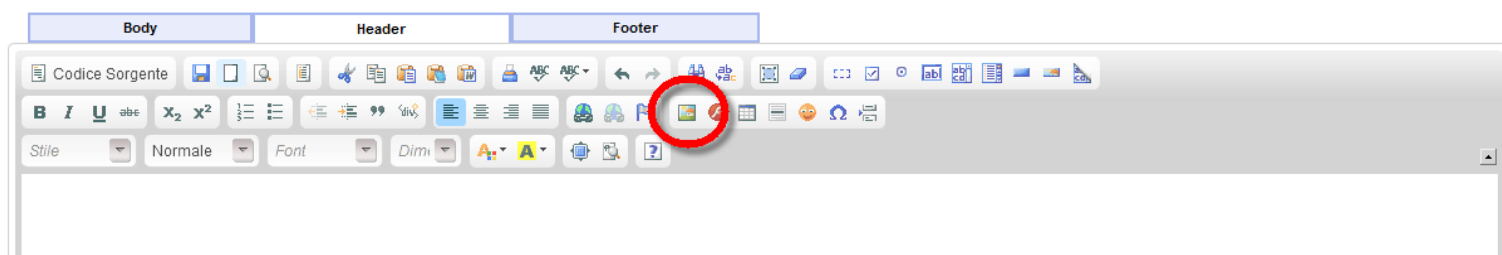
Folder Name: Default

Notes

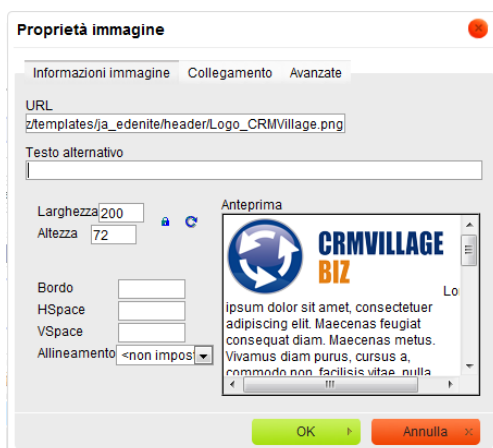
Save Cancel

III. Inserting Images into template

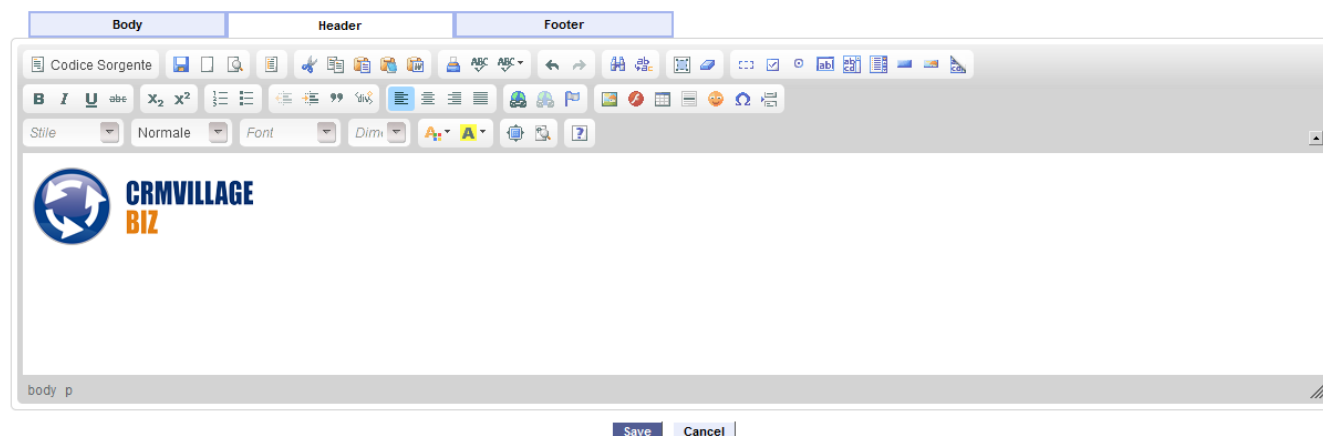
1/ Press the „Image” button on the toolbar. A popup window called "Image Properties" will appear:



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

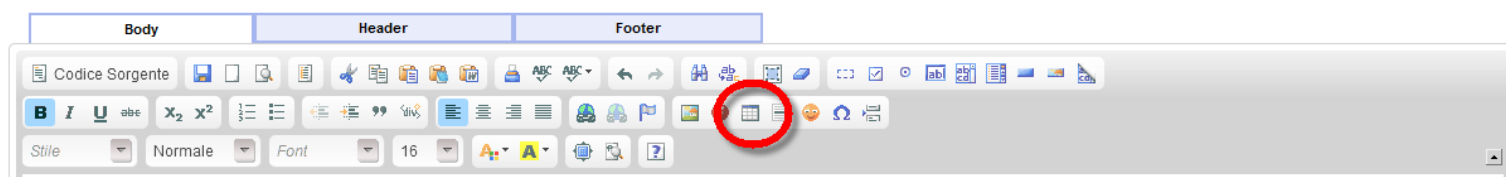


3/ Click OK to add image into Templates.



IV. Creating a table

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



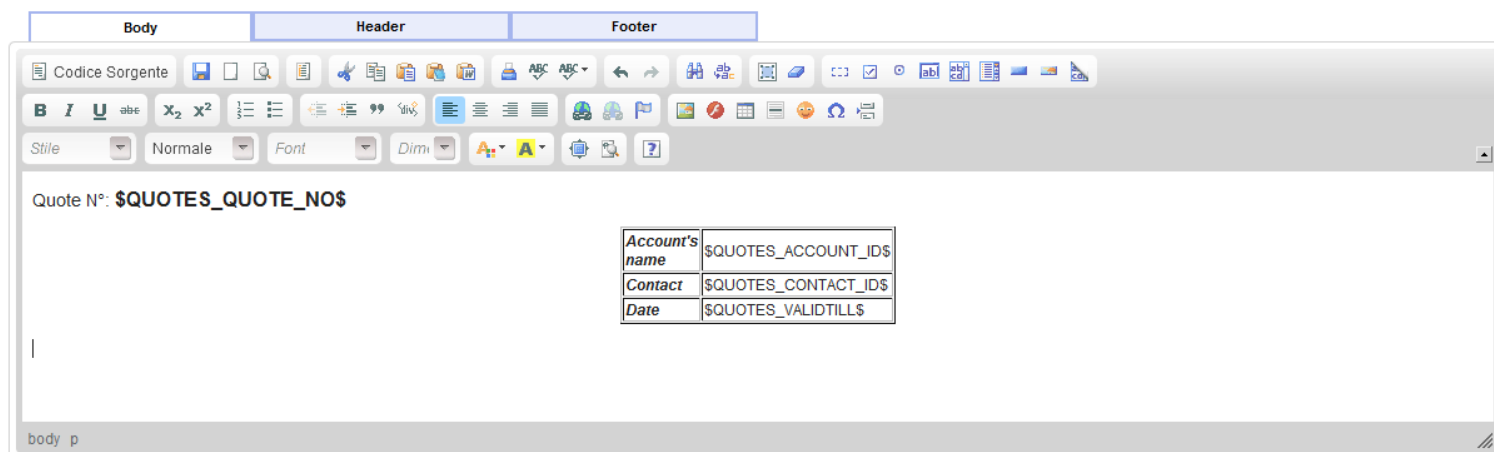
2/ Set a basic table properties like width, height, column and rows count.

Proprietà tabella

Righe 3	Larghezza 200 pixel
Colonne 2	Altezza pixel
Intestazione Prima Riga	Spaziatura celle 1
Dimensione bordo 1	Padding celle 1
Allineamento Centrato	
Intestazione	
Indice	

OK Annulla

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, ...





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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.

Product bloc template:

Pos/Qty/Name/Price/Disc/Total with ADJUSTMENT

Please select...

Pos/Name/Qty/Price

Pos/Qty/Name/Price/Disc/Total with ADJUSTMENT

Pos/Qty/Name/Price/Disc/Total

Pos/Qty/Name/Price/Disc/NetTotal/VAT/Total with ADJUSTMENT for individual TAX

Insert into template

(2)

(1)

Body

Codice Sorgente

Stile Normale Font Dim

(3) Pos	%G_Qty%	Text	%G_LBL_LIST_PRICE% \$CURRENCYCODE\$	%G_Discount%	%G_LBL_NET_PRICE% \$CURRENCYCODE\$
#PRODUCTBLOC_START#					
\$PRODUCTPOSITION\$	\$PRODUCTQUANTITY\$	\$PRODUCTUSAGEUNITS	\$PRODUCTNAME\$	\$PRODUCTLISTPRICES\$	\$PRODUCTDISCOUNT\$
#PRODUCTBLOC_END#					
%G_LBL_TOTAL%					\$TOTALWITHOUTVAT\$
%G_Discount%					\$TOTALDISCOUNT\$
%G_LBL_NET_TOTAL%					\$TOTALAFTERDISCOUNT\$
%G_Tax% \$VATPERCENT\$ % %G_LBL_LIST_OF\$ \$TOTALAFTERDISCOUNT\$					\$VAT\$
%G_Adjustment%					\$ADJUSTMENTS\$

body p

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.

Pos	%G_Qty%	Text	%G_LBL_LIST_PRICE% \$CURRENCYCODE\$	%G_Discount%	%G_LBL_NET_PRICE% \$CURRENCYCODE\$
#PRODUCTBLOC_START#					
\$PRODUCTPOSITION\$	\$PRODUCTQUANTITY\$	\$PRODUCTUSAGEUNITS	\$PRODUCTNAME\$	\$PRODUCTLISTPRICES\$	\$PRODUCTDISCOUNT\$
#PRODUCTBLOC_END#					
%G_LBL_TOTAL%					\$TOTALWITHOUTVAT\$
%G_Discount%					\$TOTALDISCOUNT\$
%G_LBL_NET_TOTAL%					\$TOTALAFTERDISCOUNT\$
%G_Tax% \$VATPERCENT\$ % %G_LBL_LIST_OF\$ \$TOTALAFTERDISCOUNT\$					\$VAT\$
%G_Adjustment%					\$ADJUSTMENTS\$
%G_LBL_GRAND_TOTAL%					\$TOTALWITHVAT\$



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

Pos	%G_Qty%	Text	%G_LBL_LIST_PRICE% \$CURRENCYCODE\$	%G_Discount%	%G_LBL_NET_PRICE% \$CURRENCYCODE\$
#PRODUCTBLOC_START#					
\$PRODUCTPOSITION\$	\$PRODUCTQUANTITY\$	\$PRODUCTUSAGEUNITS	\$PRODUCTNAME\$	\$PRODUCTLISTPRICES	\$PRODUCTDISCOUNT\$
#PRODUCTBLOC_END#					
%G_LBL_TOTAL%					\$TOTALWITHOUTVAT\$
%G_Discount%					\$TOTALDISCOUNT\$
%G_LBL_NET_TOTAL%					\$TOTALAFTERDISCOUNT\$
%G_Tax% \$VATPERCENT\$ % %G_LBL_LIST_OF% \$TOTALAFTERDISCOUNT\$					\$VAT\$
%G_Adjustment%					\$ADJUSTMENTS\$
%G_LBL GRAND TOTAL%					\$TOTALWITHVAT\$
					\$SHTAXAMOUNT\$

VI. Mapping products block with VTE form

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

PDF Maker > Edit "Standard Quote"
 General pdf templates available for any modul.

Properties Other informations Labels Product bloc Settings

*Template name: Standard Quote
 Description: Quote without price per line.
 Module: Quotes
 Related modules: Select module ...
 Product bloc template: Please select ...

Quote No
 Terms & Conditions
 Description Information
 Details

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

Body Header

Codice Sorgente

Quote N°: \$QUOTES_QUOTE_NO\$

Item Details

Currency : Euro (€)			Tax Mode : individual		
* Item Name	Qty In Stock	Qty	List Price	Total	Net Price
Test	-12.000	1.000	1000.000	1000	
			(-) Discount :	0.00	
			Total After Discount :	1000	
			(+) Tax :	0.00	1000
			Net Total	1000.000	
			(-) Discount	0.00	
			(+) Shipping & Handling Charges	0.000	
			(+) Taxes For Shipping and Handling	0	
			Adjustment	0.000	
			Grand Total	1000.000	

Currency – Euro, Dollar

Currency symbol - €, \$

Currency code – EUR, USD

Subtotal – Price without VAT befor discount, by Tax Mode: group = Net Total

Total discount – Final Discount amount

Total discount (%) - Final Discount in %

Total without VAT – Total price without VAT after discount

VAT – Total VAT amount

VAT(%) - Total VAT in %

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

Total with VAT – Total price with VAT

Shipping & Handling taxes – Final taxes for Shipping & Handling

Shipping & Handling amount – Final amount for Shipping & Handling

Adjustment – Adjustment from VTE form

Grand Total - Grand Total from VTE form



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

PDF Maker > Edit "Standard Quote"

General pdf templates available for any modul.

Properties Other informations Labels **Product bloc** Settings

Product bloc: Please select ...

*Common fields for Products & Services:

*Available fields for Products:

*Available fields for Services:

Product bloc template:

* fields are placed into Product bloc. Product bloc will be

- Position
- Currency
- Currency code
- Currency symbol
- Name (name and description of product/service)
- Name of product/service
- Description of product/service
- Comment for product/service
- Quantity
- Unit
- List price
- Total price
- Discount
- Discount (%)
- Total after discount
- VAT (%)
- VAT
- Total price with VAT

Item Details Currency : Euro (€) Tax Mode : individual

* Item Name	Qty In Stock	Qty	List Price	Total	Net Price
Test	-12.000	1.000	1000.000	1000	
			(-) Discount :	0.00	
			Total After Discount :	1000	
			(+) Tax :	0.00	1000
Net Total					1000.000
(-) Discount					0.00
(+) Shipping & Handling Charges					0.000
(+) Taxes For Shipping and Handling					0
Adjustment					0.000
Grand Total					1000.000

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

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 dicount – Total price after discount without VAT

VAT – VAT amount for each product/service

VAT(%) - VAT in % for each product/service

Total with VAT – Total price with VAT for each product/service



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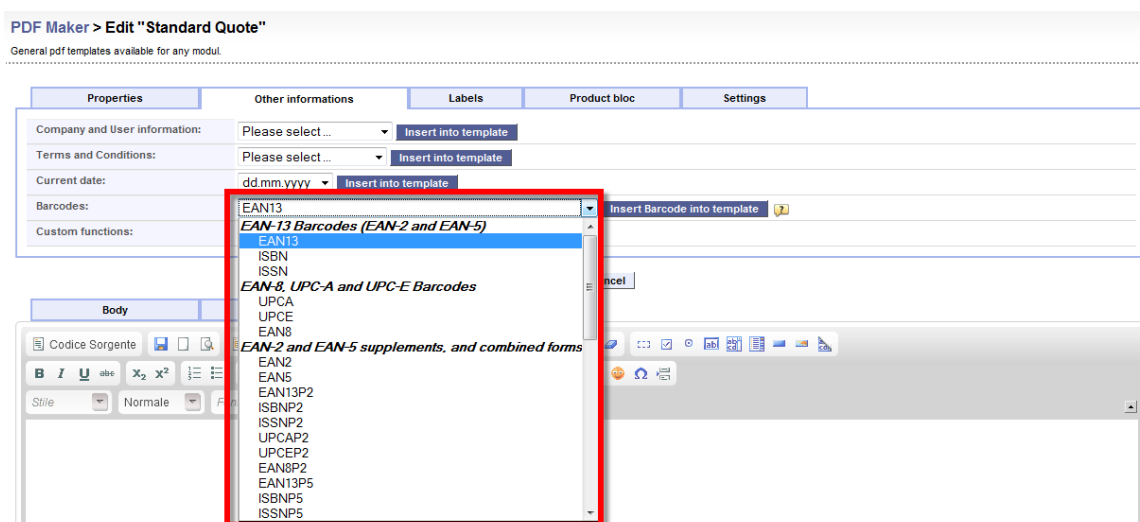
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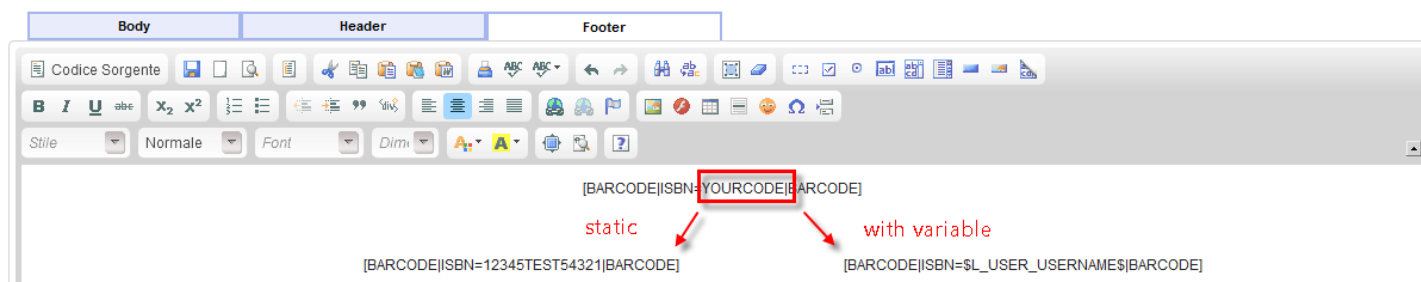
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VII. Barcode

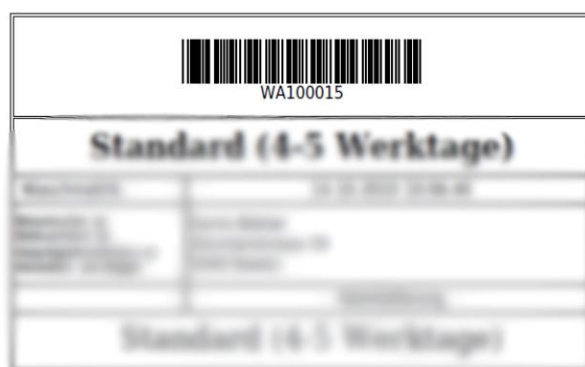
1/ In "Other informations" tab, there is "Barcode" field. Chosse your barcode type and insert into templates



2/ You can use a static number/string for making barcode or you can use a variables from actual template.



3/ The result may be like this example





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.

General pdf templates available for any modul.

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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).

PDF Product Page Break

☒ Global settings

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

Products

- ☐ Product 1
- ☐ Service A
- ☐ Product 2
- ☐ Product 3
- ☒ Service B
- ☐ Product 5

break page after checked product

Save Cancel

Pos	Quantity	Product Name	Price	Discount	Line Total	
1	10,00	Carton	Product 1	35,00	0,00	350,00
2	12,00		Service A	45,00	0,00	540,00
3	3,00		Product 2	87,00	0,00	261,00
4	4,00		Product 3	89,00	0,00	356,00
5	6,00		Service B	32,00	0,00	192,00
%G_Subtotal%						1 699,00

2 of 2

Pos	Quantity	Product Name	Price	Discount	Line Total	
6	11,00		Product 5	76,00	0,00	836,00
Total						2 535,00
Discount						0,00
Net Total						2 535,00
TAXES						0,00
						0,00
GRAND TOTAL						2 535,00



X. Product images

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

PDF Maker > Edit "Standard Quote 2"

General pdf templates available for any modul.

Properties Other informations Labels **Product bloc** Settings

Product bloc: Please select ...

*Common fields for Products & Services: Position

***Available fields for Products: Product Image**

*Available fields for Services: Service Name

Product bloc template: Please select ...

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

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

Pos	Image	Qu
#PRODUCTBLOC_START#		
\$PRODUCTPOSITIONS\$	\$PRODUCTS_IMAGENAMES\$	\$PRODUCTQUANTITY\$
\$PRODUCTUSAGEU		
#PRODUCTBLOC_END#		
Total		
Discount		



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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.

Please select the pdf template

Preventivo
Preventivo senza logo
Standard Quote
Standard Quote 2

US English

Export To PDF
Send Email With PDF
Save PDF into Documents
PDF Product Page Break
PDF Product Images

PDF Product Images


Product 1 100 x

☐ ☒ 


Service A

☐ ☒

Product 2 200 x

☐ ☒ 


Product 3 300 x

☐ ☒ 





Service B

☐ ☒

Product 5 100 x

☐ ☒ 

Save Cancel

Pos	Image	Quantity	Product Name	Price	Discount	Line Total
1		10,00 Carton	Product 1	35,00	0,00	350,00
2		12,00	Service A	45,00	0,00	540,00
3		3,00 Box	Product 2	87,00	0,00	261,00
4		4,00 Box	Product 3	89,00	0,00	356,00
5		6,00	Service B	32,00	0,00	192,00
6		11,00 Box	Product 5	76,00	0,00	836,00
Total						2 535,00
Discount						0,00
GRAND TOTAL						2 535,00

XI. Custom functions

If you need a special treatment of VTE data in your template, You can use custom (your own) functions. There is a folder „functions” under modules/PDFMaker, where you can place your own .php file with functions which you need to use. This file will be included automatically. Inside this folder is file „its4you.php”, which contains our functions. Do not modify this file, because by next version it will be overwritten. Create Your own file/files.

1/ Create new .php file under modules/PDFMaker/functions and place there your function.

2/ When creating/editing pdf template, under „Other informations” tab select custom function from selectbox „Custom functions”. You can choose one of our functions, or „Custom function” for yours.

3/ After You click on „Insert into template” button, in tempate will be added „[CUSTOMFUNCTION|functionname|param1|CUSTOMFUNCTION]”:

PDF Maker > Edit "Standard Quote 2"

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:	dd.mm.yyyy	Insert into template		
Barcodes:	EAN13	Insert Barcode into template ?		
Custom functions:	Custom function	Insert into template		

Save Cancel

Body	Header	Footer
<div> <div>Codice Sorgente</div> <div> </div> <div> Stile Normale Font Dim </div> </div> <div>[CUSTOMFUNCTION functionname param1 CUSTOMFUNCTION]</div>		

4/ Now You need to replace:

functionname - with name of your function

param1 - with parameter of your function.

You can use functions without parameters too, then simply remove „param1|”, or functions with more parameters, where each parameter is separated with an „|” symbol (eg. function|param1|param2|param3|param4|)



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XII. File name

In "Settings" tab of PDF Maker you can find "File name" definition. This setup gives you the opportunity to set name of generated PDF files according to your needs. You can combine strings, modules variables and some standard variables like Template name, Current date. This is used by saving PDF file into Documents and by sending PDF as attachment too.

PDF Maker > Edit "Standard Quote 2"

General pdf templates available for any modul.

Properties	Other informations	Labels	Product bloc	Settings
File name:	\$QUOTES_QUOTE_NOS			Quote No
Page format:	A4			Select ...
Page orientation:	Portrait			Common File Information
Ignored picklist values:				Template name
Margins:	Top 2.0 Bottom 0.5 Left 2.0 Right 2.0			Current date (dd-mm-yyyy)
Number format:	Decimal point separator , Decimal point number 2 Thousands separator			Current date (mm-dd-yyyy)
				Current date (yyyy-mm-dd)
				Quote Information
				Quote No
				Subject
				Potential Name
				Quote Stage
				Valid Till
				Contact Name
				Carrier
				Shipping
				Inventory Manager
				Account Name
				Assigned To
				Created Time
				Modified Time
				Record ID



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XIII. 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 "Sales Profile"

Viewing access privileges for "Sales Profile"

Define Privileges for <Sales Profile>
Use the options below to set privileges

Global Privileges

- ☒ **View all**
Allows "Sales Profile" to view all information / modules of vtiger CRM
- ☒ **Edit all**
Allows "Sales Profile" 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	
✓ PDF Maker	✓	✓	✓	
✓ PBX Manager	✓	✓	✓	

XIV. Mass export to PDF from list view – Batch print

Batch PDF Export allows you mass creating of PDF files from list view of all modules.

1/ Go to the list view of given module and check records which you want to generate a PDF file for.

2/ Choose one or more templates

3/ Click on „Batch PDF Export“ button and the new Popup-Layer will be displayed.

Sales > Quotes

Search for In [x]

Go to Advanced Search

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Count: 20 Filters: All

Showing Records 1 - 2 of 2

	Quote No	Subject	Quote Stage	Potential Name	Account Name	Total	Assigned To	Action
<input checked="" type="checkbox"/>	QUO1	Quote test	Created	--	azienda prova	€2535.000	admin	edit del
<input checked="" type="checkbox"/>	QUO2	Quote 4	Accepted	--	azienda prova	€2535.000	admin	edit del

Showing Records 1 - 2 of 2

Assigned To: All

4/ The Batch process is now starting, please wait until the process is finished. It might take a while. It depends on layout of your templates.

Count: 20 Filters: All

Showing Records 1 - 2 of 2

	Quote No	Subject	Quote Stage	Total	Assigned To	Action
<input checked="" type="checkbox"/>	QUO1	Quote test	Created	535.000	admin	edit del
<input checked="" type="checkbox"/>	QUO2	Quote 4	Accepted	535.000	admin	edit del

Showing Records 1 - 2 of 2

PDF Maker batch print

Preventivo
Preventivo senza logo
Standard Quote
Standard Quote 2

US English