PDF Invoice User Guide

Thank you for purchasing our extension. If you have any questions that are beyond the scope of this document, do not hesitate to leave us an email via our email support@magenest.com.

By: Magenest | Support Portal: http://servicedesk.izysync.com/servicedesk/customer/portal/29

1 Introduction
- 1.1 Feature
  - 1.1.1 For Admin
  - 1.1.2 For Customer
- 1.2 System requirement

2 1. Configuration

3 2. Manage PDF Template
- 3.1 General Configuration
- 3.2 PDF Configuration
- 3.3 PDF Content
  - 3.3.1 Create PDF template using HTML and CSS code

4 Main Function

Introduction

PDF Invoice for Magento 2 enables merchants to create beautiful and professional invoices that replace the default template in Magento. The extension comes with GrapeJS, the user-friendly template editor so that admin can simply drag and drop to add multiple elements such as text, image, shape, discount code, etc.



Feature

For Admin

- Create a custom template in HTML and convert it to PDF with the order information.
- Choose PDF templates for Order, Invoice, Shipment and Credit memo details.
- Allows customers to print a PDF order details from the store-front.
- Easily create a template with the builder tool.

For Customer

- Print the PDF for their own order details from My Account page.

System requirement

- Your store should be running on Magento Community Edition version 2.2.x or 2.3.x.

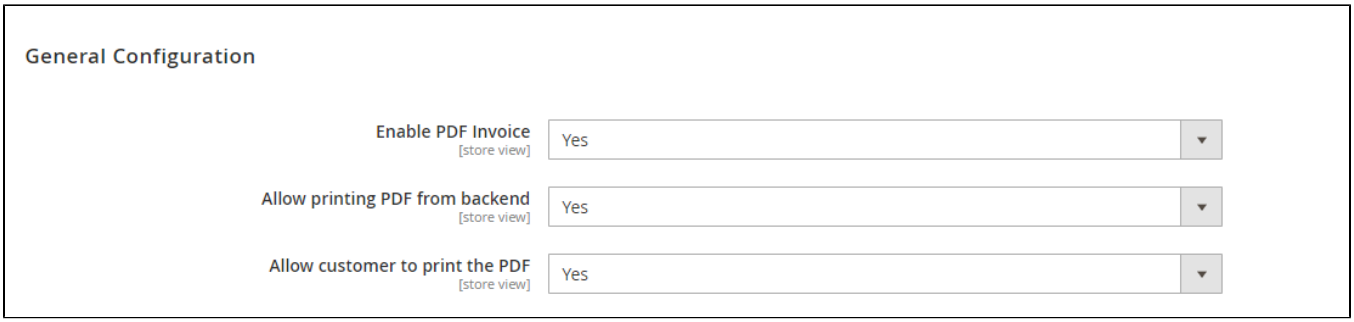
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1. Configuration

On Admin sidebar, go to **Marketing > PDF Invoice > Settings.**

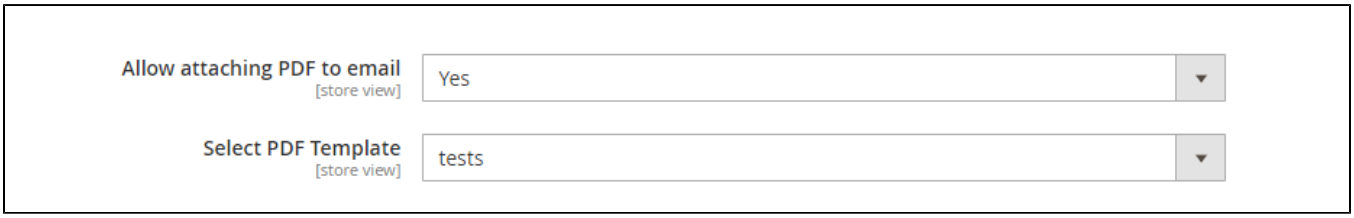
On **Configuration** page

1 **General Configuration**



- **Enable PDF Invoice**: choose Yes to activate the extension.
- **Allow printing PDF from backend**: If choose **Yes**, it will allow admin to print the PDF from the backend.
- **Allow customer to print the PDF**: If choose **Yes**, it will allow the customer to print the PDF from the frontend.

2 **Set configuration for the PDF**



There are four types of PDF: **PDF for Order, PDF for Invoice, PDF for Shipment** and **PDF for Credit Memos**. Expand the sections to configure for each PDF.

- **Allow attaching PDF to email**: choose Yes to attach the PDF files to the transaction emails.
- **Select PDF Template**: choose a template on the drop-down list for the attached PDF.

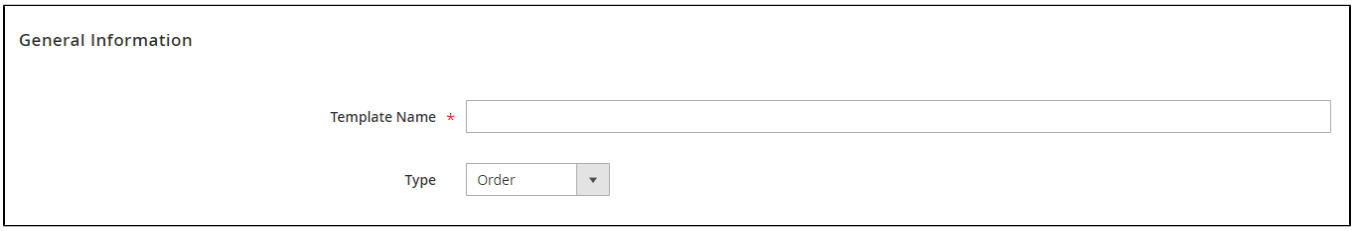
2. Manage PDF Template

This section allows editing the available PDF template or creating new template.

- On the Admin sidebar, go to **Marketing > PDF Invoice > Manage PDF Template**.
- On **Manage PDF Template** page, click on **Add New Template** button to create a new one.
- On **New Template** page:

General Configuration

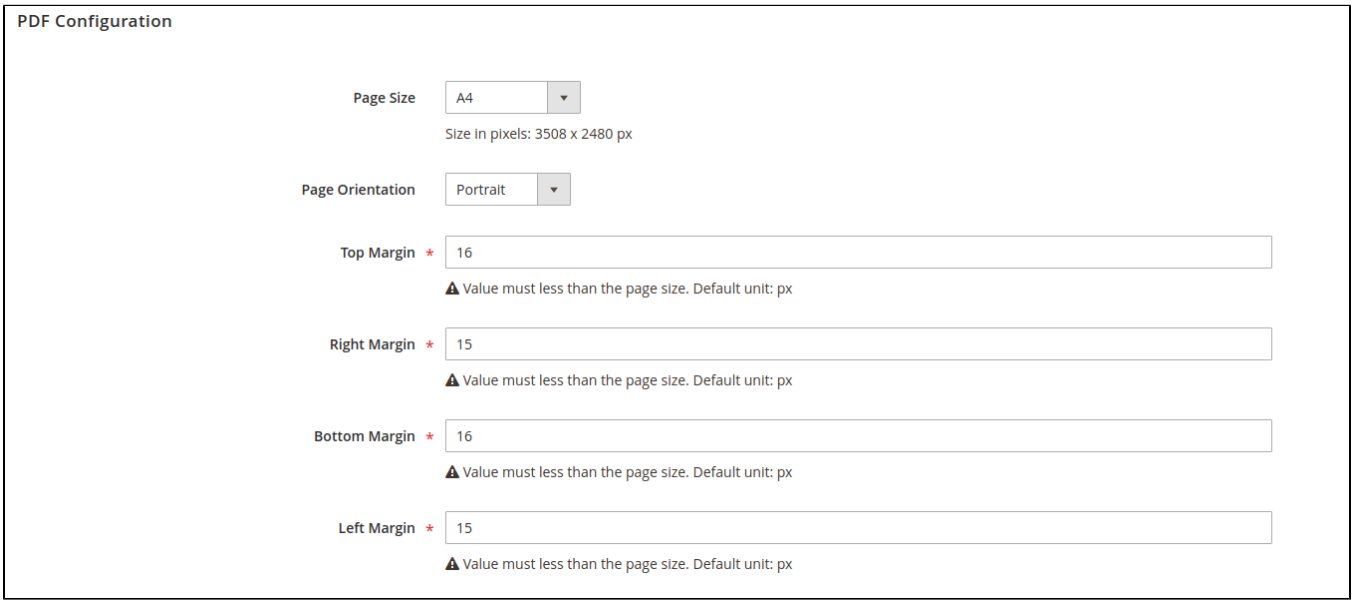
- **Template Name**: enter the name for the new template.
- **Type**: choose the type of email that the PDF is attached with. There are four default types of email: order, invoice, shipment. credit memo.



PDF Configuration

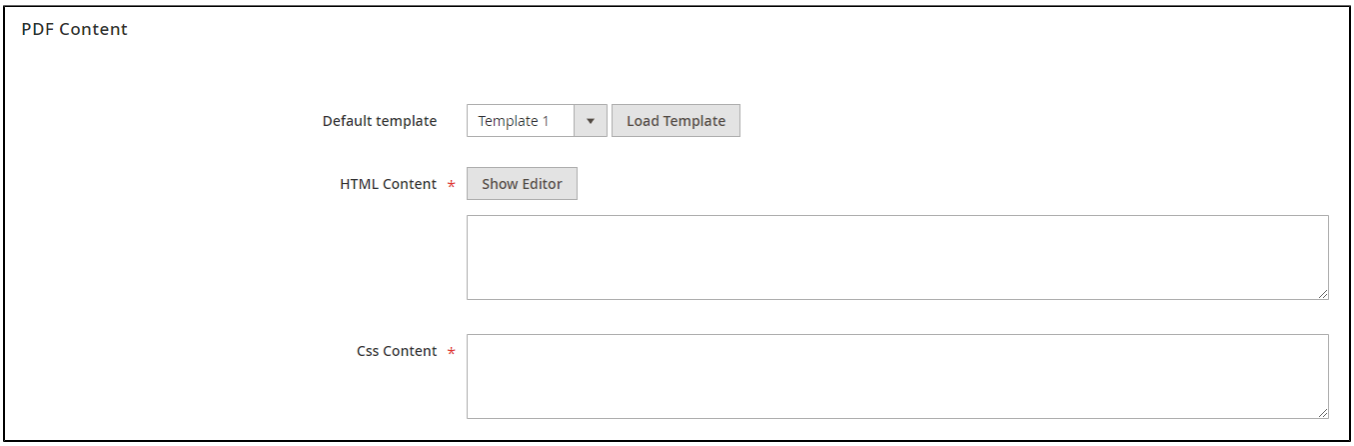
In this section, the admin can configure the layout for the PDF template.

- Select the **Page Size** and **Orientation** for the template.
- Set the margins for the the template on the **Top Margin, Right Margin, Bottom Margin** and **Left Margin** field.



PDF Content

Admin can build a new template or create a new template base on an available template.

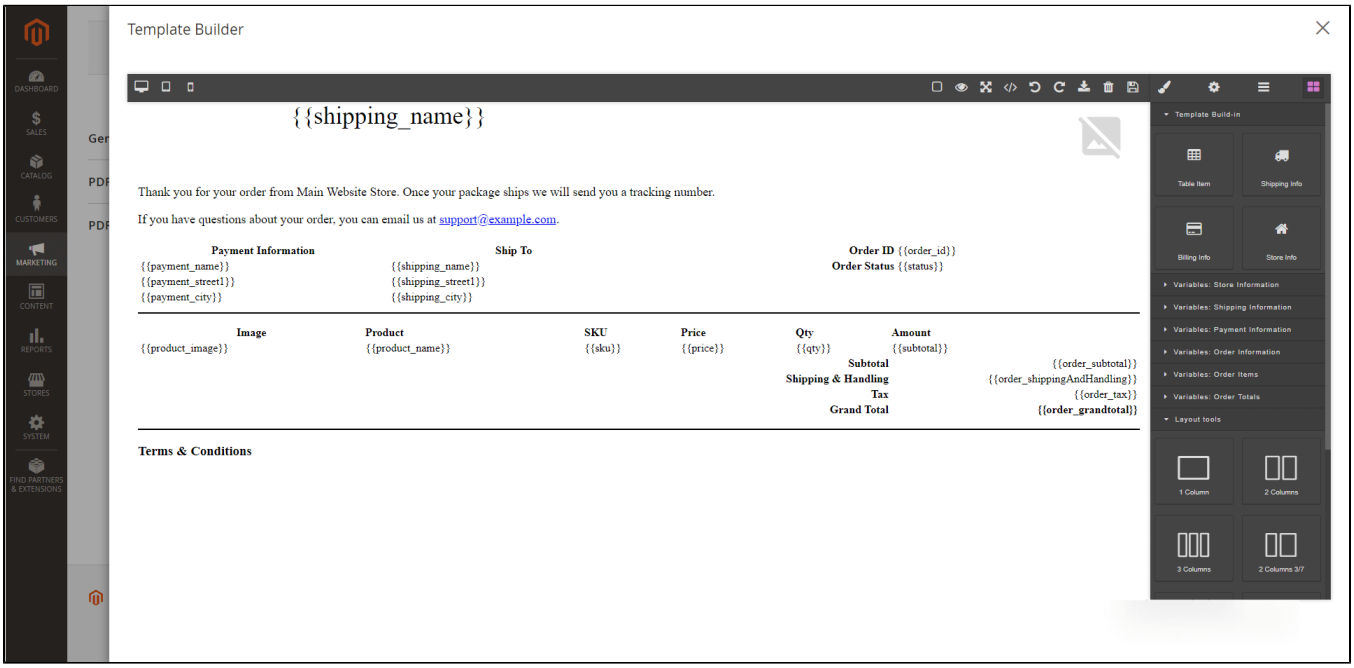


To create a template base on the available templates

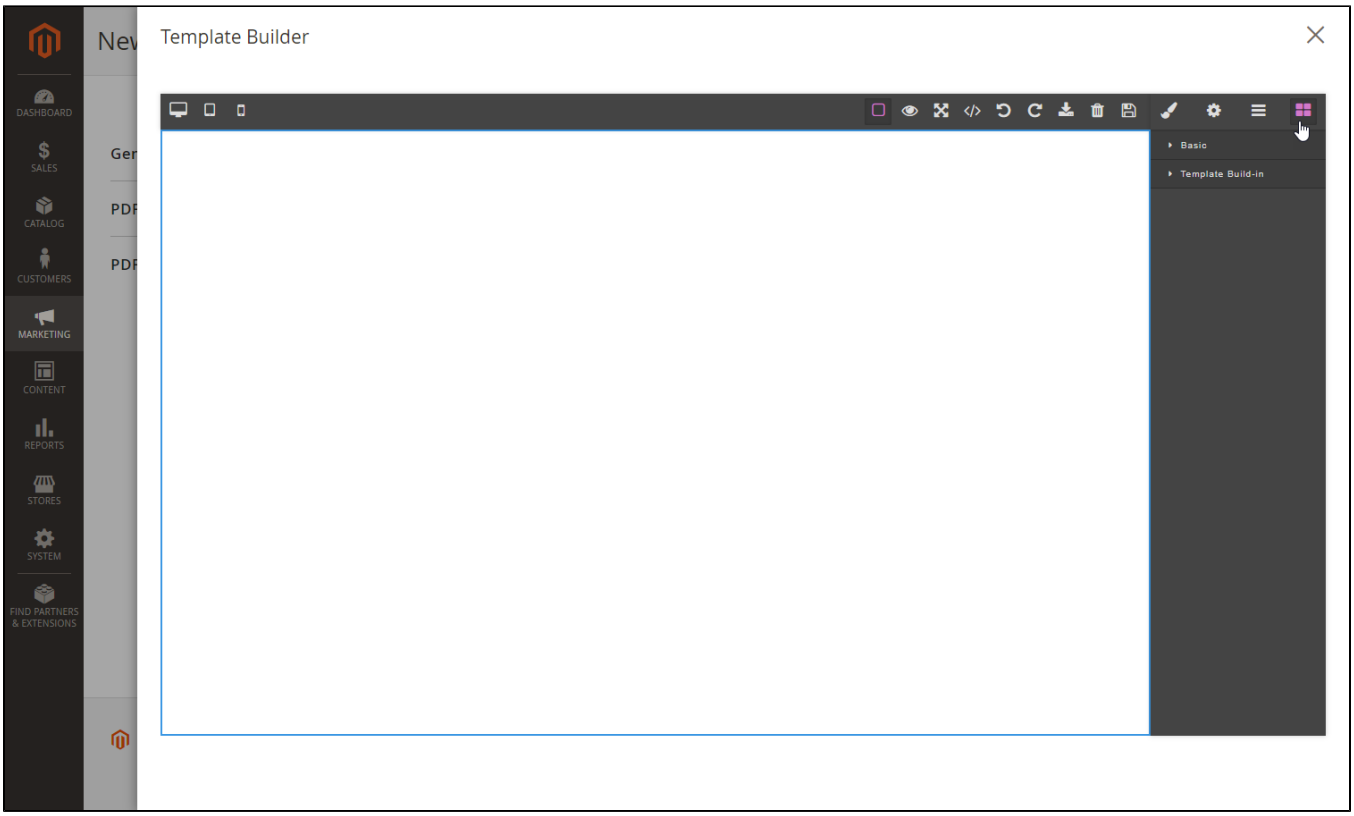
- On **Default template** section, choose one template on the drop-down list
- Click on **Load Template** button.
- Then click on **Show Editor** button to open the **Template Builder** area and set a new template base on the available one.

To build a new template, on **HTML Content**, click on **Show Editor** button. Then create your content from scratch.

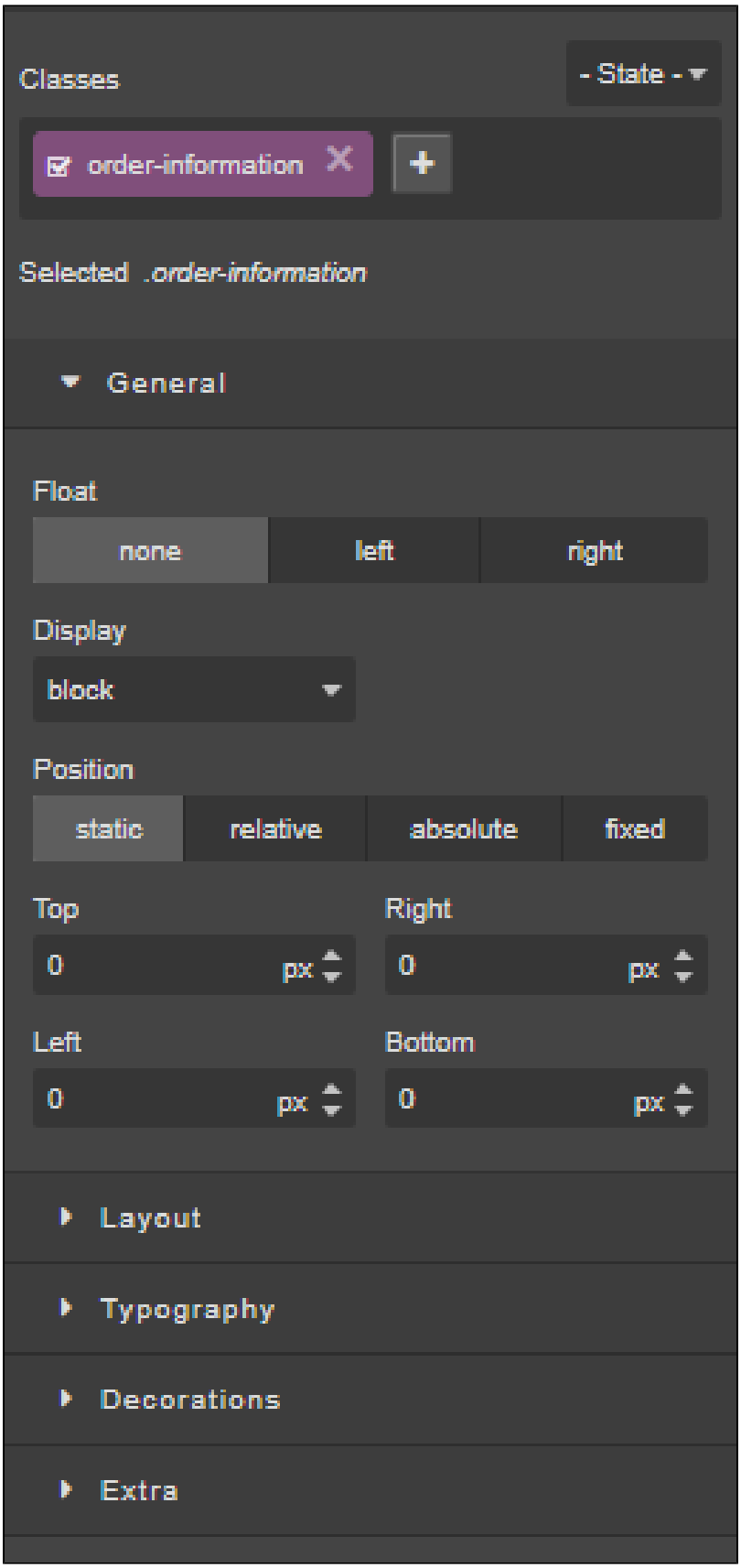
- On the **Template Builder** section, drag and drop the items on the right column to the template area to build a new template.



- Click on the last icon on the toolbar and expand the **Basic** and **Template Build-in** section. Then drag and drop the items in these sections to the building section.



- Click on each item and set the display for it with the edit table on the right.



⚠️ ***Note: Do not change the template during the building process otherwise your template will disappear.***

Create PDF template using HTML and CSS code

You can design your own custom template with HTML and CSS. For more details about all supported HTML tags and supported CSS, please refer to this site https://mpdf.github.io/html-support/html-tags.html.

To insert a shortcode, which will replace by specific information of the order, you can use this format <shortcode>{{key}}< /shortcode>.

⚠️ ***Note:***

- To load all items of the order, you have to use the <table> tag and mark the <tr>, which shows the order item value, with id="row_items". Besides, the shortcode can be used in the "order item" section only.
- To insert product image, please use this format
- To insert Store Logo, you can use this format or use the <img> with the direct link image.

Shortcode list

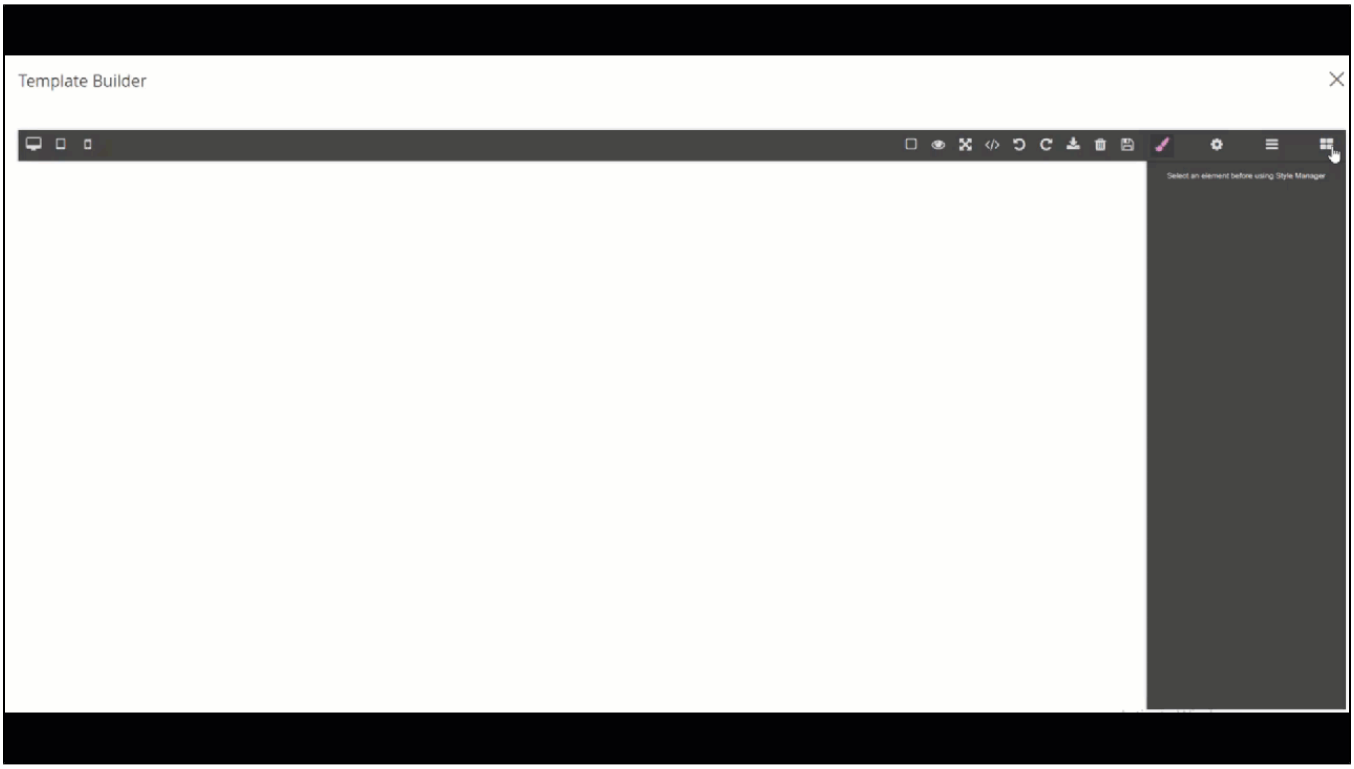
Store Information	{{store_name}} {{store_phone}} {{store_hours}} {{store_street_line1}} {{store_street_line2}} {{store_postcode}} {{store_city}} {{store_country}} {{store_region}} {{vat_number}}
Shipping Information	{{shipping_method}} {{shipping_name}} {{shipping_first_name}} {{shipping_last_name}} {{shipping_street1}} {{shipping_street2}} {{shipping_company}} {{shipping_region}} {{shipping_phone_number}} {{shipping_post_code}} {{shipping_country}} {{shipping_city}}
Payment Information	{{payment_method}} {{payment_name}} {{payment_first_name}} {{payment_last_name}} {{payment_street1}} {{payment_street2}} {{payment_company}} {{payment_region}} {{payment_phone_number}} {{payment_post_code}} {{payment_country}} {{payment_city}}

Order Information	{{order_id}} {{status}} {{invoice_id}} {{shipment_id}} {{creditmemo_id}}
Order Items	{{product_name}} {{sku}} {{qty}} {{price}} {{subtotal}} {{discount_amount}} {{rowtotal}}
Order Totals	{{order_subtotal}} {{order_shippingAndHandling}} {{order_tax}} {{order_grandtotal}} {{order_discount_amount}}

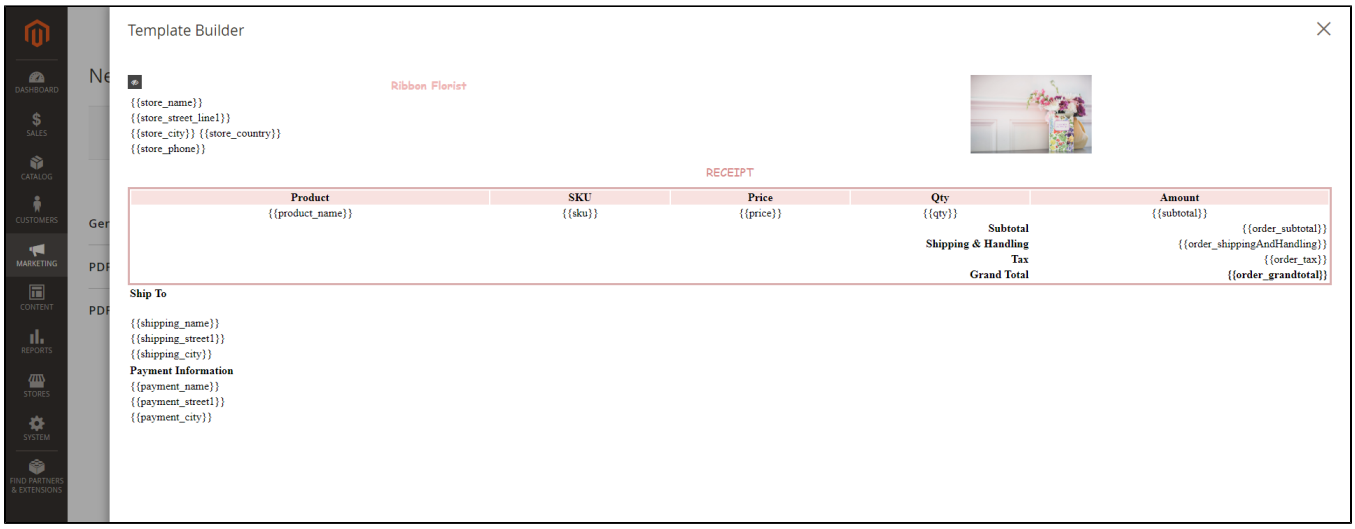
After finish, click on **Save** button to save the new template.

Main Function

Drag and drop the items on the tool tab to build the PDF template.



Preview the template directly on the building section.



Preview the template after finishing it.

Store Name

Magenest United Kingdom
1234123



RECEIPT

Product	SKU	Price	Qty	Amount
Hero Hoodie Size L Color Green	MH07-L-Green	54.00	2	108.00
			Subtotal	108.00
			Shipping & Handling	20.00
			Tax	15.68
			Grand Total	**143.68**

Ship To

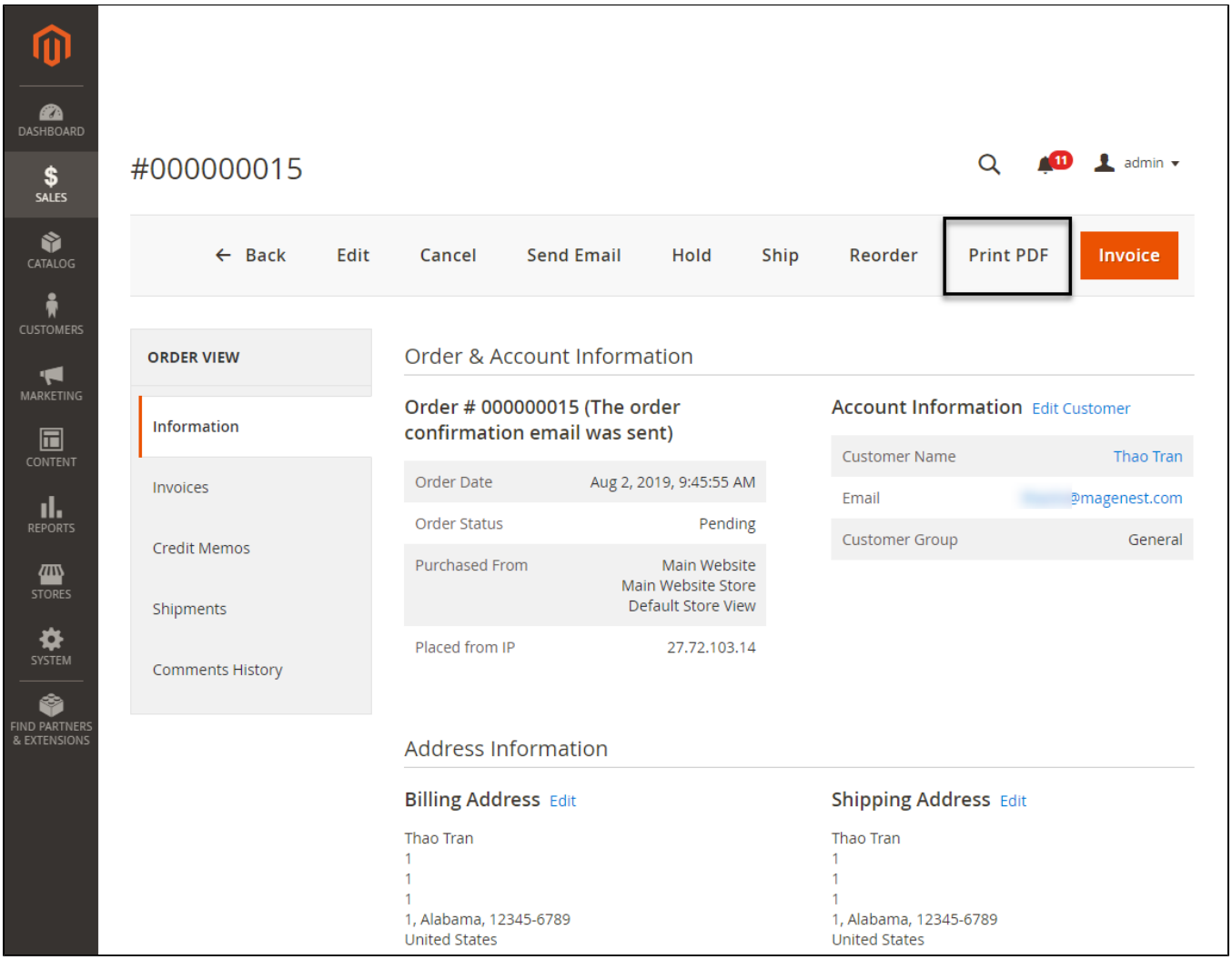
Veronica Costello
6146 Honey Bluff Parkway
Calder

Payment Information

Veronica Costello
6146 Honey Bluff Parkway
Calder

From the back-end, admin can:

- Print the PDF for the order/invoice by clicking **Print PDF** button.
- Send the order/invoice PDF to the customer via email by clicking on **Send Email** button.



From the store-front, customers can print the PDF for their own order on **My Account** page.

blocked URL

Update

- When a new update is available, we will provide you with a new package containing our updated extension.
- You will have to delete the module directory and repeat the installing steps above.
- Flush the config cache. Your store and newly installed module should be working as expected.

Support

- We will reply to support requests within **2 business days**.
- We will offer **lifetime free update and 6-month free support for all of our paid products**. Support includes answering questions related to our products, bug/error fixing to make sure our products fit well in your site exactly like our demo.
- Support **DOES NOT** include other services such as customizing our products, installation and uninstallation service.

Once again, thank you for purchasing our extension. If you have any questions relating to this extension, please do not hesitate to contact us for support.