

PDF Customizer for Magento 2 User Guide

Version 1.0

Table of Contents

I) Introduction.....	1
II) Configuration.....	3
1. General Settings.....	4
2. Order.....	4
3. Invoice.....	8
4. Shipment.....	9
5. Credit Memo.....	9
III) PDF Customizer Templates.....	10
IV) Builder Interface.....	13
1. General.....	13
2. PDF Builder section.....	14
3. Advanced section.....	15
V) Specific Elements.....	16
1. Field.....	16
2. Items.....	17
3. Totals.....	18
4. Bar Code.....	19
5. QR Code.....	20
6. Link.....	21
VI) Support.....	22

I) Introduction

This document is the User Guide for PDF Customizer. It describes the extension functionality and provides some tips for a quick start.

PDF Customizer is a powerful tool that allows you to create & customize beautiful PDF documents with visual drag & drop interface. No more converting complex HTML code to PDF, no time-consuming.

PDF Customizer is developed on a core builder based on which we've built all builder extensions. The core builder includes elements and settings that all builder extensions have in common. For details, please visit:

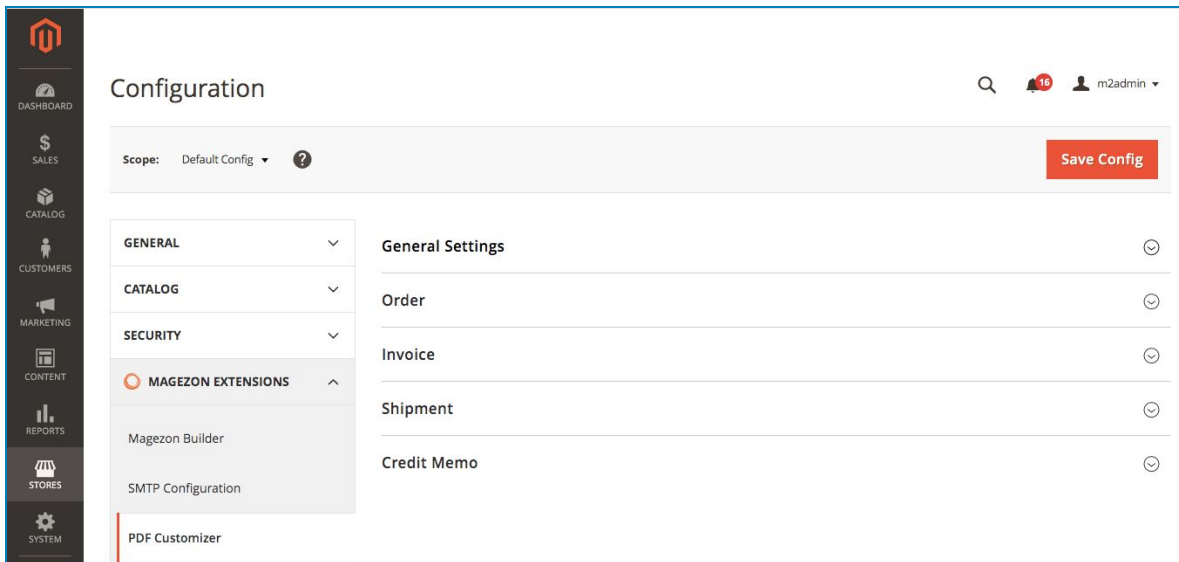
https://magezon.com/pub/media/productfile/magezon-core-builder-user_guides.pdf

In this guide, we'll focus on elements and settings that are **specific** to PDF Customizer.

II) Configuration

From the backend, navigate **Stores > Configuration > Magezon Extensions > PDF Customizer** or **Marketing > PDF Customizer > Settings**

The interface will look like below:



1. General Settings

The **Current Version** of the extension is 1.0.0

To enable the extension, select **Yes** in the **Enable PDF Customizer** field.

General Settings

Current Version 1.0.0
[store view]

Enable PDF Customizer Yes
[store view]

2. Order

Configure the general settings for the Order documents in this tab.

Order

Attach pdf to new order email No
[store view]

PDF Template Order
[store view]

Order PDF Name order1_{id}_{Y}_{m}_{d}_{H}_{i}_{s}
[store view]

Order List PDF Name List_{Y}_{m}_{d}_{H}_{i}_{s}
[store view]

Show Custom Print Button Custom PDF
[store view]

Display Print Button in Order Grid Yes
[website]

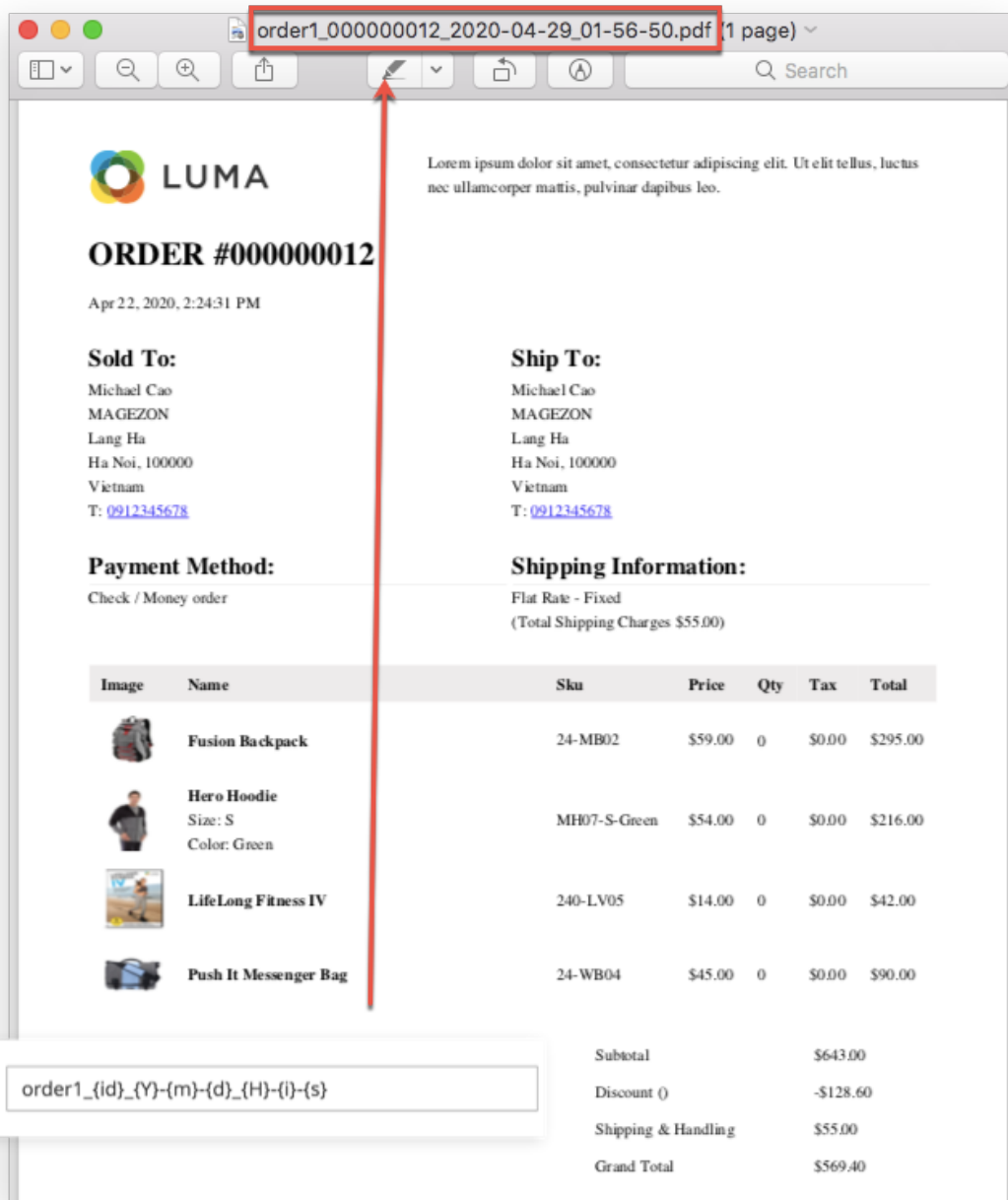
- **Attach pdf to new order email:** Choose **Yes** to notify customers of the order through the email confirmation.

- **PDF template:** Select from 4 existing templates: Order, Invoice, Shipment & Credit memo

- **Order PDF Name:** This field will vary according to the name/ID of each order document and it's for single order printing only.

The format is ***Order name_ID_Year_Month_Date_Hour_Minute_Second***

Try this following setting and see the result:



The screenshot shows a PDF viewer window with the title "order1_000000012_2020-04-29_01-56-50.pdf (1 page)". The PDF content is an order invoice for "LUMA".





ORDER #00000012
Apr 22, 2020, 2:24:31 PM

Sold To:
Michael Cao
MAGEZON
Lang Ha
Ha Noi, 100000
Vietnam
T: [0912345678](tel:0912345678)

Ship To:
Michael Cao
MAGEZON
Lang Ha
Ha Noi, 100000
Vietnam
T: [0912345678](tel:0912345678)

Payment Method:
Check / Money order

Shipping Information:
Flat Rate - Fixed
(Total Shipping Charges \$55.00)

Image	Name	Sku	Price	Qty	Tax	Total
	Fusion Backpack	24-MB02	\$59.00	0	\$0.00	\$295.00
	Hero Hoodie Size: S Color: Green	MH07-S-Green	\$54.00	0	\$0.00	\$216.00
	LifeLong Fitness IV	24-LV05	\$14.00	0	\$0.00	\$42.00
	Push It Messenger Bag	24-WB04	\$45.00	0	\$0.00	\$90.00

Subtotal: \$643.00
Discount (): -\$128.60
Shipping & Handling: \$55.00
Grand Total: \$569.40

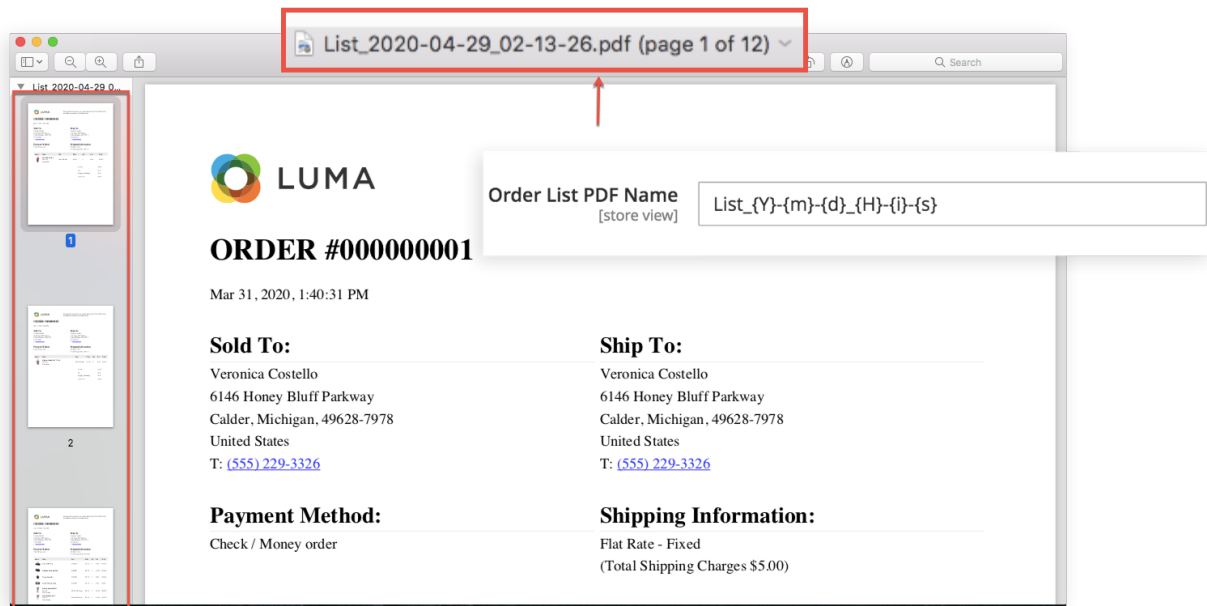
Order PDF Name
[store view]

order1_{id}_{Y}-(m)-(d)_{H}-(i)-(s)

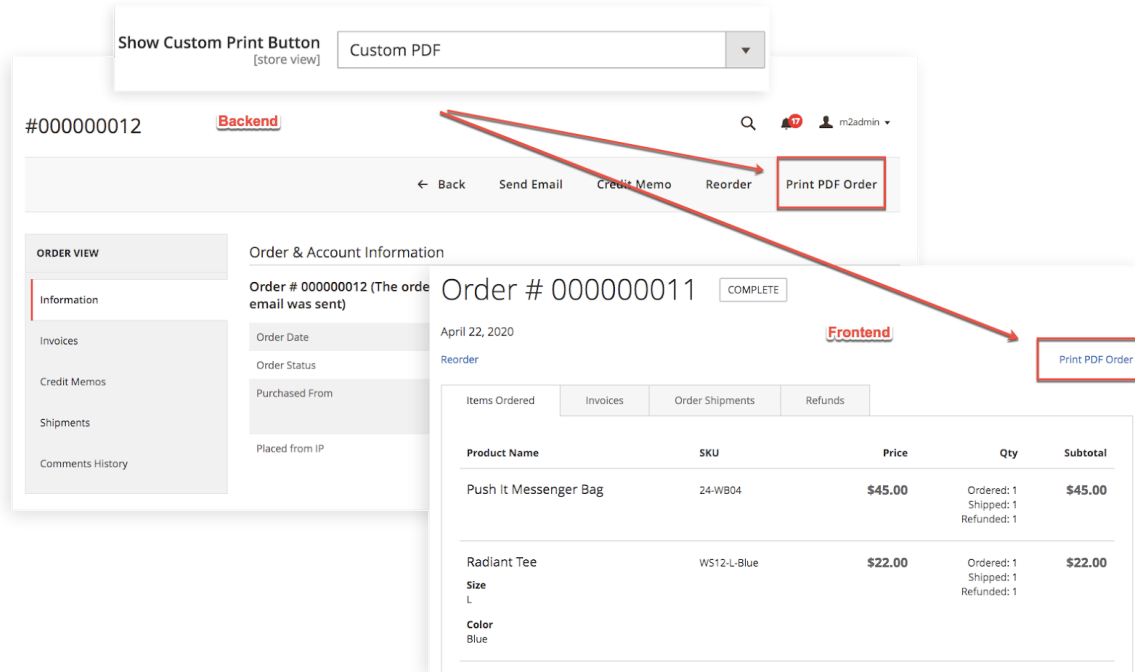
- **Order List PDF Name:** This field will vary according to the name of order documents when you print in mass.

The format is ***Order list name_Year_Month_Date_Hour_Minute_Second***

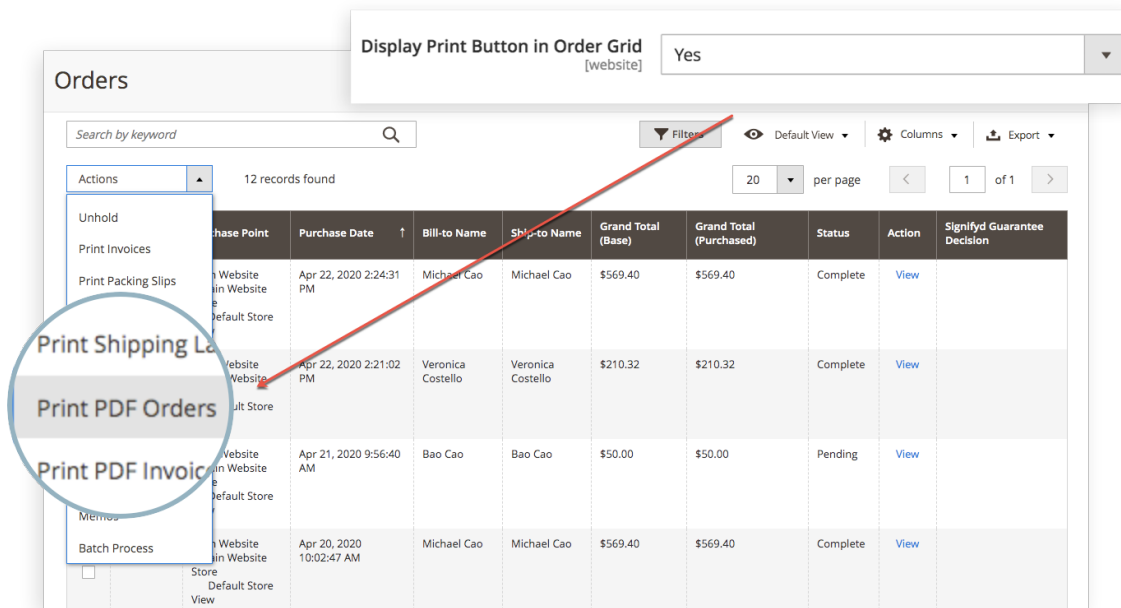
Try this setting:



- **Show Custom Print Button:** Decide to show the Print Button in the Backend Order View or Customer View.



- **Display Print Button in Order Grid:** Decide to display the Print Button for Orders in the Grid interface or not.



3. Invoice

Generally, the configurations in this tab are similar to those in the **Order** tab.

Invoice

Attach pdf to new invoice email [store view]

PDF Template [store view]

Invoice PDF Name [store view]

Invoice List PDF Name [store view]

Show Custom Print Button [store view]

Display Print Button in Invoice and Order Grid [website]

- **Attach pdf to new invoice email:** Choose **Yes** to enclose invoice(s) to the email confirmation.
- **PDF template:** Select from 4 existing templates: Order, Invoice, Shipment & Credit memo
- **Invoice PDF Name:** This field will vary according to the name/ID of each invoice.
The format: ***Invoice name_ID_Year_Month_Date_Hour_Minute_Second***
- **Invoice List PDF Name:** This field will vary according to the name of invoice documents when you print in mass.
The format: ***Invoice list name_Year_Month_Date_Hour_Minute_Second***
- **Show Custom Print Button:** Decide to show the Print Button in the Invoice View Interface or not.
- **Display Print Button in Invoice & Order Grid:** Decide to display the Print Button for Invoices in the Grid interface or not.

4. Shipment

All the configurations are the same previous tabs.

Shipment

Attach pdf to new shipment email [store view]

PDF Template [store view]

Shipment PDF Name [store view]

Shipment List PDF Name [store view]

Show Custom Print Button [store view]

Display Print Button in Shipment and Order Grid [website]

5. Credit Memo

All the configurations are the same previous tabs.

Credit Memo

Attach pdf to new credit memo email [store view]

PDF Template [store view]

Creditmemo PDF Name [store view]

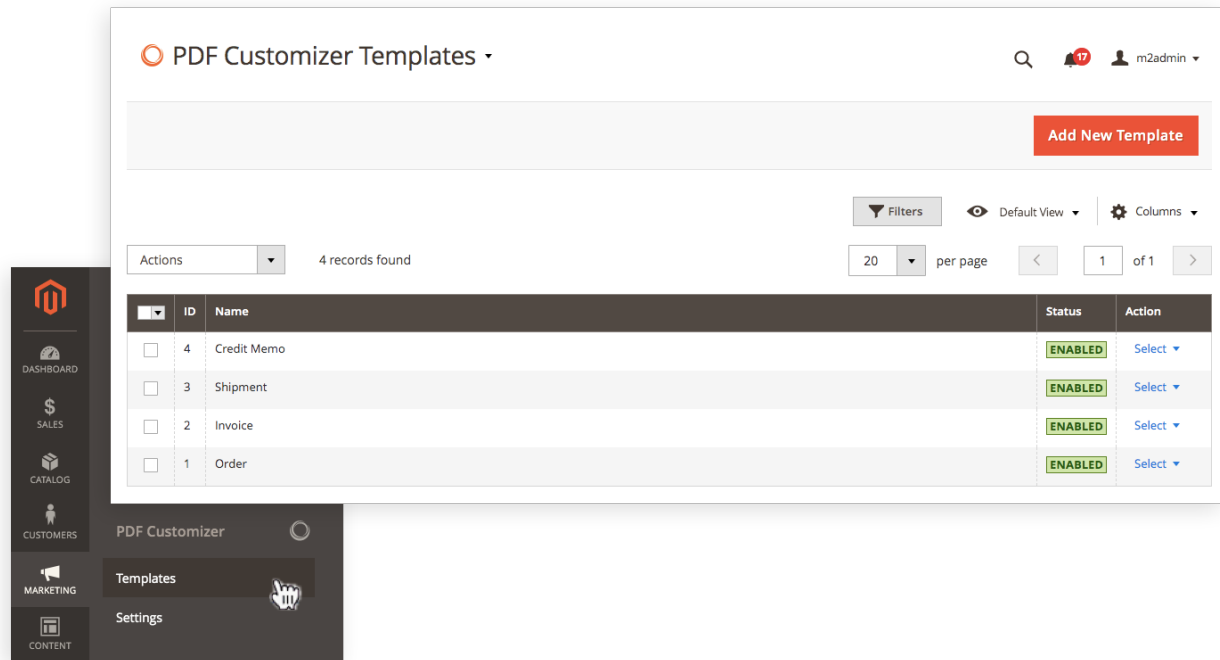
Creditmemo List PDF Name [store view]

Show Custom Print Button [store view]

Display Print Button in Creditmemo and Order Grid [website]

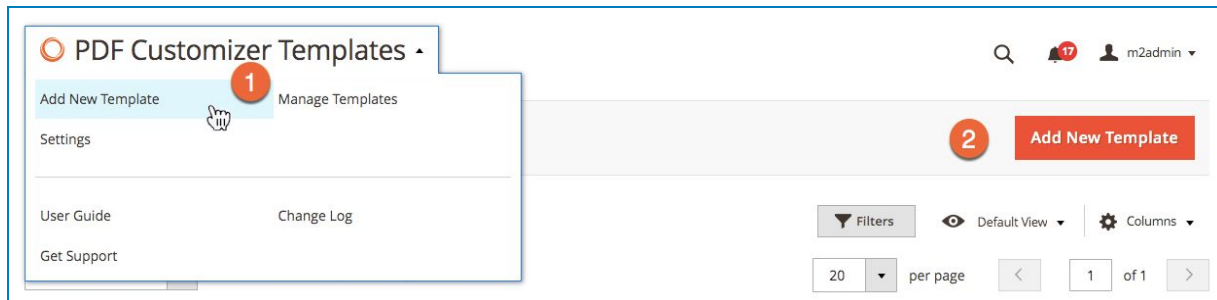
III) PDF Customizer Templates

To manage PDF Templates, navigate **Marketing > PDF Templates:**

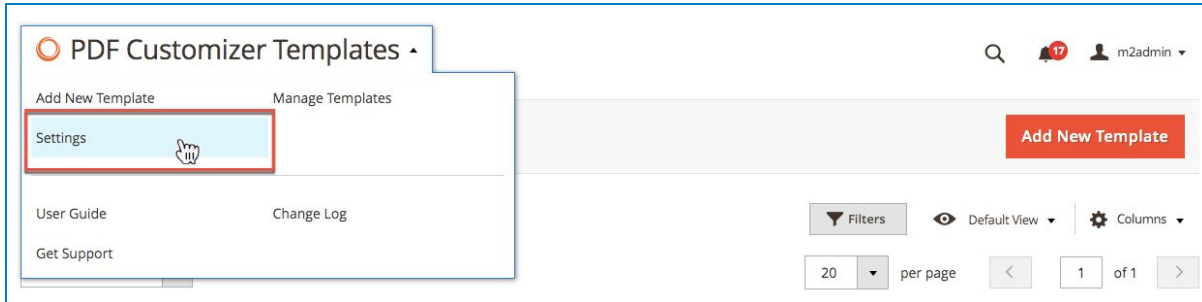


ID	Name	Status	Action
4	Credit Memo	ENABLED	Select
3	Shipment	ENABLED	Select
2	Invoice	ENABLED	Select
1	Order	ENABLED	Select

There are 2 ways to **Add New Template:**



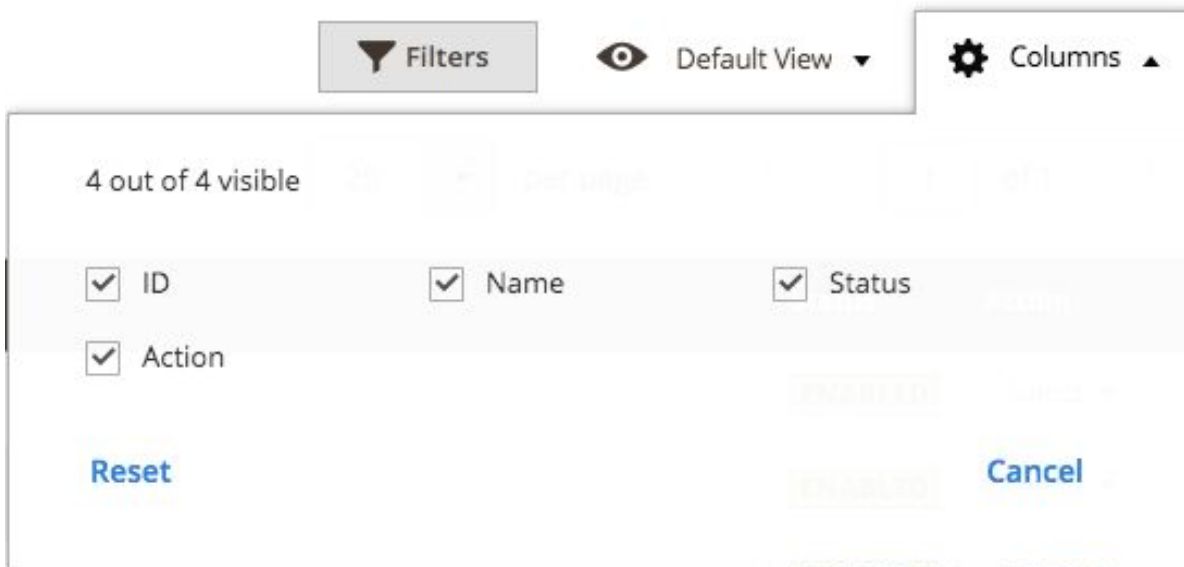
- From the **PDF Customizer Templates** interface, you can navigate to the **Configuration** interface by clicking on this button:



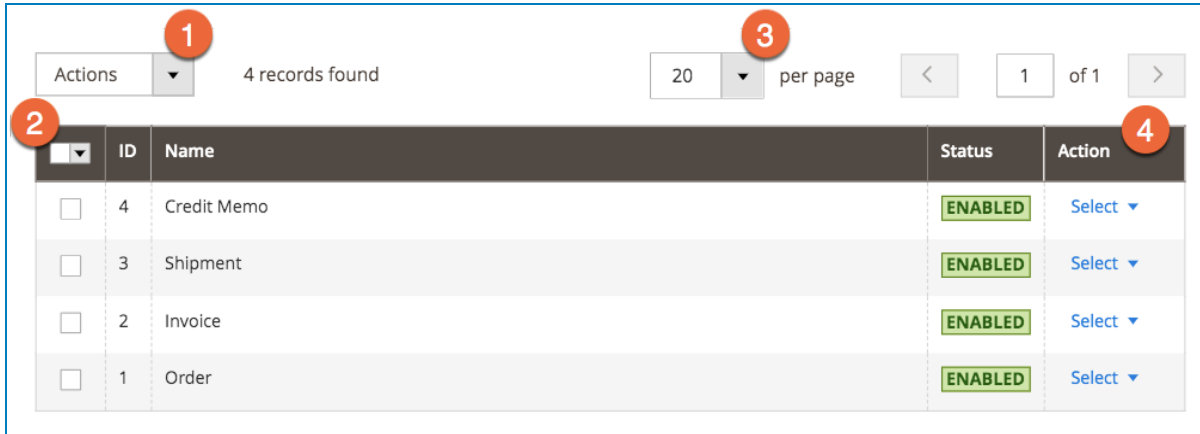
- Filter the Templates by ID, Name, or Status using **Filters** button.



- Define which column to be visible using this field:



- From left to right, we get:



The screenshot shows a web interface for managing PDF templates. At the top left, there is a dropdown menu labeled 'Actions' with a red circle '1' next to it. To its right, it says '4 records found'. In the top right, there is a pagination control showing '20' in a dropdown with a red circle '3' next to it, followed by 'per page', and '1 of 1' with navigation arrows. Below this is a table with a dark header and four rows. The table has columns for 'ID', 'Name', 'Status', and 'Action'. The first column has checkboxes, with a red circle '2' next to the first one. The 'Status' column contains green 'ENABLED' buttons. The 'Action' column contains blue 'Select' dropdowns, with a red circle '4' next to the first one.

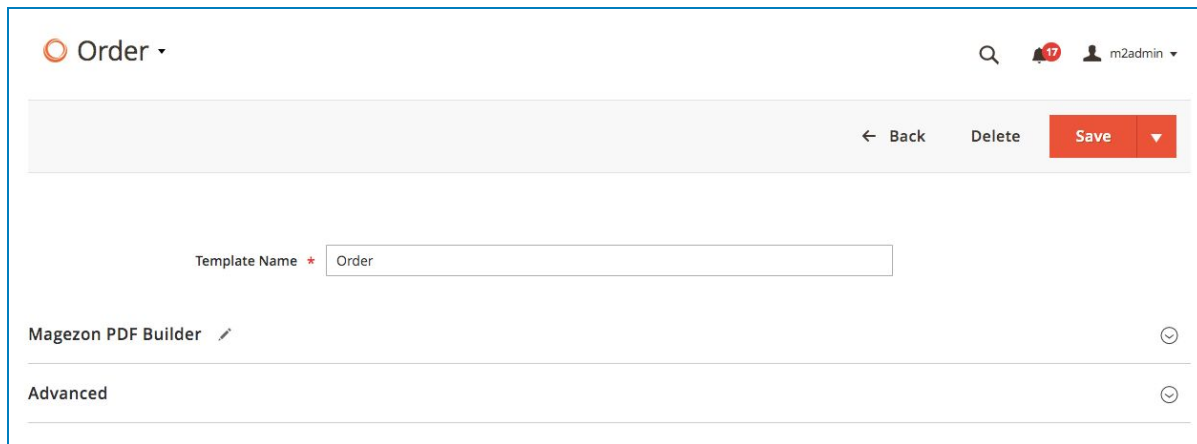
<input type="checkbox"/>	ID	Name	Status	Action
<input type="checkbox"/>	4	Credit Memo	ENABLED	Select ▾
<input type="checkbox"/>	3	Shipment	ENABLED	Select ▾
<input type="checkbox"/>	2	Invoice	ENABLED	Select ▾
<input type="checkbox"/>	1	Order	ENABLED	Select ▾

- (1) **Actions:** Apply action (Delete) to the selected template(s)
- (2) **Select box:** Tick the boxes in the left of each template or elect all if necessary
- (3) **Per page:** Define the number of templates to be displayed per page
- (4) **Action:** Decide to Edit or Delete the selected template

IV) Builder Interface

1. General

After hitting the **Edit/ Add New Template** button, the builder interface will appear like below (We use **Order Template** as an example):

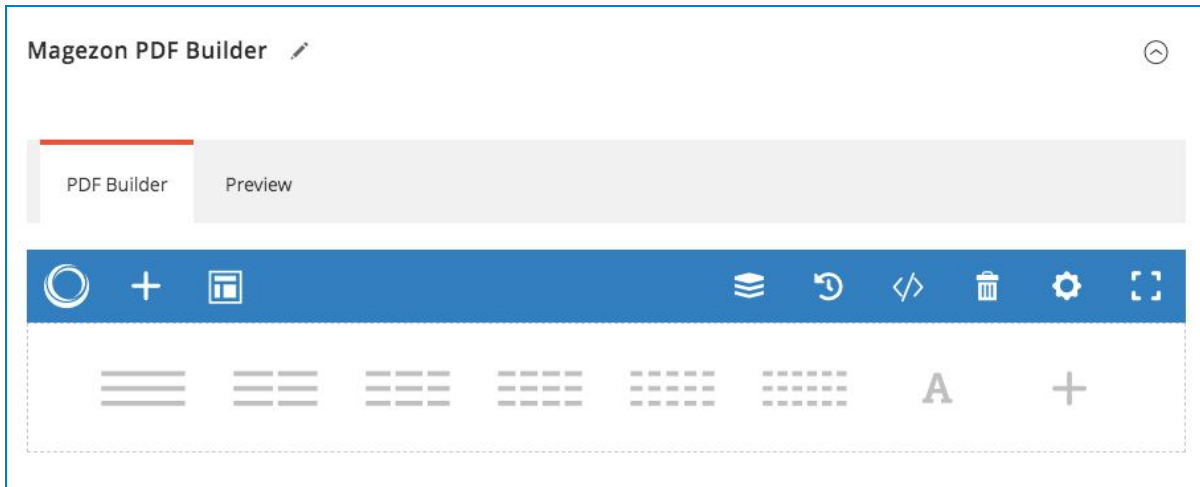


The screenshot shows the 'Order' template editing interface. At the top left, there is a breadcrumb 'Order' with a dropdown arrow. On the top right, there are icons for search, notifications (with a red '17' badge), and a user profile 'm2admin'. Below this is a toolbar with three buttons: 'Back' (with a left arrow), 'Delete', and 'Save' (in a red box with a dropdown arrow). The main area contains a 'Template Name' field with a red asterisk and the value 'Order'. Below the field are two sections: 'Magezon PDF Builder' and 'Advanced', each with a pencil icon and a dropdown arrow.

- **Back:** Back to previous working interface
- **Delete:** Delete the existing template
- **Save** button: There are 3 choices: **Save & New, Save & Duplicate or Save & Close**
- **Template Name** (Required field): Enter the name of the order here

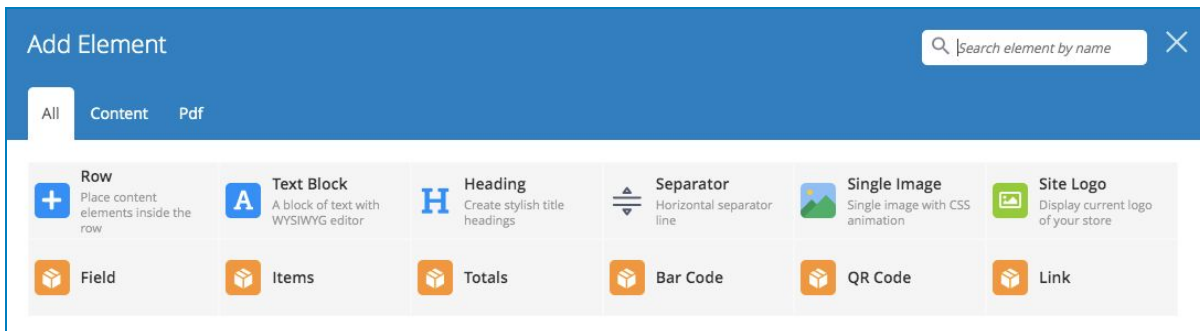
2. PDF Builder section

This section contains 2 tabs: **PDF Builder** & **Preview** that allow you to build orders with drag & drop gestures and preview the result right away.



Hit the **Plus** button to see what can be added to your header/ footer.

The list of 12 elements supported will be shown like follow:



- **Row, Text Block, Heading, Separator** are the core elements that are described carefully in this [guide](#).

- **Single Image, Site Logo** are Magezon Page Builder's elements and can be learnt through [its guide](#) (Page 27 & 128).

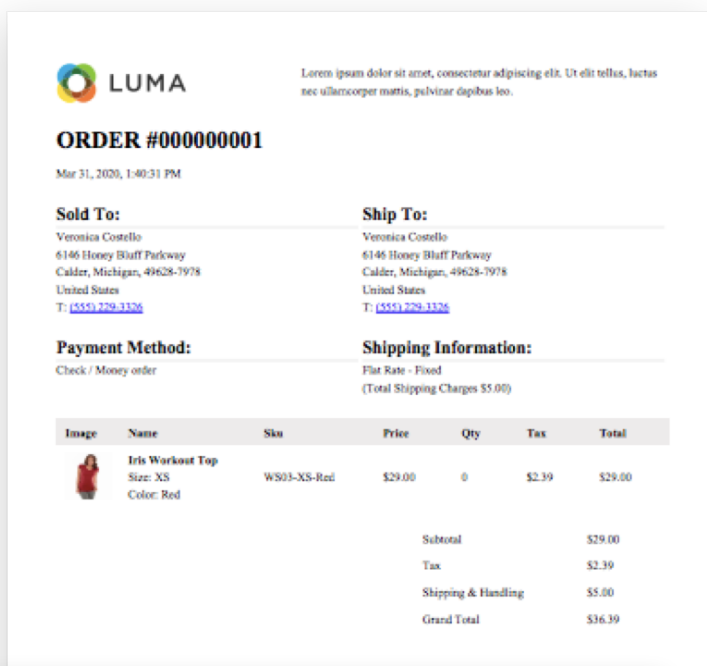
3. Advanced section

This section allows you to set up the printing layout with the following fields supported:

Orientation, Page Size, Show Page Number, Margin Top, Margin Right, Margin Bottom, Margin Left.

Set the layout to be *Portrait* with *A4* in size, *No page number* & *Default margin*:

Portrait
A4 size



Advanced

Set up the printing

Orientation

Page Size

Show Page Number No

Margin Top
mm

Margin Right
mm

Margin Bottom
mm

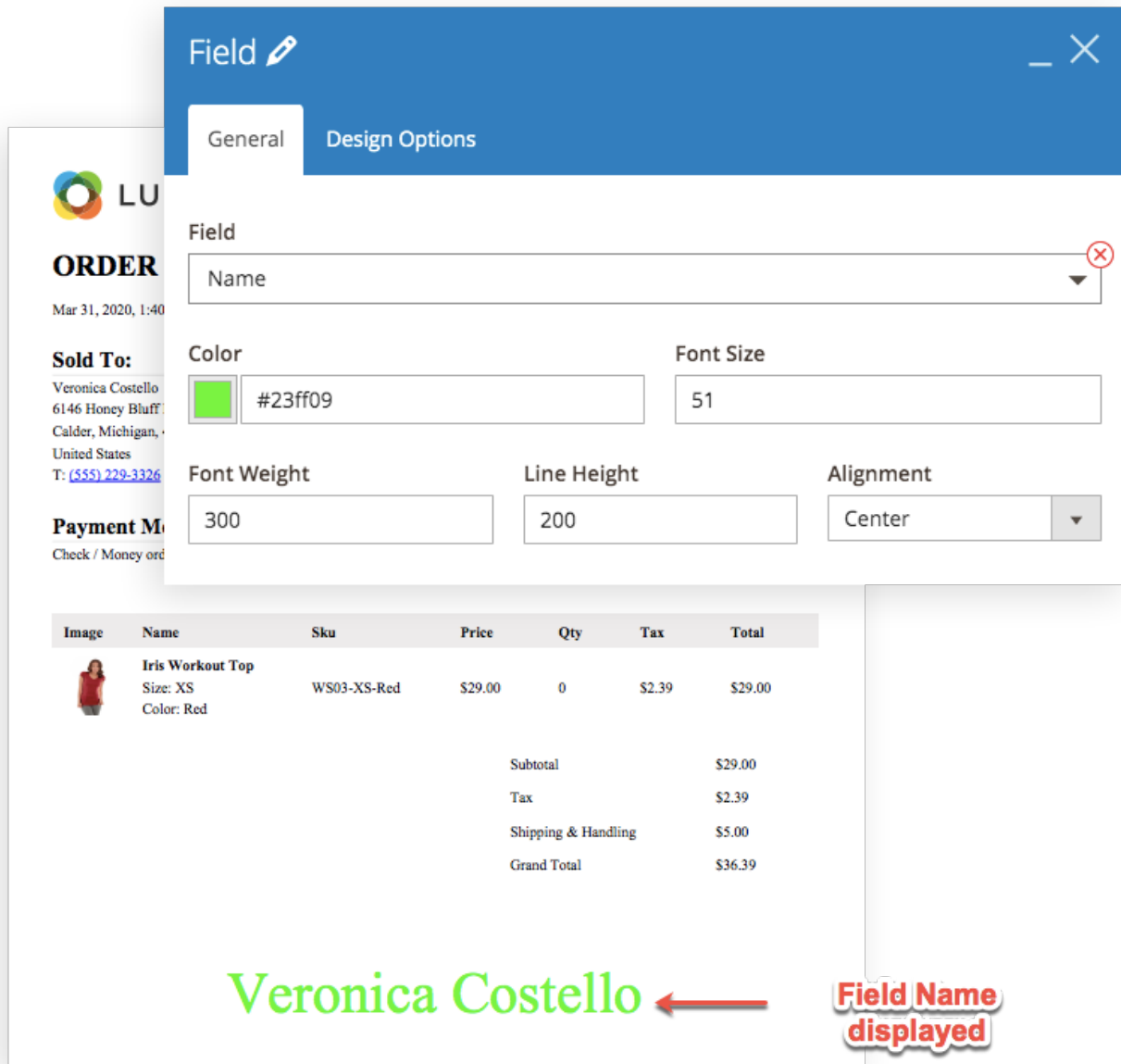
Margin Left
mm

Now, come to our specific elements.

V) Specific Elements

1. Field

Let's try the following configuration and see the result in the front:



Field _ X

General

Design Options

Field X

Name v

Color #23ff09

#23ff09

Font Size 51

51

Font Weight 300


300

Line Height 200

200

Alignment Center

Center v

Image	Name	SKU	Price	Qty	Tax	Total
	Iris Workout Top Size: XS Color: Red	WS03-XS-Red	\$29.00	0	\$2.39	\$29.00
					Subtotal	\$29.00
					Tax	\$2.39
					Shipping & Handling	\$5.00
					Grand Total	\$36.39


Veronica Costello

←

Field Name displayed

2. Items

Add products, selling items into the order list with this variable element.

Image	Name	SKU	Price	Qty	Total
	Iris Workout Top Size: XS Color: Red	WS03-XS-Red	\$29.00	0	\$29.00

Items [edit] [close]

General | **Columns** | Design Options

Title: Image Width: 60 Count: 1

Content: ``

Items [edit] [close]

General | **Columns** | Design Options

Table

Border Width: [input] Border Style: Solid Border Color: #d64e53

Heading

Font Size: [input] Font Weight: [input] Line Height: [input]

Padding: [input] Text Color: #ffffff Background Color: #d64e53

Border Width: [input] Border Style: Solid Border Color: [input]

Height: [input]

Image size configured (points to image in table)

General table settings (points to table settings panel)

3. Totals

Add **Totals** that automatically calculate the summary of the orders. Freely configure the look of the **Totals** table.

Label

Width:

Padding:

Font Size:

Font Weight:

Odd Row Color:

Odd Row Background Color:

Even Row Color:


Even Row Background Color:

Table

Border Width:

Border Style:

Border Color:



Iris Workout Top
Size: XS
Color: Red

	Price	Qty	Tax	Total
Subtotal			\$29.00	
Tax			\$2.39	
Shipping & Handling			\$5.00	
Grand Total			\$36.39	

Value

Width:

Padding:

Font Size:

Font Weight:

Odd Row Color:

Odd Row Background Color:

Even Row Color:

Even Row Background Color:

Grand Total

Font Size:

Font Weight:

Line Height:

Label Color:

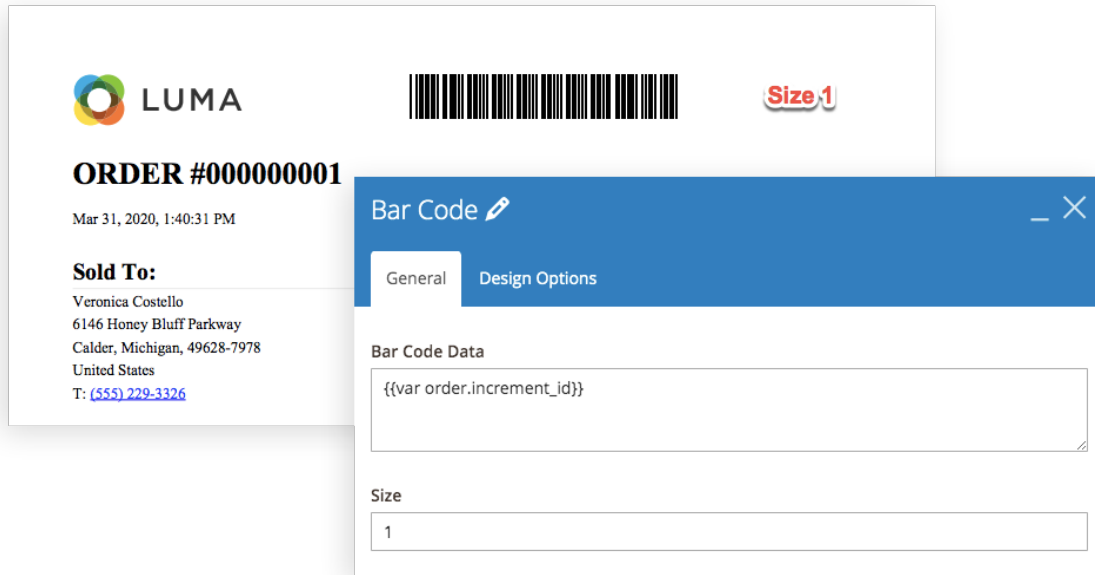
Label Background Color:

Value Color:

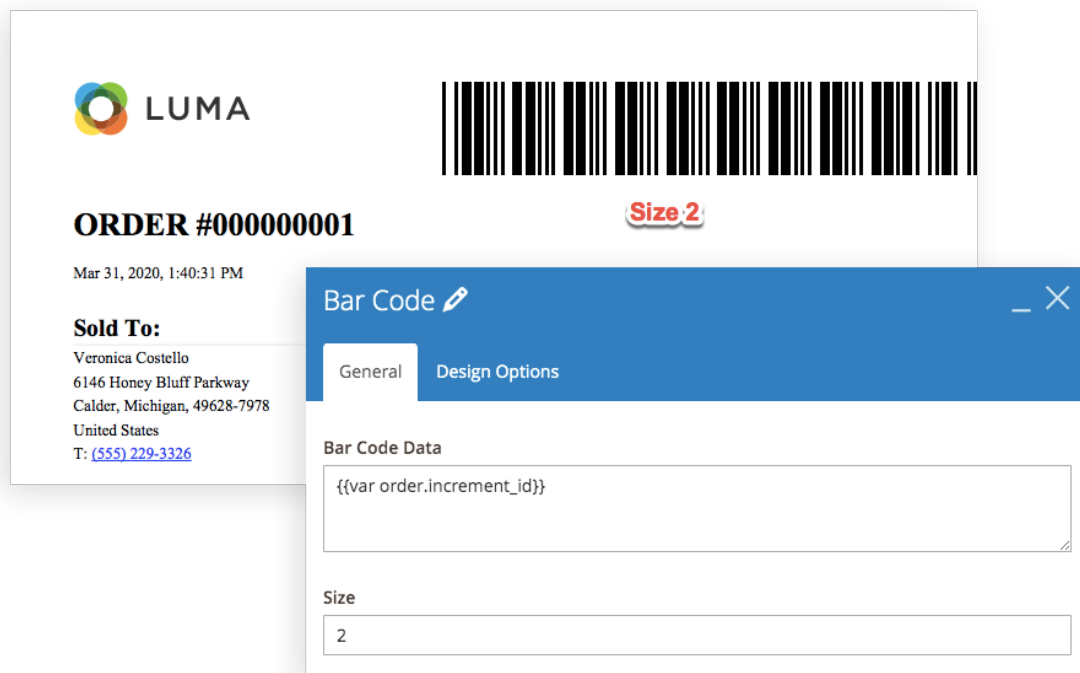
Value Background Color:

4. Bar Code

Try setting the **Bar Code** with Size 1:



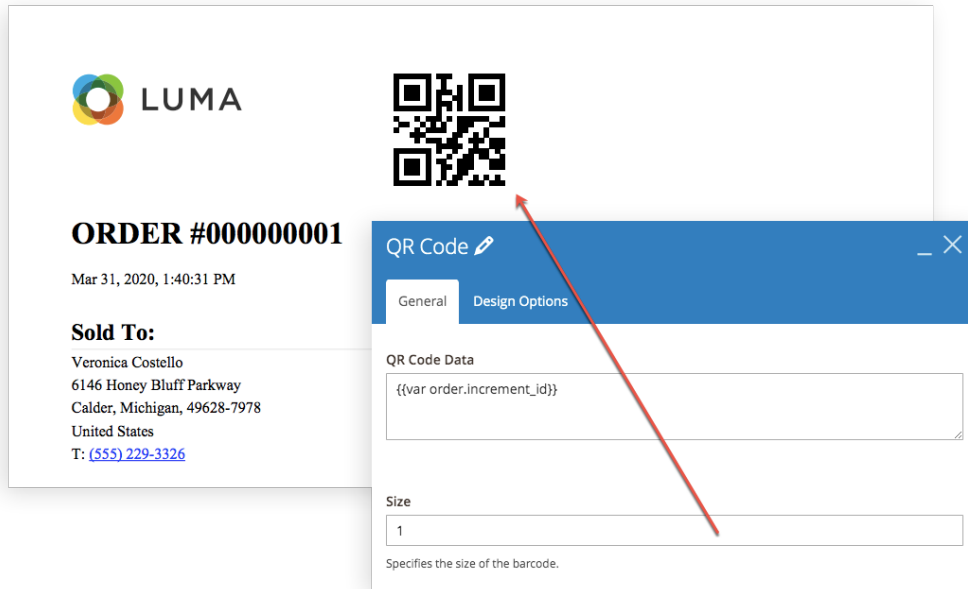
Or Size 2, 3, etc. Customize the size the way you want:



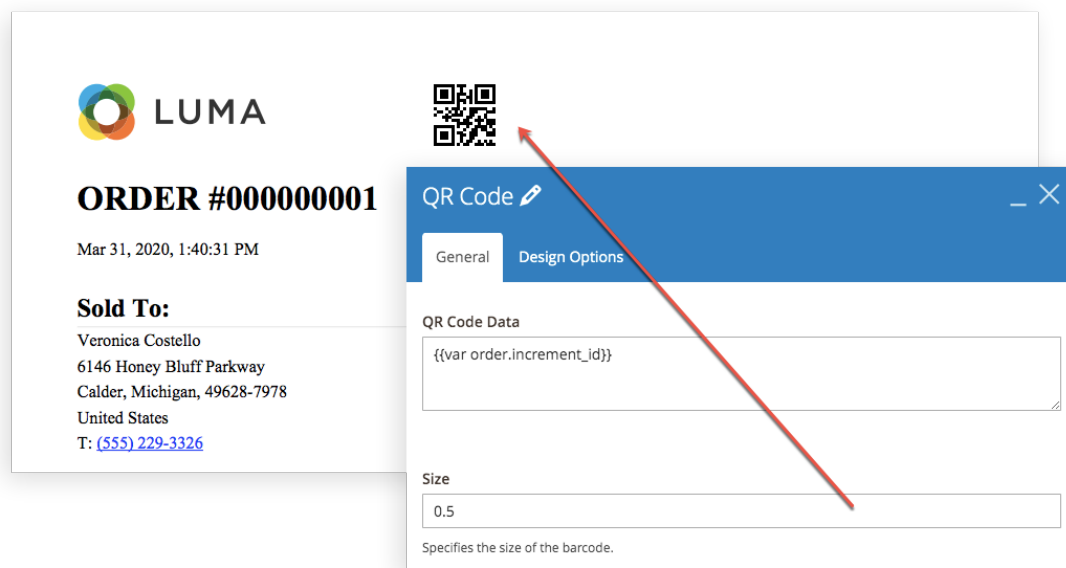
5. QR Code

Similar to the **Bar Code** configuration, set up your **QR Code** to fit the order most.

You can set its size to be 1:




Or even 0,5 if you think it makes sense:



6. Link

Set up the **Link** element to place an anchor text into the order that leads customers to the desired site. Easily set up the **Link** with 4 types supported:

- Category Link
- Product Link
- Page Link
- Custom URL

Image	Name	Sku	Price	Qty	Tax	Total
	Iris Workout Top Size: XS Color: Red	WS03-XS-Red	\$29.00	0	\$2.39	\$29.00

Check your cart on site

Link

- General
- Design Options

Text

Check your cart on site

Link

Custom Url: <https://www.magezon.com/magezon-page-builder-for-magento-2.html> **Title:**

Color #007dbd

Font Size

Font Weight

Text Underline

VI) Support

If you have any questions or need any support, feel free to contact us. We will get back to you within 24 hours since you submit your support request.

- Submit [Contact Us](#) form.
- Email us at support@magezon.com.
- Submit a [ticket](#).
- Contact us through [Skype](#): support@magezon.com.