

# **User Guide**

**PDF invoice \ shipment\ credit memo**

## **Extension Description**

PDF is a world de facto standard for a secure and reliable distribution and exchange of electronic documents, including CVS and other official papers. Sharing files in PDF format allows people to view documents regardless of what software applications, computers or operating systems they are using.

PDF invoice \ shipment\ redit memo is a professional solution that lets you generate stylish invoices, shipments and credit memos! Extension replaces the built-in Magento PDF document generation tool with fully customizable pdf templates that you edit with wysiwyg. Now you can design your pdf template in directly your browser without any coding. Then click save click "save template" and you're done!

### **demos:**

PDF credit memo sample: [creditmemo2012-09-04\\_02-20-12.pdf](#)

PDF invoice sample: [invoice2012-09-04\\_02-15-46.pdf](#)

PDF shipment sample: [packingslip2012-09-04\\_02-13-40.pdf](#)

## **Extension Installation**

**We made tests on all major installations and this extension is a fully workable. But It is highly recommended to backup your server files and database before installing this module. It is also recommended you install on a test server initially to carry out your own testing.**

**To install extension follow this steps:**

- 1 Clear the store cache under var/cache and all cookies for your store domain**
- 2 Disable Compilation Mode (if enabled)**
- 3 Log out from Magento Admin panel if you are logged in**
- 4 Unpack the contents of the “extension” folder from the package file to your Magento root directory**

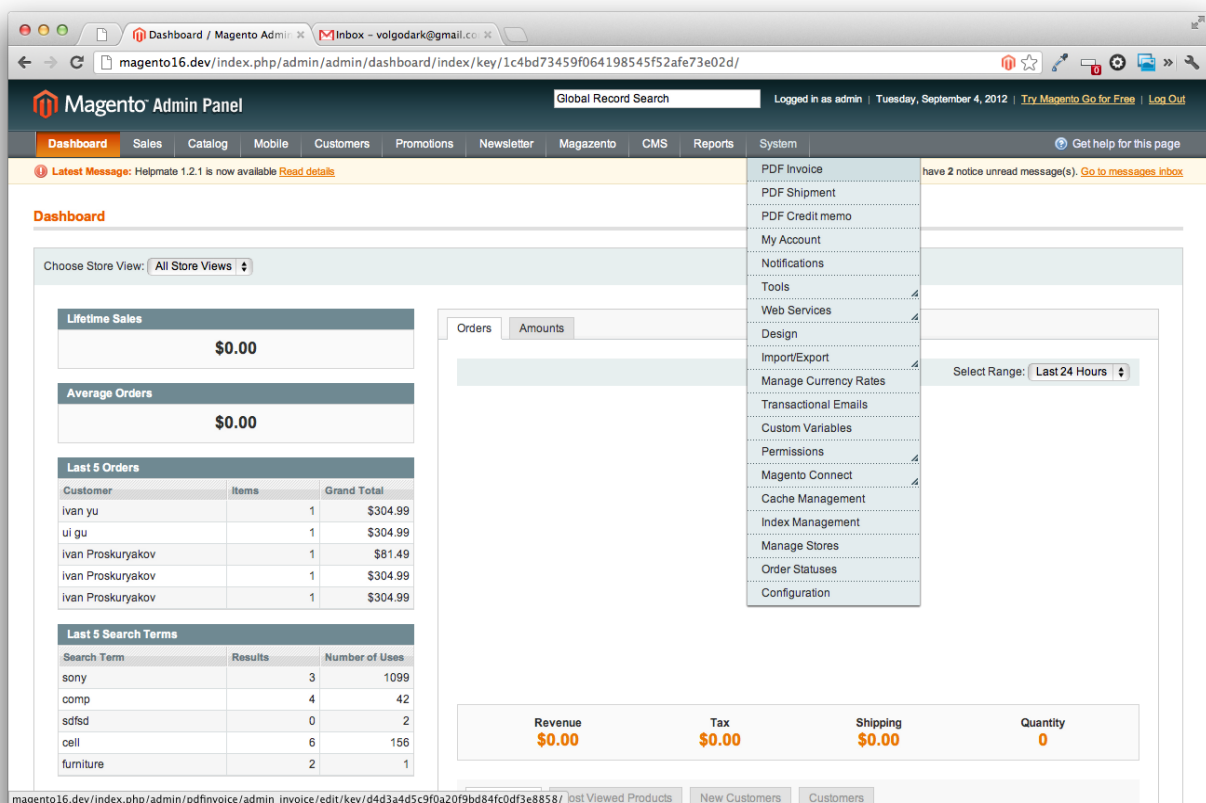
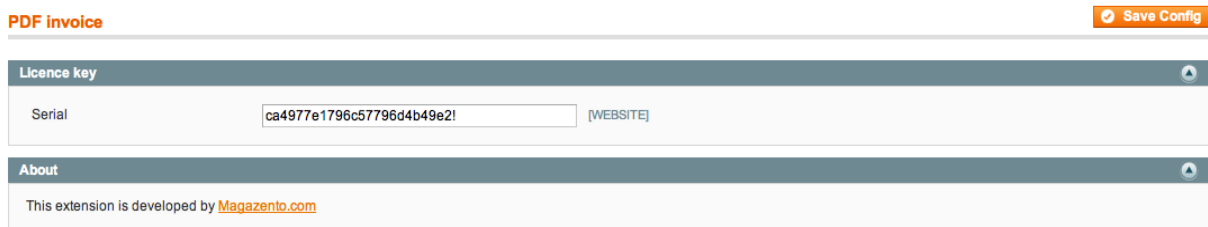
**If you dont use “default” folder as your theme pool directory copy files from app/design/frontend/default/default/ & skin/frontend/default/default to yours**

- 5 Check that magento has permissions to read extensions files.**

- 6 If Cache Control is enabled in Magento go to ‘System > Cache Management’ section, select ‘Refresh’ under ‘All Cache’ drop-down menu and press ‘Save Cache Settings’**

# Extension Usage

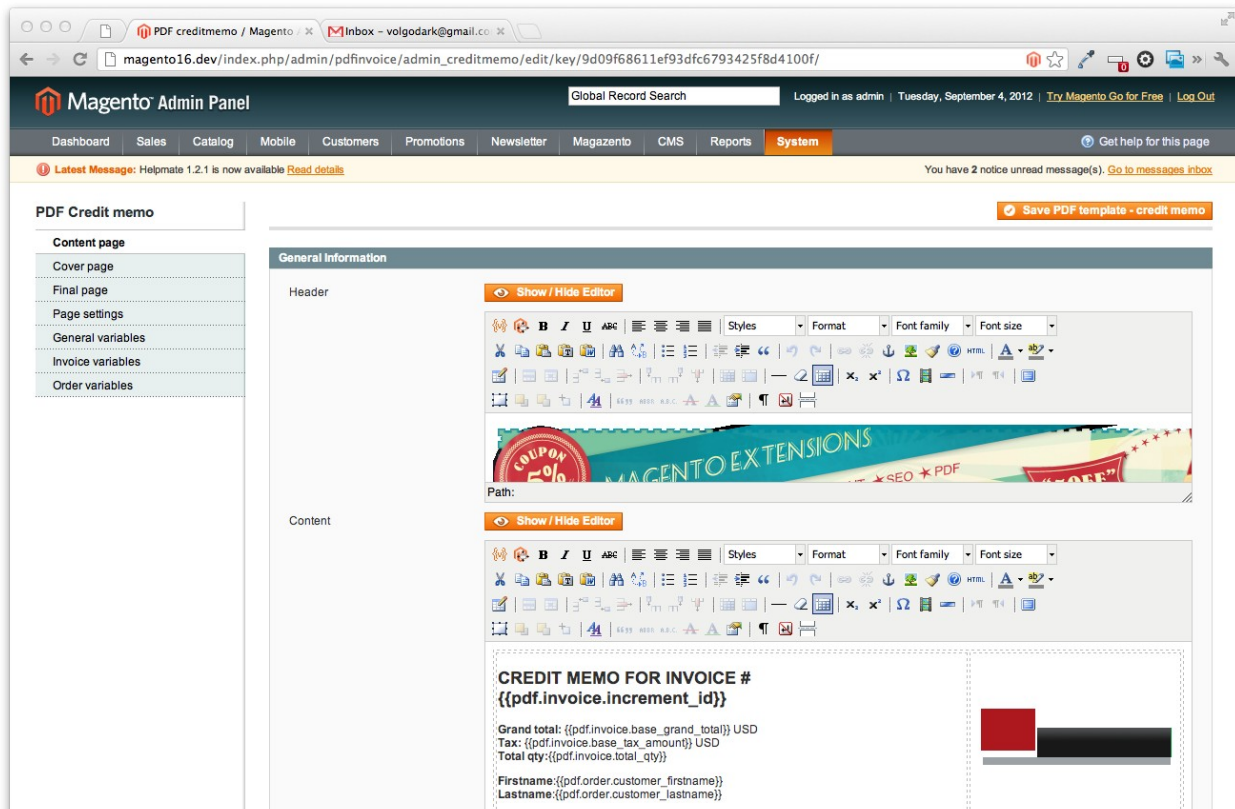
Fist of all check that all extension files and folders uploaded to the right place, after that Log into Magento Admin panel and go to System > Configuration > Magazento.com tab to check that extension is installed. You will need to enter serial key, that you received from US.



## MAGENTO PDF invoice \ shipment\ credit memo

Once extension is installed you can edit templates for your documents. Extension creates new menu items under system tab in Magento admin section.

- PDF invoice
- PDF shipment
- PDF credit memo



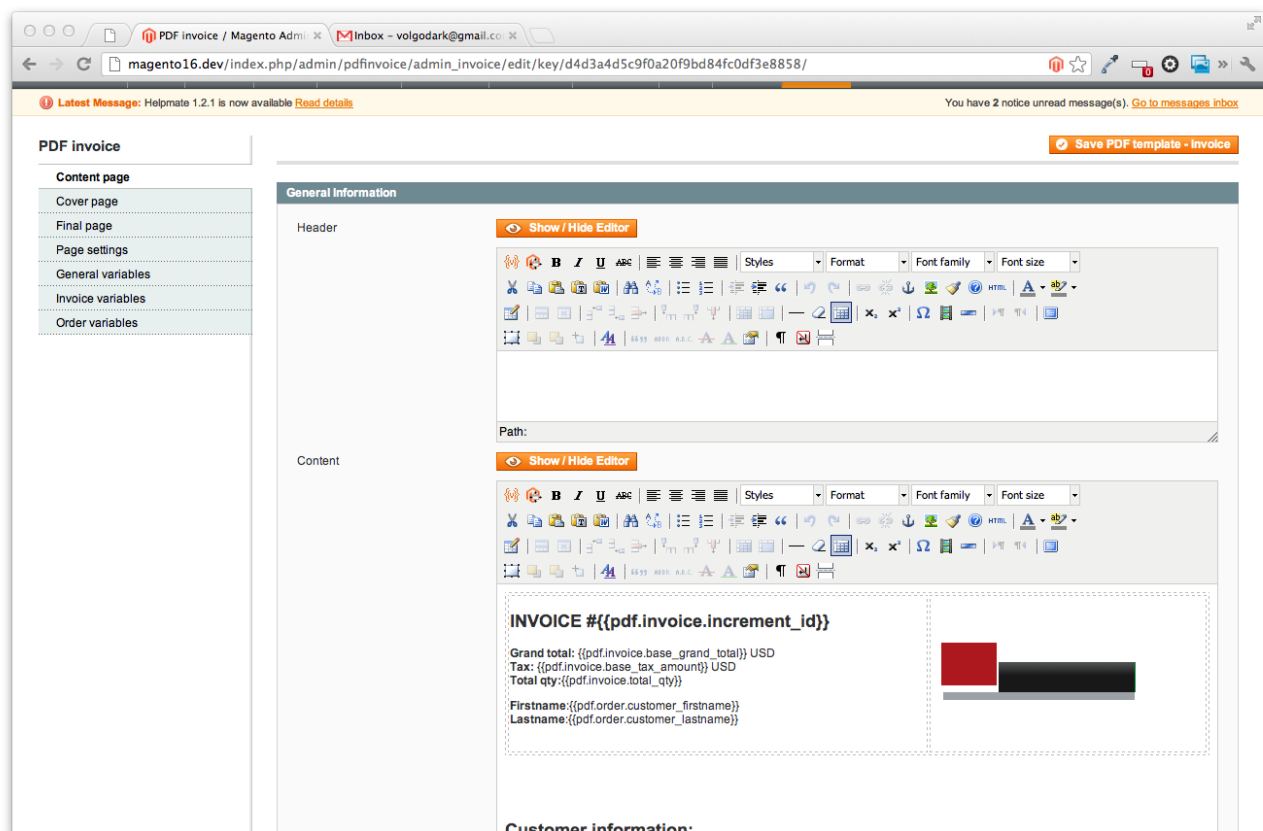
The screenshot displays the Magento Admin Panel interface. The top navigation bar includes the Magento logo, a search bar, and the user's login status. The main menu is visible, with the 'System' tab selected. A sidebar on the left lists various system configuration options, including 'PDF Credit memo'. The main content area shows the 'General Information' section for editing a PDF template. The 'Header' section contains a banner for 'MAGENTO EXTENSIONS' with a 'COUPON 50%' graphic. The 'Content' section is currently empty, showing a 'CREDIT MEMO FOR INVOICE #' template with several variables: `{{pdf.invoice.increment_id}}`, `Grand total: {{pdf.invoice.base_grand_total}} USD`, `Tax: {{pdf.invoice.base_tax_amount}} USD`, `Total qty:{{pdf.invoice.total_qty}}`, `Firstname:{{pdf.order.customer_firstname}}`, and `Lastname:{{pdf.order.customer_lastname}}`. A 'Save PDF template - credit memo' button is located in the top right corner of the editor area.

## MAGENTO PDF invoice \ shipment\ credit memo

Each item contains editors for manual editing. it means you can edit your template directly in Magento backend with built-in Wysiwyg editor. Extension goes with

- PDF cover page
- PDF main page
- PDF final page

For each type of page you can set footer, header and margins as well as page orientation



You can also find General variables, Invoice variables, Order variables tabs. They display variables which you use in your templates. For example if you need to display invoice number - insert **{{pdf.invoice.increment\_id}}**. Full variables list you may find at the end of this manual. Extension also allows to set pdf background and insert your own styles.

# MAGENTO PDF invoice \ shipment\ credit memo

The screenshot shows the Magento PDF invoice template editor. The main area contains a list of variables for the invoice, such as `entity_id`, `status`, `coupon_code`, `shipping_description`, `is_virtual`, `store_id`, `customer_id`, `base_discount_amount`, `base_discount_canceled`, `base_discount_invoiced`, `base_discount_refunded`, `base_grand_total`, `base_shipping_amount`, `base_shipping_canceled`, `base_shipping_invoiced`, `base_shipping_refunded`, `base_shipping_tax_amount`, and `base_shipping_tax_refunded`. Below the variables is a rich text editor with a toolbar and a 'Path' field. On the left side, there are settings for 'Footer', 'Layout', and 'Page margin' (top, right, bottom, left, header, footer).

The screenshot shows the 'General Information' section of the Magento PDF invoice template editor. It includes a 'Background image' section with a 'Choose File' button and a 'Delete Image' option. The 'Css' section contains a list of CSS rules for styling the invoice, including `html`, `body`, `a`, and various `.data-table` classes for tables. The footer of the page includes the Magento version (1.8.0.0) and the Magento logo.

## General future list

Order data access through snippets

- Invoice data access through snippets
- PSD invoices, shipments, credit memos support
- Magento variables support
- Magento static blocks\snippets support
- Generate PDF documents compliant with PDF/A, PDF/X and PDF/SiQ standards
- HTML, text, images support
- Full support for UTF-8
- Multilingual support - English, Português, ไทย, Español, Русский, 한국어, Français, Deutsch, 中文, العربية, etc..

## Invoice features

- PDF invoice goes with Cover, Main and final pages
- Include your own css style for PDF Invoice
- set background image PDF document
- Cover page
  - show\hide header and footer
  - set margins for header and footer
  - set PDF document margins (left, right, top, bottom)
  - set PDF page orientation (portrait or landscape)
- Final page
  - show\hide header and footer
  - set margins for header and footer



## **MAGENTO PDF invoice \ shipment\ credit memo**

- set PDF document margins (left, right, top, bottom)
- set PDF page orientation (portrait or landscape)
- Main content page
- show\hide header and footer
- set margins for header and footer
- set PDF document margins (left, right, top, bottom)
- set PDF page orientation (portrait or landscape)

## **Shipment features & settings**

- PDF shipment goes with Cover, Main and final pages
- Include your own css style for PDF Invoice
- set background image PDF document
- Cover page
- show\hide header and footer
- set margins for header and footer
- set PDF document margins (left, right, top, bottom)
- set PDF page orientation (portrait or landscape)
- Final page
- show\hide header and footer
- set margins for header and footer
- set PDF document margins (left, right, top, bottom)
- set PDF page orientation (portrait or landscape)
- Main content page
- show\hide header and footer
- set margins for header and footer

## **MAGENTO PDF invoice \ shipment\ credit memo**

- set PDF document margins (left, right, top, bottom)
- set PDF page orientation (portrait or landscape)

## **Credit memo features & settings**

- PDF credit memo goes with Cover, Main and final pages
- Include your own css style for PDF Invoice
- set background image PDF document
- Cover page
  - show\hide header and footer
  - set margins for header and footer
  - set PDF document margins (left, right, top, bottom)
  - set PDF page orientation (portrait or landscape)
- Final page
  - show\hide header and footer
  - set margins for header and footer
  - set PDF document margins (left, right, top, bottom)
  - set PDF page orientation (portrait or landscape)
- Main content page
  - show\hide header and footer
  - set margins for header and footer
  - set PDF document margins (left, right, top, bottom)
  - set PDF page orientation (portrait or landscape)

## Invoice snippets

- entity\_id = {{pdf.invoice.entity\_id}}
- store\_id = {{pdf.invoice.store\_id}}
- base\_grand\_total = {{pdf.invoice.base\_grand\_total}}
- shipping\_tax\_amount = {{pdf.invoice.shipping\_tax\_amount}}
- tax\_amount = {{pdf.invoice.tax\_amount}}
- base\_tax\_amount = {{pdf.invoice.base\_tax\_amount}}
- store\_to\_order\_rate = {{pdf.invoice.store\_to\_order\_rate}}
- base\_shipping\_tax\_amount = {{pdf.invoice.base\_shipping\_tax\_amount}}
- base\_discount\_amount = {{pdf.invoice.base\_discount\_amount}}
- base\_to\_order\_rate = {{pdf.invoice.base\_to\_order\_rate}}
- grand\_total = {{pdf.invoice.grand\_total}}
- shipping\_amount = {{pdf.invoice.shipping\_amount}}
- subtotal\_incl\_tax = {{pdf.invoice.subtotal\_incl\_tax}}
- base\_subtotal\_incl\_tax = {{pdf.invoice.base\_subtotal\_incl\_tax}}
- store\_to\_base\_rate = {{pdf.invoice.store\_to\_base\_rate}}
- base\_shipping\_amount = {{pdf.invoice.base\_shipping\_amount}}
- total\_qty = {{pdf.invoice.total\_qty}}
- base\_to\_global\_rate = {{pdf.invoice.base\_to\_global\_rate}}
- subtotal = {{pdf.invoice.subtotal}}
- base\_subtotal = {{pdf.invoice.base\_subtotal}}
- discount\_amount = {{pdf.invoice.discount\_amount}}
- billing\_address\_id = {{pdf.invoice.billing\_address\_id}}
- is\_used\_for\_refund = {{pdf.invoice.is\_used\_for\_refund}}
- order\_id = {{pdf.invoice.order\_id}}
- email\_sent = {{pdf.invoice.email\_sent}}
- can\_void\_flag = {{pdf.invoice.can\_void\_flag}}
- state = {{pdf.invoice.state}}
- shipping\_address\_id = {{pdf.invoice.shipping\_address\_id}}
- cybersource\_token = {{pdf.invoice.cybersource\_token}}
- store\_currency\_code = {{pdf.invoice.store\_currency\_code}}
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- updated\_at = {{pdf.invoice.updated\_at}}
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- invoice\_status\_id = {{pdf.invoice.invoice\_status\_id}}

## MAGENTO PDF invoice \ shipment\ credit memo

- invoice\_type = {{pdf.invoice.invoice\_type}}
- is\_virtual = {{pdf.invoice.is\_virtual}}
- real\_order\_id = {{pdf.invoice.real\_order\_id}}
- total\_due = {{pdf.invoice.total\_due}}
- total\_paid = {{pdf.invoice.total\_paid}}
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- shipping\_incl\_tax = {{pdf.invoice.shipping\_incl\_tax}}
- base\_shipping\_incl\_tax = {{pdf.invoice.base\_shipping\_incl\_tax}}
- base\_total\_refunded = {{pdf.invoice.base\_total\_refunded}}

## Order snippets

- entity\_id = {{pdf.order.entity\_id}}
- state = {{pdf.order.state}}
- status = {{pdf.order.status}}
- coupon\_code = {{pdf.order.coupon\_code}}
- protect\_code = {{pdf.order.protect\_code}}
- shipping\_description = {{pdf.order.shipping\_description}}
- is\_virtual = {{pdf.order.is\_virtual}}
- store\_id = {{pdf.order.store\_id}}
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## MAGENTO PDF invoice \ shipment\ credit memo

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- total\_refunded = {{pdf.order.total\_refunded}}
- can\_ship\_partially = {{pdf.order.can\_ship\_partially}}

## MAGENTO PDF invoice \ shipment\ credit memo

- can\_ship\_partially\_item = {{pdf.order.can\_ship\_partially\_item}}
- customer\_is\_guest = {{pdf.order.customer\_is\_guest}}
- customer\_note\_notify = {{pdf.order.customer\_note\_notify}}
- billing\_address\_id = {{pdf.order.billing\_address\_id}}
- customer\_group\_id = {{pdf.order.customer\_group\_id}}
- edit\_increment = {{pdf.order.edit\_increment}}
- email\_sent = {{pdf.order.email\_sent}}
- forced\_do\_shipment\_with\_invoice = {{pdf.order.forced\_do\_shipment\_with\_invoice}}
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- customer\_email = {{pdf.order.customer\_email}}
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- global\_currency\_code = {{pdf.order.global\_currency\_code}}

## MAGENTO PDF invoice \ shipment\ credit memo

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- hold\_before\_status = {{pdf.order.hold\_before\_status}}
- order\_currency\_code = {{pdf.order.order\_currency\_code}}
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- relation\_child\_id = {{pdf.order.relation\_child\_id}}
- relation\_child\_real\_id = {{pdf.order.relation\_child\_real\_id}}
- relation\_parent\_id = {{pdf.order.relation\_parent\_id}}
- relation\_parent\_real\_id = {{pdf.order.relation\_parent\_real\_id}}
- remote\_ip = {{pdf.order.remote\_ip}}
- shipping\_method = {{pdf.order.shipping\_method}}
- store\_currency\_code = {{pdf.order.store\_currency\_code}}
- store\_name = {{pdf.order.store\_name}}
- x\_forwarded\_for = {{pdf.order.x\_forwarded\_for}}
- customer\_note = {{pdf.order.customer\_note}}
- created\_at = {{pdf.order.created\_at}}
- updated\_at = {{pdf.order.updated\_at}}
- total\_item\_count = {{pdf.order.total\_item\_count}}
- customer\_gender = {{pdf.order.customer\_gender}}
- base\_custbalance\_amount = {{pdf.order.base\_custbalance\_amount}}
- currency\_base\_id = {{pdf.order.currency\_base\_id}}
- currency\_code = {{pdf.order.currency\_code}}
- currency\_rate = {{pdf.order.currency\_rate}}
- custbalance\_amount = {{pdf.order.custbalance\_amount}}
- is\_hold = {{pdf.order.is\_hold}}
- is\_multi\_payment = {{pdf.order.is\_multi\_payment}}
- real\_order\_id = {{pdf.order.real\_order\_id}}
- tax\_percent = {{pdf.order.tax\_percent}}
- tracking\_numbers = {{pdf.order.tracking\_numbers}}
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- hidden\_tax\_refunded = {{pdf.order.hidden\_tax\_refunded}}
- base\_hidden\_tax\_refunded = {{pdf.order.base\_hidden\_tax\_refunded}}

## Extension Troubleshooting

After the extension installation the store gives an error, or blank page, or suggests to start Magento installation procedure.

- > Change the owner of the extracted extension files to the web server user and set 775 permissions on them. Clear the store cache and try again.

There is extension tab under configuration section, or having the extension tab clicked I get a blank page, or *Access Denied* error.

- > Clear the store cache, browser cookies, logout and login again.

I've set up everything correctly, inserted the HTML code but there is nothing on that page.

- > Clear the store cache, clear your browser cache and domain cookies and refresh the page.

My configuration changes do not appear on the store.

- > Clear the store cache, clear your browser cache and domain cookies and refresh the page.



## Extension Uninstallation

You can completely disable extension if you delete `"/app/etc/modules/Magazento_Pdfinvoice.xml"` file or just change `"true"` to `"false"`

```
<?xml version="1.0"?>
<config>
  <modules>
    <Magazento_Pdfinvoice>
      <active>true</active>
      <codePool>local</codePool>
    </Magazento_Pdfinvoice>
  </modules>
</config>
```

## CustomWork with Magento!

As you may know, for now Magento is the superior ecommerce platform, scalable and and full of additional features that the others ecommerce platforms doesn't have. We are focused on the the custom module and additional features development for Magento CMS. We also provide premium web-store development services including design and consulting. For us is not important your business size, does your company big or it doesn't. We will build you your eCommerce business through research with the latest innovations in web-development niche.

If you need need custom development for magento, please do not hesitate to contact us at [service@magazento.com](mailto:service@magazento.com) or <http://www.magazento.com/english/quote>

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