



Pdf Quote for Magento 2

Online Version

An online version of this user manual can be found [here](#).

Demo Store

A demo store is available to trial the settings of this extension:

- Frontend: pdfquote.demo-m2.fooman.co.nz
- Backend: pdfquote.demo-m2.fooman.co.nz/admin

User: demo

Password: demo123

Quick Links

This User Manual is structured in the following sections:

[Install + Set Up \(User Manual\)](#)

2

Install + Set Up (User Manual)

Go to **Stores > Configuration > Sales> PDF Print-outs** to configure your pdf quote in Magento.

Configuration

Search🔍 3🔔 admin👤

Store View: Default Config ⓘ Save Config

GENERAL

CATALOG

CUSTOMERS

SALES

Sales

Sales Emails

PDF Print-outs

Tax

Invoice

Common Pdf Settings

Shipment

Credit Memo

Quote

Quote Settings

Quote

Title

[store view]

Quote

ⓘ Use system value

Show Print Quote Button in Checkout

[store view]

Yes

ⓘ Use system value

Print Quote Button Text

[store view]

Print Quote

ⓘ Use system value

Customer Addresses

[store view]

Both Addresses

ⓘ Use system value

Columns

[store view]

Type	Custom Title	Custom Width	Alignment	Action
Qty			Auti	🗑
Name			Auti	🗑
Sku			Auti	🗑
Row Tot:			Auti	🗑
Add Column				

ⓘ Use system value

Title (v1.0+)

Enter a title for the Quote.

Show Print Quote Button in Checkout (v1.2.5+)

With this setting set to Yes the Print Quote button will not display during checkout on the Payment Step.

Print Quote Button Text (v1.2.5+)

The entered Text will be used for the button that triggers the download of the Quote Pdf.

Customer Addresses (v1.0+)

Which addresses should appear on the pdf? Choose from shipping address, billing address or both. Note that downloadable product orders won't have a shipping address.

You can customise the customer address format by accessing **System > Configuration > Customer Configuration > Address Templates > Pdf**. The | character will be converted into a line break.

Columns (v1.0+)

Add the attributes that you wish to display as columns on your picking list.

Enter the desired relative width of each column or leave this blank if you want to use the default width. Relative column width example: if you had 3 columns and used widths 1, 1 and 2. Then the last column would take up 50% of the available page width.

There is no maximum number of columns to display. However, the more columns you select, the smaller they will become in order to fit on the same page.

Columns
[store view]

Type	Custom Title	Custom Width	Alignment	Action
Item Attributes				
✓ Sku			Auto ▼	
Name				
Position				
Price				
Qty			Auto ▼	
Subtotal				
Subtotal (Excl.)				
Discount				
Row Total				
Tax				
Tax Percentage				
Product Image				▼
Sku Barcode				
Weight				
Row Weight				
Checkbox				

Sort By Column
[store view]

Custom Text
[store view]

?

Sort By Column (v1.0+)

Choose which column to sort your quote by.

Custom Text (v1.0+)

Type any custom text that you want to include on your pdf quotes. You might want to include things like quote terms, further instructions, or a thank you message.

Common Pdf Settings

Next, configure the general pdf settings.

If you use [Fooman Pdf Customiser](#), you will have already set these up.

Common Pdf Settings

Page Settings

Page Size	A4		[GLOBAL]
Page Orientation	Portrait		[GLOBAL]
Top Margin	15		[STORE VIEW]
	in millimeters		
Bottom Margin	25		[STORE VIEW]
	in millimeters		
Side Margins	20		[STORE VIEW]
	in millimeters		

Page Size (v1.0+)

Choose from A4 or letter.

Page Orientation (v1.0+)

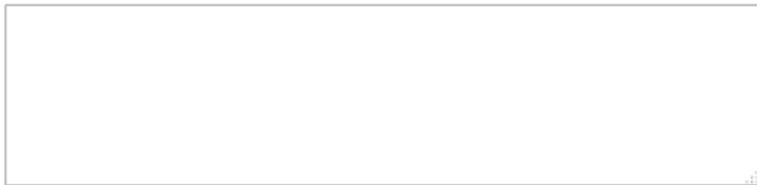
Choose to print pdf's in either portrait or landscape.

Top/Bottom/Side Margins (v1.0+)

Select your preferred top/bottom/side margins in millimetres.

Set the bottom margin large enough to accommodate any footers and the page number. If the bottom margin is set too low, this can result in the footer blocks taking up all available space and there being no room to display the page number.

Footer Block 1



[STORE VIEW]

Footer Block 2



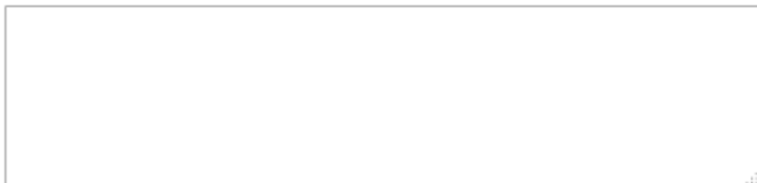
[STORE VIEW]

Footer Block 3



[STORE VIEW]

Footer Block 4



[STORE VIEW]

Footer Blocks 1 – 4 (v1.0+)

You can use up to 4 footer blocks to add custom footer content. The width of the footer blocks will automatically adjust to accommodate 1, 2, 3 or 4 footers in the space available.

You can use simple HTML like `<p></p>`, `<br/>` in these fields.

Footers will start where the bottom and side margins are set. For example, if the bottom margin is set to 5, the footer will start at 5 cm above the bottom of the page. Make sure the bottom margin is large enough if you have a lot of text in the footers.

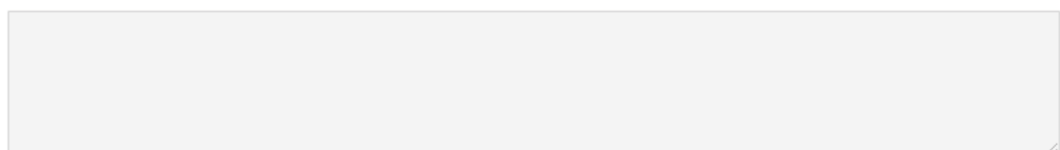
Store Address (v1.0+)

Enter your store's address as you would like it to appear in the pdfs. This field can also be used for free text and store address is only a suggested use.

Background image
[store view]

Choose file No file chosen

Store Address
[store view]



Order Comments
[store view]

No



Background Image (v1.0+)

Upload an image that will be used as a background to the pdfs. Images will be scaled (but not distorted) to fit the page.

Store Address (v1.0+)

Enter your store's address as you would like it to appear in the pdfs. This field can also be used for free text and store address is only a suggested use.

Order Comments (v1.0+)

When set to Yes, comments inputted under Sales > Orders > Comment History will be added to the pdf (the comments you see in the back-end order view history):

#100000080

ORDER VIEW

Information

Invoices

Credit Memos

Shipments

Comments History

Dec 6, 2016, 10:41:00 PM 10:41:00 PM | Pending | Customer **Notified**

Notes for this Order

Font and Barcode Settings

Font	Helvetica	?	[STORE VIEW]
Base Font Size	12	?	[STORE VIEW]
Barcode Type	CODE 39 EXTENDED + CHECKSUM	?	[STORE VIEW]
Please make sure the barcode type is appropriate for the content or the pdf generation might fail (Default: CODE 39 EXTENDED + CHECKSUM).			
Display Tracking Number as Barcode	Yes	?	[STORE VIEW]

Font (v1.0+)

- System fonts (Helvetica, Times and Courier) offer the largest potential pdf size reduction (up to 95%), but might not show all international characters (see Troubleshooting)
- Dejavu fonts offer broader international character support (UTF-8), but do not offer the same pdf size reduction as system fonts
- Use the Arial fonts for Chinese, Korean or Japanese markets where the Adobe character package is widely installed. This option also offers up to 90% potential pdf size reduction.

Base Font Size (v1.0+)

Change the size of the base font.

- Headings will be scaled to 150% of the base font
- Line items will be automatically scaled to 80% of the base font, when the base font size is set to 12 or higher.

Barcode Type (v1.0+)

If you have chosen to show barcodes under the “Columns” setting for each pdf (Order/Invoice/Shipment/Credit Memo), choose how barcodes will be displayed. The default setting is CODE 39 EXTENDED + CHECKSUM. Ensure that you select the correct barcode type for the SKU you are using, or pdf generation could fail.

Display Tracking Number as Barcode (v1.0+)

When set to "Yes", the shipping tracking number will be displayed as a barcode in the shipping section of the pdf.

Logo Settings

Logo for the Pdf

No file selected.



Logo Placement

left



Logo for the Pdf (v1.0+)

Upload your logo as a gif, jpeg or png file. A good size is 700 pixels wide and 300 pixels high.

Placement of the Logo (v1.0+)

- Right – the logo will be positioned in the top right corner, scaled to measure 2.5cm high (with width scaled accordingly, depending on the shape/size of the file)
- Left – the logo will be positioned in the top left corner, scaled to measure 2.5cm high

(with width scaled accordingly, depending on the shape/size of the file)

Miscellaneous

Open in Browser	Yes		[GLOBAL]
Display Quantity as full number	Yes	 	[STORE VIEW]

Open in Browser (v1.0+)

When set to Yes, pdf documents will be send to the browser for display, if set to no the file will be sent to the browser for download.

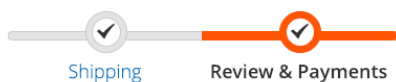
Display Quantity as Full Number (v1.0+)

When set to Yes, quantities will be displayed as a full number (eg. 1.0000 units will be displayed as 1 unit). This is the recommended default setting.

When set to No, quantities will be displayed as a partial number (eg. 1.9500 units).

How to create a quote pdf

1. Customers need to go through the order process and complete the checkout fields
2. At the final checkout step, the customer should select "Print Quote" instead of placing their order
3. The Pdf quote will be downloaded.



Payment Method:

Check / Money order

☒ My billing and shipping address are the same

Test Order
Testing Street
Test City, 12345
New Zealand
1234

[Print Quote](#)[Apply Discount Code](#) ▼[Place Order](#)

Order Summary

Cart Subtotal	\$428.23
Shipping	\$10.00
Flat Rate - Fixed	

Order Total	\$438.23
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2 Items in Cart	▼
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Ship To:

Test Order
Testing Street
Test City, 12345
New Zealand
1234

Shipping Method:

Flat Rate - Fixed

Do I need to download and install Pdf Customiser separately?

No - Pdf Quote (Magento 2) works independently of Fooman Pdf Customiser. You only need to download the Pdf Quote extension. If Pdf Customiser is also installed they will share common pdf settings and the pdfs will look consistent for all pdfs.

Reporting Any Issues/Bugs

We are proud of our quality extension code - it's been widely tested and we stand by it 100%. If something does happen and you think you might be experiencing an issue or bug, please contact us via support@fooman.co.nz and we will help you out.