

# **Reports to PDF for Magento**

## **User Guide**

version 1.0

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## 1. Introduction

### 1.1. Purpose

This document is a **User Guide** for **Reports to PDF for Magento**. It describes how work with the extension.

**Reports to PDF for Magento** is built in Magento's defaults reports thus allowing you to export all types of reports to PDF in addition to standard Magento options.

The PDF outputs can be set to look the way you need, there can be watermarks added, title and additional information. You can also select the size of the output and its orientation.

## 2. Installation and License

### 2.1. Installation

All our Magento extensions and templates are installed via **IToris Installer**.

Download **IToris Installer** from here <http://www.itoris.com/itoris-magento-installer.html> and un-pack to the root of your website. It will then appear in menu **System → IToris extensions → IToris Installer**.

Open it and you will see all our Magento Extensions and Templates, both installed and available. You can install, update and un-install them with one click now.

Find **Reports to PDF** in the list of extensions and press **Install** button. Enter the license key and confirm installation.

### 2.2. Update

When a new release of **Reports to PDF** is available – open **IToris Installer** in admin area, find **Reports to PDF** box and press **Update** icon. The extension will be automatically undated.

### 2.3. License

**Reports to PDF** is single-domain. One license allows to install the extensions on one domain or sub-domain or localhost only.

You can switch the license from one domain to another. To do it login to <http://www.itoris.com> using the credentials you will receive together with the license. Go to **My Downloads** area and reset you license from the current domain there. Then use it again as described in 2.1. chapter to activate the extension on another domain.

## 3. How to Use

### 3.1. Settings. General

Open **Reports to PDF** in admin area (**System → IToris extensions → Reports2Pdf**). Here settings for all Magento reports can be created.

On the left you will see the list of all reports' types available in Magento. Each report type can be set in a different way depending on your needs.

The screenshot shows the Magento Admin Panel interface. At the top, there's a navigation bar with tabs for Dashboard, Sales, Catalog, Customers, Promotions, Newsletter, CMS, Reports, and System. Below this is a message bar indicating the latest message and the number of unread messages. The left sidebar is titled 'Report Types' and has a tree view with 'SALES' selected. Under 'SALES', there are sub-items: Orders, Tax, Invoiced, Shipping, Refunded, and Coupons. The main content area is titled 'Sales Orders Report Settings' and has buttons for Back, Reset, and Save. It contains two sections: 'General Settings' and 'Header settings'. The 'General Settings' section has fields for Page Size (A4 (210x297 mm)), Page Orientation (Album, Portrait), Apply Cross-page Watermarks, and Watermark Image. The 'Header settings' section has fields for Display Header, Font Size (12 points), and Header Content.

Switch reports on the left pane and set them.

### 3.2. Settings. What can be set

You can add the following settings to each report type:

#### General settings

**Page size:**

- A4
- A3
- Letter
- Envelope

**Page orientation:**

- Album
- Portrait

Apply cross-page Watermarks (and ability to upload the image for watermarks)


#### Header settings

**Display header:**

Select if you wish a header on the PDF output

**Font size:**

If yes – select the header's size

 **Sales Orders Report Settings**

[Back](#) [Reset](#) [Save](#)

**General Settings**

Page Size \*

A4 (210x297 mm)

Page Orientation \*

☐ Album ☒ Portrait

Apply Cross-page Watermarks

☐

Watermark Image

[Browse...](#)

**Header settings**

Display Header

☐

Font Size

12 points


Header Content


▲ Insert Variable : -- available variables --▼

**Body settings**

Body Content \*

Show / Hide Editor

**B** **I** **U** **ABC** |  | **Styles** | **Paragraph** | **Font family** | **Font size**



Report Name

Report Time

From

To

Match Period To

Period

Order Status

Empty Rows

Show Actual Values

Show Report For

Path: p

▲ Insert Variable : -- available variables --▼

**Footer settings**

Display Page Number

☐

**Header content:**

Enter the header's text. You can also include variables in the header. The available variables are:


Header Content

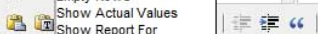
▲ Insert Variable : -- available variables --▼

Body settings

Body Content \*

Show / Hide Editor

**B** **I** **U** **ABC** |  | **Styles** | **Paragraph** | **Font family** | **Font size**



Report Name

Report Time

From

To

Match Period To

Period

Order Status

Empty Rows

Show Actual Values

Show Report For

Path: p

▲ Insert Variable : -- available variables --▼

Please, visit us at: <http://www.itoris.com> or contact directly by email: [sales@itoris.com](mailto:sales@itoris.com)

Variables in real reports will be substituted with their data. E.g. if you select Report Time variable – the time the report has been generated will be displayed. The parameters you set in defaults Magento reports are used as variables in PDF reports.

### Body settings

#### **Body content:**

Organize the display of the report's body. Here you can also insert the variables.

### Footer settings

#### **Display Page Number**

Select if the report should have page numbers

## 3.3. Reports Generating

To generate a PDF report go to standard Magento reports area, set the standard parameters, choose **export to PDF** and press **Export** button. The report will be generated and exported in PDF.

Magento Admin Panel

Global Record Search

Logged in as admin | Wednesday, November 24, 2010 | [Log Out](#)

Dashboard Sales Catalog Customers Promotions Newsletter CMS **Reports** System

**Latest Message:** Magento CE Version 1.4.2.0-RC1 Preview Release Now Available [Read details](#) You have 1 critical, 4 major, 19 minor and 16 notice unread message(s). [Go to messages inbox.](#)

**Most Viewed**

Show Report For: All Websites

From: 08/24/10 To: 11/24/10 Show By: Month Refresh

Export to: PDF CSV Excel Export

Period	Product Name	Price	Views
08/2010	No records found for this period.		
09/2010	CN Clogs Beach/Garden	\$15.99	11