

BestPDF

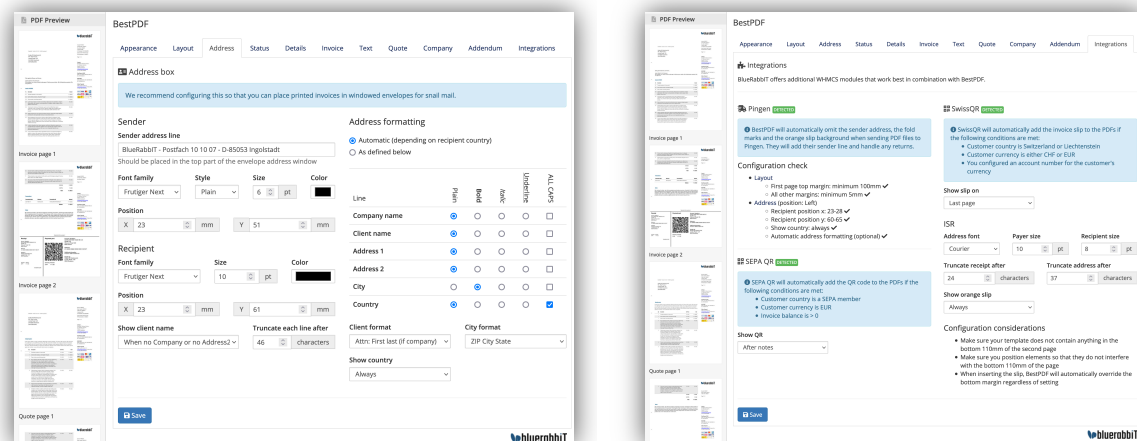
Addon for WHMCS

Version 2.18.0 – 2024-09-16

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Introduction

Thank you for purchasing this WHMCS addon. Please read this document for installation instructions. Should you have any questions, please contact us via our ticket system in our client area at <https://my.bluerabbit.solutions>



Features

- Generate elegant PDF invoices
- Use PDF template files for high quality output
- Embed your company logo
- Upload custom TrueType fonts
- HTML rendering support
- RTL support
- Highly customizable with over 240 configuration parameters
- Support for BlueRabbit Pingen.com module
- Support for BlueRabbit Swiss QR/ISR module
- Support for BlueRabbit SEPA QR module

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Disclaimer

We are not liable for any damage or loss in revenue caused by this software. If you do not agree with this, please do not use this software.

Requirements

- WHMCS 8.0 or newer (last tested with 8.8.0)
- ionCube Loader 11 or newer
- PHP 7.4 or 8.1
- PHP FileInfo, intl and mbstring extensions
- PHP memory_limit 256M or greater (512M recommended)
- ImageMagick, GraphicsMagick or Poppler recommended

Prerequisites

PHP Extensions

You need the PHP **intl** and **fileinfo** extensions. On most systems, they are already active.

For Debian / Ubuntu based systems: `sudo apt install php-intl php-fileinfo php-mbstring`

For Redhat / CentOS based systems: `sudo yum install php-intl php-fileinfo php-mbstring`

For cPanel:

- Login as admin
- Under the “Software and Service” section, click on “Select PHP Version”
- Ensure that “intl” and “fileinfo” are checked and save

For Plesk:

- Login as admin
- Under “Tools & Settings”, click on “PHP Settings”
- Click on the version you are using
- Ensure that “intl” and “fileinfo” are checked and save

System Locales

For the automatic formatting of currencies and locales to work properly, on Linux-based systems it is necessary to have the corresponding locales installed. Otherwise, PHP will fall back to US format.

On Debian/Ubuntu systems for example, to install additional locales type:

`sudo dpkg-reconfigure locales`

and select the desired locales.

Installation

1. Copy the contents of **modules/** to your WHMCS **modules/** folder.
2. Proceed with the Configuration chapter.
3. Proceed with the Customization chapter.
4. Proceed with the Activation chapter.

Upgrade from v2.x

1. Copy the contents of **modules/** to your whmcs **modules/** folder, overwriting existing files.
2. Open the BestPDF addon to trigger the update procedure
3. Check the language files in the **modules/addons/bestpdf/lang/** folder. If you want to customize anything, create a language file in **modules/addons/bestpdf/lang/overrides/** that contains the modified strings.

Upgrade from v1.x

4. Delete your **modules/addon/bestpdf/vendor/** directory.
5. Copy the contents of **modules/** to your whmcs **modules/** folder.
6. **IMPORTANT:** Open the BestPDF addon, this will trigger the automatic upgrade procedure.
7. Take your time to familiarize yourself with the new configuration interface.
8. Double check that your invoices still look the way they should.

Configuration

WHMCS Addon Configuration

1. Go to Setup > Addon Modules
2. Find “Best PDF” and click on “Activate”
3. Click on “Configure”

The following configuration parameters are available:

- *License Key*
Insert your BestPDF license key here. If you are using our Pingin or Swiss QR/ISR modules, you can use the license of those products.
- *Access control*
Make sure you grant access to the addon to the appropriate staff groups.

When saving, make sure the license status says “Active”.

BestPDF Addon Configuration

Open the Addon from Addons > BestPDF. You will see a tabbed interface for configuring the addon.

General

Invoices & Quotes

Here you can configure the addon to automatically check if the invoicepdf.tpl and quote.pdf.tpl template files point to BestPDF. A common scenario is that updating the template would overwrite those files and effectively deactivate BestPDF.

You can also enable automatic fixing of the template files, so that BestPDF continues working.

Date format

Choose whether to use the WHMCS setting for date formatting, or if to format automatically according to the client’s country and language.

Preview thumbnails

BestPDF supports ImageMagick, GraphicsMagick and Poppler for generating preview thumbnails. Select the mode you prefer and specify the path to the binary. Typically, for ImageMagick and GraphicsMagick it is ‘convert’ and for Poppler it is ‘pdftoppm’.

Most Linux distributions offer packages for either one of these utilities. Here are some example commands for the most common distributions:

CentOS / RedHat-based:

Install the required package with any of these commands, depending on which one you want to use:

```
sudo yum install poppler-utils  
sudo yum install ImageMagick ghostscript
```

Ubuntu / Debian-based:

Install the required package with any of these commands, depending on which one you want to use:

```
sudo apt install poppler-utils  
sudo apt install imagemagick ghostscript  
sudo apt install graphicsmagick ghostscript
```

Error handling

The behavior on errors can be configured here. Either have BestPDF fallback to the parent template (and thus classic WHMCS PDF rendering) or throw the error.

A common error might be an expired BestPDF license.

Data path

Here you can specify a full path for the BestPDF data directory. By default, the directory is just the module's directory. However, we recommend specifying a separate directory outside of the WHMCS root. This keeps the files safer and especially makes upgrades easier, allowing you to delete and reupload the BestPDF module without losing any files.

Appearance

Logos

Upload your company logo and specify the position it should be placed in.

Templates

Here you can upload your PDF templates that are to be used as background.

See the next chapter for details on creating suitable PDF files.

Fonts

Upload your own custom TrueType fonts, which can then be selected throughout the configuration.

Layout

Here you can specify page margins, the appearance of titles and of tables.

Address

This covers everything that goes into the address box on the first page of the invoice or quote.

If you happen to send invoices per mail in windowed envelopes, be sure to position the box properly. We also recommend enabling the automatic address formatting, especially if you have international customers.

Status

Everything that has to do on where and how to display the invoice status is covered on this page.

Details

The contents and styling of the Details box can be configured here.

Invoice

This covers the specifics of invoices.

Quote

This covers the specifics of quotes.

Text

Here you can configure flexible text to be displayed on all invoices.

Company details

While you can include your company details in the PDF templates, you can also configure them here.

The field also supports Smarty syntax with the merge fields provided, similar to WHMCS e-mail templates.

Addendum

Here you can specify whether to append a specific PDF file or a page with specific Text to each generated document. This could be useful to add stuff like promotions or instructions.

Integrations

Pingen

If you have the BlueRabbit Pingen module installed, BestPDF will detect this and check if your configuration validates against the Pingen service requirements.

When sending invoices to Pingen.com, BestPDF will make some adjustments automatically, like omitting the sender address in the address window.

SEPA QR

If you have the BlueRabbit SwissQR module installed, BestPDF will detect this and show some additional configuration options to customize your QR/ISR payment slips.

SwissQR

If you have the BlueRabbit SEPA QR module installed, BestPDF will detect this and show an additional configuration option to determine where you want the QR code to show up.

Activation

When you are satisfied with how the preview invoice and quote look, follow these steps.

If you are using the WHMCS Six or TwentyOne templates:

1. In the WHMCS Admin Area, go to **System Settings > General Settings**
2. Change the System Theme to **BestPDF-6** or **BestPDF-21**, respectively

To switch back to your original WHMCS invoice/quote templates, change the System Theme back to what it was before.

If you are using your own template:

1. Backup the **invoicepdf.tpl** and **quotepdf.tpl** files from your whmcs template.
2. Copy those two files from **templates/bestpdf-six/** or **templates/bestpdf-twenty-one/** (depending if your template is based on WHMCS Six or TwentyOne) from this addon's archive to your whmcs template or child template.

You can always switch back to your original WHMCS invoice/quote templates by restoring the backed up tpl files.

Customization

While BestPDF supports using a simple image file as your company's logo, we recommend using the PDF template approach for better quality results.

In PDF template mode, BestPDF will use a PDF template you provide and draw the invoices on top of it. This allows you to place your logo, company details or any other static information where you want, directly in the template file.

We have provided some examples for you in the *examples/* folder, but basically you should create your own template.

It is important to follow the following criteria for creating a template:

- The PDF format should be PDF specification 1.4, not greater than that.
In Adobe Acrobat for example, you should save the file as **PDF/A-1b**.
- Upload the template via the BestPDF configuration interface.

BestPDF will load the template and draw on it based on configuration. Make sure that margins and positions are set accordingly in the module configuration, so that the end result looks nice 😊

Your PDF template file should consist of one or two pages:

- Page 1: Empty room for the customer address (mailing envelope window).
- Page 2: If this page is present, it will be used for pages 2-n, else the first page will be used.

In case you are using BestPDF in conjunction with the BlueRabbit Pingin or Swiss QR/ISR modules, make sure to read that respective module's documentation for additional considerations concerning PDF templates.

Localization

PDF invoices and quotes are fully localized. Most of the translations are in the WHMCS language files, but we had to add some of our own, which you can find in the `modules/addons/bestpdf/lang/` directory.

If you want to modify the language files that ship with BestPDF, we strongly recommend that you use an override file instead, see `modules/addons/bestpdf/lang/overrides/example.php`. It works the same way as WHMCS's language overrides.

Localized tax names

Tax names can be localized in the module's language files.

See `modules/addons/bestpdf/lang/overrides/english.php` for more details.

Localized date formats

Date formats can be localized in the module's language files, using the php strftime syntax.

See `modules/addons/bestpdf/lang/overrides/example.php` for more details.

Changelog

Version 2.18.0 – 2014-09-16

- WPDF-224 Add WHMCS 8.11 and PHP 8.2+8.3 compatibility
- WPDF-225 Update to FPDF 2.6.1
- WPDF-227 Added option to show tax lines even when rate is at 0%
- WPDF-228 Add tax rate option to the merge fields for text
- WPDF-226 Fix client full date format handling for some regions

Version 2.17.1 – 2024-03-25

- WPDF-221 Make status width configurable
- WPDF-222 Fix editor not showing all configured buttons
- WPDF-223 Fix custom fields on quotes ignoring “show on invoice” setting

Version 2.17.0 – 2024-01-15

- WPDF-210 Add option to add quantity/unit price columns to invoice items table
- WPDF-212 Swiss ZIP no longer has CH prefix
- WPDF-213 Add absolute positioning option for SEPA QR module
- WPDF-214 Show module version in addon footer
- WPDF-216 Always show country in address box for Pingen
- WPDF-219 Update to FPDF 2.6.0
- WPDF-211 Show custom fields in quotes
- WPDF-215 Fix autofix being always enabled
- WPDF-217 Fix issues when client has billing contact other than default
- WPDF-220 Improve error handling when BestPDF is called but disabled

Version 2.16.0 – 2023-10-24

- WPDF-202 Add fallback option in case of errors
- WPDF-203 Add options to check and autofix templates
- WPDF-209 Add option to make first line item descriptions bold
- WPDF-208 Refactored date parsing to make it more reliable
- Update to FPDF 2.5.0

Version 2.15.4 – 2023-06-26

- WPDF-204 Fix pagination with own templates on WHMCS < 8.1.1
- WPDF-205 Make handling of language overrides more failsafe
- WPDF-206 Fix quote without client failing to generate when credit or account summary are enabled
- WPDF-207 Fix license check fallback mode

Version 2.15.3 - 2022-11-28

- WPDF-199 Fix trimming breaking some UTF8 strings (now requires mbstring extension)
- WPDF-200 Fix payment method shown in quote details box
- WPDF-201 Fix payment slip unnecessarily initialized for quotes

Version 2.15.2 - 2022-11-07

- WPDF-198 Bundled encoding for easier PHP version transition

Version 2.15.1 - 2022-10-20

- WPDF-195 Client total due now takes transactions into account
- WPDF-196 Fix showing thumbnail error on save when thumbnails are disabled

Version 2.15.0 - 2022-09-19

- WPDF-187 Improved performance
- WPDF-188 Add ability to show total amount due in account on invoice summary
- WPDF-189 Add ability to show credit balance on invoice summary
- WPDF-191 Add compatibility for new BlueRabbit SwissQR v5 addon
- WPDF-192 Add compatibility for WHMCS v8.6
- WPDF-193 Add compatibility for PHP 8.1
- WPDF-186 Fix overdue status wrongly shown for DD/MM/YYYY date format

Version 2.14.0 - 2022-05-11

- WPDF-181 Add option to include product descriptions in invoice items
- WPDF-182 Add option to strip empty product custom fields from invoice items
- WPDF-185 Add option to show transactions on next page
- WPDF-183 Fix some settings not replicating correctly in Details tab
- WPDF-184 Avoid empty client name line

Version 2.13.1 - 2022-02-02

- WPDF-179 Fix margin handling for new details box alignment options
- WPDF-180 Fix margin handling for SEPA QR slip style output

Version 2.13.0 - 2022-01-31

- WPDF-166 Show actual errors when generating thumbnails fails
- WPDF-167 Added several new variables available as mergefields
- WPDF-170 New option for SEPA QR positioning in SwissQR style (requires SEPAQR v1.2+)
- WPDF-171 Add option not to show page label
- WPDF-172 Add alignment options for detail box fields
- WPDF-173 Add option to show page numbers at page horizontal center
- WPDF-174 Configurable label suffix for details box
- WPDF-175 Option to configure printability of SwissQR slip (requires SwissQR v4.9+)
- WPDF-176 Option to show notes before transactions
- WPDF-177 Add payment method option to details box
- WPDF-168 Fix license validation doing unnecessary checks
- WPDF-169 Fix thumbnail bin showing as not executable on some systems

Version 2.12.0 - 2022-01-10

- WPDF-162 Add option to skip company info on page with SwissQR slip
(requires SwissQR addon version 4.8 or greater)

- WPDF-163 Show proper error message when required PHP extensions are missing
- WPDF-164 Improve error handling when generating thumbs
- WPDF-165 Improve tolerance in config handling

Version 2.11.0 - 2021-11-29

- WPDF-150 Improve configuration handling
- WPDF-154 Add ability to configure data path
- WPDF-155 Warn if WHMCS is not compatible on upgrade
- WPDF-157 Show if thumb binary is found and executable
- WPDF-159 Allow to use templates and logos at the same time
- WPDF-161 Add ability to embed font subsets – does not work with all ttf fonts
- WPDF-160 Restore WHMCS 7.5+ compatibility – PHP 7.2+ still required though
- WPDF-156 Fix handling of negative x position in summary
- WPDF-158 Fix not able to deactivate transaction table header borders

Version 2.10.0 - 2021-11-22

- WPDF-131 Render HTML in invoice/quote items and text
- WPDF-139 Honor Notes x position when below summary
- WPDF-140 Date formatting is now configurable
- WPDF-141 Code is PSR12 compliant
- WPDF-142 Optional regex filter for line items
- WPDF-145 Ship template files in child templates
- WPDF-146 Implement automated code quality checks
- WPDF-148 Implement support for RTL languages
- WPDF-138 Fix tax label not working in quotes
- WPDF-143 Fix licensing check issues
- WPDF-144 Fix preview not adhering to WHMCS date formatting
- WPDF-151 Fix handling of negative x position in summaries
- WPDF-152 Fix date formatting not being applied to all dates
- WPDF-153 Fix font upload not working on some environments
- WHMCS 8.0 is now the minimum required version

Version 2.9.0 - 2021-06-11

- WPDF-134 Add option to display invoice line item number
- WPDF-133 Fix importing PDF template might show slight right and bottom margin
- WPDF-135 Fix wrong invoice generation date with some locales
- WPDF-136 Fix notes text background not being transparent

Version 2.8.0 - 2021-04-06

- WPDF-102 Fonts get automatically reinstalled if necessary
- WPDF-113 Add paper fold marks for both A4 and Letter formats
- WPDF-128 Use client localized short date format
- WPDF-130 Maintain original font names for better readability
- WPDF-129 Fix blank page being added in seldom cases

Version 2.7.2 - 2021-02-15

- WPDF-125 Fix number formatting in quotes being inconsistent
- WPDF-126 Fix clients with default locale getting wrong number formatting
- WPDF-127 Updated FPDF libraries to version 2.3.6

Version 2.7.1 - 2021-02-01

- WPDF-124 Add support for tax rates with three decimals
- WPDF-123 Fix currencies without decimals showing decimals

Version 2.7.0 - 2021-01-25

- WPDF-103 Configurable invoice message to show on all invoices
- WPDF-104 Configurable additional notes text to show on all invoices
- WPDF-105 Add support for our new SEPA QR module
- WPDF-118 Ability to configure separate table header options for invoice summary
- WPDF-112 Improve template rendering error handling
- WPDF-120 Fix regression requiring PHP 7.3 – 7.1 is now again the minimum version
- WPDF-121 Fix quote generation failing if summary transactions show is set to always
- WPDF-122 Fix some third party modules injecting tabs into GUI

Version 2.6.0 - 2021-01-04

- WPDF-96 Implemented addendum functionality
- WPDF-97 Pass custom invoice number to SwissQR 4.7+
- WPDF-98 Added template examples for WHMCS 8.1 twenty-one theme
- WPDF-101 Updated FPDF libraries to version 2.3.5
- WPDF-100 Fix company info escaping issue in WHMCS v8

Version 2.5.0 - 2020-10-06

- WPDF-89 Added support for WHMCS v8 language parameter
- WPDF-91 Implemented bottom margin p2+ setting
- WPDF-94 Updated FPDF libraries to version 2.3.4
- WPDF-90 Reduced memory consumption when handling logo images
- WPDF-92 Fixed some localizations producing errors on manual e-mail send
- WPDF-93 Fixed tax rate number not being localized

Version 2.4.0 - 2020-08-31

- WPDF-81 Fallback to standard font when custom font cannot be loaded
- WPDF-82 Implemented localized price formatting
- WPDF-83 Company details now can draw outside margins
- WPDF-87 Adapted sidebar styling to WHMCS v8
- WPDF-88 Company info can now show translation strings using \$lang variable
- WPDF-84 Fixed wrong invoice status with localized date formats
- WPDF-85 Fixed invoice generation date not being localized
- WPDF-86 Fixed paid date not being shown in invoice details

Version 2.3.0 - 2020-07-13

- WPDF-21 Date format can now be localized via language files
- WPDF-79 Added “never” option for displaying subtotal
- WPDF-80 Tax names can now be localized via language files

Version 2.2.2 - 2020-07-01

- WPDF-74 Added instructions for enabling required PHP extensions
- WPDF-75 Fallback to logo mode if template mode is set without templates
- WPDF-76 Fixed large logo files corrupting pdf file on some systems
- WPDF-77 Fixed file corruption when using certain custom fonts

Version 2.2.1 - 2020-06-01

- WPDF-68 Case conversion with special characters now works correctly
- WPDF-69 Fix “Show credit when > 0” not working for currencies with prefix
- WPDF-70 Integration page now takes Pingin Address Position setting into account
- WPDF-71 Fixed language files not always loading correctly
- WPDF-72 Fixed overdue status not set when past due date but no overdue notice yet
- WPDF-73 Updated FPDF libraries to version 2.3.3

Version 2.2.0 - 2020-04-14

- WPDF-60 Added “show on last page” option to company details
- WPDF-61 Added option to not show transactions in summary
- WPDF-63 Improved Pingin configuration check
- WPDF-64 Implemented invoice overdue status and show invoice overdue message
- WPDF-66 Removed no longer necessary USA country name workaround for Pingin module
- WPDF-67 Updated FPDF libraries to version 2.3.2
- WPDF-62 Fixed transaction amount in summary not always being correct
- WPDF-65 Fixed company info editor stripping html attributes on save

Version 2.1.0 - 2020-03-21

- WPDF-44 Added Client VAT to details box
- WPDF-25 Company info now supports Smarty syntax
- WPDF-58 Company info now uses tinymce WYSIWYG editor
- WPDF-59 Implemented automatic international address formatting
- WPDF-50 Added option to make white background transparent in tables
- WPDF-52 Added option to add empty line before last summary line
- WPDF-45 Improved error handling on file upload
- WPDF-54 Show error if thumbnail generation fails
- WPDF-57 Column widths automatically adjust to sum 100% on save
- WPDF-48 Company info no longer page breaks when hitting margin
- WPDF-47 Fixed table borders being too thick
- WPDF-49 Fixed summary layout in position mode

Version 2.0.1 - 2020-03-19

- WPDF-40 Fixed ImageMagick creating thumbnails with transparent background
- WPDF-41 Fixed upgrade procedure failing when license is invalid
- WPDF-42 Fixed company info being cut off at 255 characters
- WPDF-43 Improved layout of template upload form

Version 2.0.0 - 2020-03-17

- Complete rewrite
- New configuration interface with over 200 configuration parameters (v1 only had 7)
- Upload PDF templates from GUI
- New logo mode in case you don't want PDF templates, with logo upload
- Upload custom TrueType fonts
- Preview changes instantly
- Automatic and seamless upgrade from v1
- Supports BlueRabbit Pingin and SwissQR modules
- Updated FPDF libraries to version 2.3.1
- PHP 7.1 is now the minimum required version

Version 1.1.1 - 2020-01-20

- WPDF-11 Adapted USA country name so it works fine with our Pingin module
- WPDF-10 Fixed quote not fully generating when no notes are present
- Improved license status handling

Version 1.1.0 - 2019-07-01

- WPDF-8 Fixed WHMCS Batch PDF functionality not working properly
- WPDF-9 Improved licensing check when running from cron

Version 1.0.2 - 2019-05-27

- WPDF-7 Fixed page break not always working properly with SwissISR module
- Updated FPDF libraries to version 2.2.0

Version 1.0.1 - 2018-12-17

- Added support for our Swiss ISR module

Version 1.0.0 - 2018-11-28

- Initial release