Plugins

- How to configure PDF plugin?
- How to configure Form Actions plugin?
- How to configure Email plugin?
- Save Data
  - How to configure Save data plugin?
  - How Save Data plugin look like?
- How to configure Users & Profiles plugin?

How to configure PDF plugin?

Create a cool document with extension .docx and upload to the plugin configuration. Select a name for the file your users will download as pdf and you're done. In order to include inputs or outputs of your form, you need to introduce the required cell like this ${C8} , replacing for the required cell position. If you want to include a generated chart to your pdf, you need to include it this way : ${mychart} (being mychart the name you gave to your chart at the spreadsheet).

How to configure Form Actions plugin?

This plugin will launch different functions (for ex hide and show sections) depending on user actions.
You need to enter at the configuration fields 'Select fields that will trigger actions' which fields will launch these actions. Type any cell at the 'Add fields to above selector' field and click the button to add fields to the selector.

Whenever these inputs are changed, the form actions will be launched.

Then you have to configure the behaviour: Click 'add Action' in order to add a new function to your form. A new section will show for you to introduce:

- **Range name:** Named range you want to apply this action to
- **Action:** Select the behaviour desired (hide,show, hide until calculate...etc)
- **Condition:** (optional).If you fill this section this action will take place only if the condition is met (certain sheet/cell has a certain value)

You can add as many actions you need, and you can configure them for the same section of your form. For ex: you can hide a certain section by default of the form using a hide option, and show it when a field changes to a certain value adding a show option with condition attached.

How to configure Email plugin?

These are the basic fields you have available for this plugin:

- Mode : You can choose if the email will be sent when pressing a button, or everytime the calculator is launched.
- Email Sheet/cell : Select the sheet and the cell that contains the destination email. It can be fixed at the spreadsheet, an input asked to the user to fill, or even an output cell.
- Email subject cell: Select the cell that contains the preferred/calculated email subject
- Send BCC to cell: Select the cell that contains the blind copy email address
- Reply to : Enter here your email address, this way it will appear automatically if any user replies to the message
- File added to email : You can attach any type of file to your email (maybe with your conditions, with a presentation,images etc..).
- Send PDF Generated (Need PDF plugin available) : If selected, the pdf generated using the pdf plugin will be attached to the email.
- Email Content: Free content to be sent. You have an editor where you can style your email contents. In order to include inputs or outputs of your form, you need to introduce the required cell like this ${C8} , replacing for the required cell position. If you want to include a generated chart to your email, you need to include it this way : ${mychart} (being mychart the name you gave to your chart at the spreadsheet).

The email will be sent from xlsjuice default email. If you want to use your own email account (so your users will see you as the 'sender'), you can fill these fields:

- SMTP Host
- SMTP User
- SMTP Password
- SMTP Port
- SMTP Encryption
- Test Email: You can type here any email and click test in order to check if the configuration above is correct

Save Data

How to configure Save data plugin?

This plugin will add a 'Save' button so your users can save form data, a 'New' button able to reset form/discard changes and a list of previously saved forms that users can check/edit at a new toolbar shown at the top.

You only need to select which fields do you want to show at the top list menu.

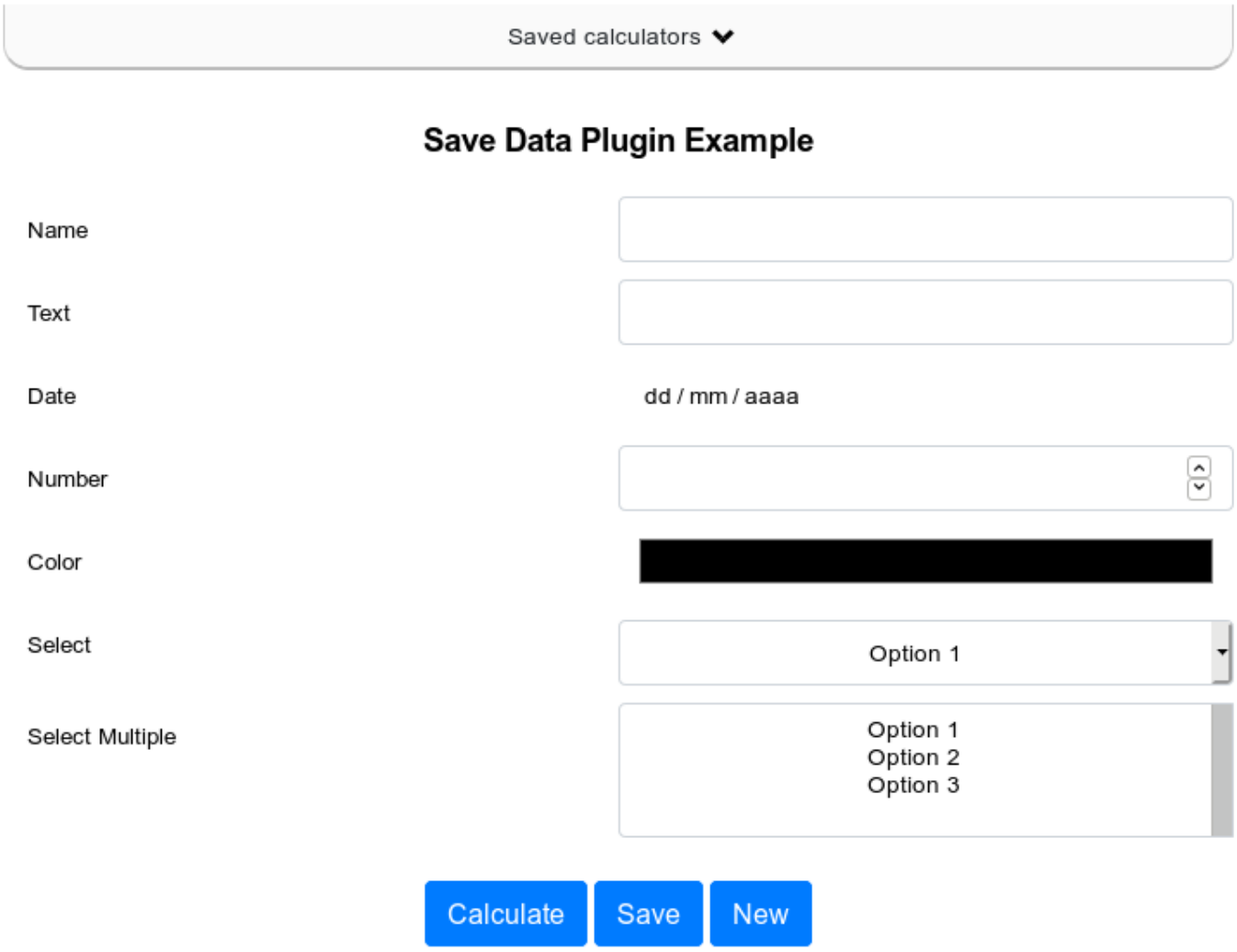
You have two default columns you can add (date and generated files), and using the configuration field below (Add inputs/outputs to above selector), you can show additional information entered at the form. Type the cell you want to show and click the button 'Add field' in order to add another column to the list.

With buttons and toolbar labels you can configure the texts you want to show at the form both for the buttons and the top toolbar.

How Save Data plugin look like?

We've made an example with different (not all) input types so you can test save data plugin on a live webpage.

This example saves calculations linked to the user browser, but, if you publish the calculator using a CMS like Joomla or Wordpress the plugin saves data linked to your current logged in user.



The list of saved calculators appears at the top of the page. Once displayed each user will see his list of calculators previously saved. You can choose which fields you prefer to show at this menu in order your users can identify their records. In plugin configuration you can select among your inputs, outputs and 2 built in fields, Date saved and Files generated (Check PDF Plugin). In the example, we'd selected the Date saved and the first input called 'Name'.

With the options at the right side of the list you'll be able to edit or delete saved data.

At the end of the calculator you'll see 2 buttons: Save and New. Save button will save new calculator or update current record if you previously selected one row to edit.

To add a Custom title for one column at the record list, you can add a Named Range

name in the cell selected to display in list inside your spreadsheet, and it will be automatically used.

Useful links:

Test the Save Data Plugin Example

Download the Excel File used in the example

Take a look at How to configure Save data plugin?

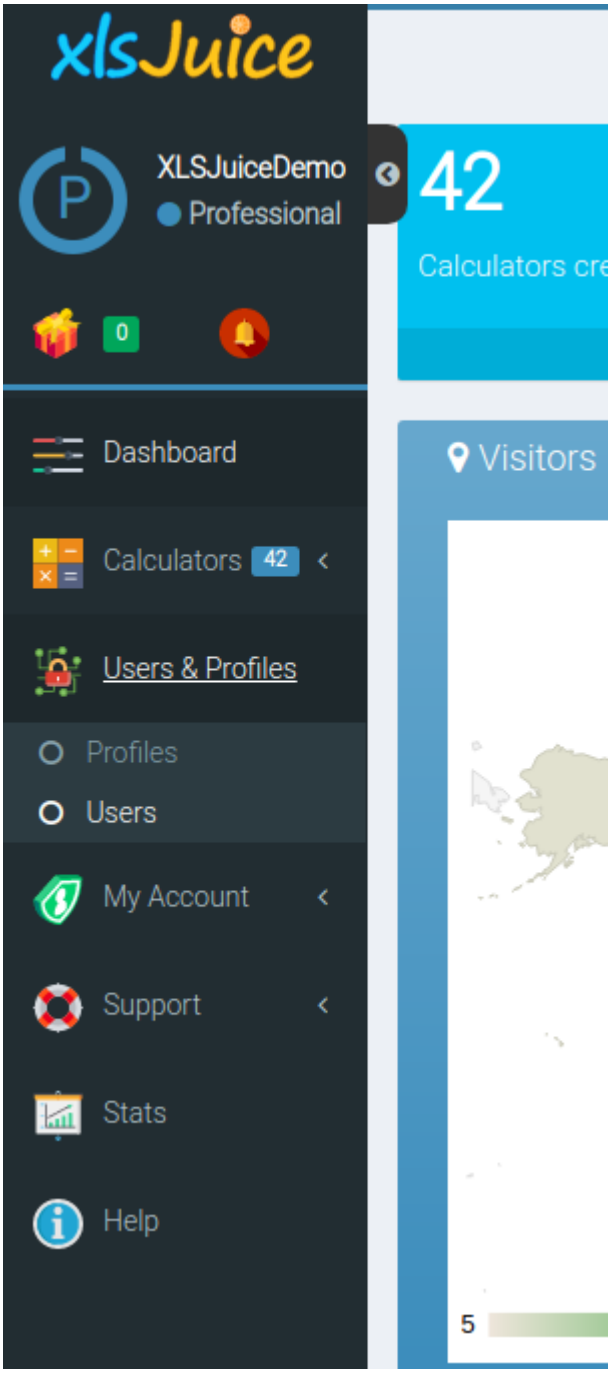
How to configure Users & Profiles plugin?

Users and Profiles

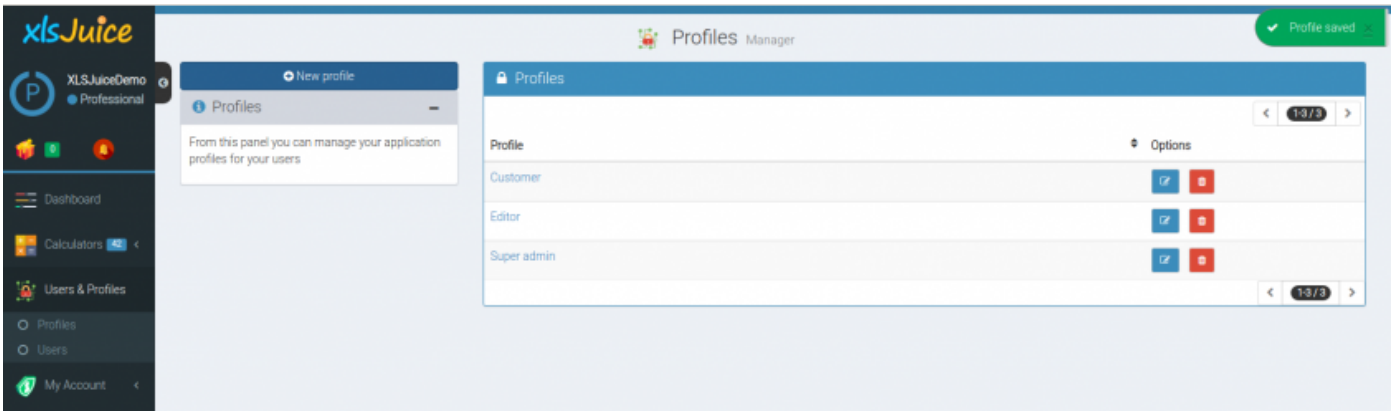
With this plugin you can create a login access to your calculator page, in this case you will want to add your users and the different groups/profiles you will want to include at your system.

If you're using the calculators integrated with your own CMS, like Joomla, Wordpress, etc, you will probably prefer to use your CMS users and groups for managing the calculator access, so you can jump to the next step 'Configuring views' instead.

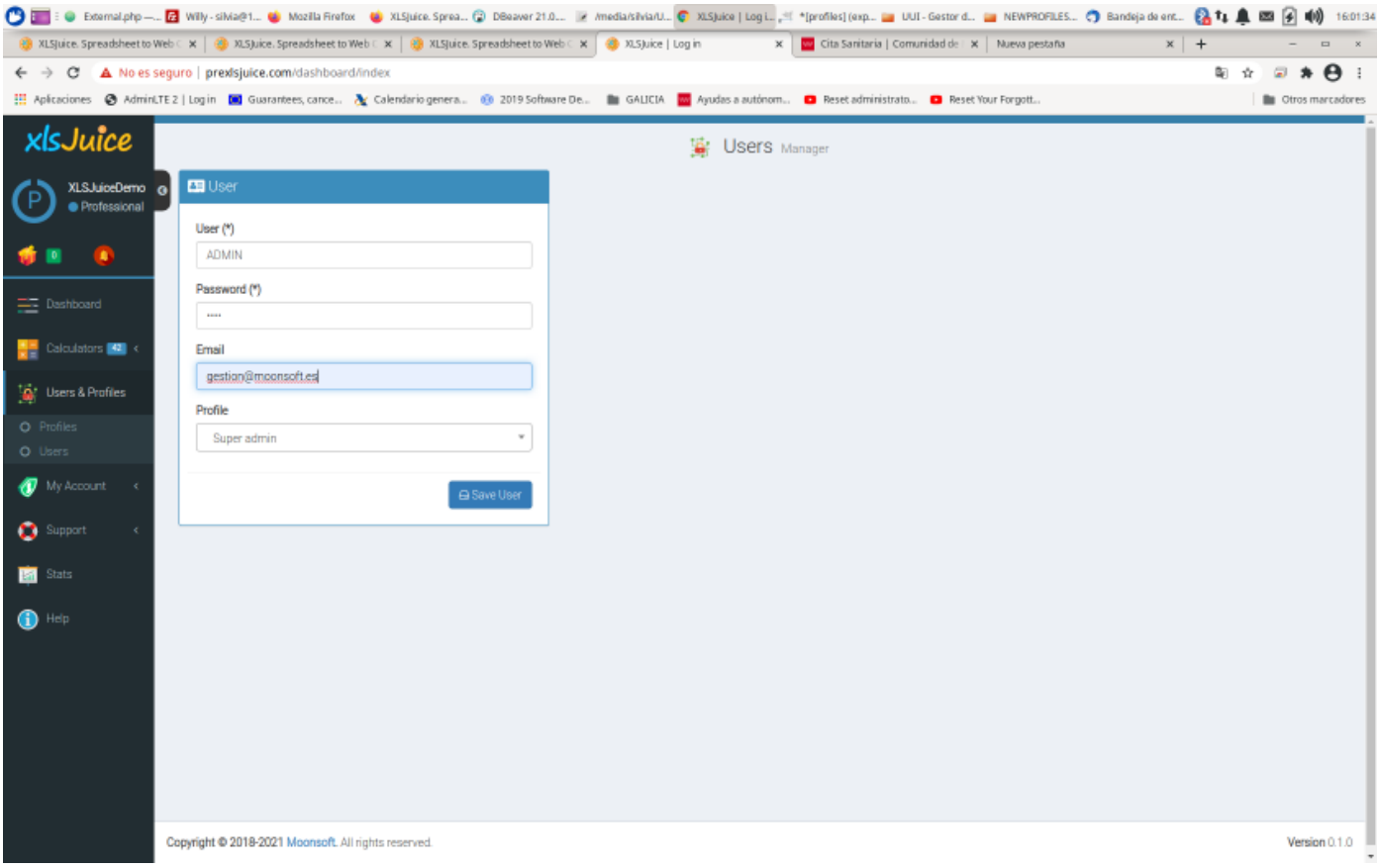
You will find these new options at your main menu, under the User & Profiles entry



The Profiles menu will allow you to create as many profiles or groups as desired in order to organize your users afterwards.



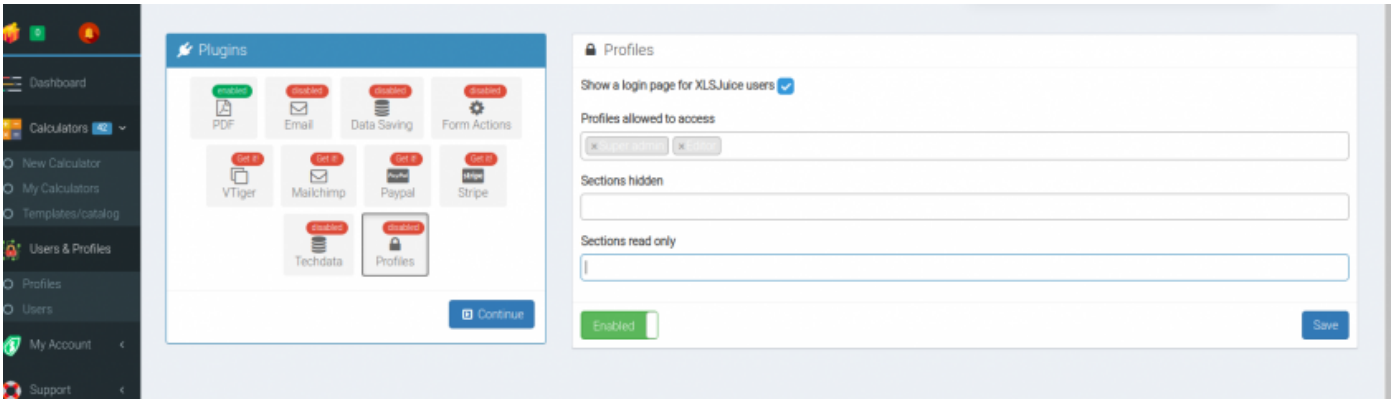
The Users menu will allow you to create as many individual users with access and the group they belong to.



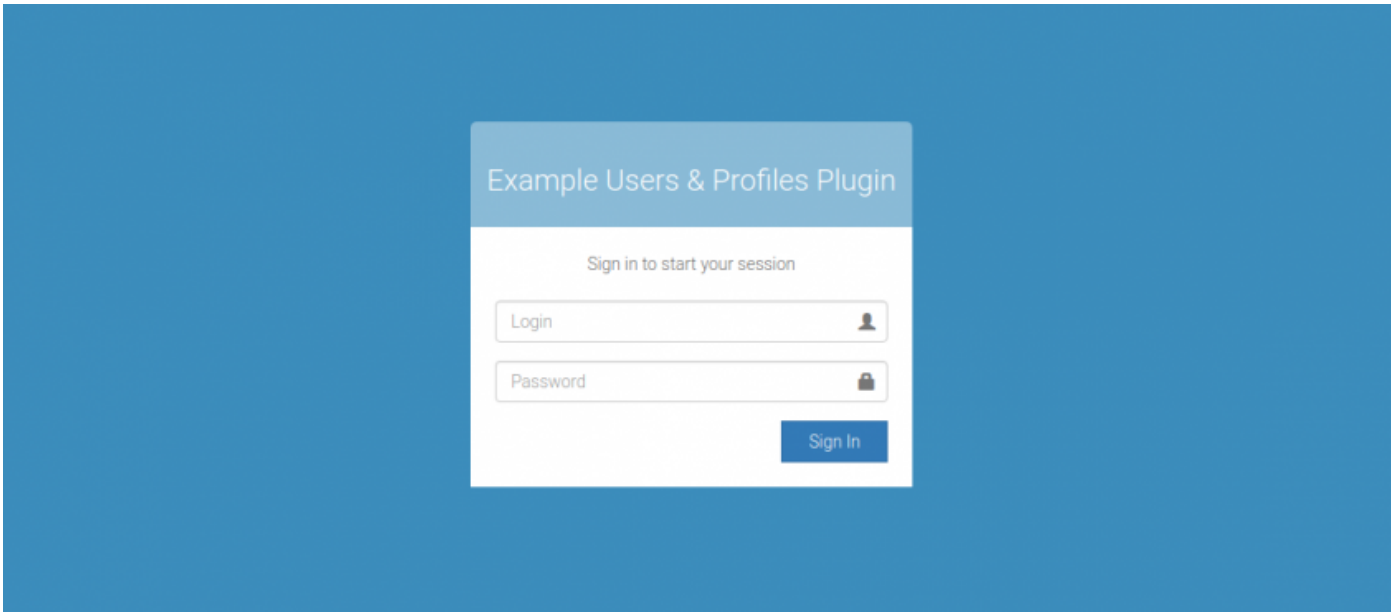
Adding login page to your calculator

Once you have your database with users and profiles ready, you can enable one ready-to-publish login page that will show up in order to control access to your calculator. You only need to configure the plugin with the check 'Show a login page for XLSJuice users', and select the profiles that will have access to enter the main calculator page

With this plugin you will be able to configure some sections that you want to hide from this users view, and/or some sections you want to show read-only (they will see the fields, but they won't be able to change the values).



If you choose to add a login page for your users, then the main calculator page will be preceeded by a login form



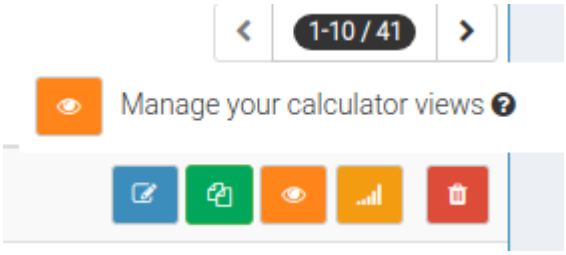
Configuring views

A 'view' is a version of your calculator that allows a different configuration of the plugins. It will inherit by default the plugin configurations from the main/parent calculator, but you can configure any of the plugins in a different way and this copy will behave with this new configuration instead.

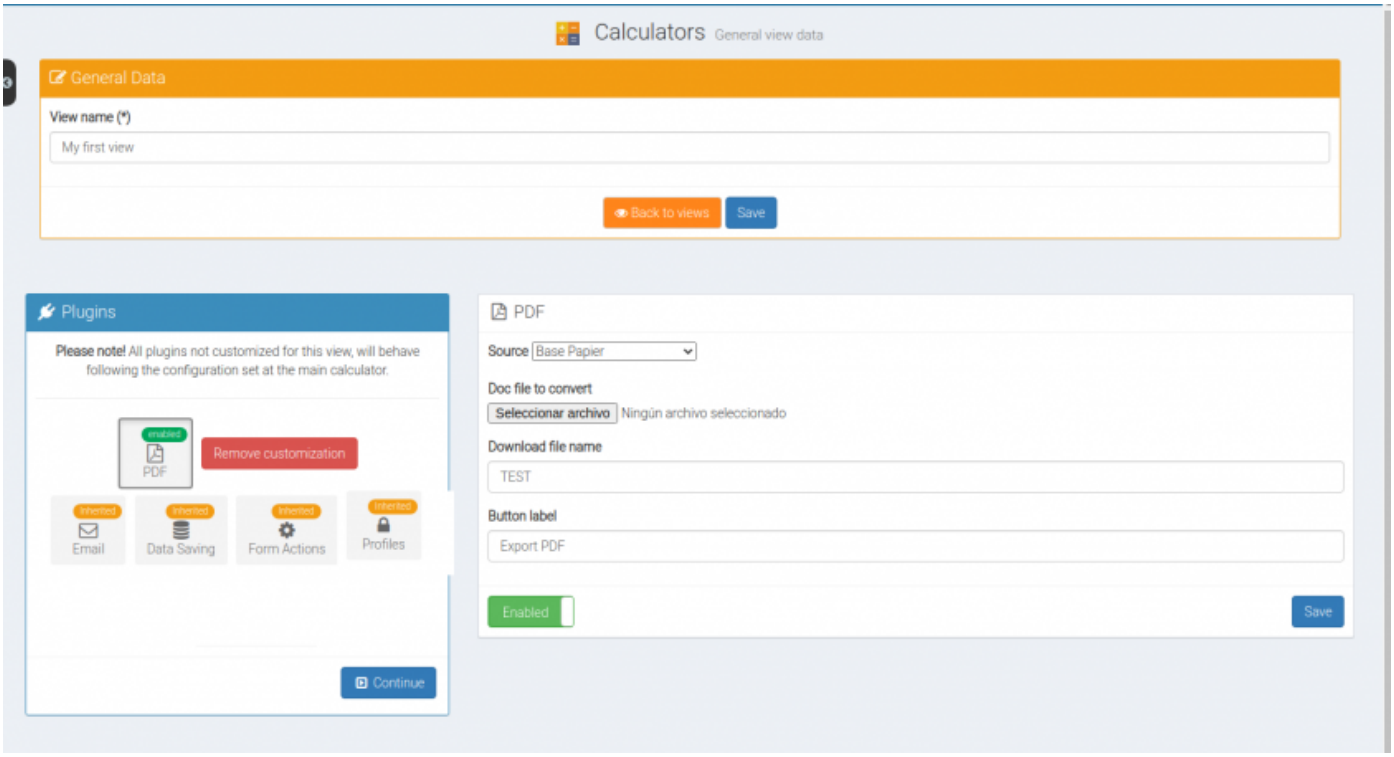
This view don't have a layout configuration, it will use its parent calculator layout and

fields configuration, modifying the plugins behavior will give you a high amount of options, like hiding sections for different users groups, send different emails, generate different PDF documents, etc

In order to create a view you only need to click the icon present at each calculator toolbar



The view configuration page will ask you for a name for your new view, and for the configuration of your plugins. You can use the 'inherited' configuration from your main calculator, enable/disable, or change its internal configuration.



Pressing 'continue' button will forward you to the final calculator page where you can check the specific url created to access this specific view, to share with your users, or insert at your preferred cms or webpage.