

3.7 Create PDF

This action allows you to create a PDF document using a template defined in the "PDFmaker" section.

MAIN FIELDS

- **Entity PDF document** -> allows to select an entity on which to generate the PDF.
N.B: it is not possible to select an entity (instance of a module) if there is no PDF Template related to it
- **Title PDF** -> indicates the title of the PDF
- **Relate PDF to** -> represents the id of the entity involved in the process to which you want to link the PDF
- **Language PDF template** -> represents the language of the PDF Template (Italian or English)
- **Assigned to** -> represents the assigned user of the PDF
- **PDF Template** -> allows to select one of the templates available for the selected entity.
- **Documents folder** -> allows to select the folder where you want to save the PDF

The screenshot shows a web form titled "Action: Create PDF". At the top right, there are "Save" and "Cancel" buttons. The form contains several input fields and dropdown menus:

- Action title:** A text input field containing "Create PDF".
- PDF document Entity:** A dropdown menu with "ID" selected.
- PDF Info section:**
 - PDF subject:** A dropdown menu with "Select Option..." selected.
 - Related PDF to:** A dropdown menu with "Other" selected, and a text input field containing "\$15-crmid".
 - PDF template language:** A dropdown menu with "Pick list Values" selected, and a text input field containing "en_us".
 - Assigned To:** A dropdown menu with "User" selected, and a text input field containing "admin@vtenext.com (User)".
- PDF custom Info section:**
 - PDF template:** A dropdown menu with "Pick list Values" selected, and a text input field containing "Standard Layout".
 - Document folder:** A dropdown menu with "Documents Fol" selected, and a text input field containing "Default".

Figure 1

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