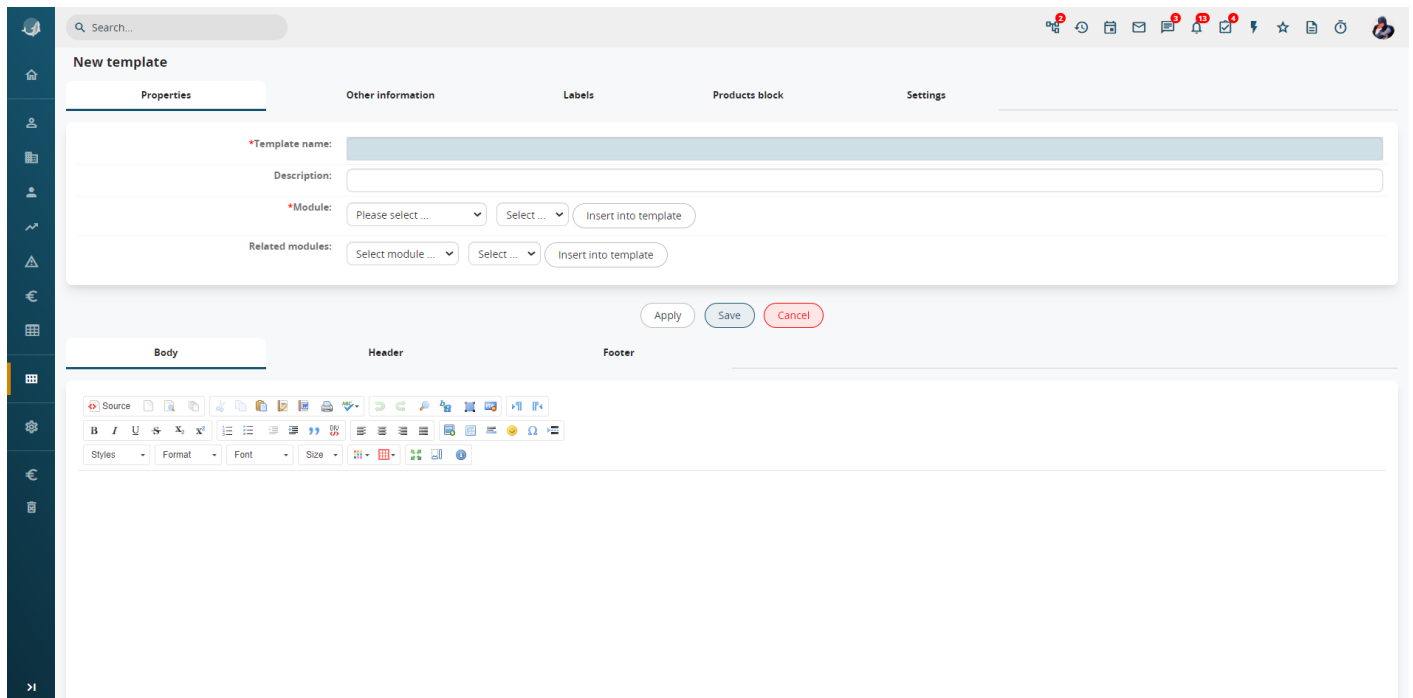


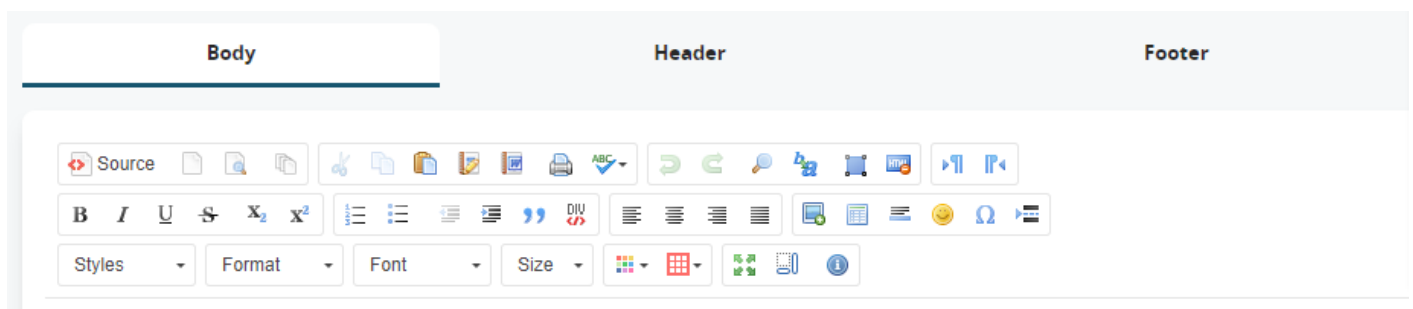
# 14.1 Create a PDF template

To create a new template for the PDF Maker module, click on the ADD TEMPLATE key or button on the right and indicate the name for the template and the reference module: the template will be available for the indicated module only. This means that we will find it in the PDF Print options only if it is located in that module. For example, if I create a template to print invitations to contacts, I will only find it inside a registry in the OTHER menu at the top right.



The content of the template is organised into three different sections:

- Body: template body
- Header: repeats on every page
- Page footer: repeats on every page



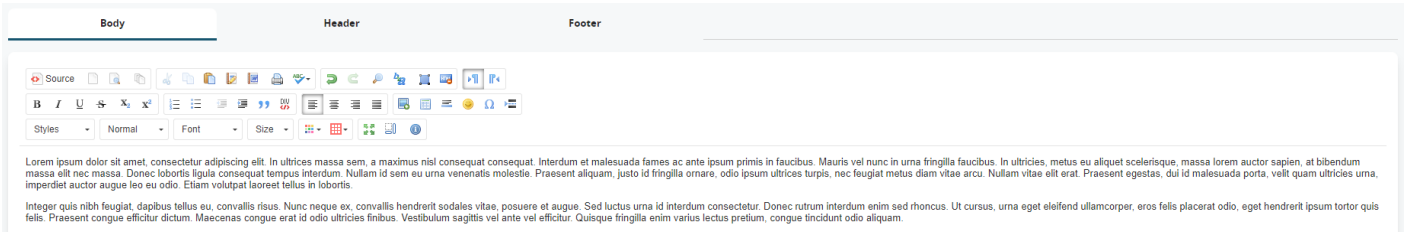
Within the three areas you can enter:

- Fixed text parts

- Variables: they are replaced with vtenext data when exporting the document in PDF format

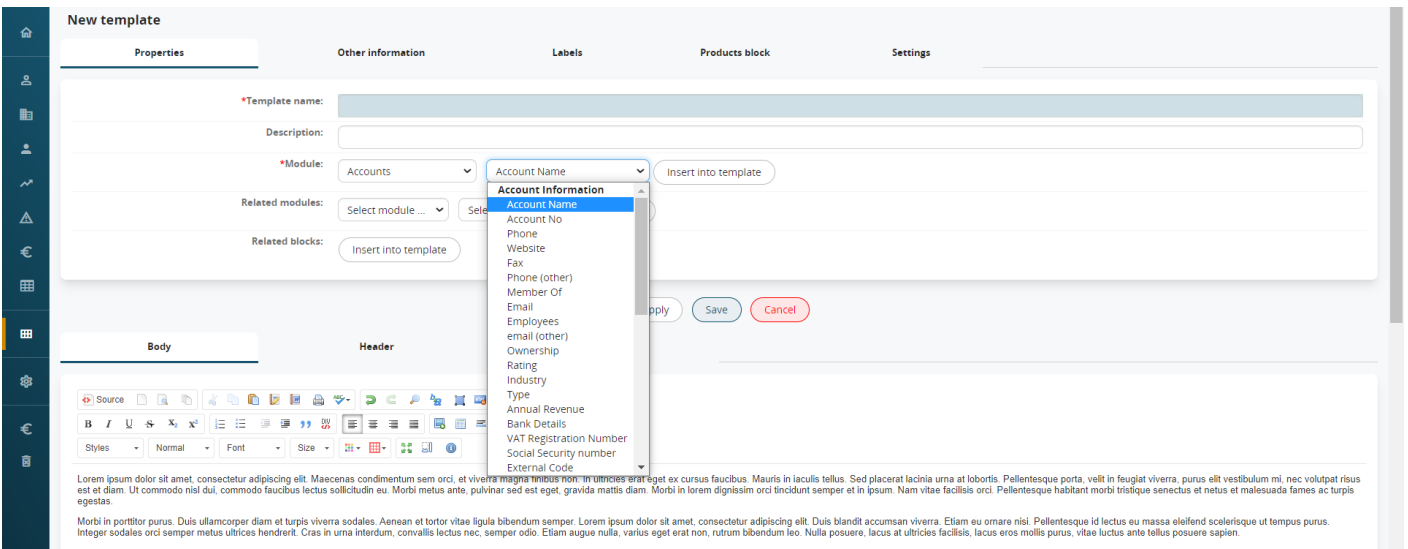
## Fixed text

It is possible to insert fixed text inside the Header, Body or Footer by positioning the cursor and starting to write the content:



## Variables

To insert variables, position the cursor at the point where you want to insert the variable, choose the type of variable to insert from the MODULE item above, and then click on Insert in the template:



The system inserts a variable string that will be replaced with the value assumed by the field when the PDF is generated:

Body Header Footer

Source [Icons]

B I U [Icons]

Styles Normal Font Size [Icons]

Nome Azienda: \$ACCOUNTS\_ACCOUNTNAME\$  
 Provincia: \$ACCOUNTS\_BILL\_STATES\$

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas condimentum sem orci, et viverra magna finibus non. In ultricies erat eget ex cursus fau et diam. Ut commodo nisl dui, commodo faucibus lectus sollicitudin eu. Morbi metus ante, pulvinar sed est eget, gravida mattis diam. Morbi in lorem dignis: egestas.

Morbi in porttitor purus. Duis ullamcorper diam et turpis viverra sodales. Aenean et tortor vitae ligula bibendum semper. Lorem ipsum dolor sit amet, conse sodales orci semper metus ultrices hendrerit. Cras in urna interdum, convallis lectus nec, semper odio. Etiam augue nulla, varius eget erat non, rutrum bibi

Once the text has been entered, you can format fixed and variable text using the editor tools. All the fields on the main module (Module) to which the template has been associated are available in the linked drop-down menu.

It is possible to insert variables on modules related to the main module (Module) also. There are two types of variables:

- modules connected in a 1-to-1 relation with the main module: there is a field within the registry that refers to another vtenext module. Example: in the Quotes form, you will find the Company Name field linking to a company registry.

Properties Other information Labels Products block Settings

\*Template name: Quotes Template

Description: Standard template for all the quotes

\*Module: Quotes Quote No Insert into template

Related modules: Accounts Billing State Insert into template

- blocks connected with modules with 1-to-many relations with the main module: the module item is in the relations menu. Example: in the Quotes module, you can find the Sales Orders block, with numerous orders inside (you can generate a number of orders from one Quote).

Related blocks: Insert into template

Template: Please select ... Insert into template

Apply Save Cancel

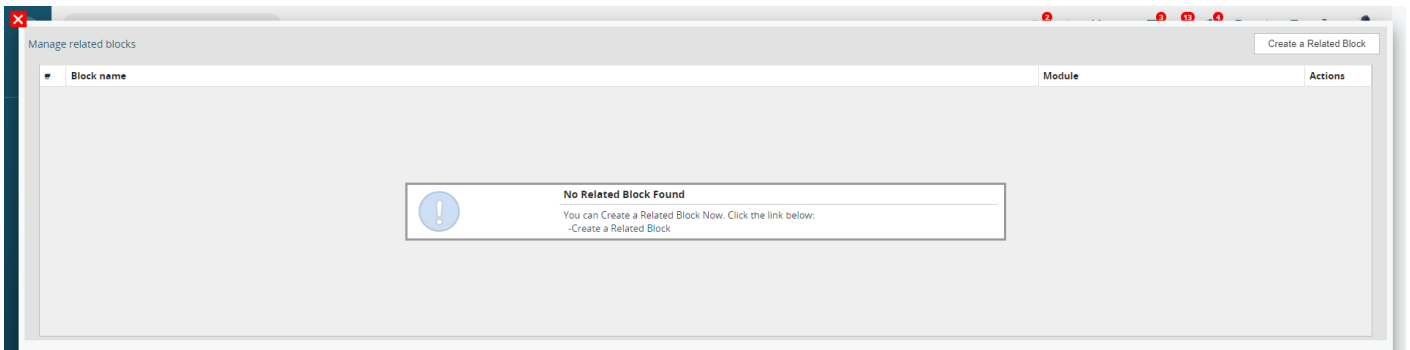
## Variables in 1-to-1 relations

- a) position the cursor at the point where you want to insert the variable
- b) choose the related module
- c) choose a field to insert
- d) click on Insert in the template

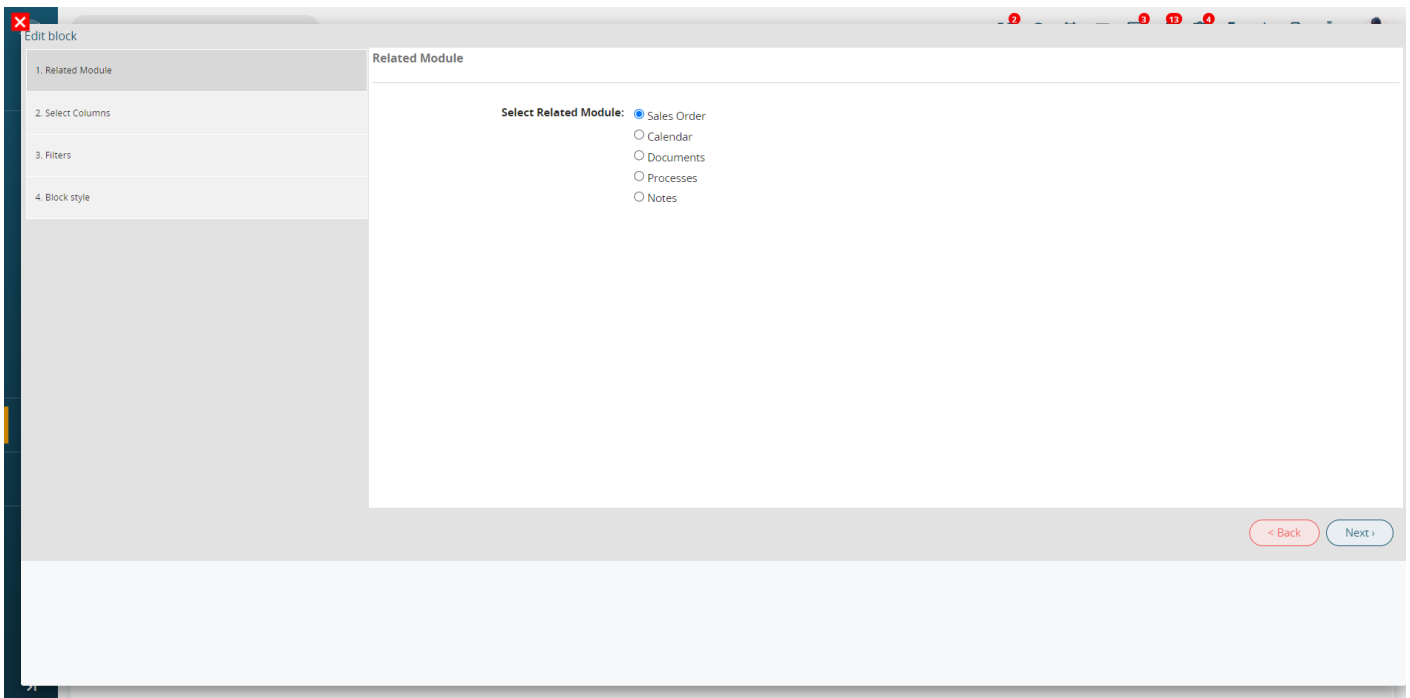
### Variables in 1-to-many relations (connected blocks)

- a) move the cursor to the point where you want to insert the variable
- b) click on the Insert button in the template under Related Blocks:

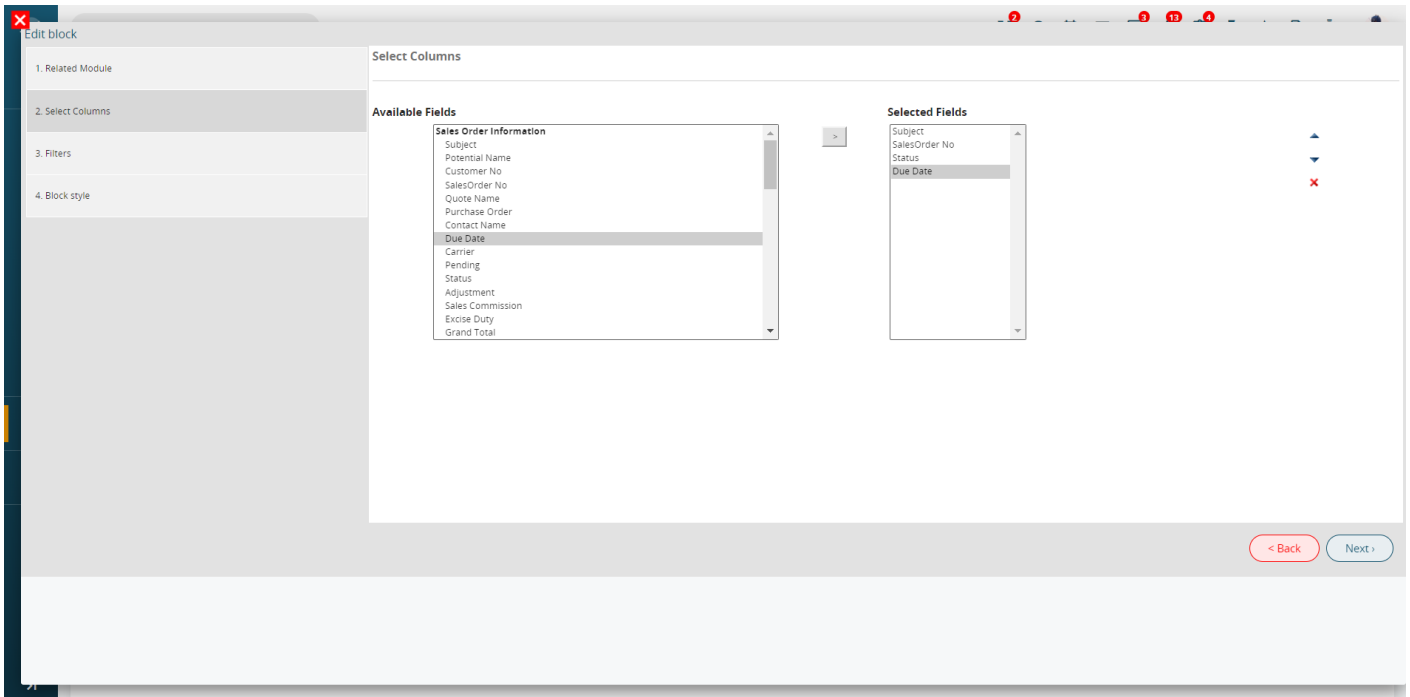
You can now select one of the already existing blocks (check that they refer to the module for which we are building the template) or start the wizard procedure to create a new block through Create Related Blocks:



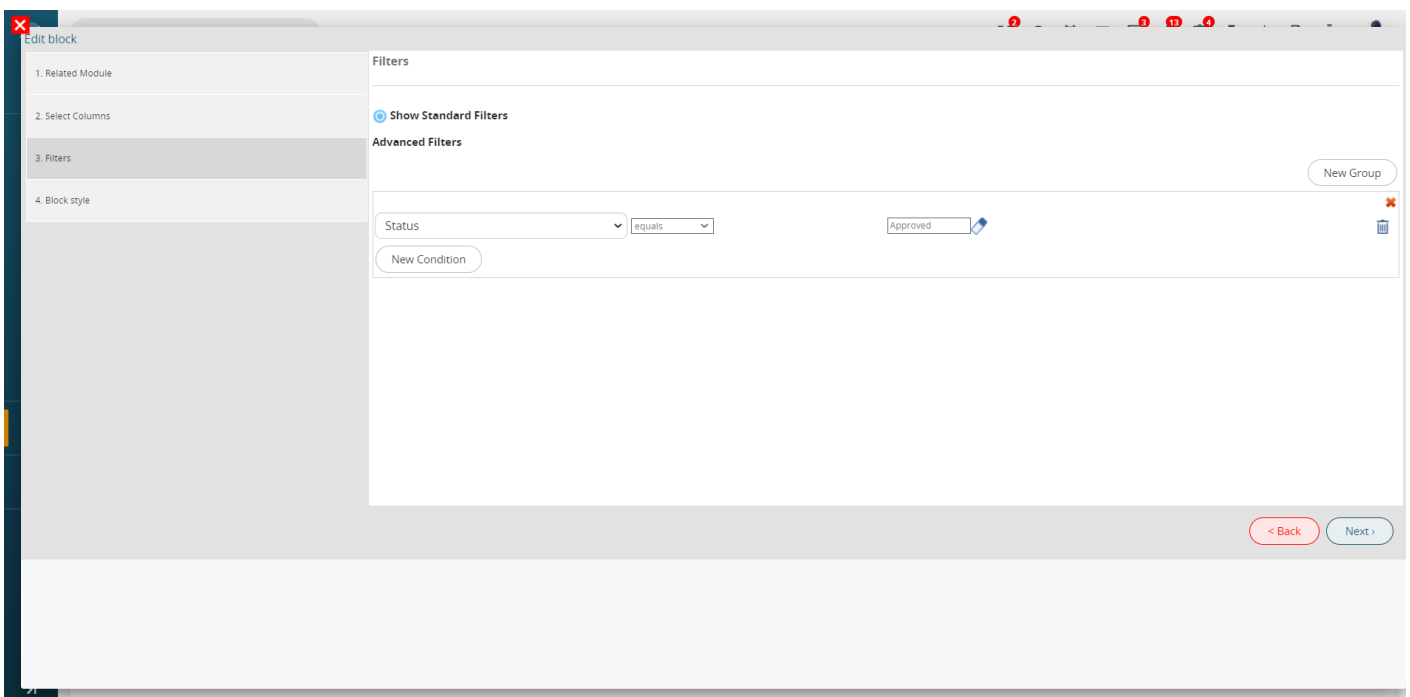
*Click on CREATE A RELATED BLOCK*



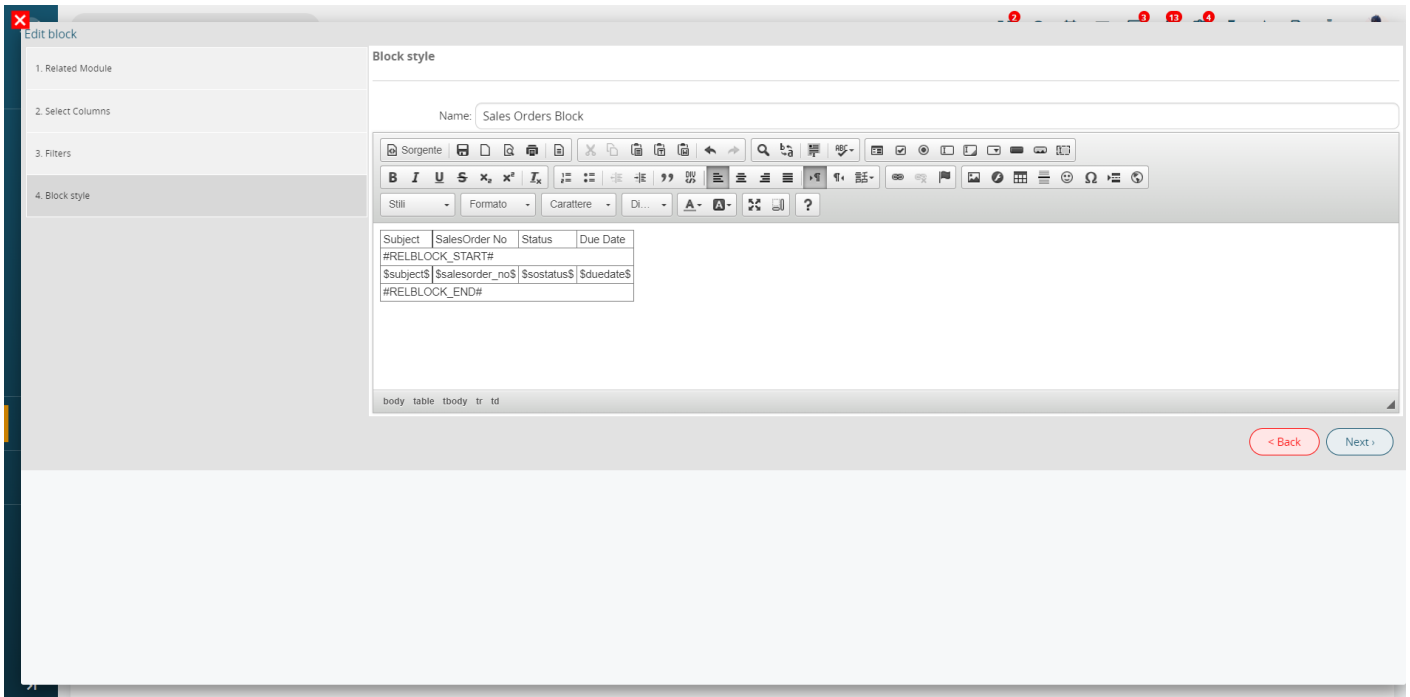
*Choose the related module for which you want to view the data in PDF format*



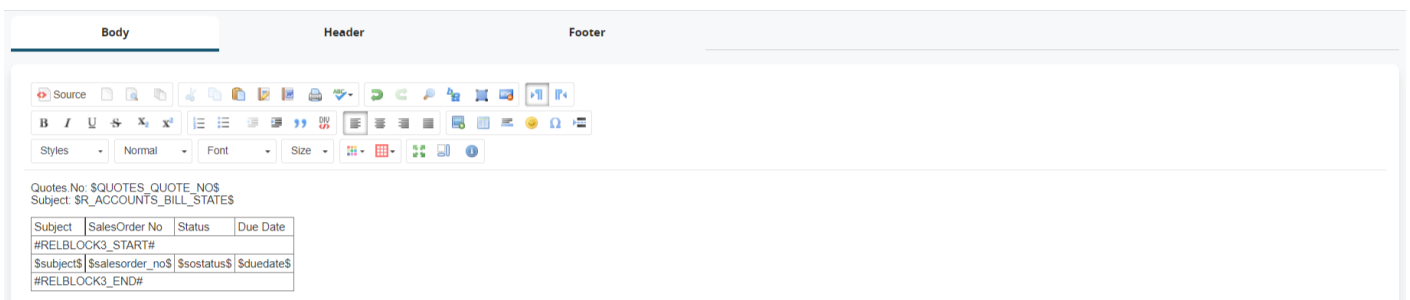
*Choose the fields you want to display (from the left-hand column, using the cursor, shift the fields into the right-hand column)*



*If appropriate, set a filter to display the desired data (e.g.: all Sales Orders in Approved status)*



*Refine the table as desired and name the block*



*Once the configuration is finished, the result will be like the one shown in the figure*

**N.B.:** the "Table Fields" can be inserted in a PDF using the linked blocks.

Revision #4

Created 2022-05-25 17:25:40 UTC by Alberto

Updated 2022-10-07 09:13:55 UTC by Admin