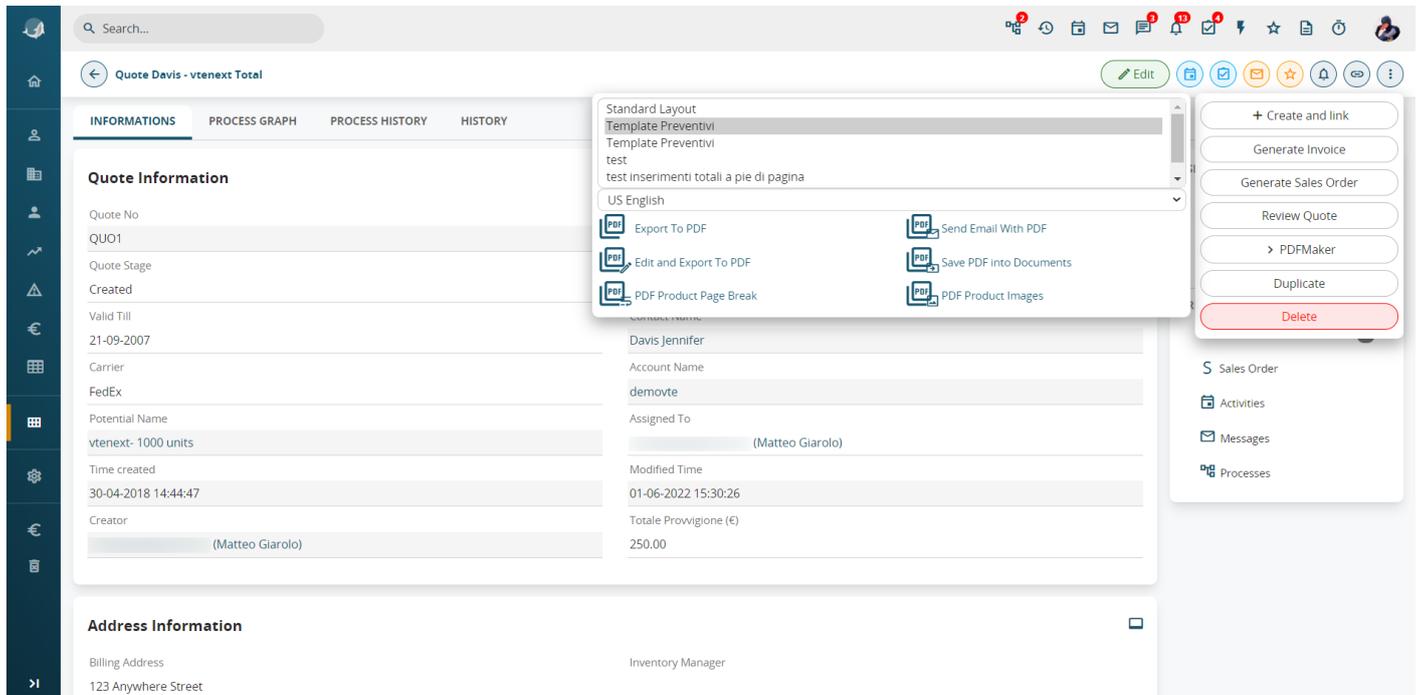


14.5 Export to PDF

To generate a PDF, access the main module registry (e.g.: Quotes) and click the Other button in the top right-hand corner. The PDF Maker panel for exporting the document will appear. Choose the desired model and press Export in PDF.



The screenshot displays a CRM interface for a quote. The main content area is titled "Quote Information" and contains the following details:

- Quote No: QUO1
- Quote Stage: Created
- Valid Till: 21-09-2007
- Carrier: FedEx
- Potential Name: vtenext-1000 units
- Time created: 30-04-2018 14:44:47
- Creator: (Matteo Giarolo)

Below this is the "Address Information" section, showing the Billing Address as "123 Anywhere Street".

A central modal window is open, displaying a list of PDF templates for export:

- Standard Layout
- Template Preventivi
- Template Preventivi
- test
- test inserimento totali a pie di pagina
- US English

At the bottom of this modal, there are several PDF-related actions:

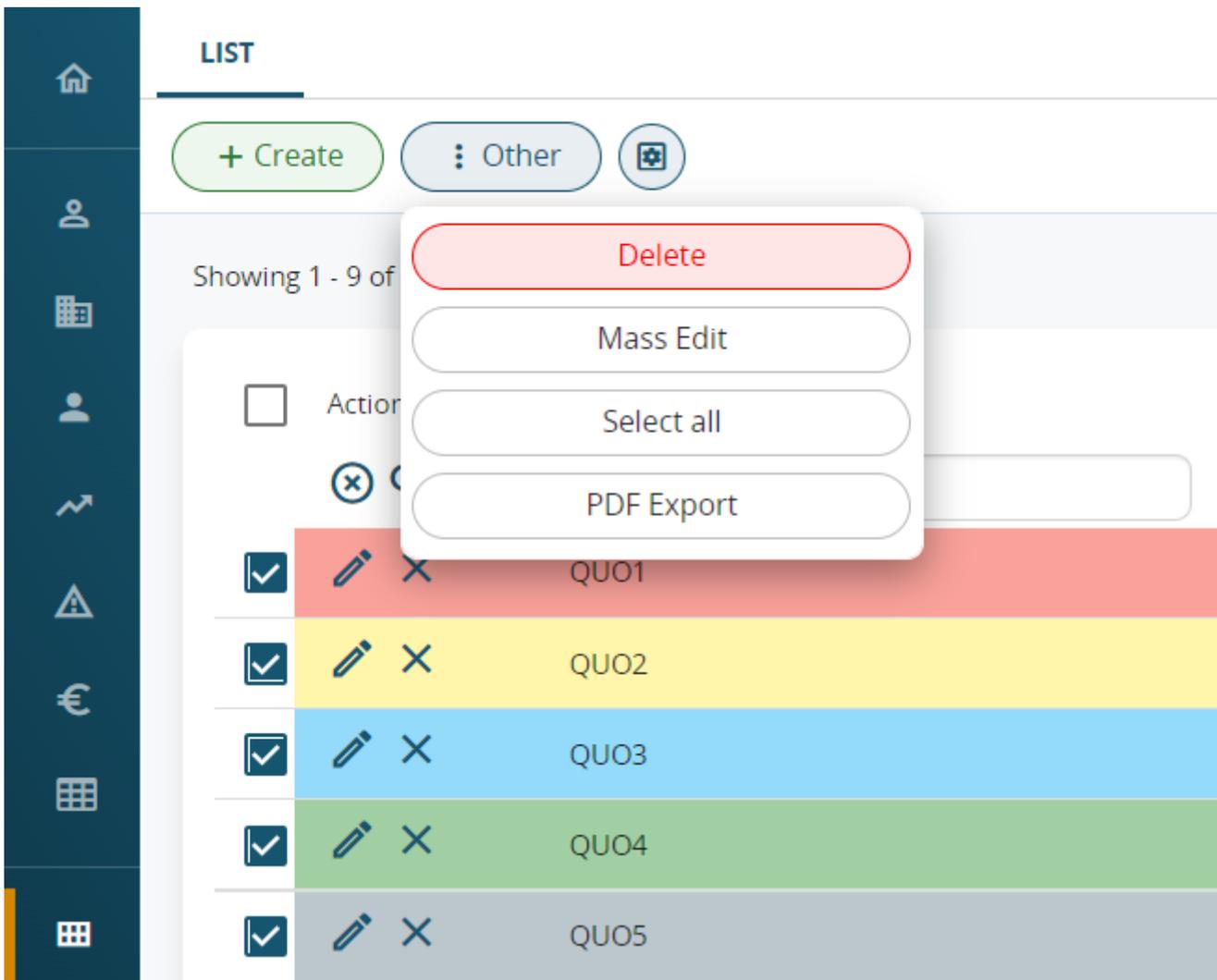
- Export To PDF
- Edit and Export To PDF
- PDF Product Page Break
- Send Email With PDF
- Save PDF into Documents
- PDF Product Images

On the right side of the interface, a vertical menu is visible with the following options:

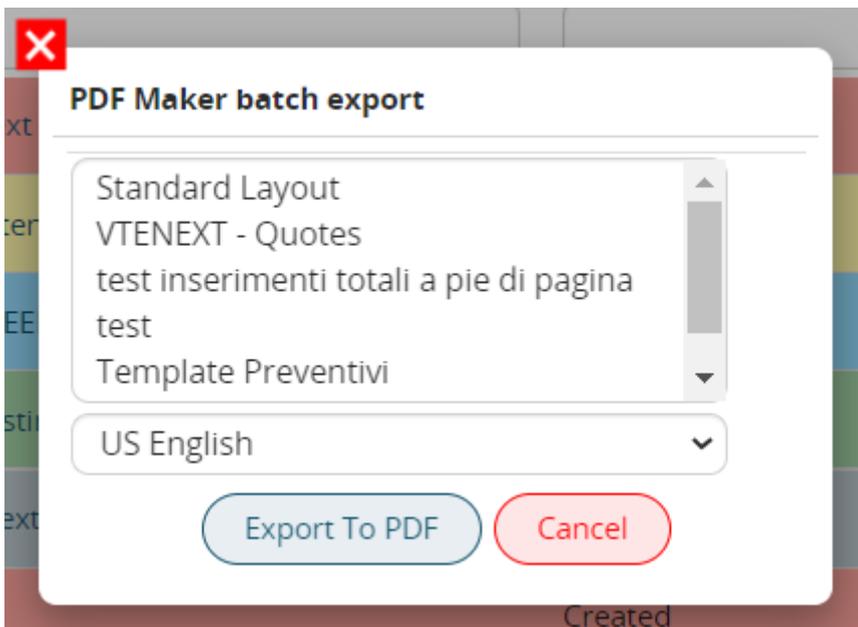
- + Create and link
- Generate Invoice
- Generate Sales Order
- Review Quote
- PDFMaker
- Duplicate
- Delete
- Sales Order
- Activities
- Messages
- Processes

At this point the system will generate the document.

You can generate a PDF merge for multiple entities: select the entities from the list view and press PDF Export:



Then choose the template for massive export:



Revision #2

Created 25 May 2022 17:25:40 by Alberto

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