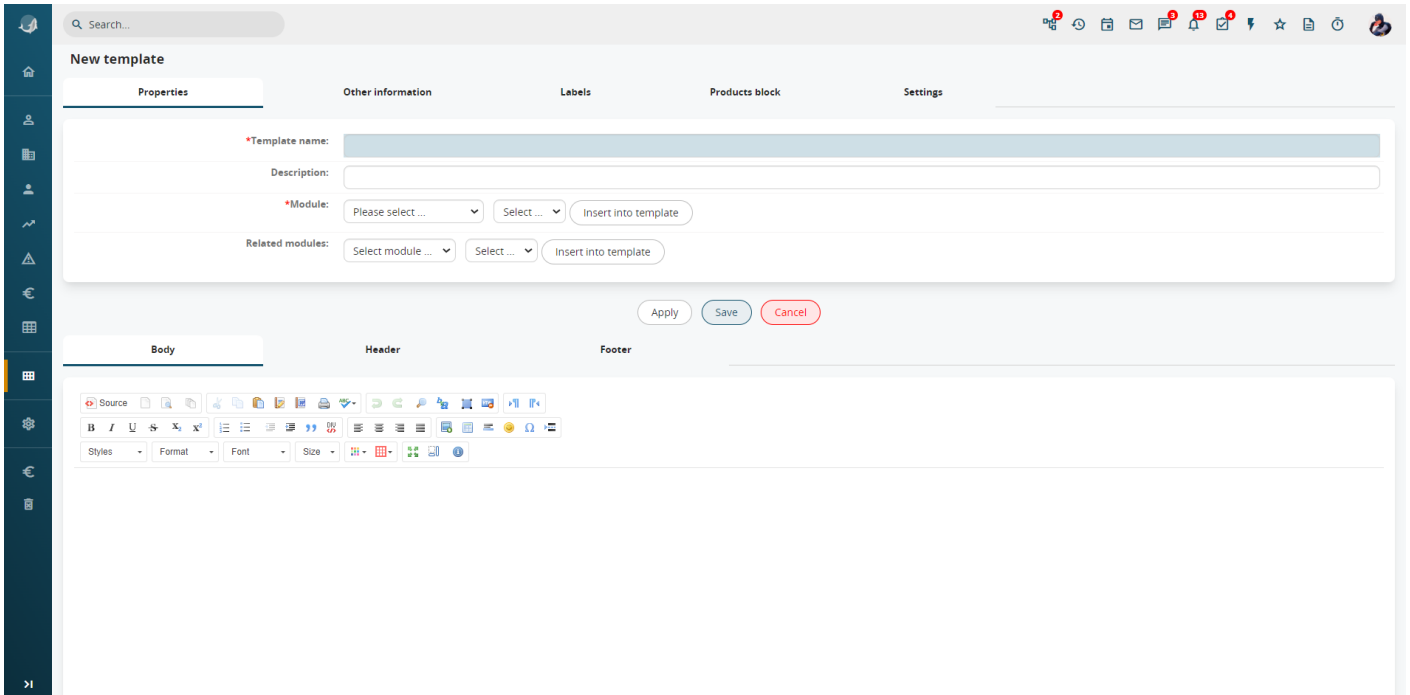


14.1 Create a PDF template

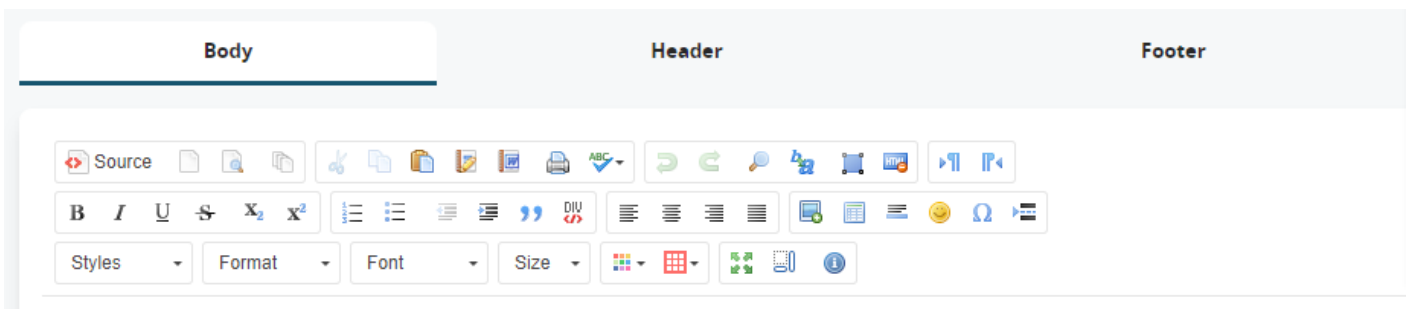
To create a new template for the PDF Maker module, click on the ADD TEMPLATE key or button on the right and indicate the name for the template and the reference module: the template will be available for the indicated module only. This means that we will find it in the PDF Print options only if it is 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 screenshot shows the 'New template' form in a software interface. The form is divided into two main sections: 'Properties' and 'Body'. The 'Properties' section includes fields for 'Template name', 'Description', 'Module' (with a dropdown menu), and 'Related modules' (with two dropdown menus). There are also 'Apply', 'Save', and 'Cancel' buttons. The 'Body' section is divided into three tabs: 'Body', 'Header', and 'Footer'. The 'Body' tab is currently selected, showing a rich text editor with various formatting options like bold, italic, underline, and font size.

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



The screenshot shows the 'Body' section of the template editor. It features a rich text editor with various formatting options like bold, italic, underline, and font size. There are also buttons for 'Source', 'Format', 'Font', and 'Size'. The editor is divided into three sections: 'Body', 'Header', and 'Footer'.

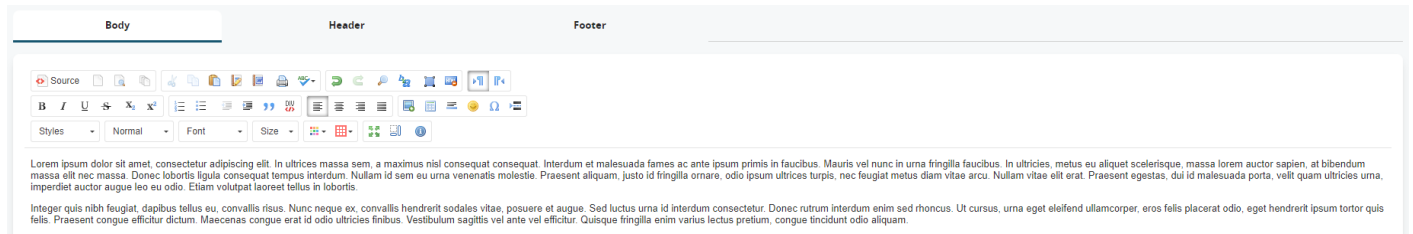
Within the three areas you can enter:

- Fixed text parts

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

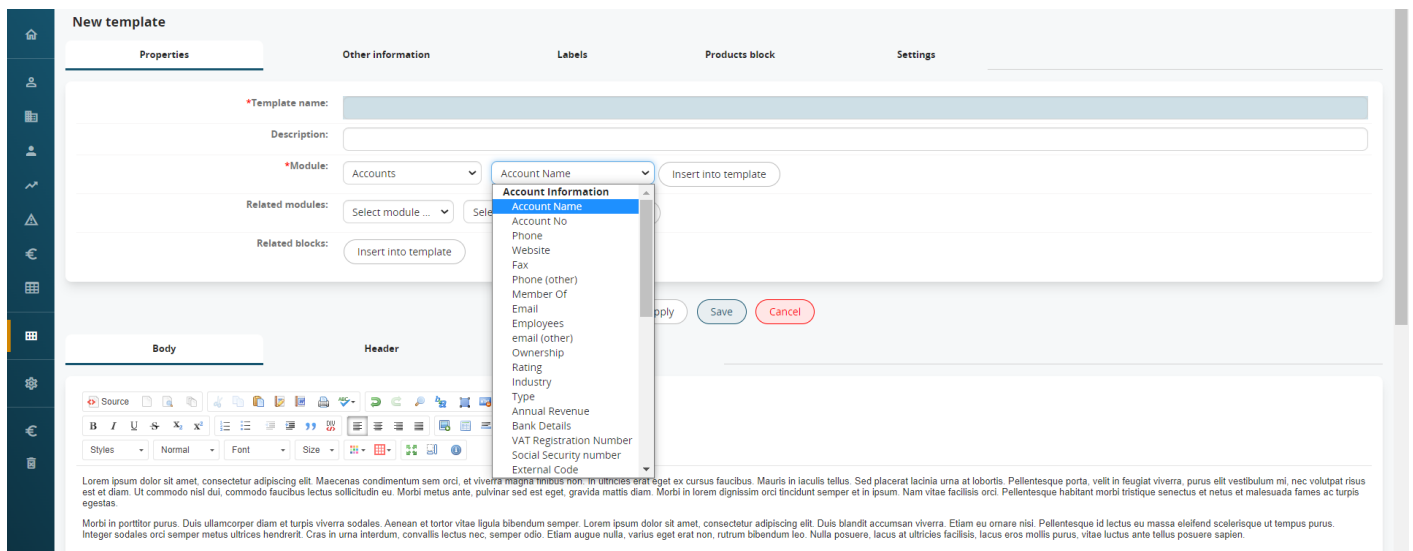
Fixed text

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:

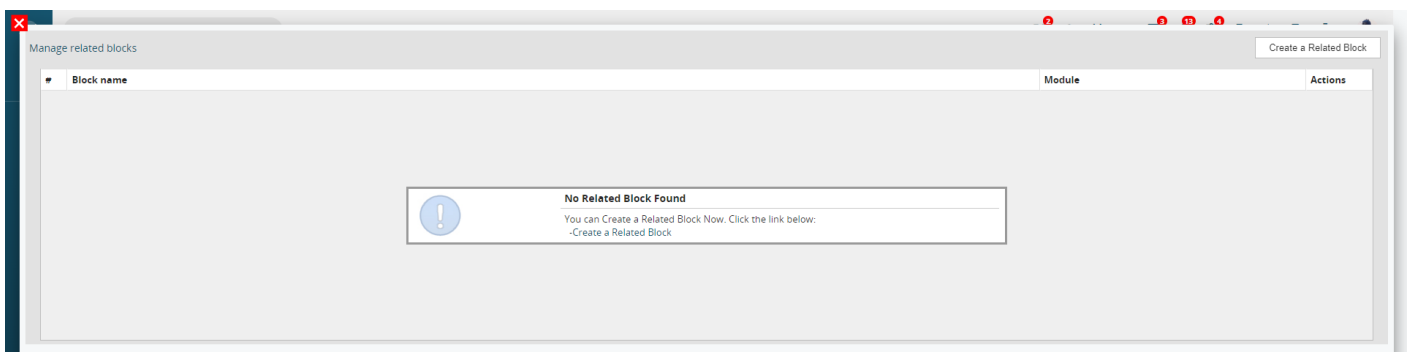
Body	Header	Footer
<p>A detailed screenshot of a rich text editor toolbar. It includes icons for undo, redo, bold, italic, underline, strikethrough, subscript, superscript, bulleted list, numbered list, indent, outdent, link, unlink, insert table, source code, and various alignment options. Below the icons are dropdown menus for styles (set to 'Normal'), font face, font size, and background color.</p>		
<p>Nome Azienda: \$ACCOUNTS_ACCOUNTNAMES\$ Provincia: \$ACCOUNTS_BILL_STATES\$</p> <p>Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas condimentum sem orci, et viverra magna finibus non. In ultricies erat eget ex cursus faucibus. Ut commodo nisl dui, commodo faucibus lectus sollicitudin eu. Morbi metus ante, pulvinar sed est eget, gravida mattis diam. Morbi in lorem dignissim egestas.</p> <p>Morbi in porttitor purus. Duis ullamcorper diam et turpis viverra sodales. Aenean et tortor vitae ligula bibendum semper. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas condimentum sem orci, et viverra magna finibus non. In ultricies erat eget ex cursus faucibus. Ut commodo nisl dui, commodo faucibus lectus sollicitudin eu. Morbi metus ante, pulvinar sed est eget, gravida mattis diam. Morbi in lorem dignissim egestas.</p>		

- 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

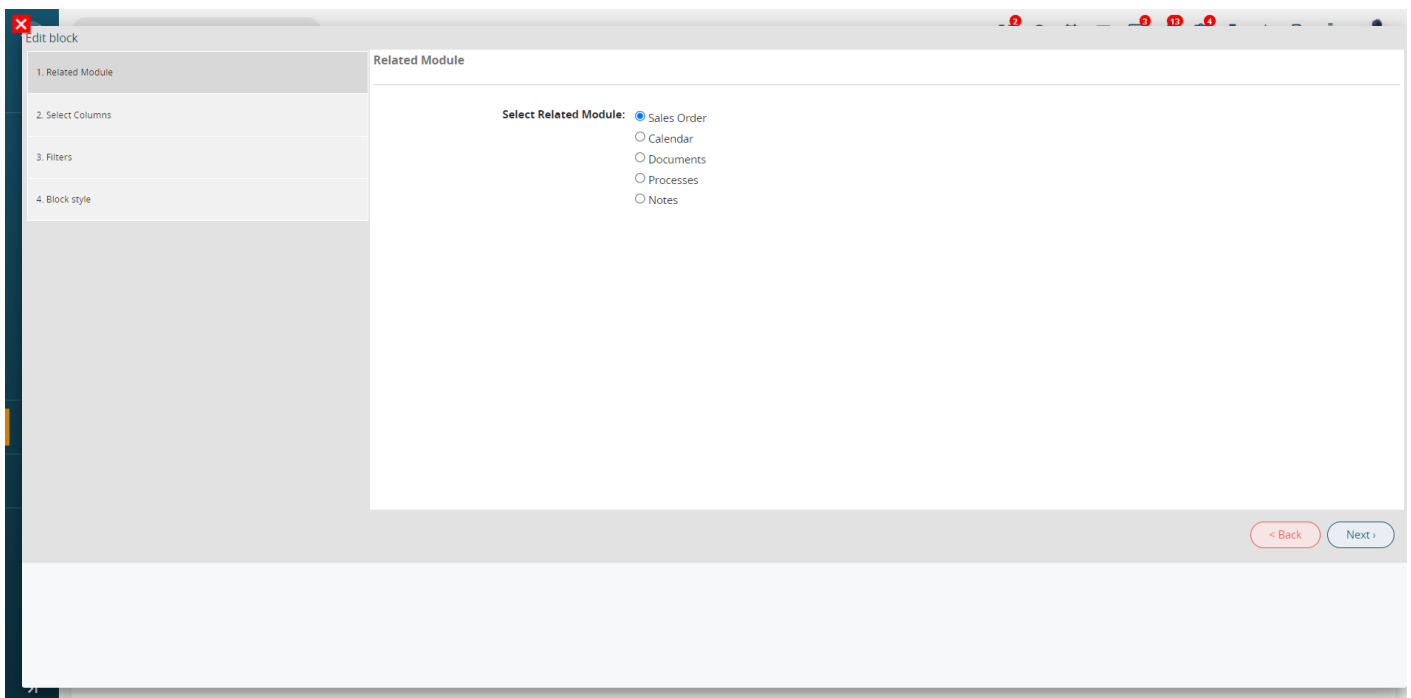
Variables in 1-to-many relations (connected blocks)

- 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:

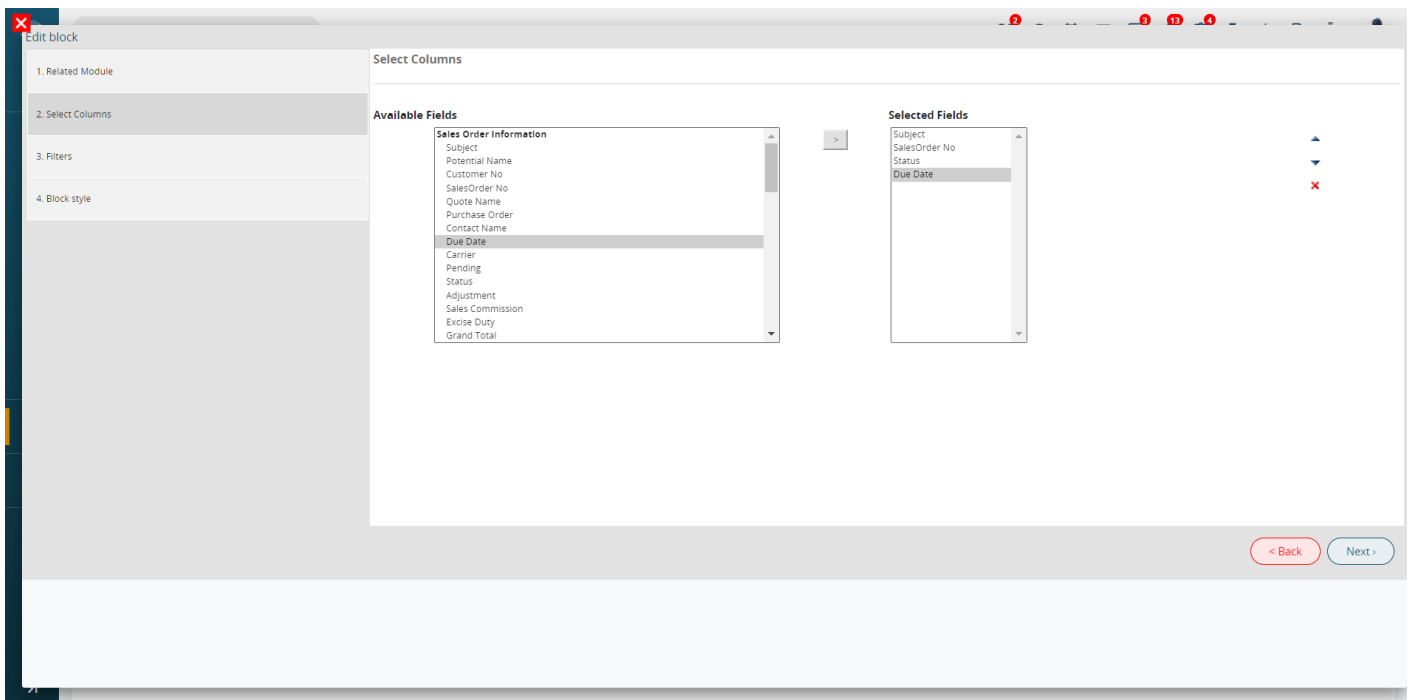
You can now select one of the already existing blocks (check that they refer to the module for which we are building the template) or start the wizard procedure to create a new block through Create Related Blocks:



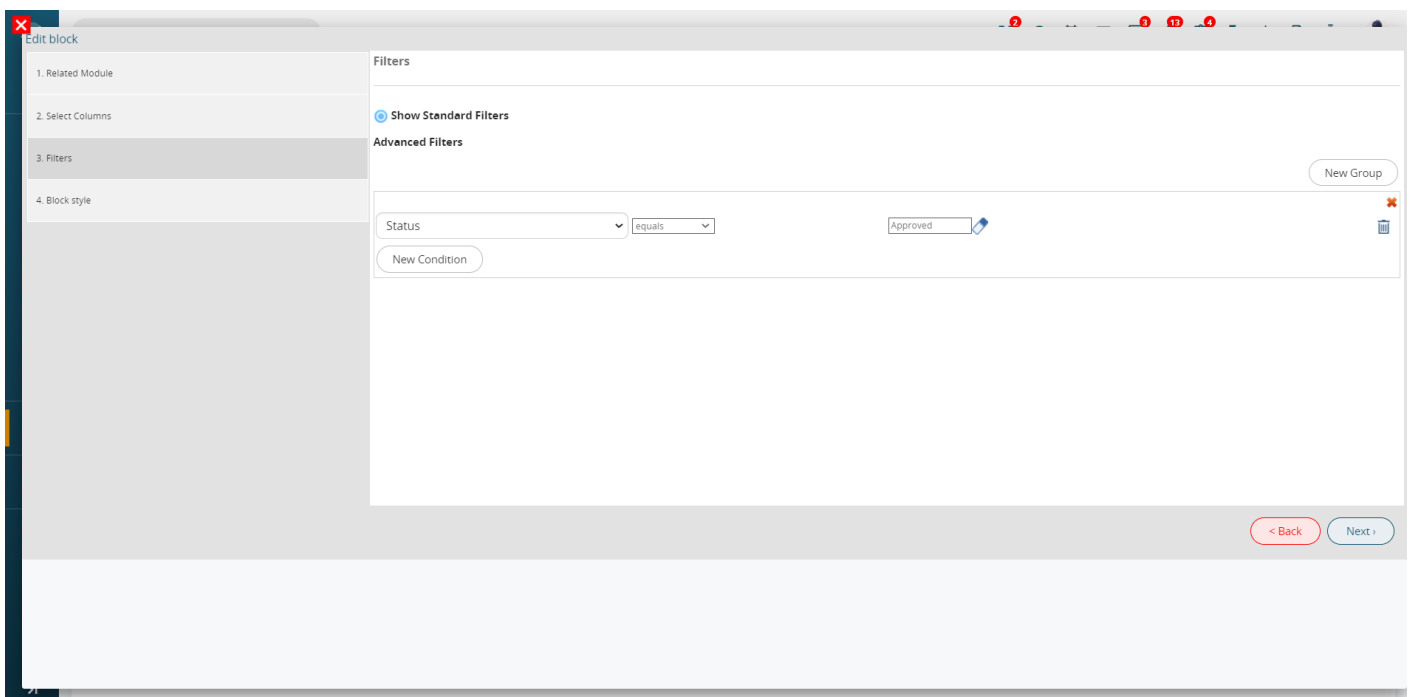
Click on CREATE A RELATED BLOCK



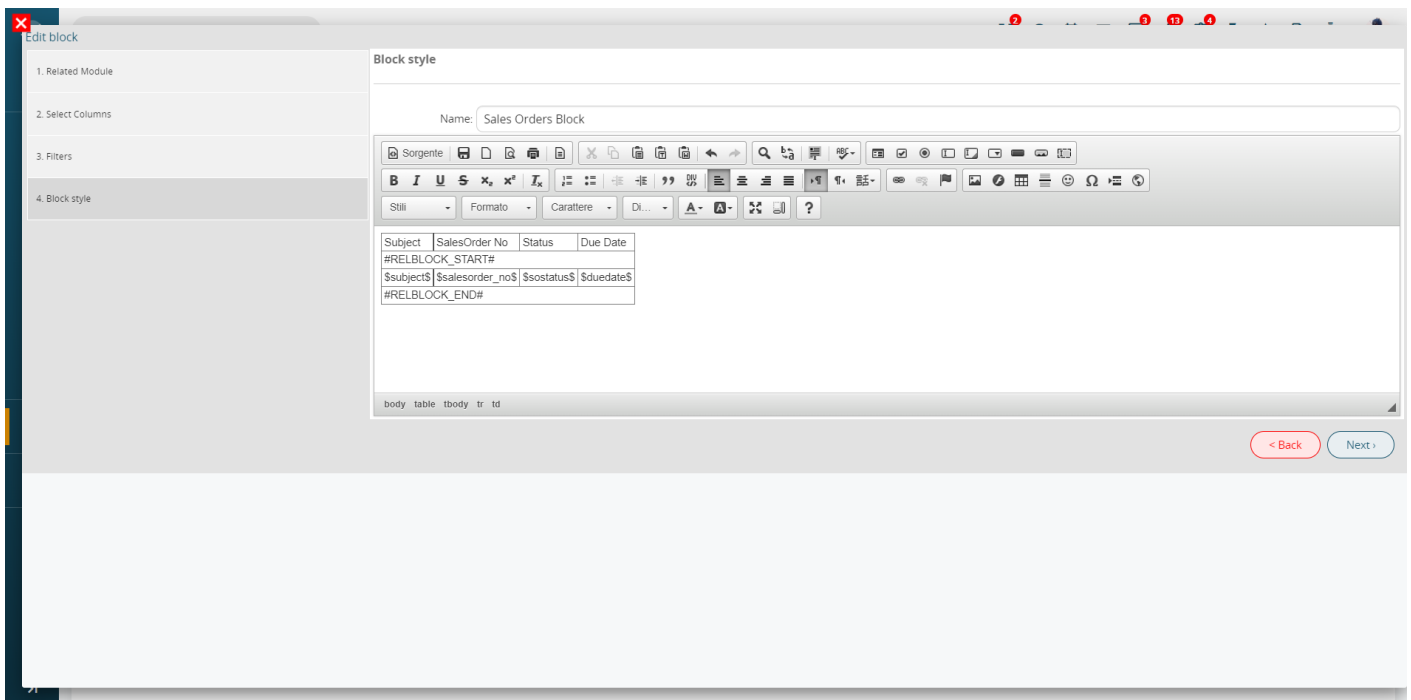
Choose the related module for which you want to view the data in PDF format



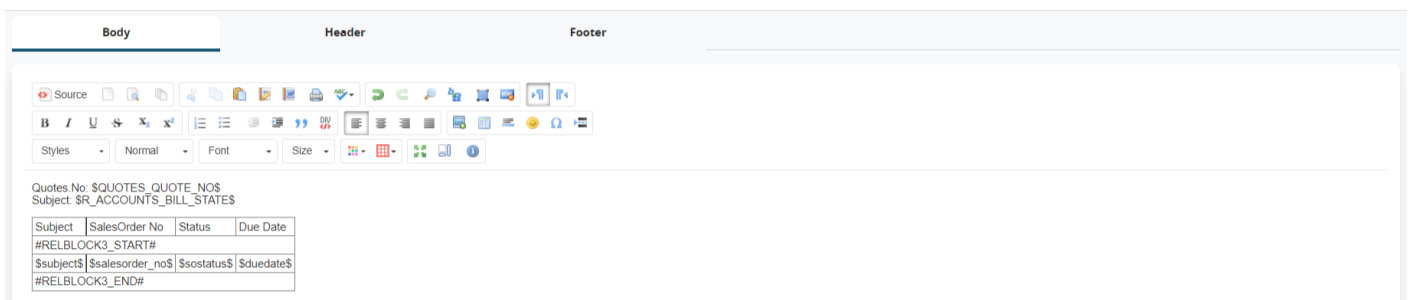
Choose the fields you want to display (from the left-hand column, using the cursor, shift the fields into the right-hand column)



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 #1

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