



## Description

Provides the ability to have a button which will display the PDF template in selected entity.

**Version:** v7+

## Installation

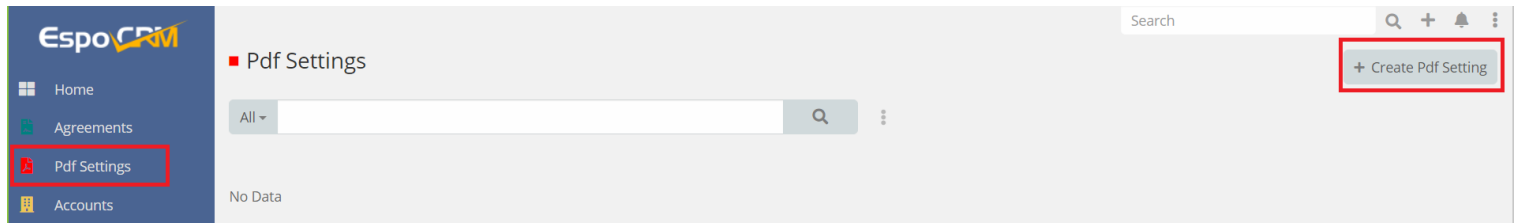
In order to install EspoCRM extension:

1. Login as an administrator.
2. Go to Administration > Extensions.
3. Upload your extension package (zip file).
4. Click Install button.

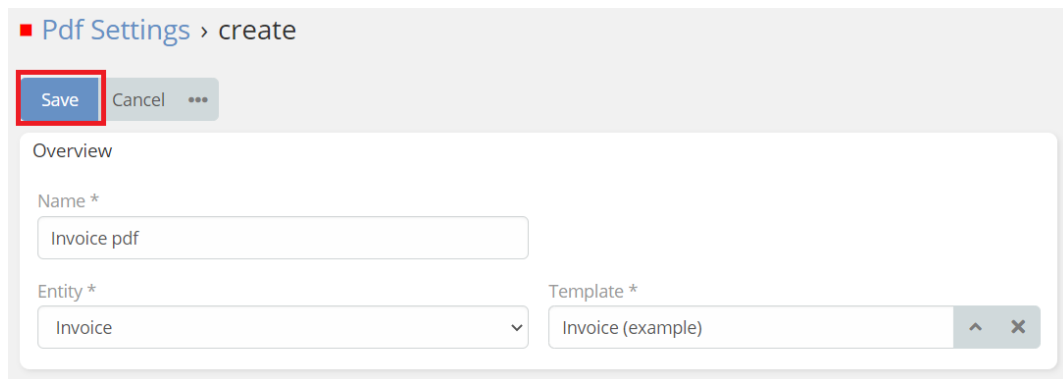
You can find more information here: <https://docs.espocrm.com/administration/extensions/>

## Creating PDF settings

1. Go to the Pdf Settings entity and create new record.



2. Specify the name, choose an entity where you will use PDF template and select a PDF template. Save it.

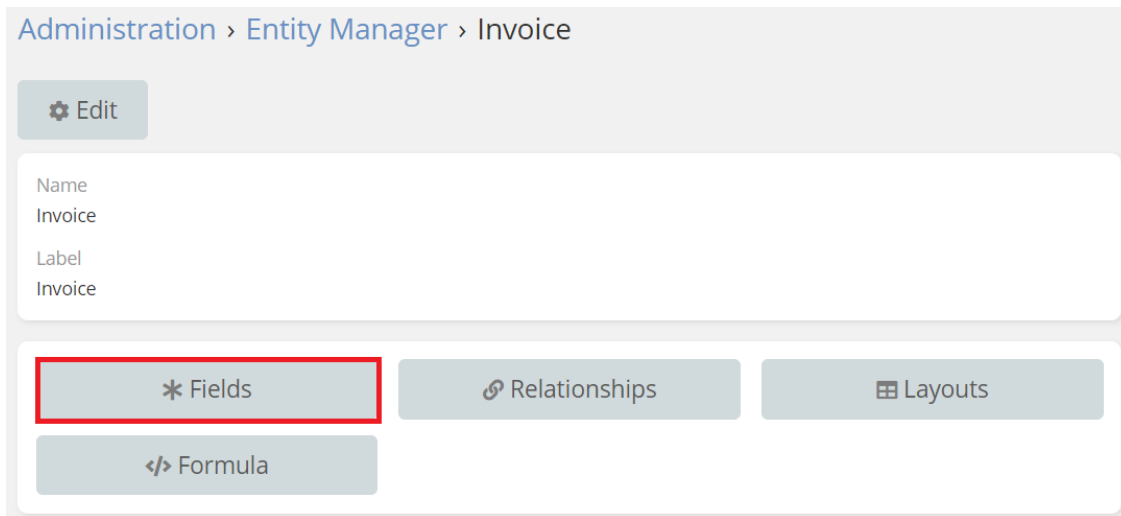


**NOTE:** Pdf Settings allows you to select an entity only once. e.g. you can't create Pdf Settings twice for selected entity (in example above for Invoice entity).

**More about PDF templates:** <https://docs.espocrm.com/user-guide/printing-to-pdf/#templates>

## Creating PDF field button

1. Go to the Administration->Entity Manager->Your entity which you selected in PDF Settings(in this case "Invoice"). Click on Fields.



Administration > Entity Manager > Invoice

Edit

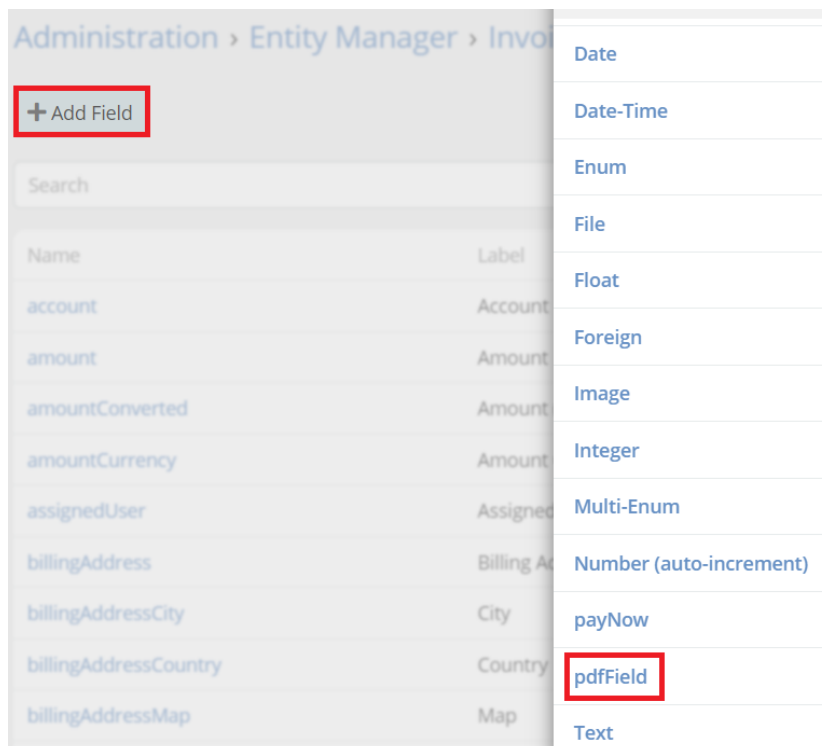
Name  
Invoice

Label  
Invoice

\* Fields Relationships Layouts

</> Formula

2. Click on Add Field and select pdfField.



Administration > Entity Manager > Invoice

+ Add Field

Search

Name	Label
account	Account
amount	Amount
amountConverted	Amount
amountCurrency	Amount
assignedUser	Assigned
billingAddress	Billing Address
billingAddressCity	City
billingAddressCountry	Country
billingAddressMap	Map

- Date
- Date-Time
- Enum
- File
- Float
- Foreign
- Image
- Integer
- Multi-Enum
- Number (auto-increment)
- payNow
- pdfField
- Text

3. Give the name to field and save it.

Administration > Entity Manager > Invoice > Fields

**Save** Close

Type  
pdfField

Name

Label

Required ⓘ

4. Go to entity layouts and choose where you want to place created field. Drag and drop created field to the field list. Save it.

Administration > Entity Manager > Invoice > Layouts

Invoices

- List
- Detail
- List (Small)
- Detail (Small)
- Bottom Panels
- Search Filters
- Mass Update
- Side Panels (Detail)
- Side Panels (Edit)
- Side Panels (Detail Small)
- Side Panels (Edit Small)

List


**Save** Cancel Reset to Default

Enabled

- Name
- Account
- Status
- Created At
- Amount

Disabled

- Amount (converted)
- Assigned User
- Billing Address
- Billing Contact
- City
- City (Shipping)
- Pdf
- Country





## Accessing the template

1. Go to your entity which you selected in PDF Settings(in this case "Invoice"). And click on PDF icon.

Invoices + Create Invoice Templates ...

All -

Total: 1

<input type="checkbox"/> Name	Account	Status	Created At ^	Amount	Pdf
<input type="checkbox"/> Invoice	Account	Confirmed	Today 09:57	\$306.00	

2. PDF template will open.

Company Name

Invoice

Account

Date: 2022-12-14

Invoice

Currency: USD

#	Name	Qty	List Price	Unit Price	Amount
1	product	3.00	102.00	102.00	306.00
Pre-Discounted Amount					306.00
Discount Amount					0.00
Amount					306.00
Tax Amount					0.00
Shipping Cost					
Grand Total Amount					<b>306.00</b>

Thank you for your business.