

Description

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

Installation

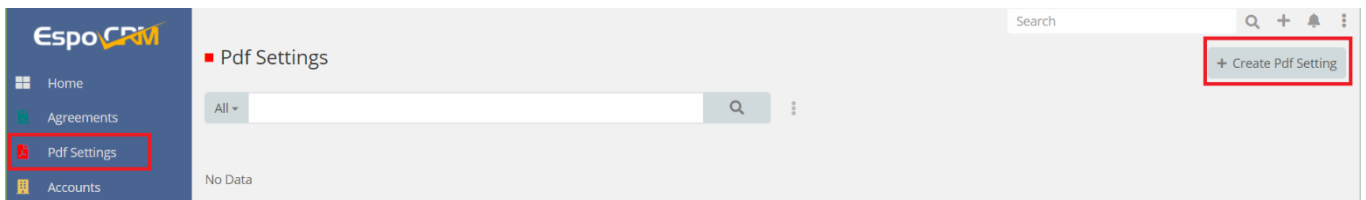
In order to install EspoCRM extension:

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

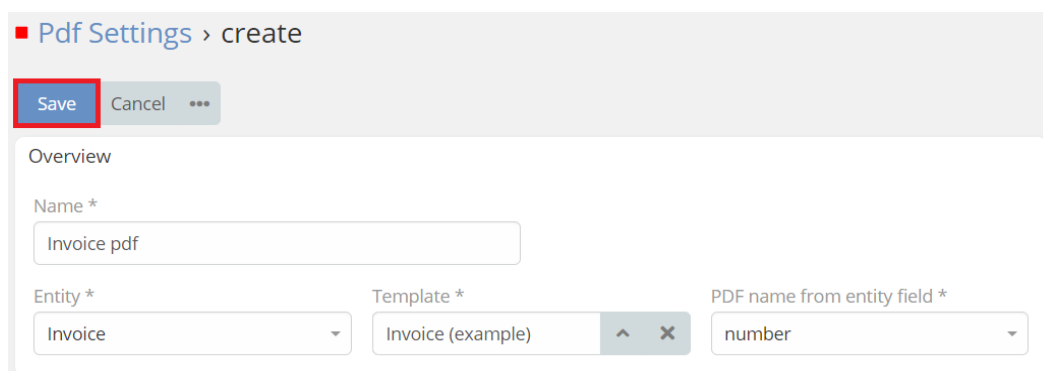
You can find more information here: <https://docs.espocrm.com/administration/extensions/>

Creating PDF setting

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



2. Specify the name, choose an entity where you will use the PDF template, select a PDF template, and choose a field of the selected entity that will be used for the PDF file name. The PDF file name will be the value of the field of the selected entity. In this example, the file name will be the value of the "Invoice" entity number field. Save it.

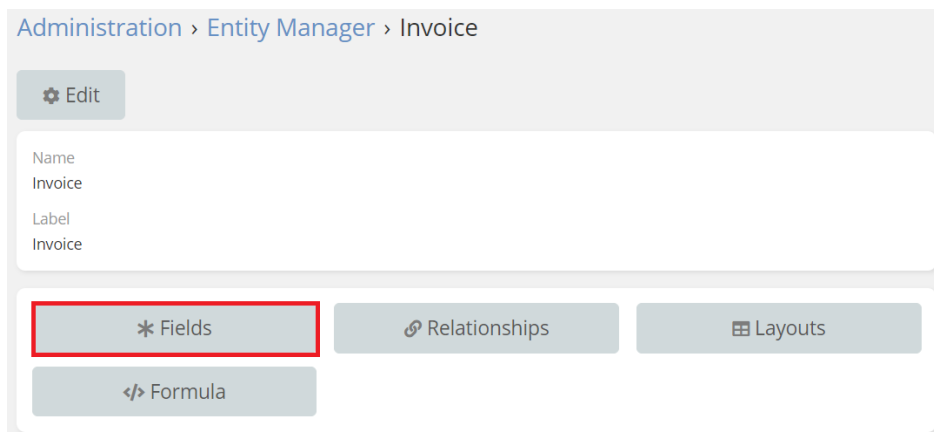


NOTE: Pdf Settings allows you to select an entity only once. e.g. you can't create Pdf Settings twice for selected entity (in example above for Invoice entity).

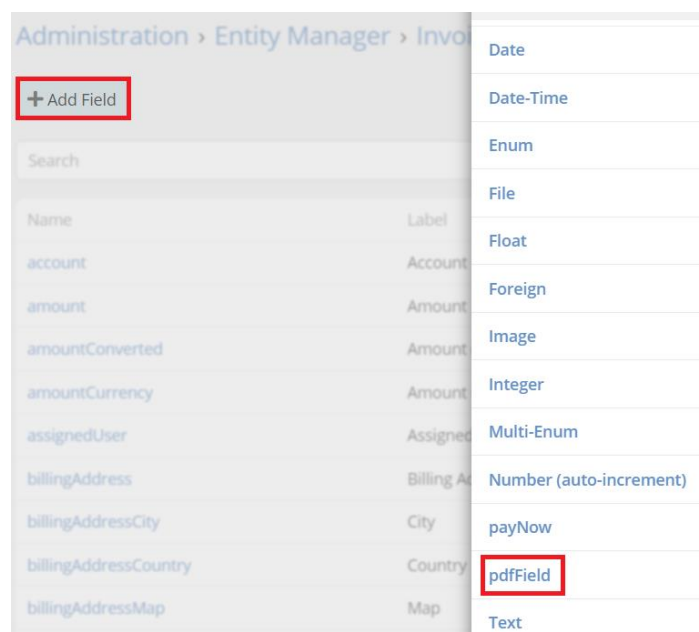
More about PDF templates: <https://docs.espocrm.com/user-guide/printing-to-pdf/#templates>

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.



2. Click on Add Field and select pdfField.



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

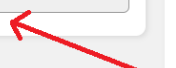
Save Cancel Reset to Default

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								
<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					306.00

Thank you for your business.



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Information for EspoCRM users who already have this extension installed:

In version 1.1.2, a new field "PDF name from entity field" has been added to the "Pdf Setting" entity. Don't forget to fill in this field for your existing "Pdf Setting" records.