

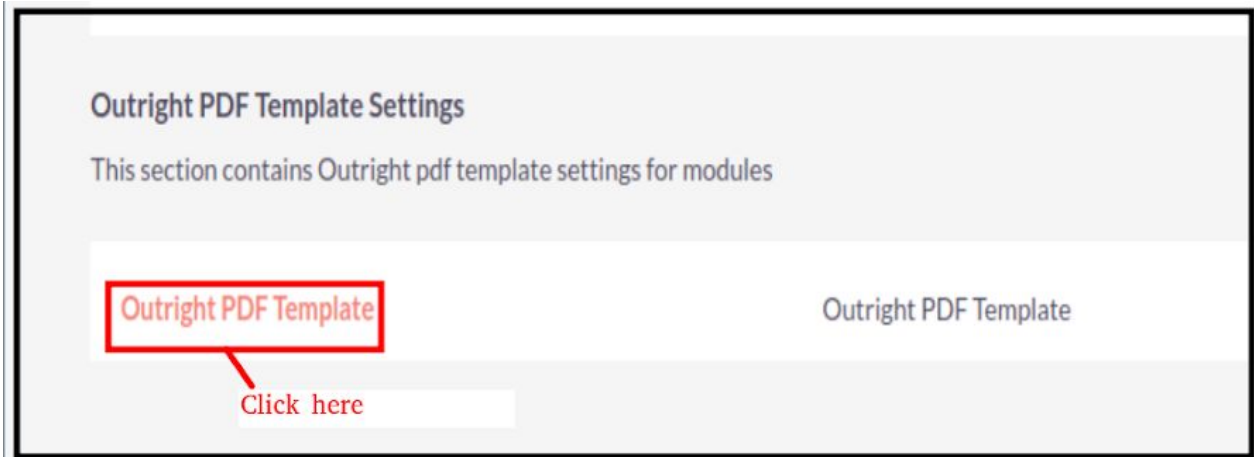


SuiteCRM Empower PDF Template

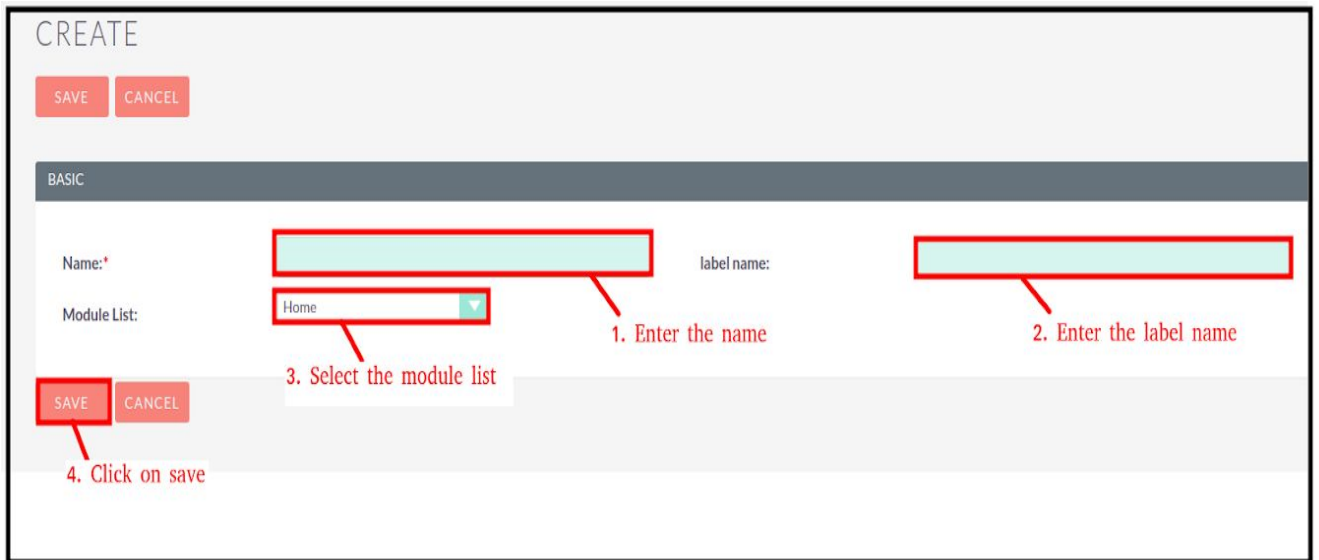
User Guide

Configuration Guide:-

1. Go to Administration page and click outright pdf template

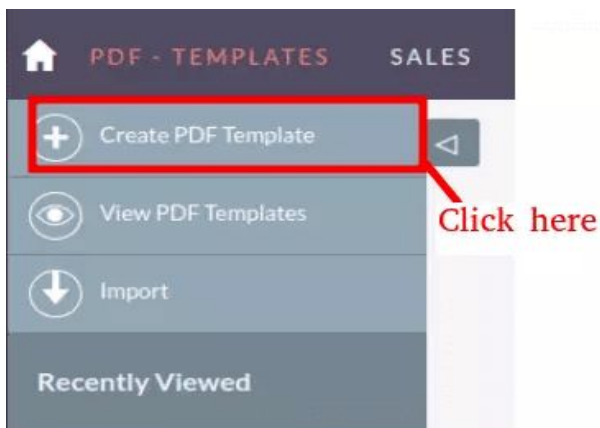


2. Create a new outright pdf template settings and then enter the name, label name, select the module list and click on save



3. Click on All tab from the main menu

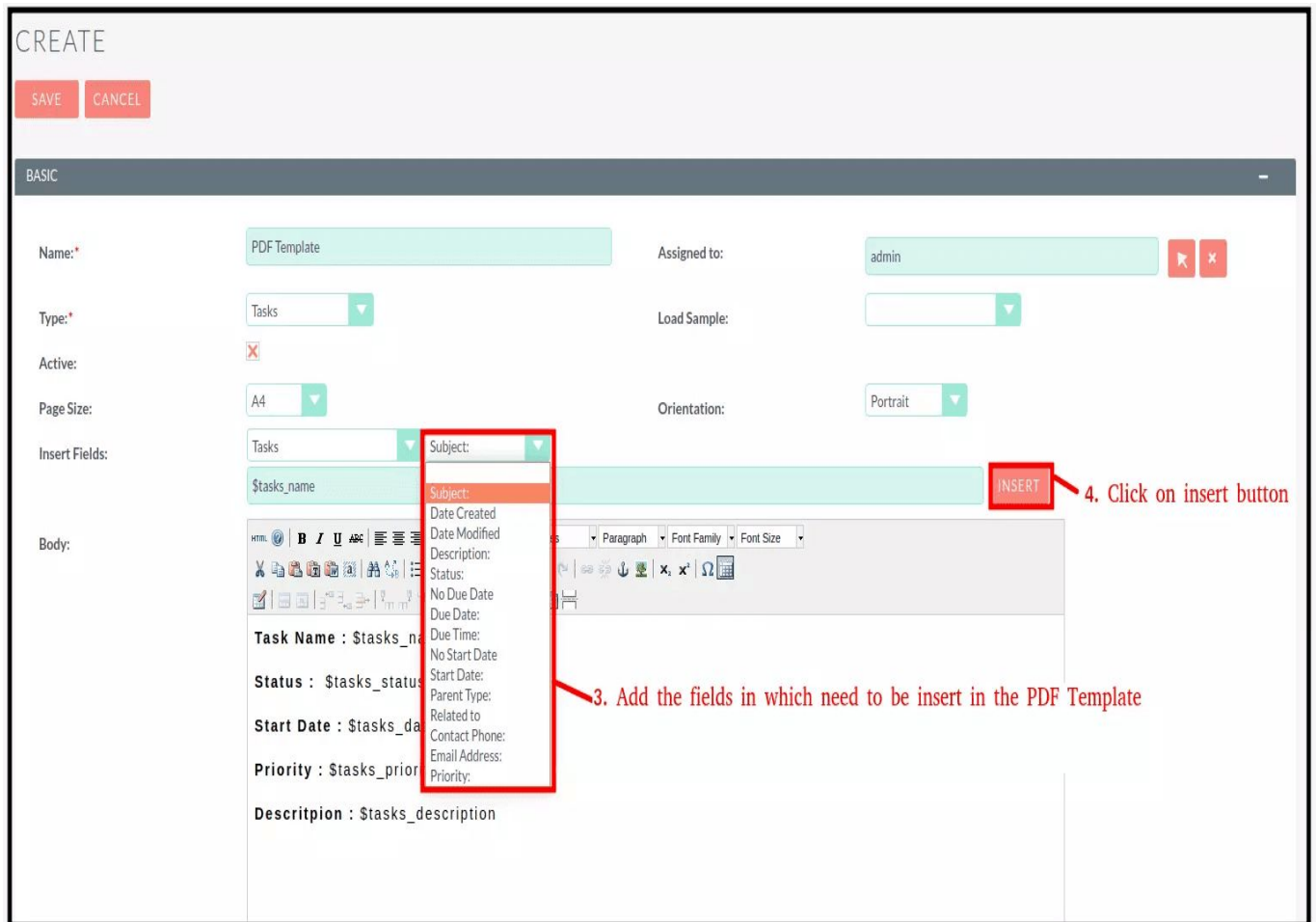
4. Then Go to the PDF - Templates module and create a new PDF - Template for Task module



5. Enter the name for pdf template and Select the module

The screenshot shows the 'CREATE' interface for a PDF Template in SuiteCRM. The 'Name' field is set to 'PDF Template'. The 'Type' dropdown menu is open, showing a list of modules: Tasks, Quotes, Invoices, Contracts, Accounts, Contacts, Leads, Opportunities, and EmailMarketing. The 'Tasks' option is highlighted. Red annotations include a box around the 'Name' field with the text '1. Enter the name' and a box around the 'Tasks' option in the dropdown with the text '2. Select the module in which need to be create on a PDF Template'. The interface also includes 'SAVE' and 'CANCEL' buttons at the top, and 'Assigned to: admin', 'Load Sample:', and 'Orientation: Portrait' fields. An 'INSERT' button is visible at the bottom right of the form area.

- 6. Select the type “Task”
- 7. Select the insert field and add the fields

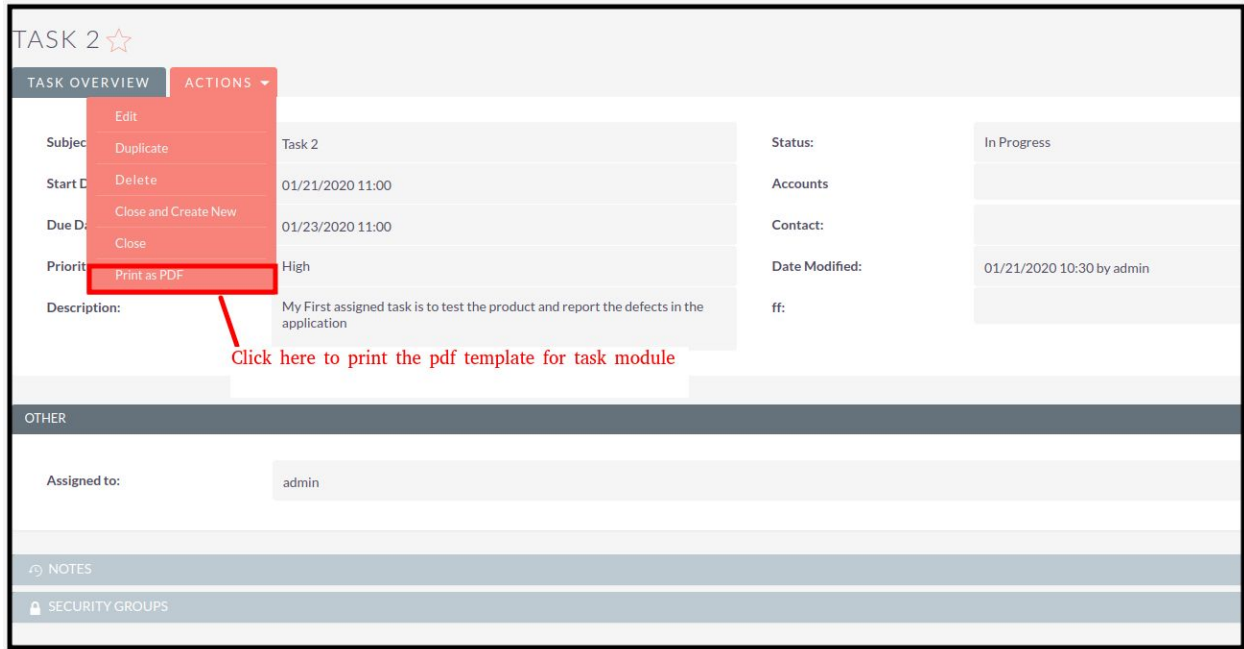


User Guide:-

1. Create a new task from Task module

The screenshot shows the 'TASK 2 » EDIT' form in SuiteCRM. At the top, there are four buttons: 'SAVE', 'CANCEL', 'CLOSE AND CREATE NEW', and 'SAVE AND CONTINUE'. Below these is a 'TASK OVERVIEW' section. The form contains several fields: 'Subject:*' with the value 'Task 2', 'Start Date:' with a date picker set to '01/21/2020 11:00', 'Due Date:' with a date picker set to '01/23/2020 11:00', 'Priority:*' with a dropdown set to 'High', and 'Description:' with the text 'My First assigned task is to test the product and report the defects in the application'. On the right side, there are fields for 'Status:*' (dropdown set to 'In Progress'), 'Related to:' (dropdown set to 'Task'), 'Contact Name:', 'Date Modified:' (01/21/2020 10:30), and 'ff:'. Red boxes and arrows highlight specific fields with numbered instructions: 1. Enter the subject name (Subject), 2. Select the start date (Start Date), 3. Select the due date (Due Date), 4. Select the priority (Priority), 5. Enter the description (Description), and 6. Select the status (Status).

2. Click on Actions drop down list from the detail view of any task record and then click on the option “Print as PDF”



4. Select the PDF template from the list. It will download the pdf file for the task module.

