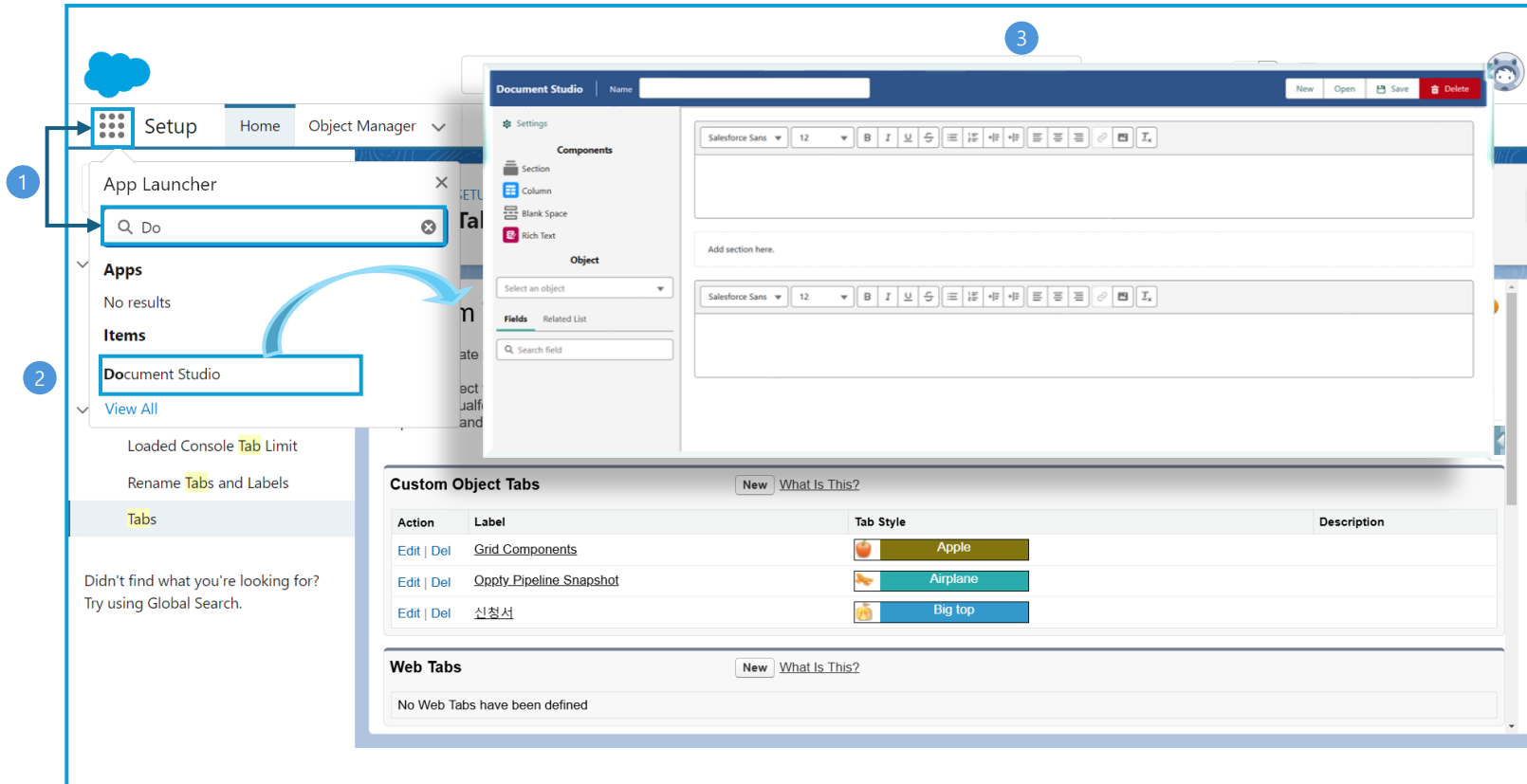


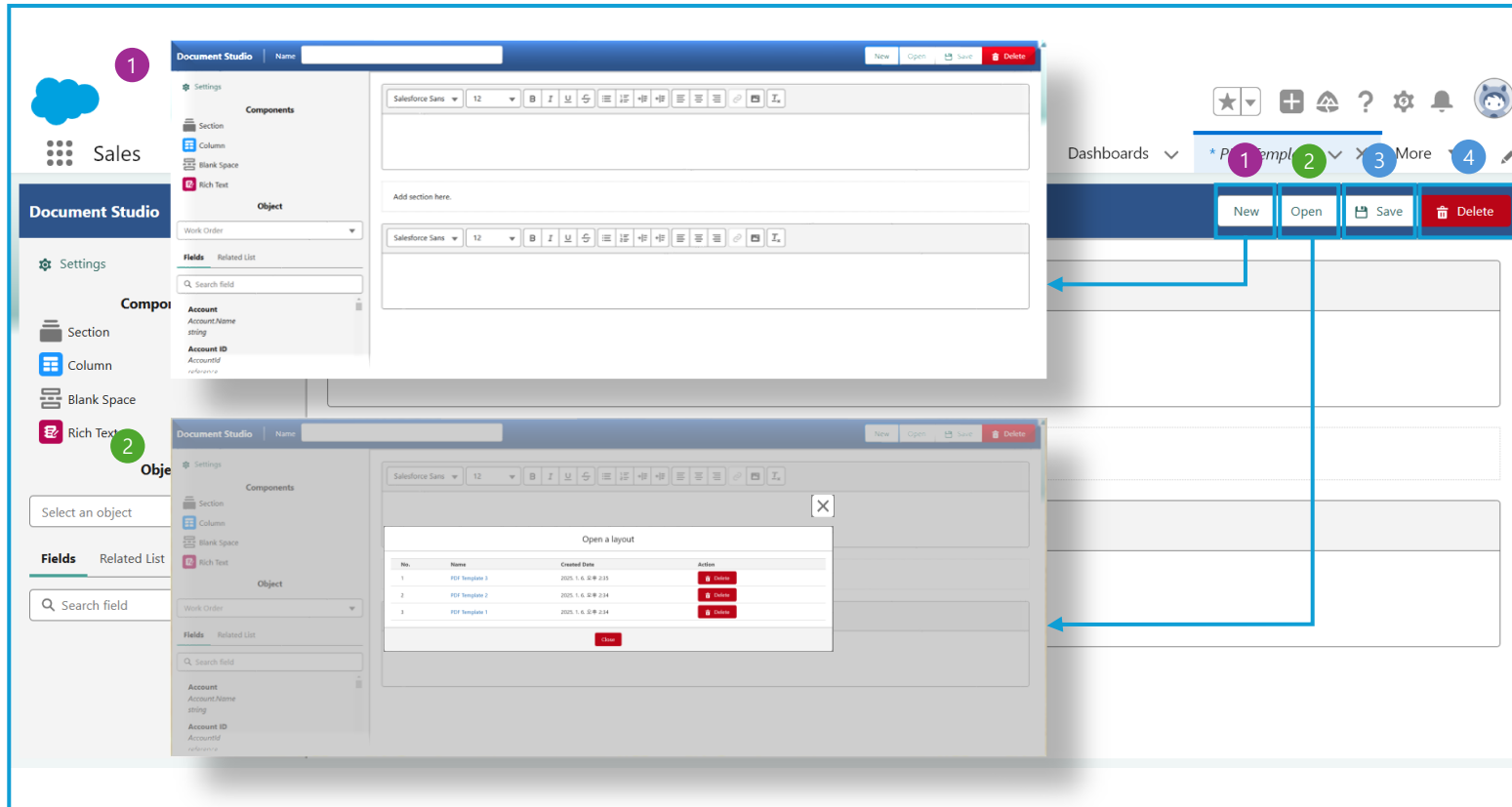
Document Studio (PDF Template)

Manual Guide

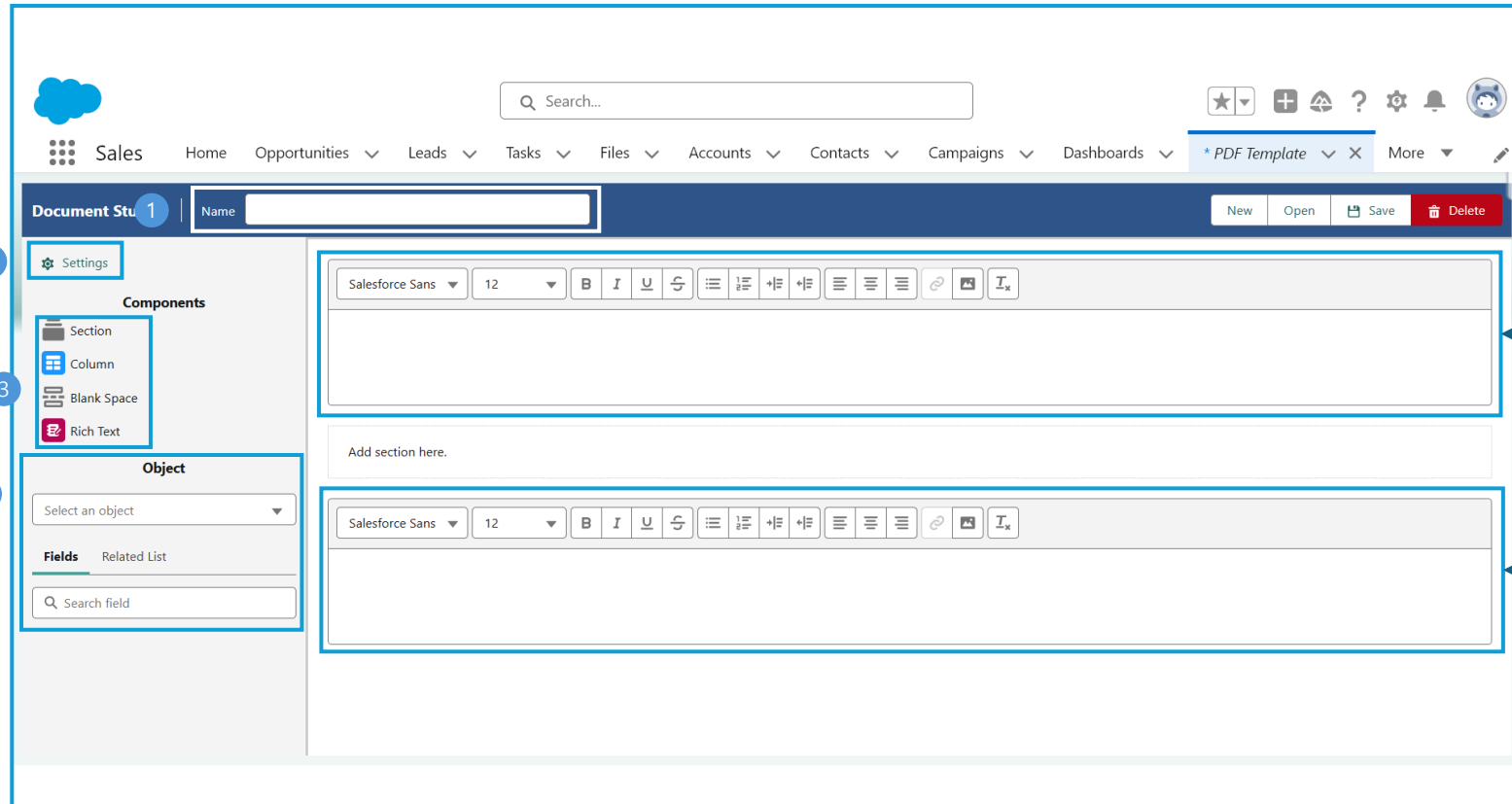
PDF Template



- ① Click the top left of the screen  Enter the specified **Document Studio** in the search field of the App Launcher
- ② Click the **Document Studio** App to go to the PDF form creation screen.



- ① [New] Button: Calls up the new template creation screen
- ② [Open] Button: Select a created template
- ③ [Save] Button: Save a new template or save current existing template
- ④ [Delete] Button: Delete saved template



① Name : Specify the template name to use

② Settings

- Set template access by layout
- Set field titles and value positions
- Set the overall template font size
- Specify the signature target

③ Adding Components

(Section)

- Move [Section] to the area where you want to add Column, Blank Space, and Related Record. Move [Column] to the area where you want to add fields.

※ Columns must be located within a Section.

(Blank Space)

- Add blank space instead of field

※ Blank Space must be located within a Section

(Rich Text)

- Move to where you want to add a Rich Text area where you can insert a photo, write a document title (a fixed string), etc...

④ AND ⑤ ► Next page

The screenshot shows the Document Studio interface. At the top, there's a navigation bar with a search bar and various icons. Below it, a sidebar contains a 'Components' panel with options like Section, Column, Blank Space, and Rich Text. The main area is divided into sections for editing. Numbered callouts are placed as follows: 1 points to the 'Document Studio' header; 2 points to the 'Settings' gear icon; 3 points to the 'Components' panel; 4 points to the 'Object' selection dropdown; and 5 points to the main editing area, which includes a rich text editor with a toolbar and a section for adding content.

④ Field Settings

(Object)

- Select Objects to add to PDF template

(Field)

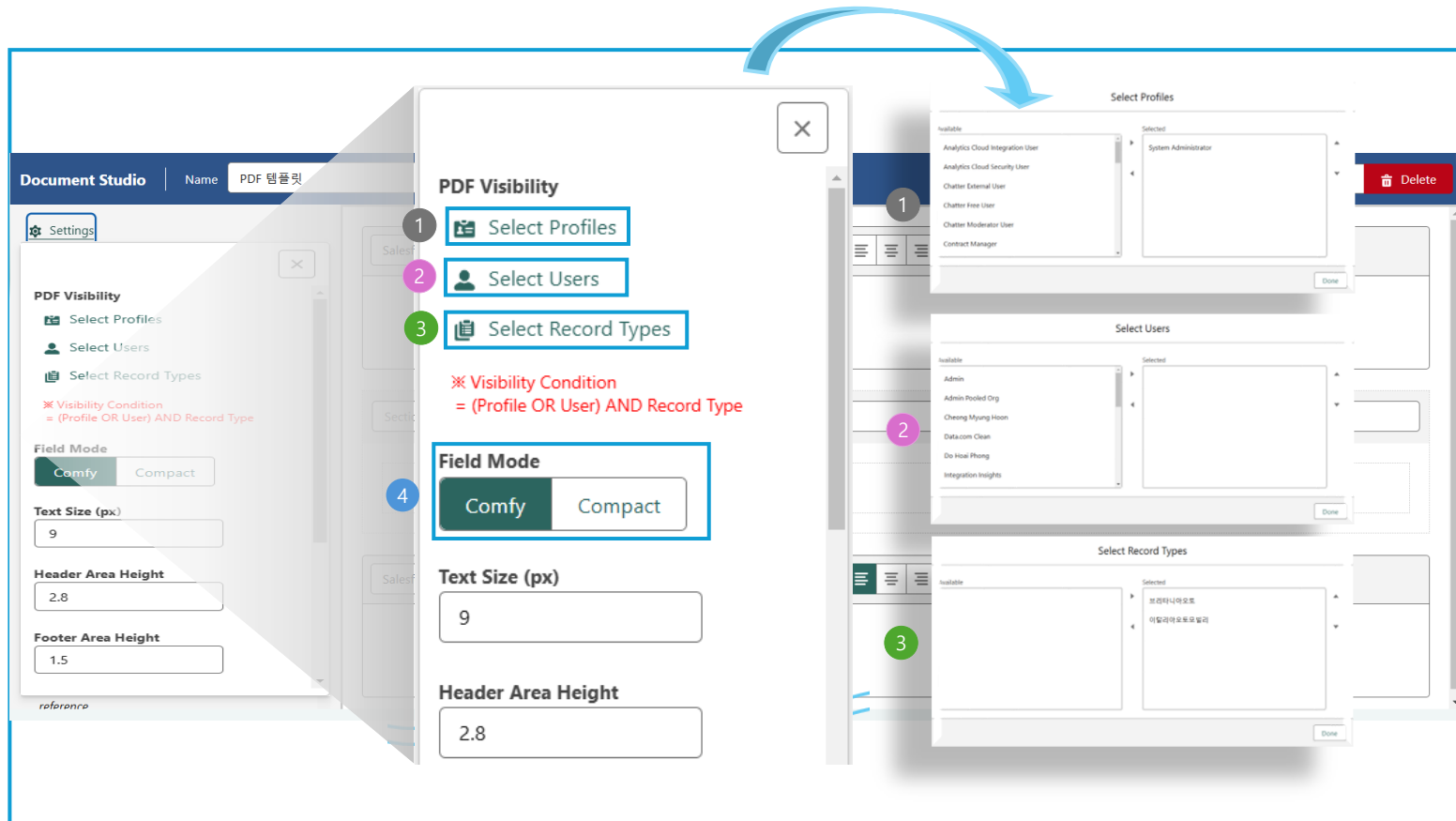
- Area where the fields of the object selected in ④ are displayed
- Move fields to display in PDF form to Column

(Related list)

- List related to the object selected in ④

⑤ Header/ Footer

- Enter text or pictures (Rich Text) to display at the top and bottom of the document
- ※ What you enter in the header and footer will be repeated on all pages.



Setting template access by Layout

① Select Profiles

- Grant template access only to users with specific profiles

② Select Users

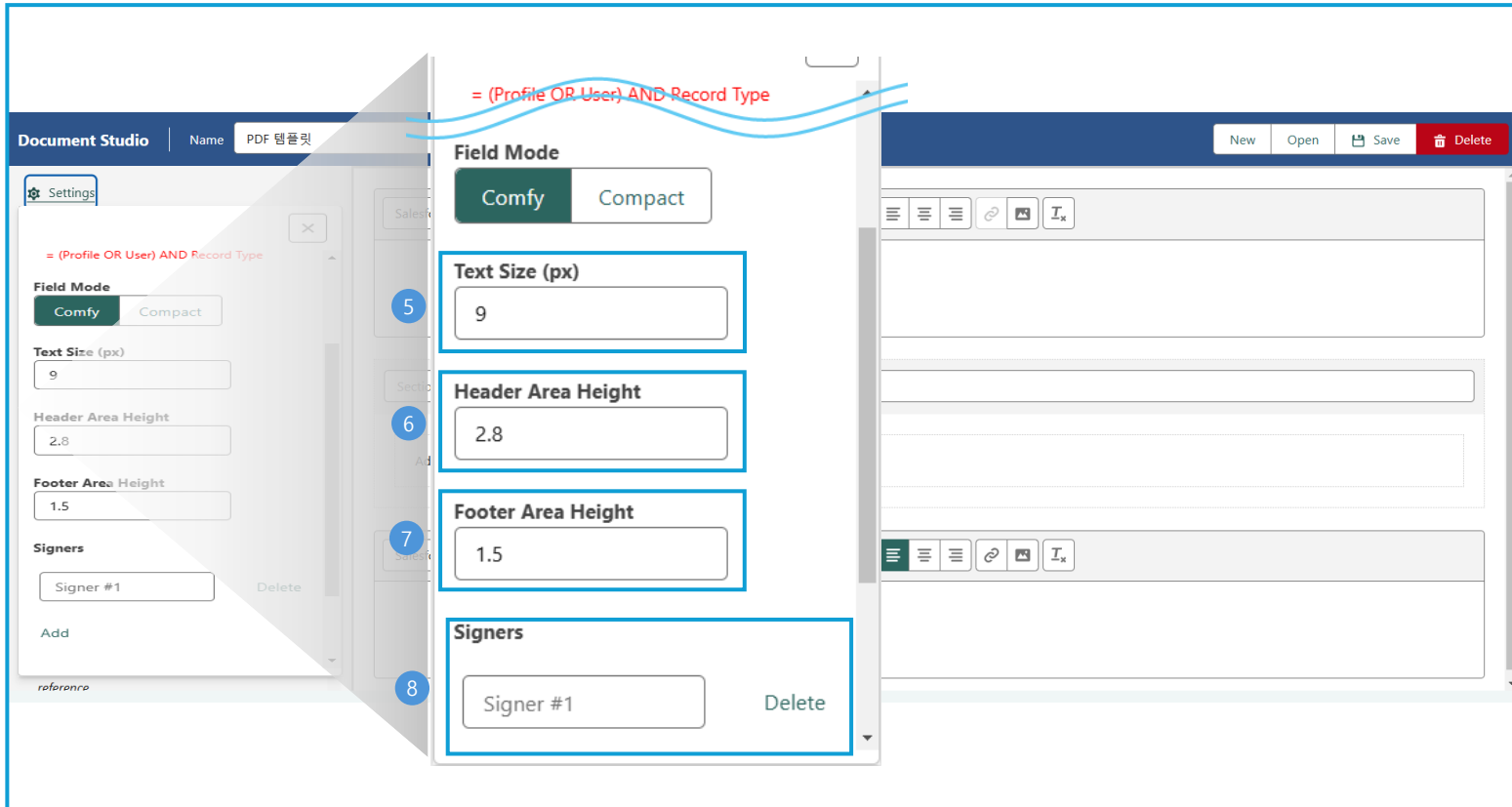
- Grant template access to only certain users

③ Select Record Types

- Grant template access only to specific Record Types

④ Field Mode : Setting the position of the Field Label and Field Value

- Comfy : Top (title)/bottom (value) format
- Compact : Left(title)/Right(value) format



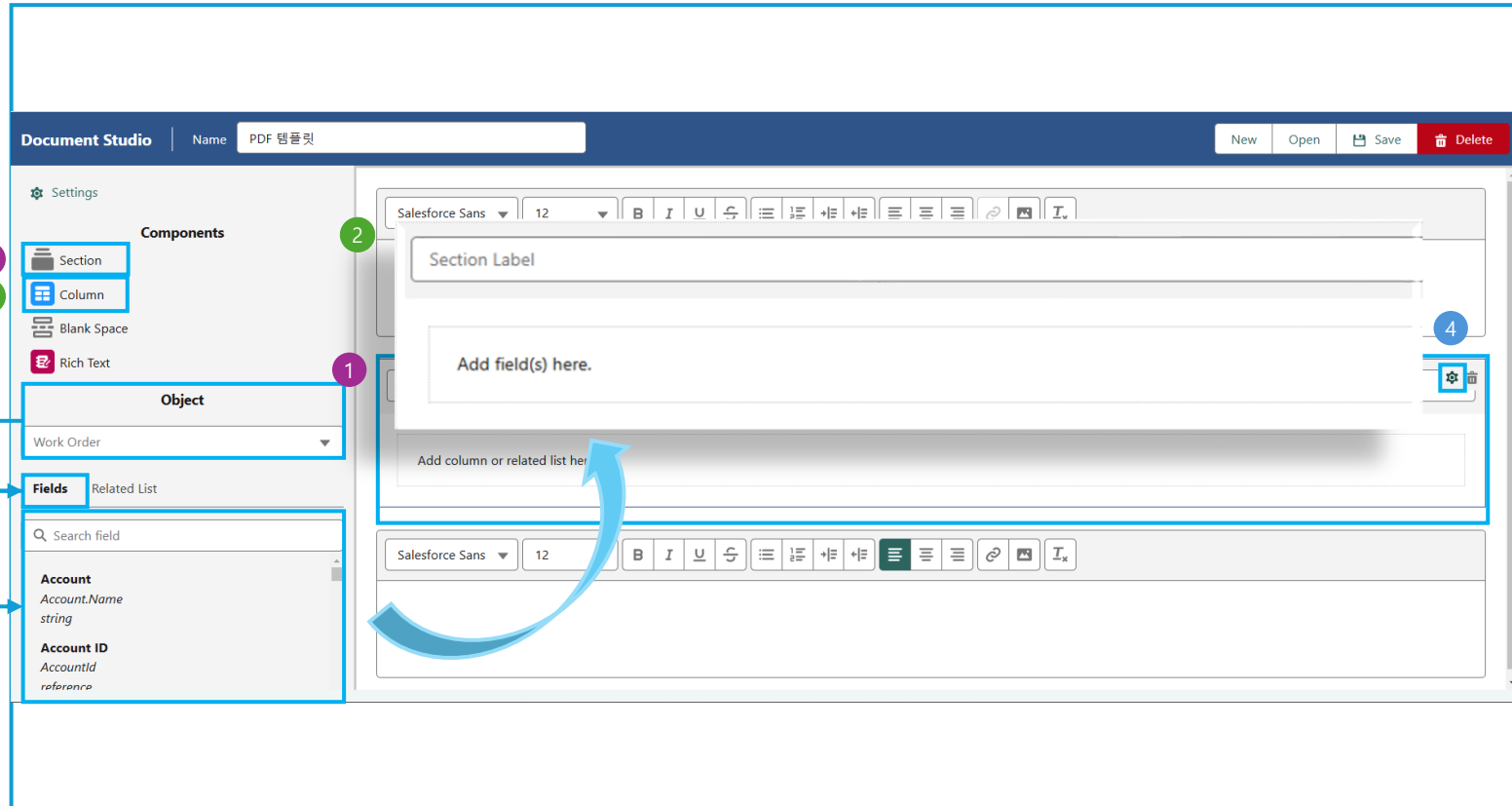
⑤ Text Size(px) : Set the overall template font size

⑥ Header Area Height : Set header area height

⑦ Footer Area Height : Set footer area height

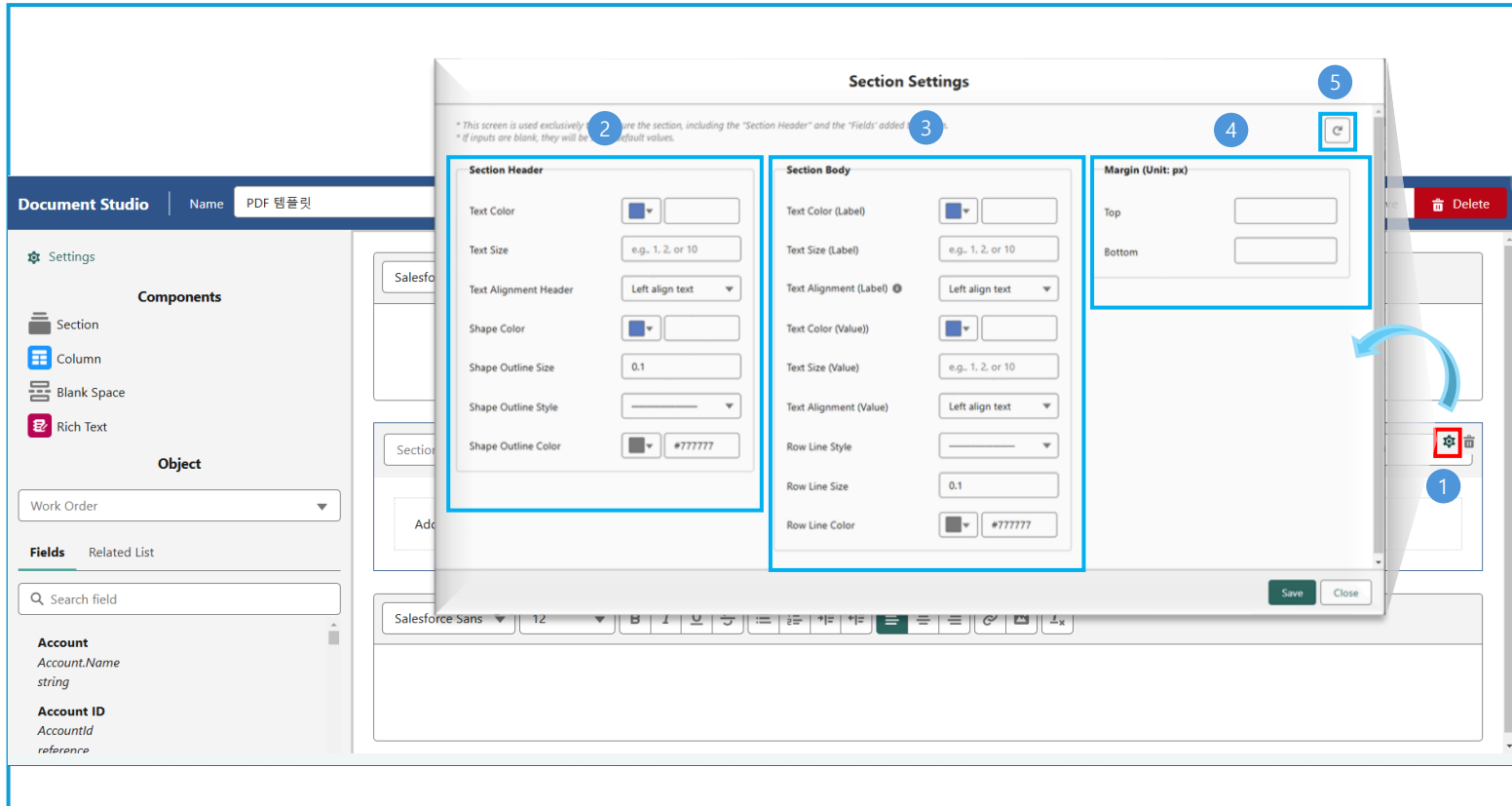
⑧ Signers : Specify the signature target

- There is no limit to the number of signature recipients.
- The signature is fixed at the end of the template.
- Signer #: Enter the name of the person to be signed
- Add : Add a signatory
- Delete : Delete signature target



Section

- ① Drag [Section] to [Add section here] on the right screen
- ② Drag [Column] to move it to the [Add column or related list here] area of the Section created in ①.
※ Columns can only be located within a Section.
- ③ Field settings
 - Select the Object to reflect the PDF template
 - Move the fields you want to reflect in the PDF template to the [Add field(s) here] area.
 - ※ If you want to add a Lookup object, you must first create a Field Set for the Lookup object and specify the fields to be added..
 - ※ The name of the Field Sets must be "Report_Lookup_Fields".
- ④ Click the  icon on the top right of the added Section Box to go to the Section Settings screen.
 - For Section Setting, please refer to the next page



① Section Setting

※ When you hover your mouse cursor over the Section Label location, the Setting icon [⚙] will appear.

② Section Header

- Setting the font design of the section title
 - Text Color, Text Size, Text Alignment

※ Caution

- The Text Alignment (Label) feature can only be applied when Field Mode is set to 'Comfy'.
- When Field Mode is 'Compact', the alignment of Text Alignment (Label) is determined by the setting of Text Alignment (Value).

- BOX design settings for section titles
 - Shape Color (Box background color), Shape Outline Size (Box outline thickness), Shape Outline Style (Outline type)

③ Section Body

- Set the font design of the corresponding Section field label
 - Text Color (Label), Text Size (Label), Text Alignment (Label)
- Set the font design of the field value in the corresponding Section
 - Text Color (Value), Text Size (Value), Text Alignment (Value)
- Design settings for dividing lines
 - Row Line Style, Row Line Size, Row Line Color

④ Margin (Unit: px):

- Adjust spacing from header or other sections

⑤ Icon (↺) : Reset Section Settings

Document Studio

Settings

Components

- Section
- Column
- Blank Space
- Rich Text

Object

Work Order

Related List

Search field

Expense Related List

Field Api Name	Label	Type
Accountid	Account ID	REFERENCE
Amount	Amount	CURRENCY
CreatedByName	Created By Full Name	STRING
CreatedByid	Created By ID	REFERENCE
CreatedDate	Created Date	DATE
IsDeleted	Deleted	BOOLEAN
Description	Description	TEXTAREA
Discount	Discount	PERCENT
ExpenseEndDate	End Date	DATE

Selected Field

Selected Field	Label	Heading Alignment	Width (12%)
Account.Suffix	Account Suffix	center	7 %
ExpenseNumber	Expense Name	center	5 %

Filter record with current user login

+ Add condition

+ Add order

LIMIT 100

Cancel Preview SQL Query Apply

Set up a list of related lists

- ① Move [Section] to [Add section here] on the right screen
- ② Set up list
 - a. Select Objects to add to PDF template
 - b. Enter and search for Related List Object in the [Related list] tab at the bottom of the selected Object.
 - c. Move the selected Related List Object to the [Add column or related list] area of the corresponding Section.
 - d. After moving, display the related list setting screen

Expense Related List

Search field

Deselect all fields

Field Api Name	Label	Type
Accountid	Account ID	REFERENCE
Amount	Amount	CURRENCY
CreatedByName	Created By Full Name	STRING
CreatedByid	Created By ID	REFERENCE
CreatedDate	Created Date	DATETIME
IsDeleted	Deleted	BOOLEAN
Description	Description	TEXTAREA
Discount	Discount	PERCENT
ExpenseEndDate	End Date	DATE

Selected Field	Label	Heading Alignment	Width (12%)
Account.Suffix	Account Suffix	center	7
ExpenseNumber	Expense Name	center	5

Filter record with current user login

+ Add condition

+ Add order

LIMIT 100

Cancel Preview SQL Query Apply

+ Add order

Field Label	Order
0	<Select Field> Ascending

Setting up related list fields

- Click the icon in the upper right corner of the added related list to go to the settings screen.
- View fields to use in PDF forms (left area) and add them (right area)
- Set the width of a column
 - Specify width by column (percent)
 - When using the No. Column, it is recommended to set the total column width of the remaining fields to about 95%.
- Filter record with current user Login
 - When generating PDF, only records owned by the logged-in user are displayed (e.g., if the Related List of Account is Oppty, only Oppty owned by the logged-in user is displayed in the PDF)
- Record Filter: Enter the conditions for the records to be displayed on the screen.
- Delete all added fields
- Specify the field to sort by
 - Click [+ Add order]
 - Select the fields to sort and how to sort them
- Specify the number of records in the related list to display (default = 1)
- [Cancel] : Cancel settings and close settings screen
 [Preview SQL Query] : Displays the query reflecting the configured fields and conditions.
 [Apply] : Save settings and close settings screen

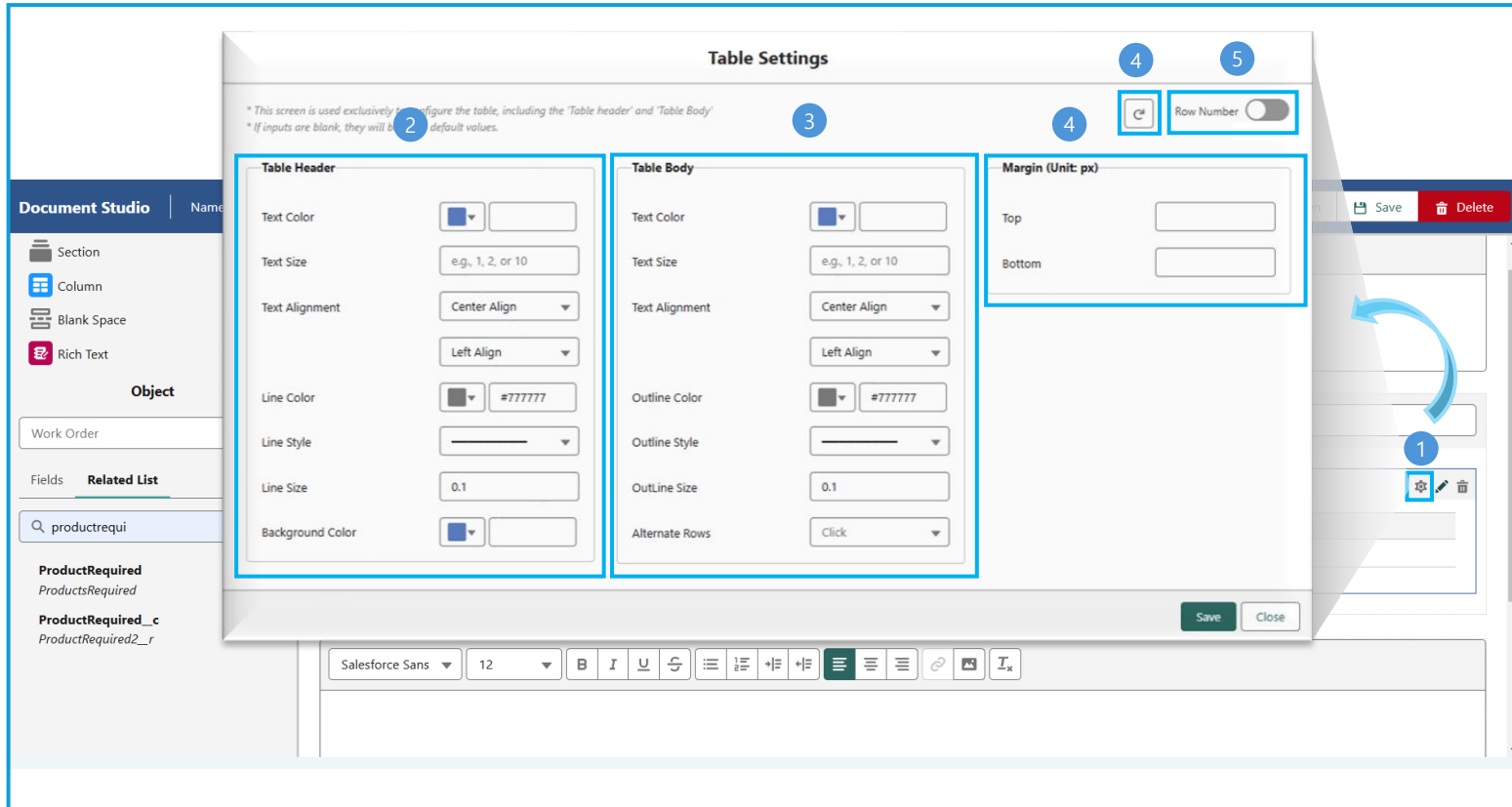


Table Settings

① Table Header

- Setting the font design of the column title
 - Text Color, Text Size, Text Alignment
- Set the outline design of the column title
 - Line Color (Outline Color), Line Style (Outline Type), Line Size (Outline Thickness)
 - Background Color

② Table Body

- Set the font design of the column value
- Set the outline design of the column value
 - Outline Color, Outline Style, Outline Size
 - Alternate Rows: Background color
 - None: Background color not set
 - All: Set the background color of all columns to the same
 - Odd&&Even: Separate background color settings for even/odd columns

③ Margin (Unit: px):

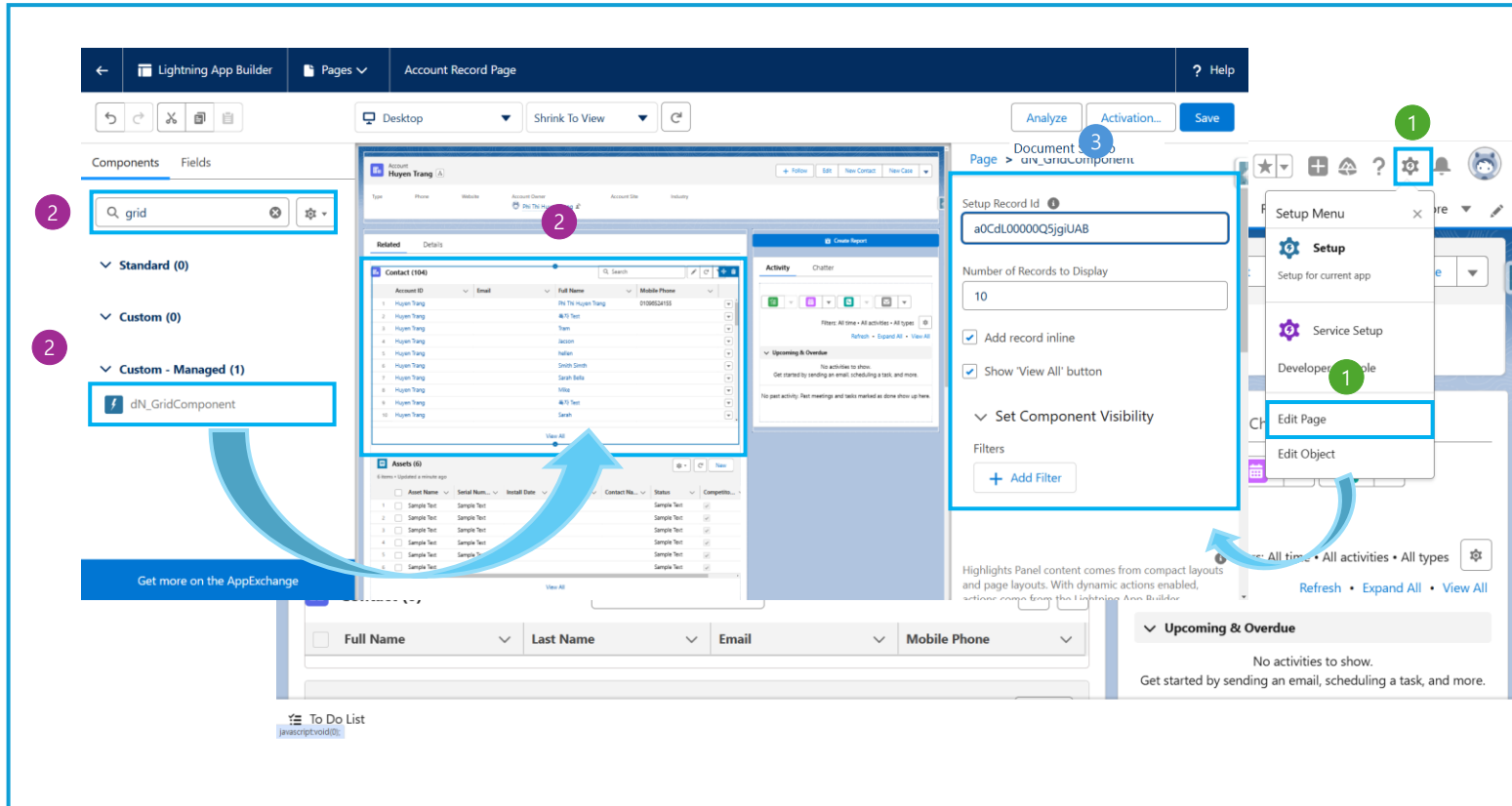
- Adjust spacing from header or other sections

④ Icon (↺) : Reset Section Settings

⑤ Set whether to use the sequential column

- Create a No. column in the table when activated
- When using the No. Column, it is recommended to set the total column width of the remaining fields to about 95%.

Lightning layout Component



Document Studio Component (Lightning Layout)

- ① Click the [⚙️] icon at the top right of the screen to add a component, then click [Edit Page]
- ② Add Light layout Component
 - Search for 'dn_GridComponent' in the [Component] tab and move it to the location where you want to display the component.
- ③ Setting Component Properties
 - Specify the Button Label and API Name.
 - Set button visibility as needed