

Advanced PDF Generator

End User Guide



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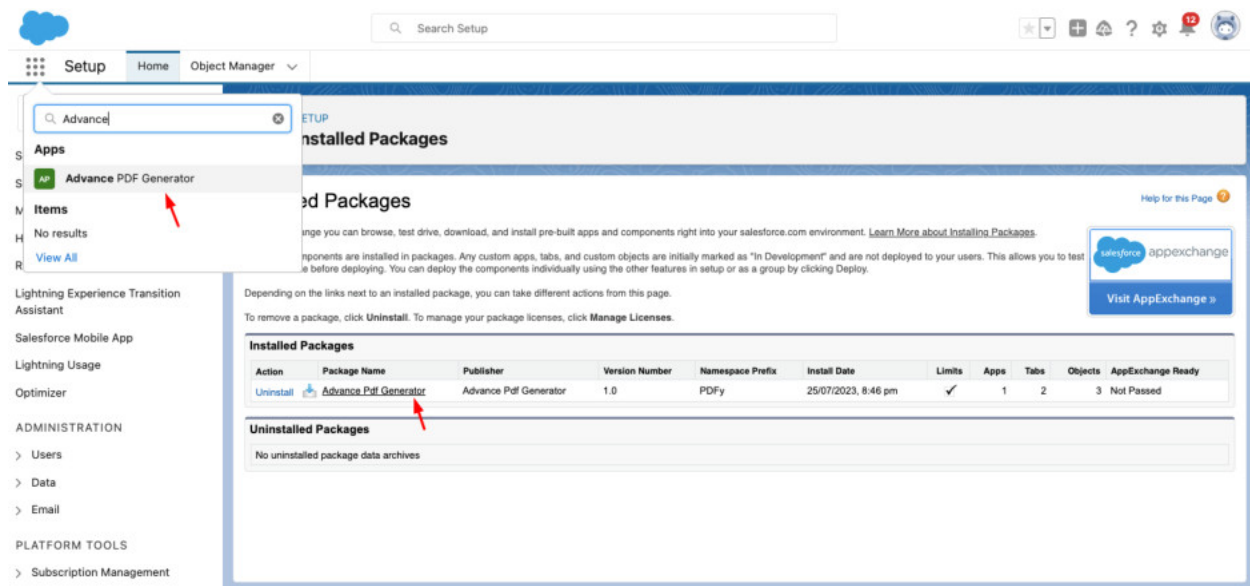
1. Introduction

Advanced PDF Generator is specifically designed to effortlessly generate PDFs using Salesforce record details and related records. This comprehensive user guide has been carefully crafted to provide you with a seamless experience, guiding you through the entire process of installation, configuration, and utilization of the app's diverse range of features. By the end of this guide, you'll be well-equipped to make the most of the Advanced PDF Generator's capabilities and streamline your PDF generation tasks like never before.

2. Installation

To install the Advanced PDF Generator, follow these steps:

1. Log in to your Salesforce account as an administrator.
2. Navigate to the AppExchange (Salesforce's marketplace for apps).
3. Search for "Advanced PDF Generator."
4. Click the "Get It Now" button and Install for **admins only**.
5. Grant necessary permissions when prompted during the installation process.
6. Once installed, the Advanced PDF Generator will be available within your Salesforce organization.

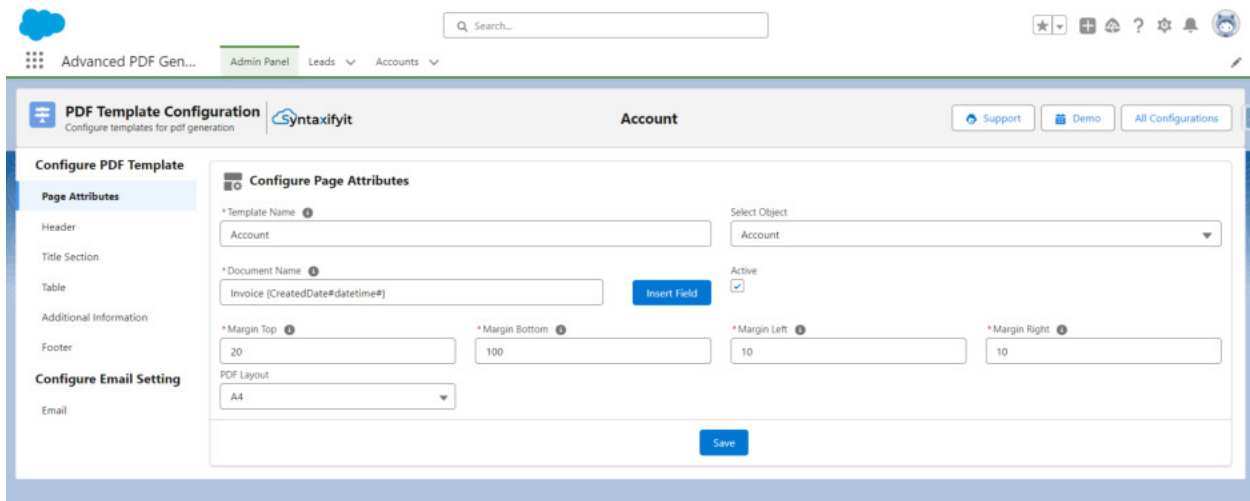


3. Configuration

a. Page Attributes

The Page Attributes section allows you to set up the basic settings for your PDF. Here are the fields/options available:

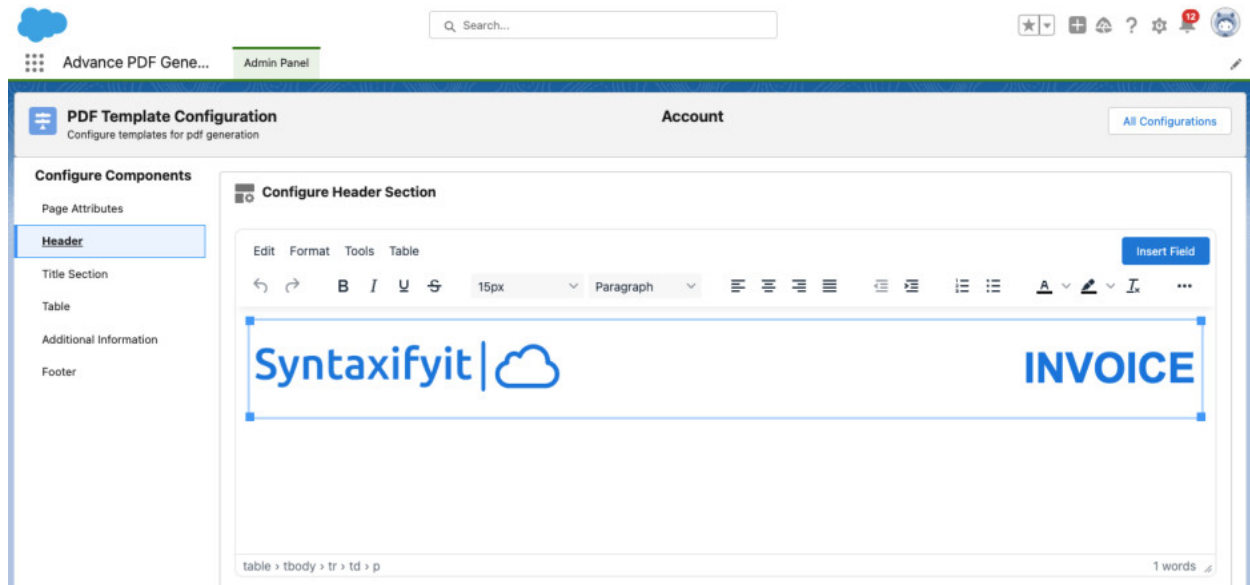
1. **Template Name:** Specify a name for your PDF template for future reference.
2. **Select Object:** Choose the main Salesforce object (parent) for which you want to generate the PDF.
3. **Document Name:** Enter the name of the generated PDF document.
4. **Active:** Check this box if you want to set the template as active for use.
5. **Margin Top, Margin Bottom, Margin Left, Margin Right:** Adjust the margins of the PDF page as per your requirements.
6. **PDF Layout:** Specify the page size for the layout of the PDF document, such as A4, A5, B3, B2, Letter, etc.



The screenshot displays the 'PDF Template Configuration' interface for 'Account'. The left sidebar shows a tree view with 'Configure PDF Template' expanded, containing 'Page Attributes', 'Header', 'Title Section', 'Table', 'Additional Information', 'Footer', and 'Configure Email Setting'. The 'Page Attributes' section is active, showing fields for 'Template Name' (set to 'Account'), 'Select Object' (set to 'Account'), 'Document Name' (set to 'Invoice (CreateDate#datetime#)' with an 'Insert Field' button), 'Active' (checked), 'Margin Top' (20), 'Margin Bottom' (100), 'Margin Left' (10), 'Margin Right' (10), and 'PDF Layout' (A4). A 'Save' button is at the bottom right.

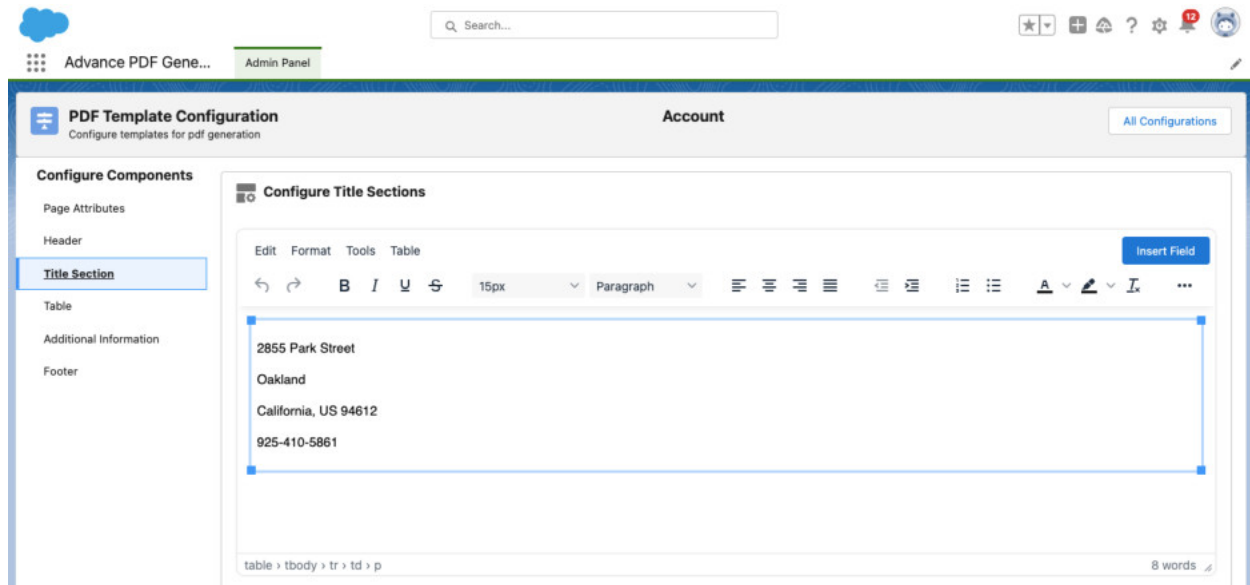
b. Header Configuration

The Header Configuration allows you to customize the header section of the generated PDF. You can add details like your company logo, address, or any other relevant information.



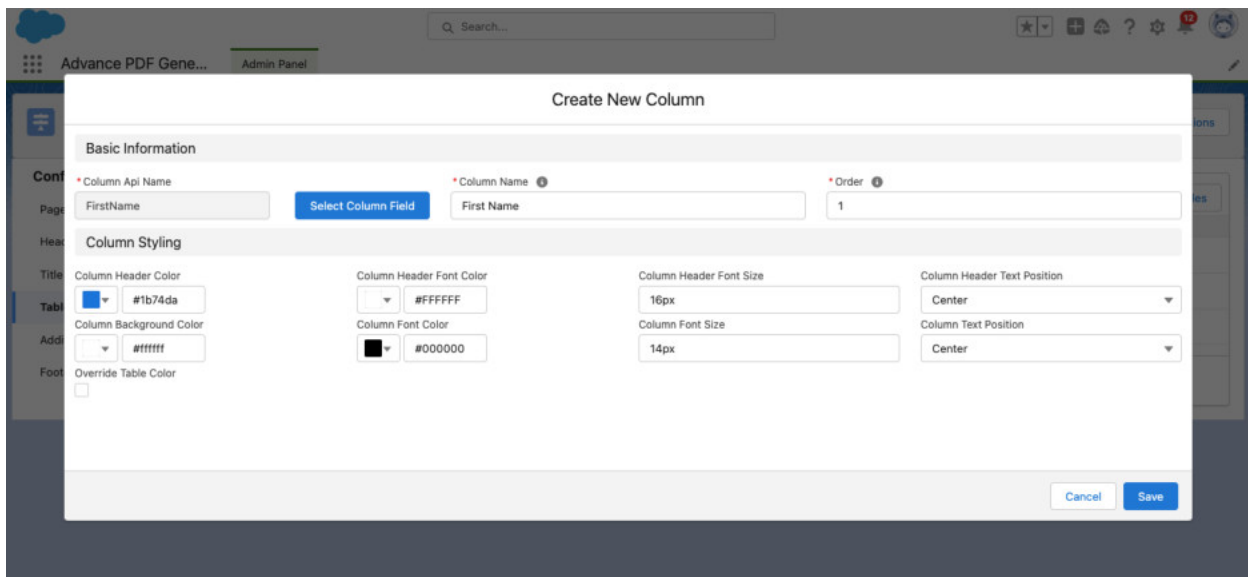
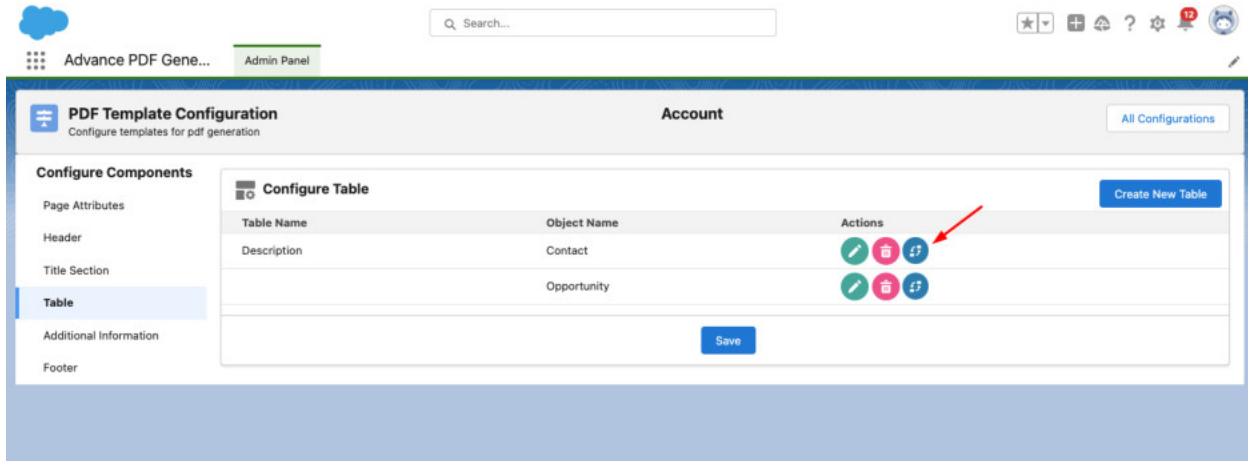
c. Title Configuration

In the Title Configuration section, you can define the title settings for your PDF. Customize the font, size, alignment, and other styles for the title.



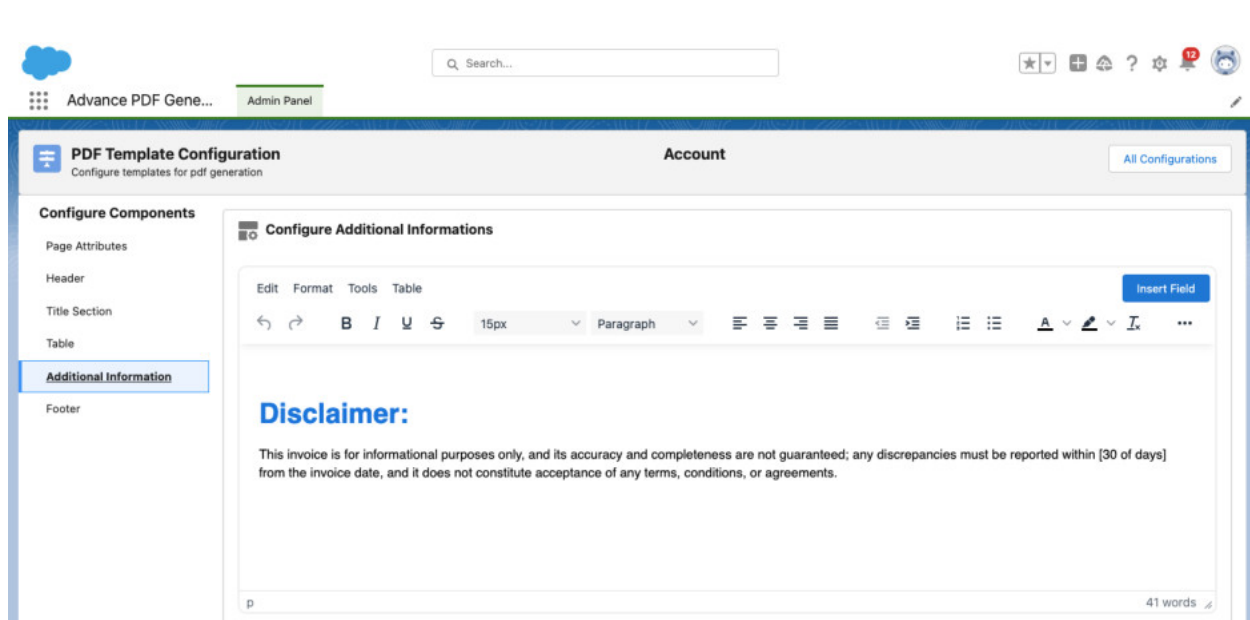
e. Column Configuration

In this section, you can specify which fields from the child object should be displayed in the table. You can choose the field names, data types, and formatting options for the columns in the table.



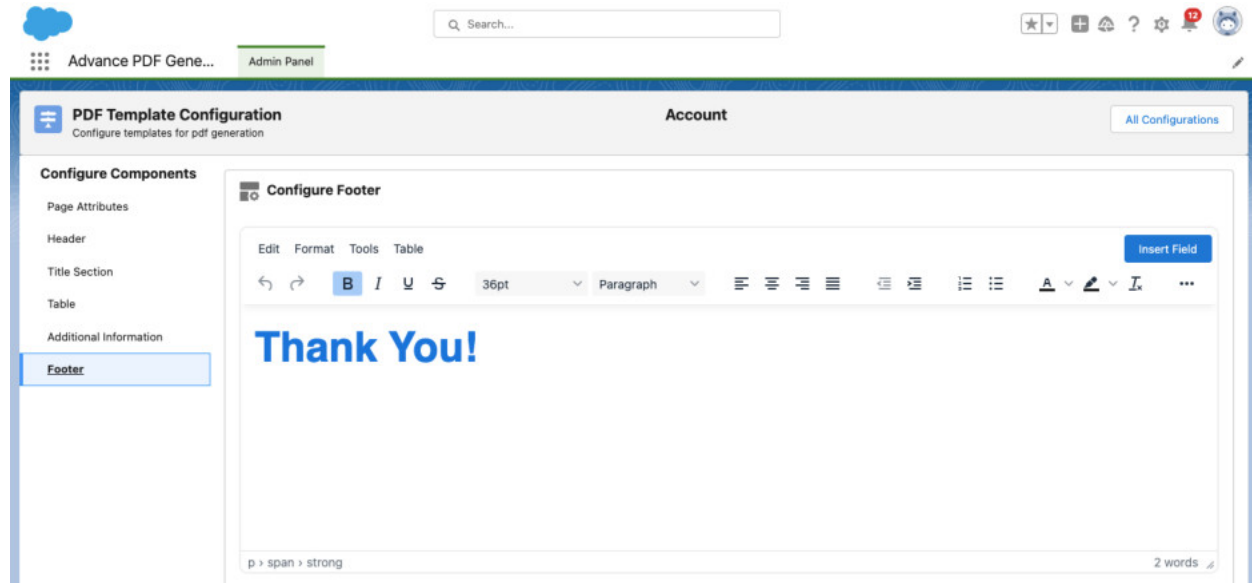
f. Additional Information Configuration

The Additional Information Configuration enables you to include extra details in your PDF. These could be additional notes, instructions, disclaimers or any other information you want to display alongside the main record details.



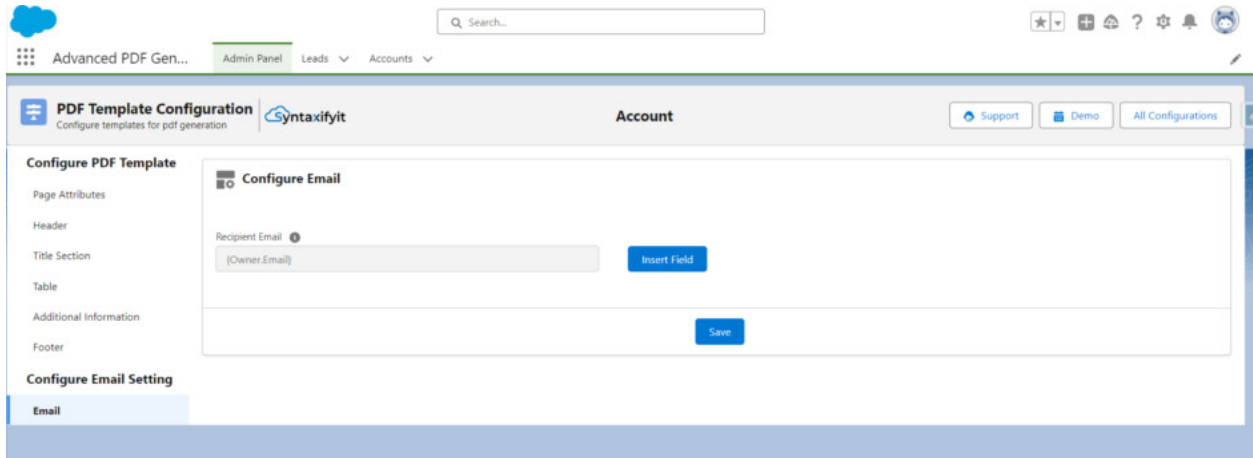
g. Footer Configuration

The Footer Configuration allows you to customize the footer section of the generated PDF. You can add information such as text, copyright notices, links, or any other relevant details.



h. Email Configuration

The Email Configuration allows you to include an email merge field from the current/selected object or related objects for the **recipients' email** address when sending an email along with the generated PDF.



The screenshot displays the 'Configure Email' interface within the Syntaxifyit application. The top navigation bar includes the Syntaxifyit logo, a search bar, and icons for various functions. Below this, the 'Advanced PDF Gen...' menu is visible, with 'Admin Panel' selected. The main content area is titled 'Configure PDF Template' and 'Configure Email'. On the left, a sidebar lists template sections: Page Attributes, Header, Title Section, Table, Additional Information, Footer, and 'Configure Email Setting', with 'Email' currently selected. The main panel shows a 'Recipient Email' field containing '[Owner.Email]' and an 'Insert Field' button. A 'Save' button is located at the bottom right of the configuration area.

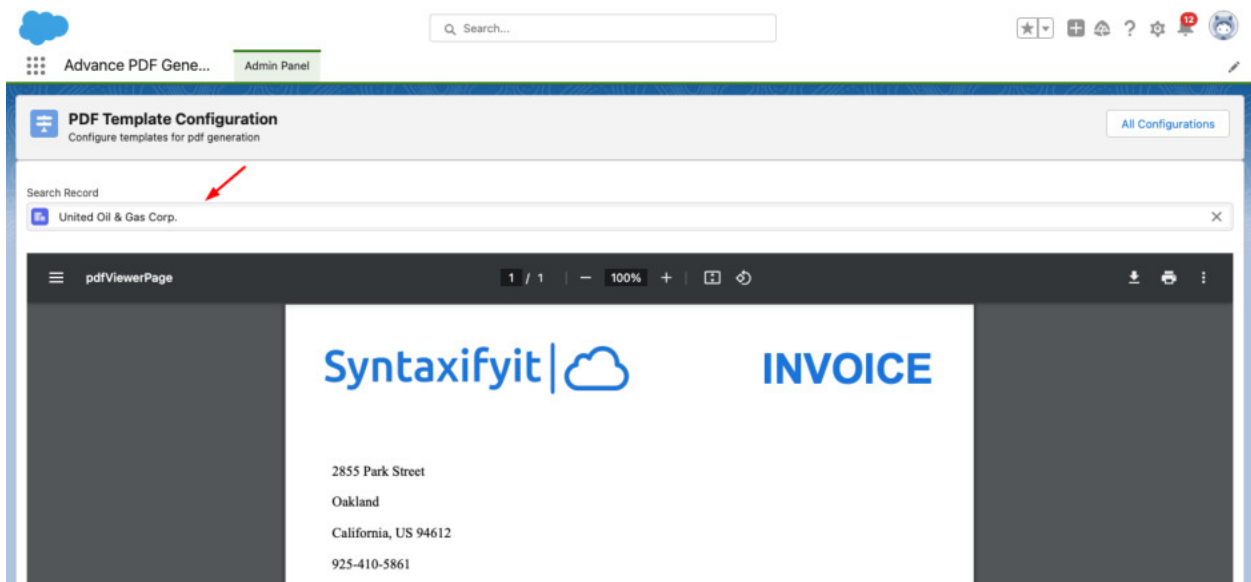
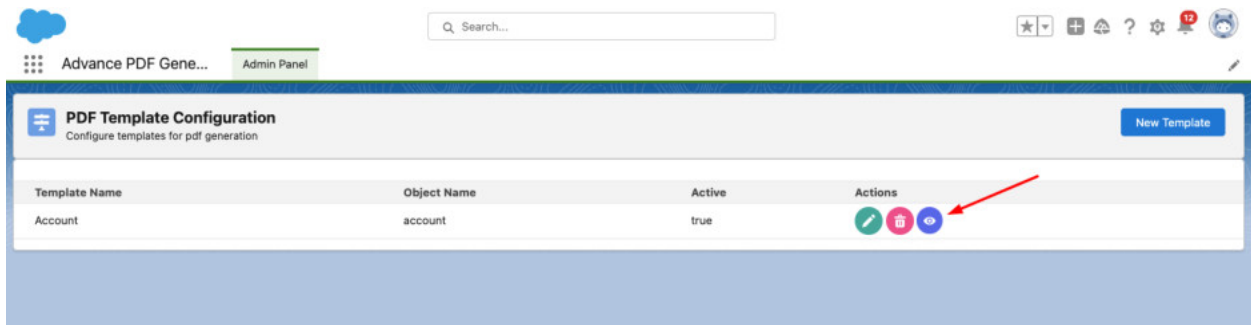
4. Generating a PDF

Previewing the PDF

Before generating the final PDF, you can preview it to ensure it looks as expected:

In the PDF Generator interface, review all the configurations you've made.

On the Admin Panel, Click the "Preview" button/icon and select any record to view the PDF.

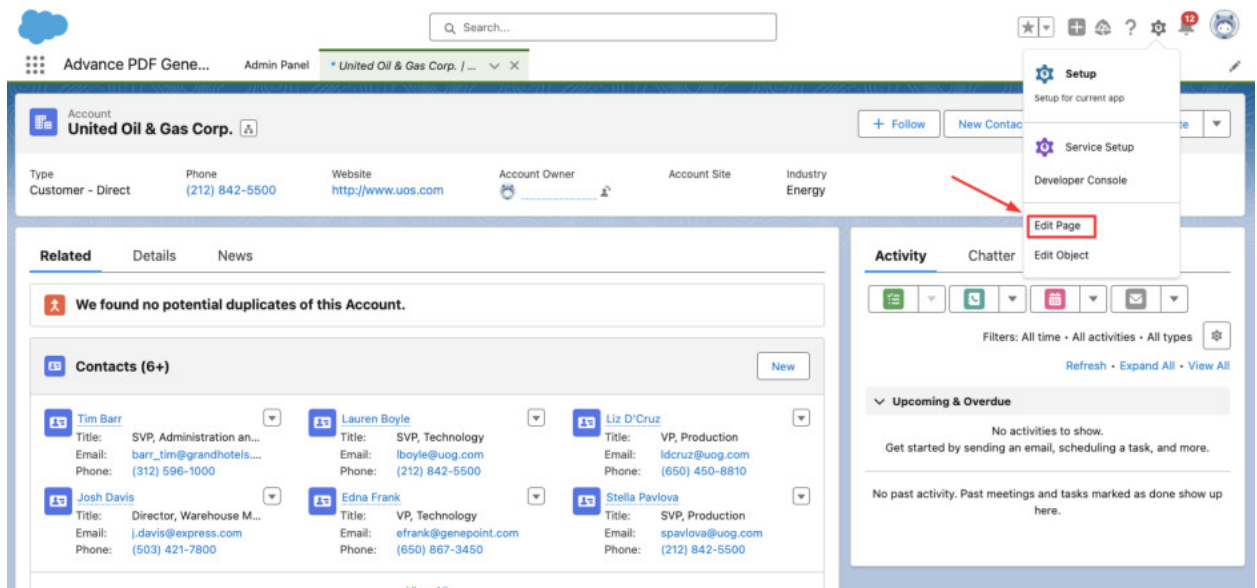


Downloading the PDF

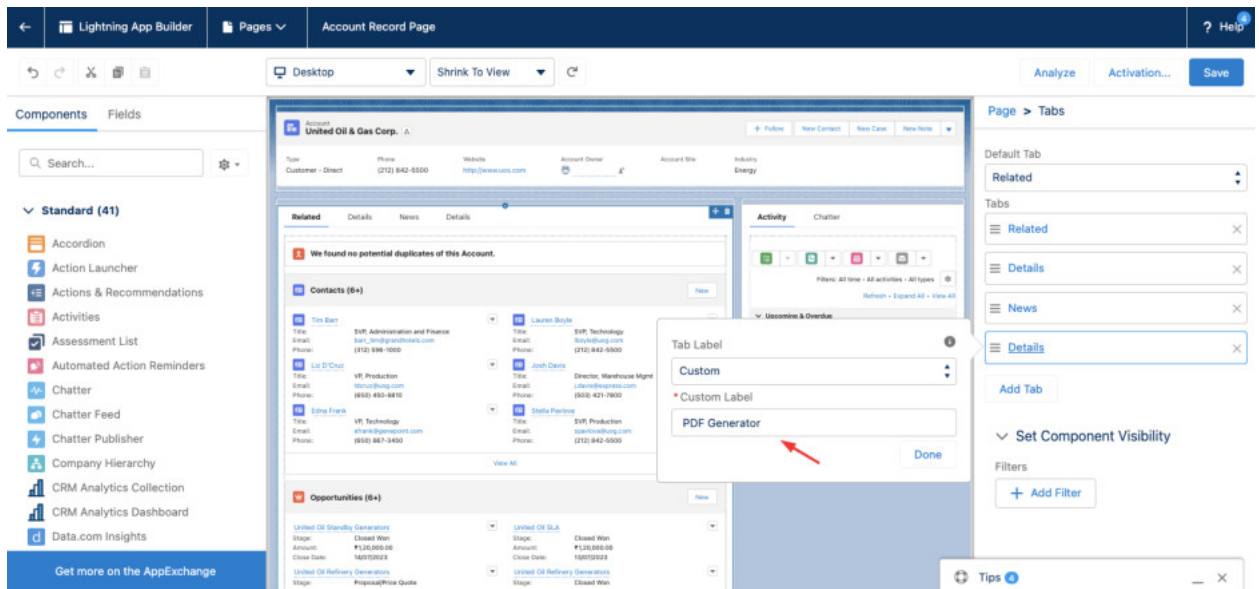
If the preview is satisfactory, you can proceed to download the PDF:

Once you have configured all the settings as per your requirements, follow these steps to generate a PDF:

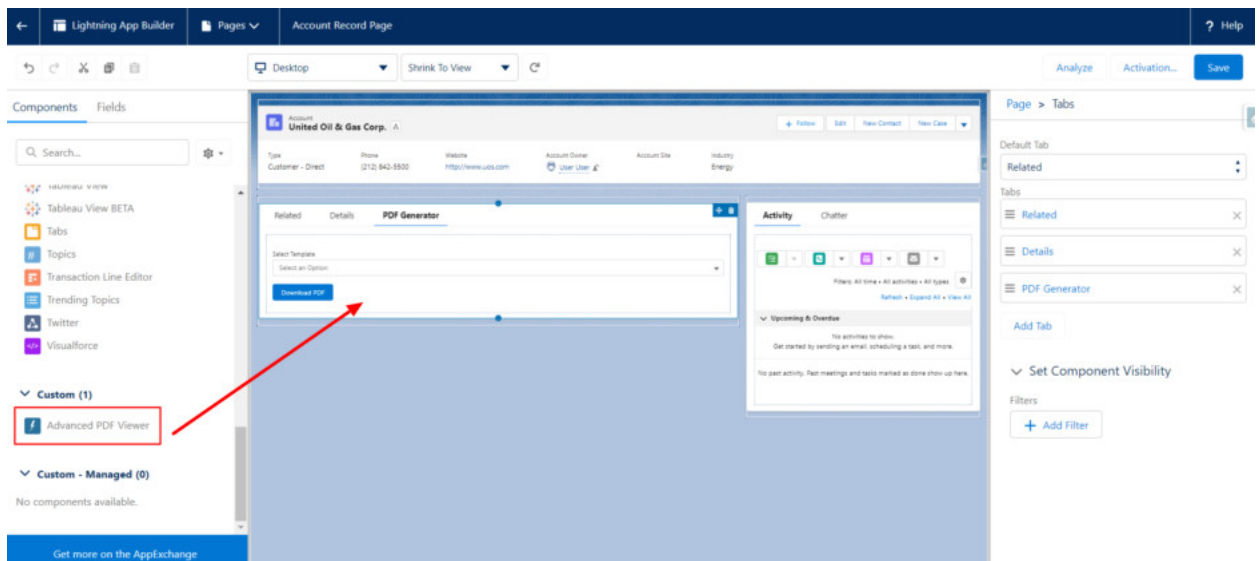
1. Go to the Object record for which you want to create a PDF (for e.g. Account).
2. Locate the "Gear" icon and click on it. From the dropdown menu, select/click on "Edit Page."



- Within the page editor, find the "Component/Tabs" section. On the right side of this section, click the "Add Tab" button. For better understanding, label this tab as "PDF Generator."

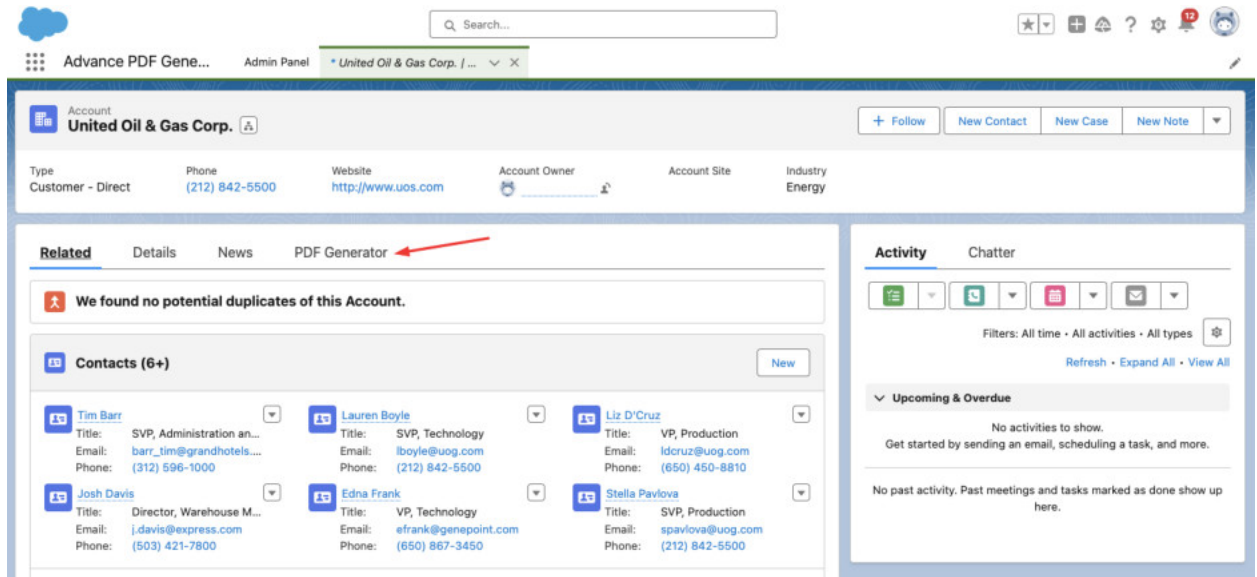


- Now, click on the name of the newly added tab within the section/layout. Drag the custom component "Advanced PDF Viewer" and drop it onto the new tab you just created.



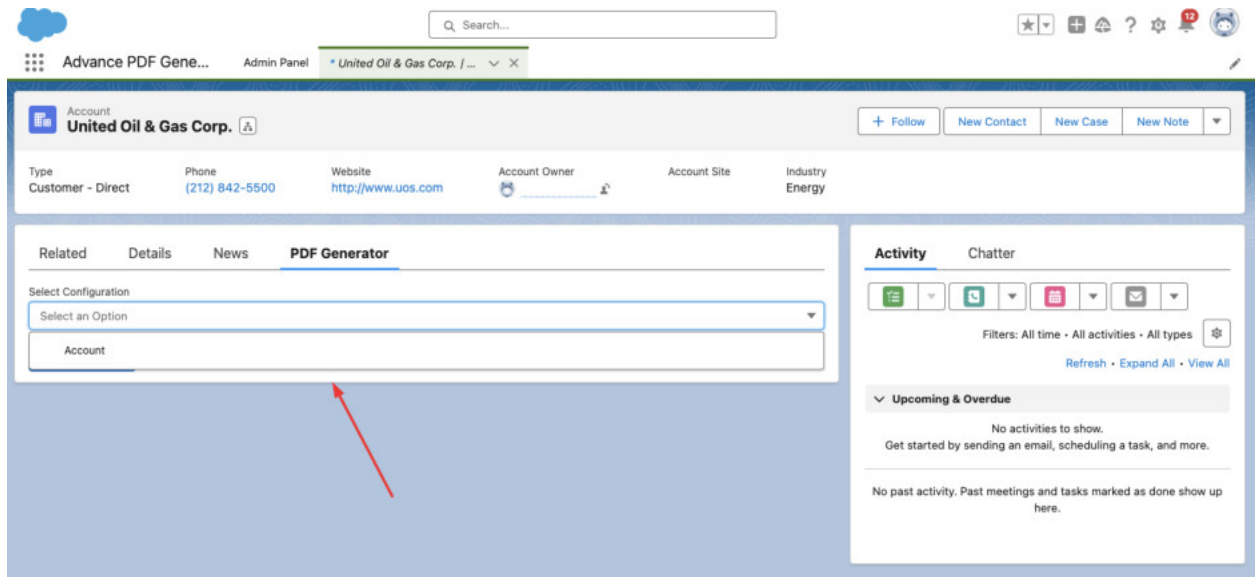
- Once you've made these changes, save the page and then activate it.

- Return to the record page, and you should now see the "PDF Generator" tab. Click on it.



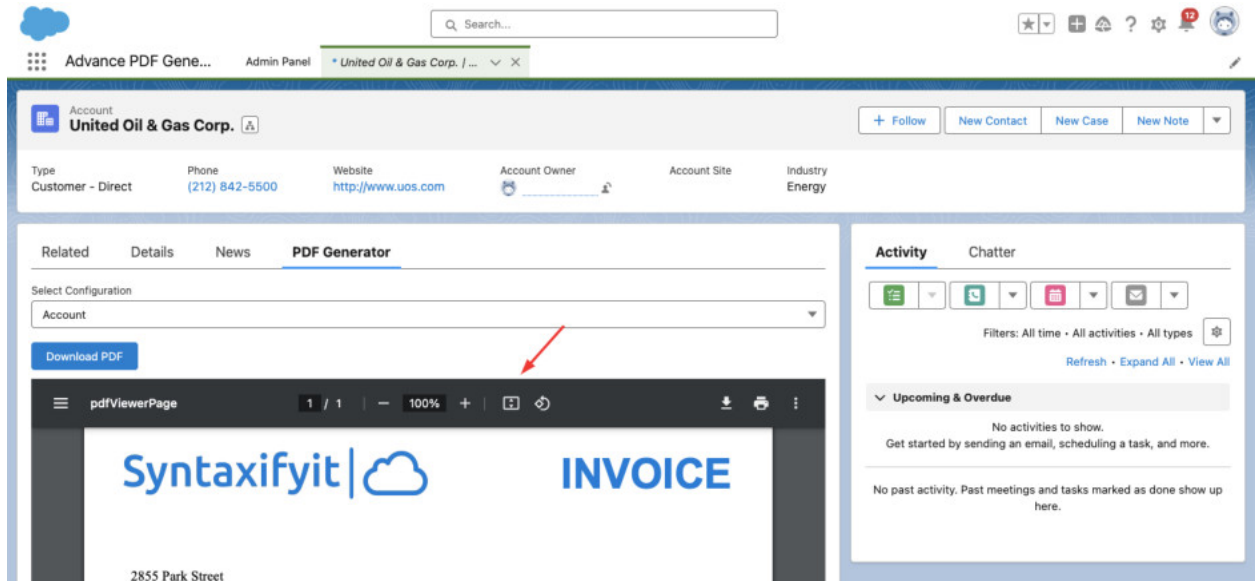
The screenshot shows the record page for United Oil & Gas Corp. The top navigation bar includes a search bar and various utility icons. Below the account header, there are tabs for Related, Details, News, and PDF Generator. A red arrow points to the PDF Generator tab. The main content area displays account details, a list of contacts, and an activity section on the right.

- In the PDF Generator tab, you will see a list of available templates under Select Template dropdown. Select/Click on the template you want to use for generating the PDF.

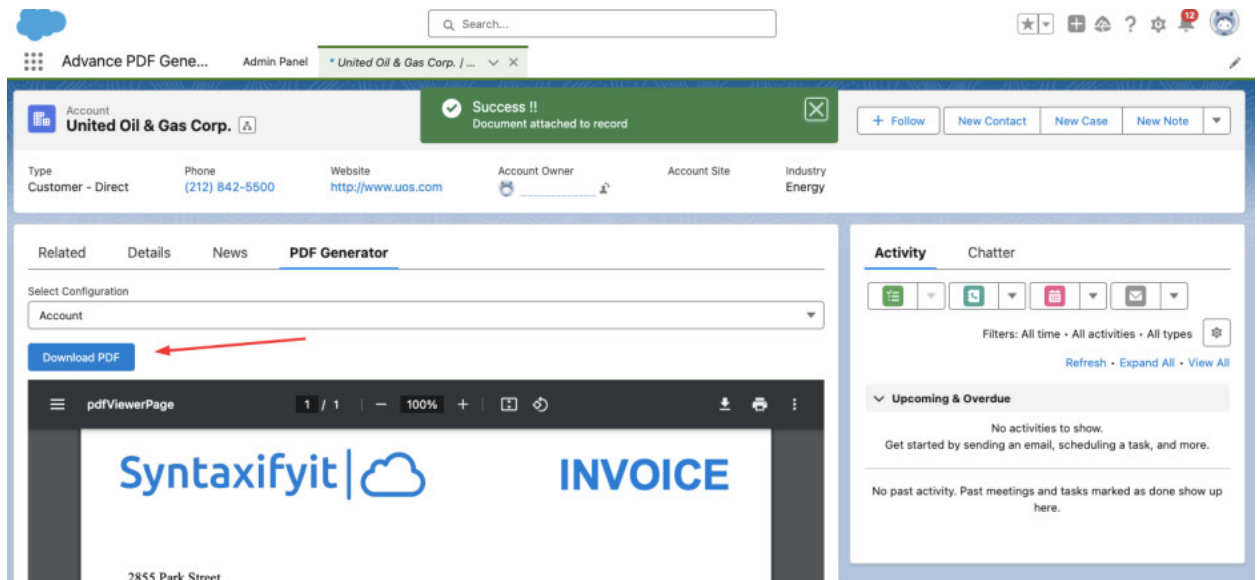


The screenshot shows the record page for United Oil & Gas Corp. with the PDF Generator tab selected. The main content area displays a "Select Configuration" dropdown menu with the option "Account" selected. A red arrow points to the "Account" option. The right sidebar shows the activity section.

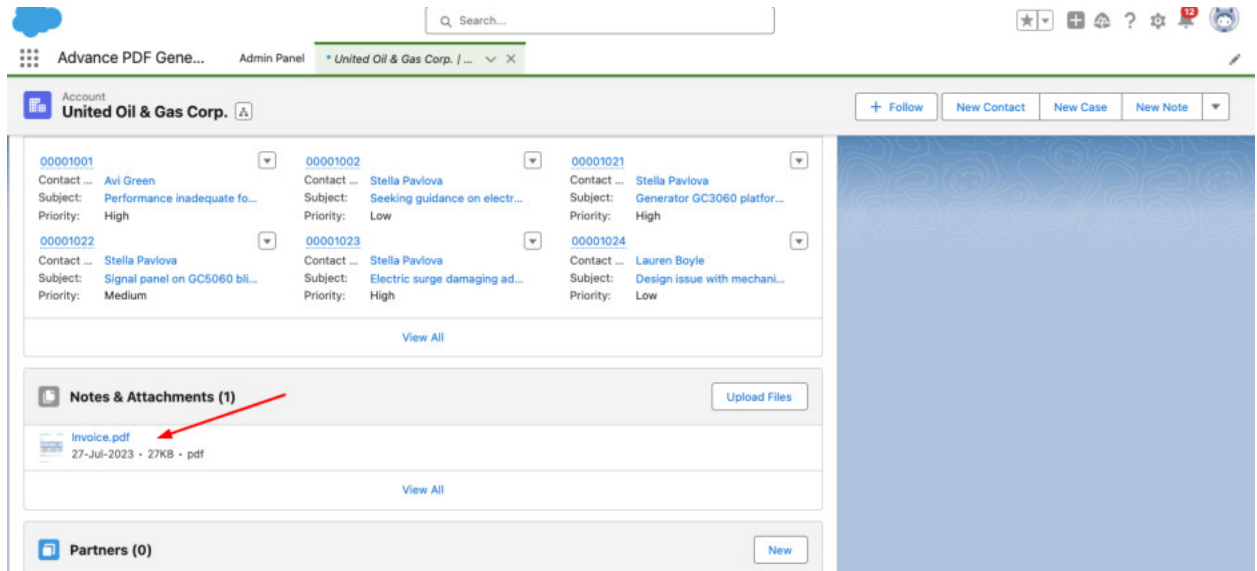
- The system will process your request and generate the PDF based on the configured settings.



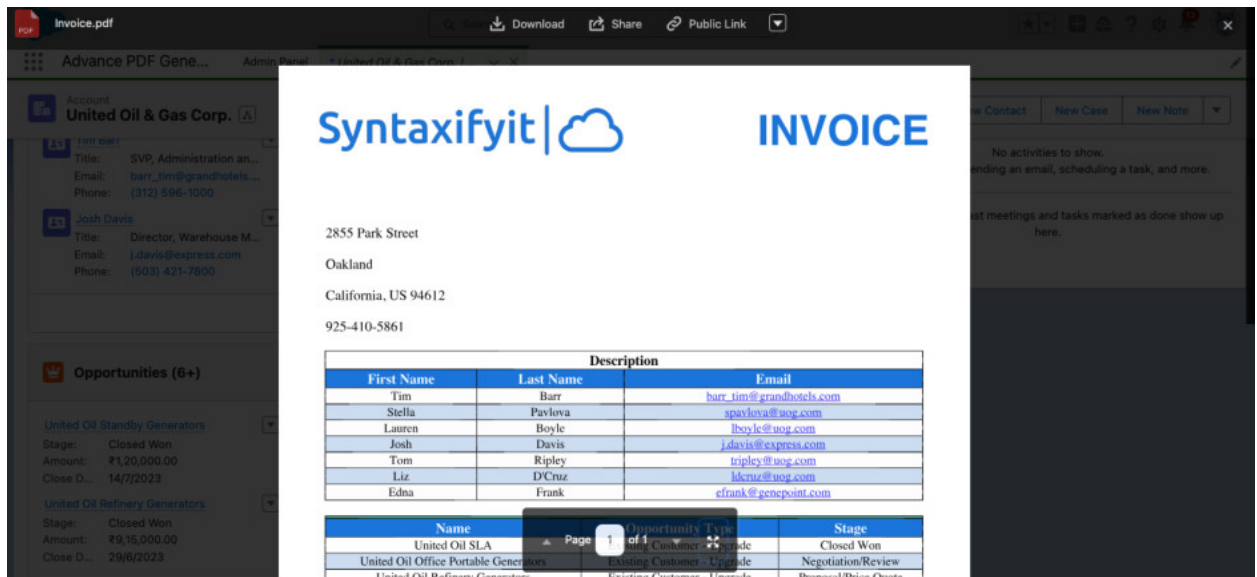
- Once the PDF is generated, you will see a "Download PDF" button. Click on it to download the PDF file.



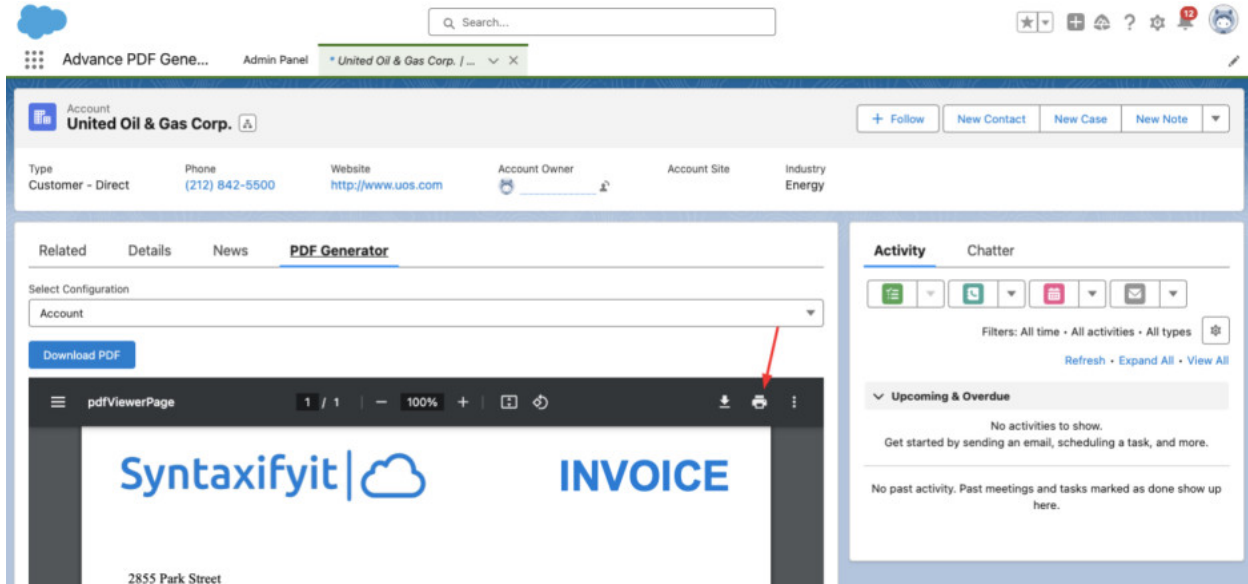
10. The generated PDF will be automatically attached to the record as a file attachment.



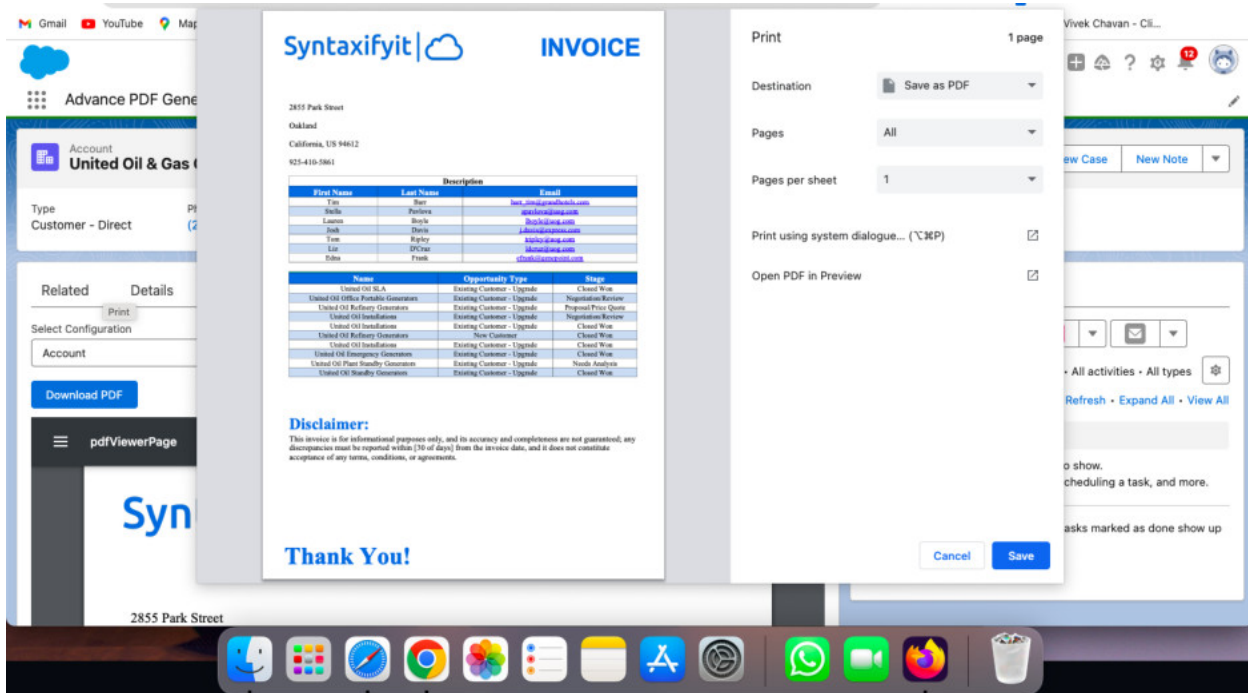
11. To view your generated PDF, open the attached file



Note: If necessary, you have the option to print the PDF as well.



The screenshot shows the Syntaxifyit web application interface. At the top, there's a search bar and navigation icons. The main header displays the account name "United Oil & Gas Corp." and various action buttons like "Follow", "New Contact", "New Case", and "New Note". Below the header, there's a section for account details including Type (Customer - Direct), Phone ((212) 842-5500), Website (http://www.uos.com), Account Owner, Account Site, and Industry (Energy). The main content area is divided into tabs: Related, Details, News, and PDF Generator. The PDF Generator tab is active, showing a "Select Configuration" dropdown set to "Account" and a "Download PDF" button. Below this is a PDF viewer showing the invoice content. A red arrow points to the printer icon in the PDF viewer toolbar. The right sidebar shows an "Activity" section with filters and a "Chatter" section.



This screenshot shows the same Syntaxifyit web application interface, but with a print dialog box open over the PDF viewer. The print dialog has the following settings: Destination (Save as PDF), Pages (All), Pages per sheet (1), Print using system dialogue... (checked), and Open PDF in Preview (checked). The PDF content visible behind the dialog includes the Syntaxifyit logo, the word "INVOICE", the address "2855 Park Street, Oakland, California, US 94612, 925-410-5961", a table of project details, a disclaimer, and a "Thank You!" message.

First Name	Last Name	Email
Tim	Boyle	tim@syntaxifyit.com
Boyle	Perkins	boyle@syntaxifyit.com
Levens	Boyle	boyle@syntaxifyit.com
Josh	Boyle	josh@syntaxifyit.com
Tom	Ripley	tom@syntaxifyit.com
Lee	DFH	lee@syntaxifyit.com
John	Frank	john@syntaxifyit.com

Project	Client/Party Type	Stage
United Oil S.A.	Existing Customer - Ugnale	Closed Won
United Oil Office Portable Generators	Existing Customer - Ugnale	Negotiation Review
United Oil Refinery Generators	Existing Customer - Ugnale	Proposed Price Quote
United Oil Insulations	Existing Customer - Ugnale	Negotiation Review
United Oil Insulations	Existing Customer - Ugnale	Closed Won
United Oil Refinery Generators	New Customer	Closed Won
United Oil Insulations	Existing Customer - Ugnale	Closed Won
United Oil Emergency Generators	Existing Customer - Ugnale	Closed Won
United Oil Plant Standby Generators	Existing Customer - Ugnale	Needs Analysis
United Oil Standby Generators	Existing Customer - Ugnale	Closed Won

Disclaimer:
This invoice is for informational purposes only, and its accuracy and completeness are not guaranteed; any discrepancies must be reported within (10 of days) from the invoice date, and it does not constitute acceptance of any terms, conditions, or agreements.

Thank You!

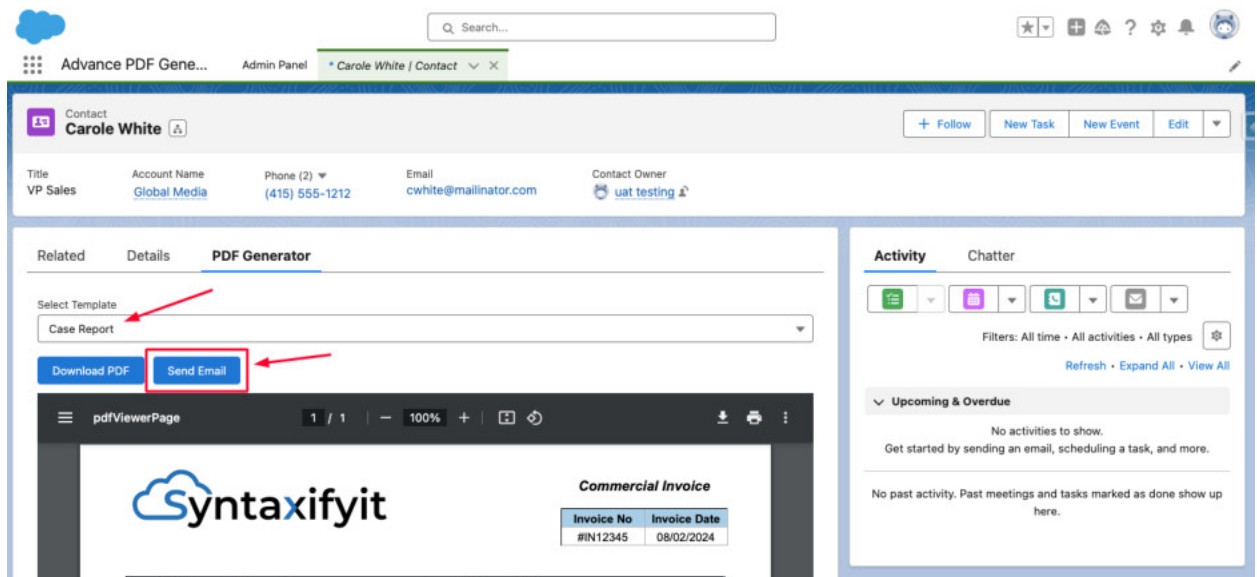
5. Pro version: Sending an email with the generated PDF

With the Pro version of Advanced PDF Generator, you can seamlessly send emails along with the generated PDF documents. This feature enhances your communication efficiency and ensures that recipients receive essential information promptly. There are two options available for sending emails:

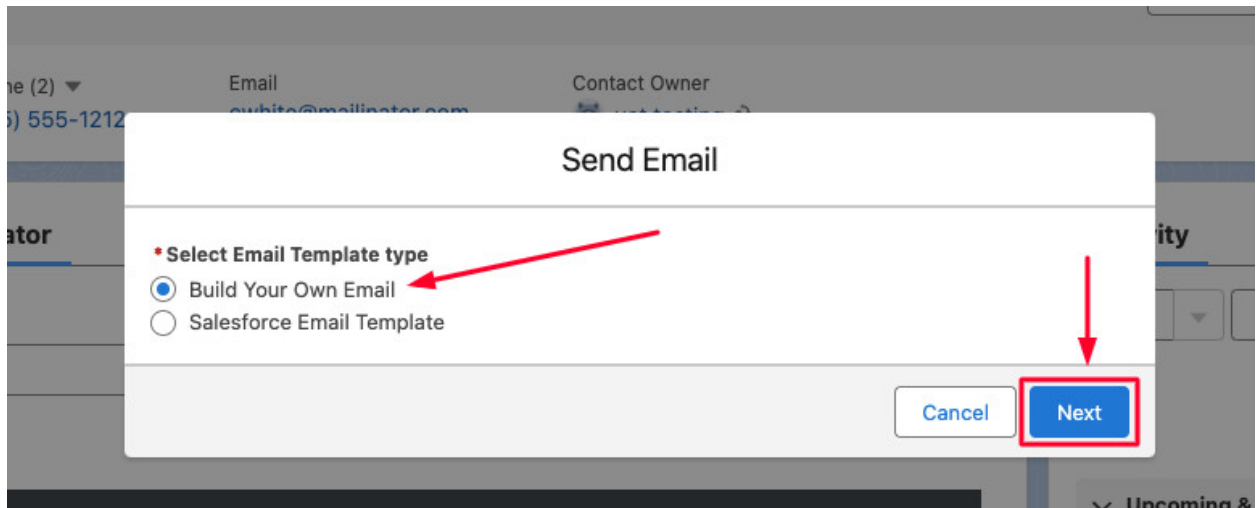
1. Build Your Own Email:

You can compose personalized emails according to your specific requirements. This option allows for flexibility in crafting the message and tailoring it to the recipient's needs. Follow the steps below to send an email using your custom content:

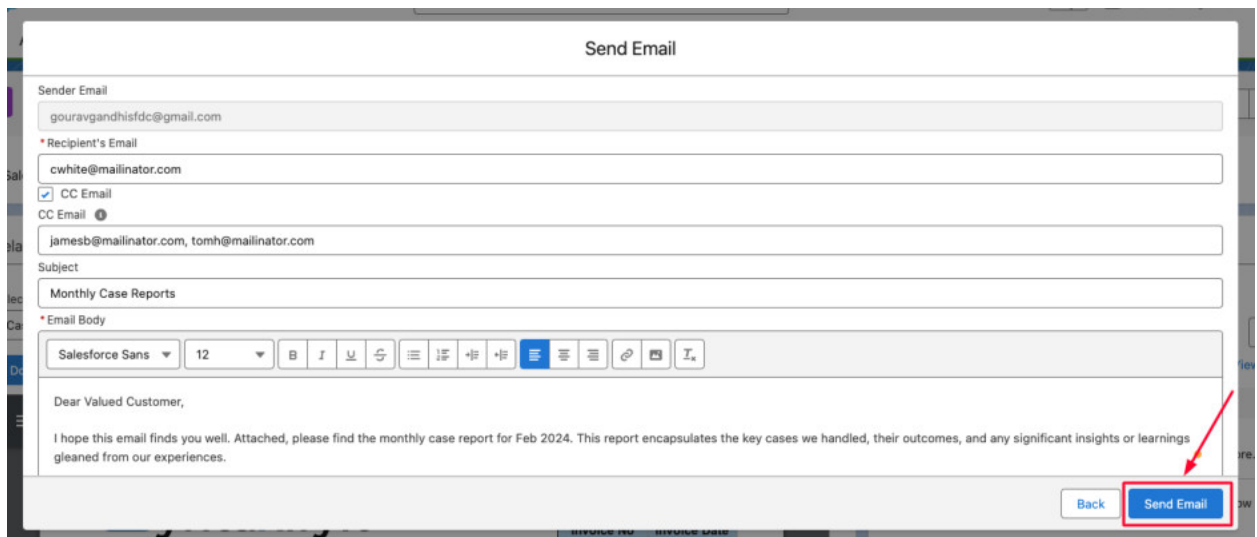
- Go to the object record for which you want to create a PDF (for e.g. Contact).
- In the PDF Generator tab, you will see a list of available templates under 'Select Template' dropdown. Select/Click on the template you want to use for generating the PDF and click on the 'Send Email' button.



- Choose the "Build Your Own Email" option from the 'Select Email Template type' list and click on the "Next" button.



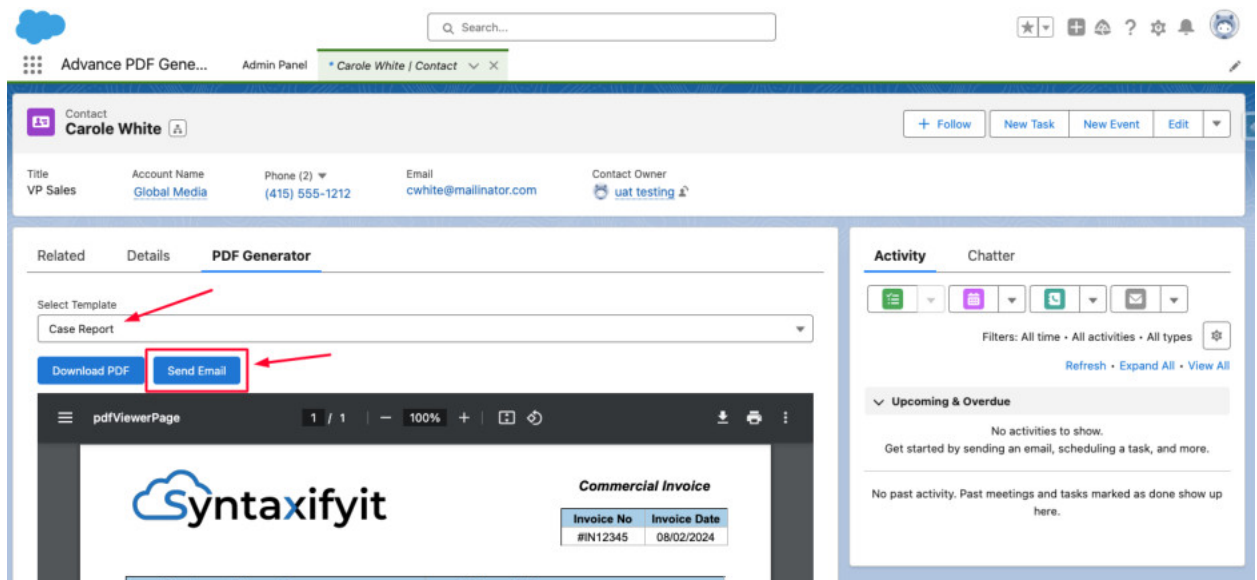
- Enter/Update the recipient's email address in the designated field. Include CC to send to multiple users/recipients.
- Compose the email content in the provided text area, including subject, message body, and any additional information.
- Review the email content for accuracy and completeness.
- Finally, click on the "Send Email" button to deliver the email along with the generated PDF document.



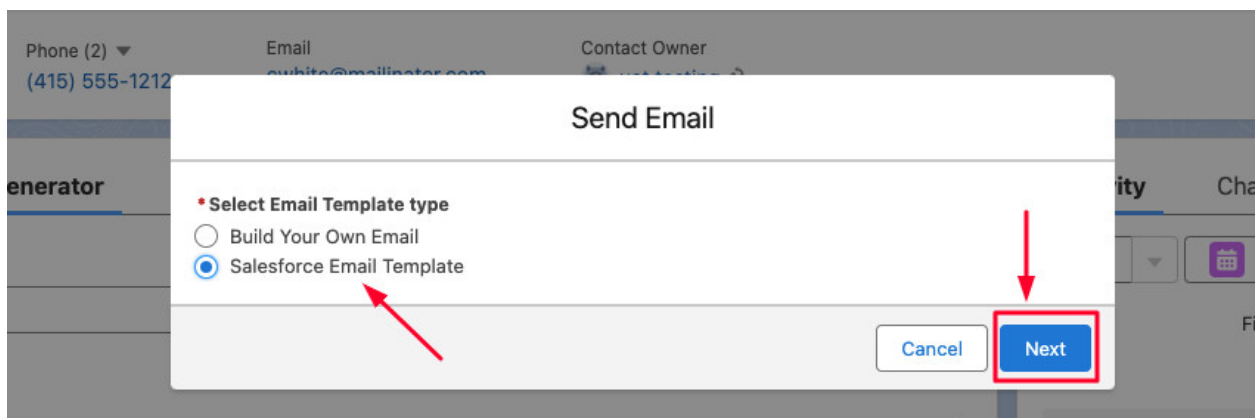
2. Choose Salesforce Email Template:

You can leverage pre-designed email templates available in Salesforce, including both Classic and Lightning email templates. This option streamlines the email creation process and ensures consistency in branding and messaging. Follow the steps below to send an email using a Salesforce email template:

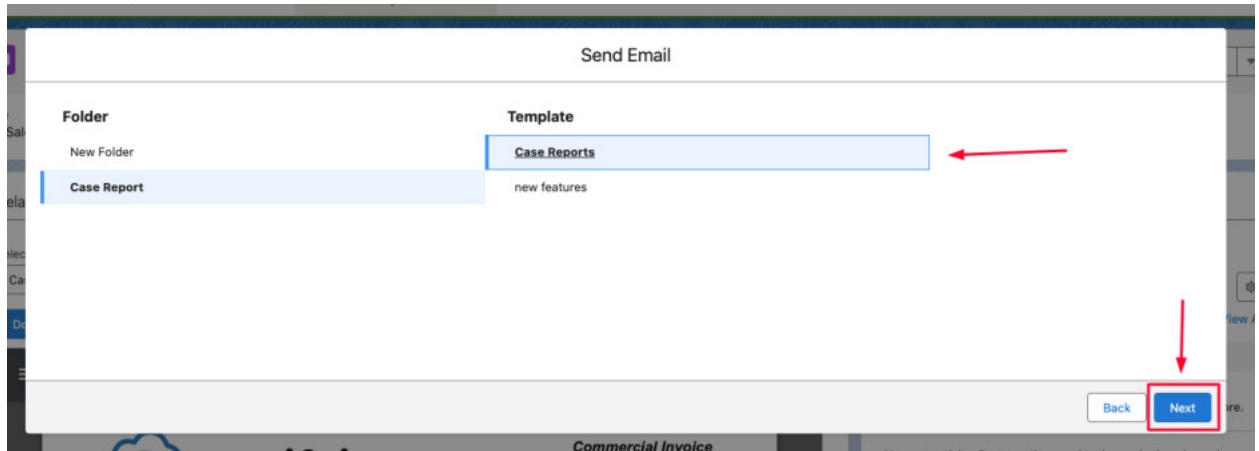
1. Click on the "Send Email" button after selecting the PDF Template.



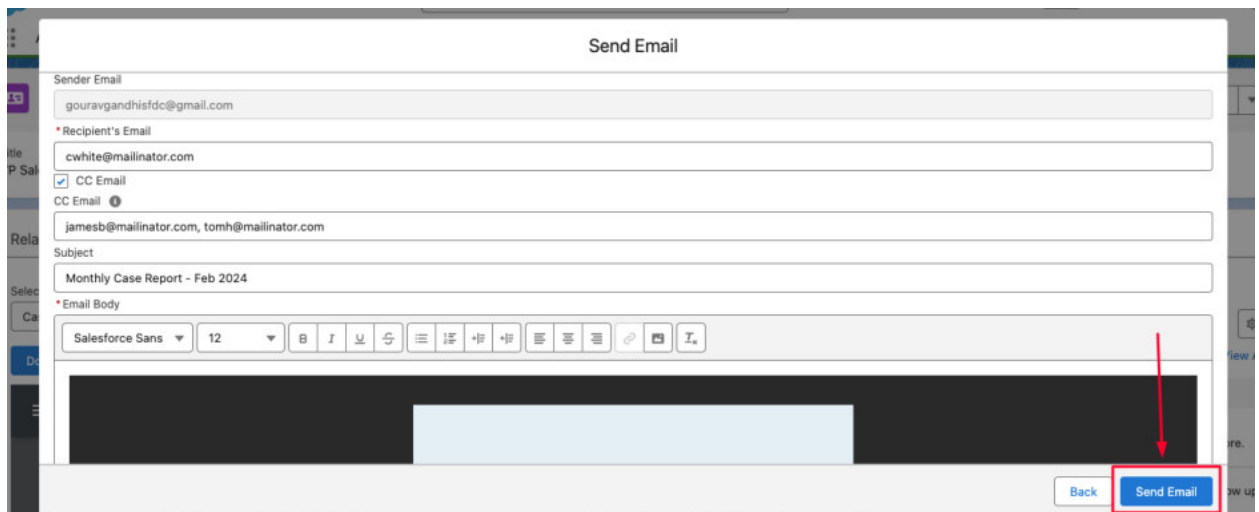
2. Choose the "Choose Salesforce Email Template" option from the 'Select Email Template type' the list.



3. Select the desired email template from the list of available templates (Classic or Lightning) and click on the "Next" button.



4. Verify and update recipient email addresses as needed.
5. Customize any merge fields or dynamic content within the template to personalize the email.
6. Review the email content and template formatting.
7. Finally, click on the "Send Email" button to dispatch the email with the generated PDF document.

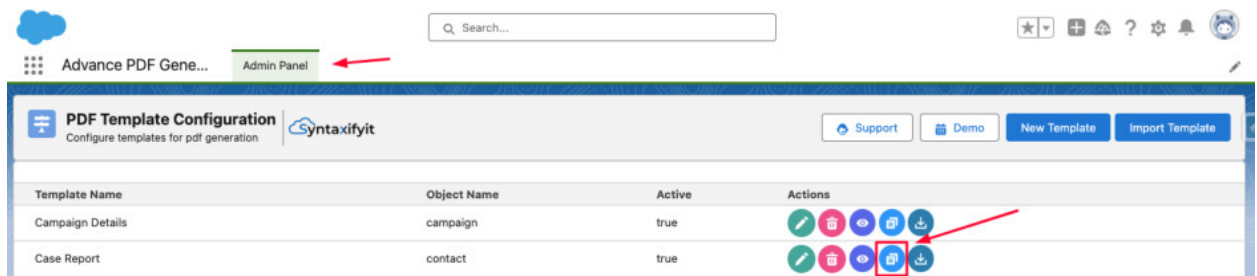


By offering these two options, the Advanced PDF Generator empowers you to efficiently send emails along with the generated PDF documents, catering to your diverse communication needs and preferences. Whether creating custom messages or utilizing predefined templates, you can ensure timely and effective delivery of information to recipients.

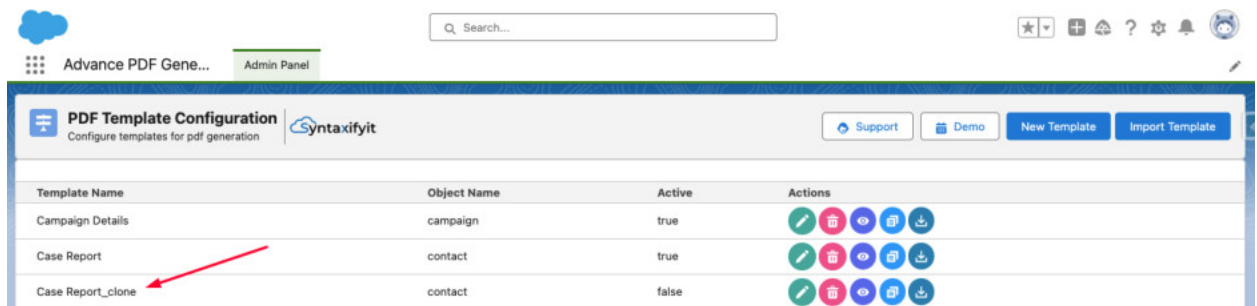
6. Pro version: Cloning a PDF Template

With the Pro version of Advanced PDF Generator, you can swiftly clone existing PDF templates without any confirmation prompts, ensuring a seamless and efficient process. This feature enables you to replicate templates effortlessly while preserving all elements and configurations. Here's how you can clone a PDF template:

- Go to the Admin panel tab within the Advanced PDF Generator application.
- Under the PDF Template Configuration section, review the list of available templates.
- Click the "Clone" icon on the template you wish to duplicate to initiate the cloning process.

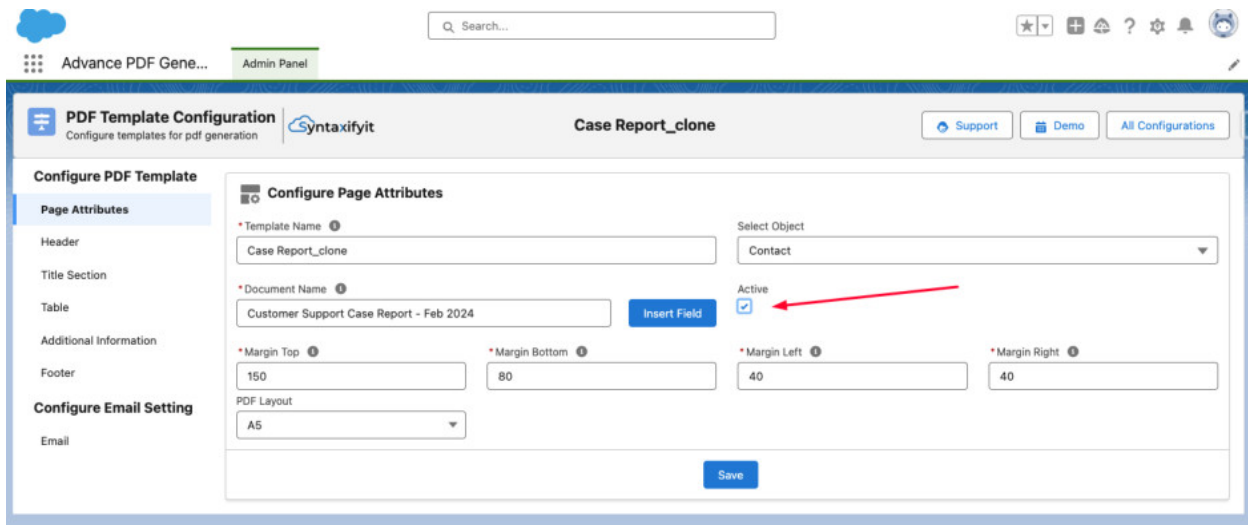


- The selected template will be instantly duplicated, creating an exact replica of the original.
- The cloned template will be saved and displayed under the PDF Template Configuration Section with a name that combines the original template's name with "_clone", for example, "Case Reports_clone".



Once cloned, you can customize and modify the cloned template as needed. Each and every element, including Page Attributes, Header, Title Section, Table, Additional Information, and Footer, will be replicated from the original template.

Note: The cloned template will be inactive initially. Activate it by editing the template configuration and checking the active checkbox to make it available for use.



The screenshot shows the 'PDF Template Configuration' interface for 'Case Report_clone'. The 'Configure Page Attributes' section is active, showing fields for Template Name, Document Name, Margins, and PDF Layout. The 'Active' checkbox is checked, indicating the template is active. A red arrow points to the 'Active' checkbox.

Field	Value
Template Name	Case Report_clone
Document Name	Customer Support Case Report - Feb 2024
Margin Top	150
Margin Bottom	80
Margin Left	40
Margin Right	40
PDF Layout	A5

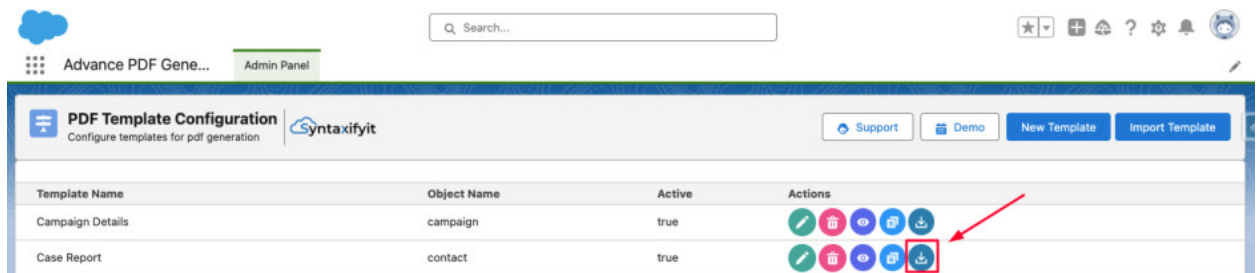
By offering the ability to clone PDF templates seamlessly, the Pro version of the Advanced PDF Generator enhances template management efficiency, allowing you to quickly create variations of existing templates without the need for manual confirmation, thereby streamlining the customization process and ensuring consistency across generated documents.

7. Pro version: Exporting and Importing a PDF Template

With the Pro version of the Advanced PDF Generator, you can easily export and import PDF templates between sandbox and production environments. This feature streamlines the template management process, allowing for seamless transitions and consistency across different environments. Here's how you can export and import a PDF template:

1. Exporting a PDF Template:

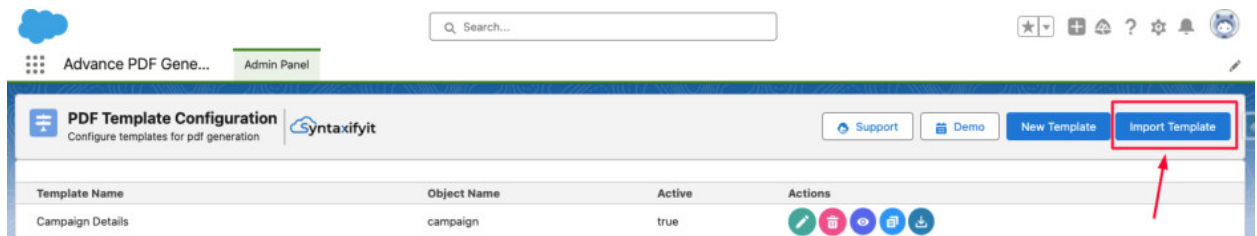
- Navigate to the PDF Template Configuration section within the Admin panel.
- Locate the template you wish to export.
- Click on the "Download" icon associated with the template.



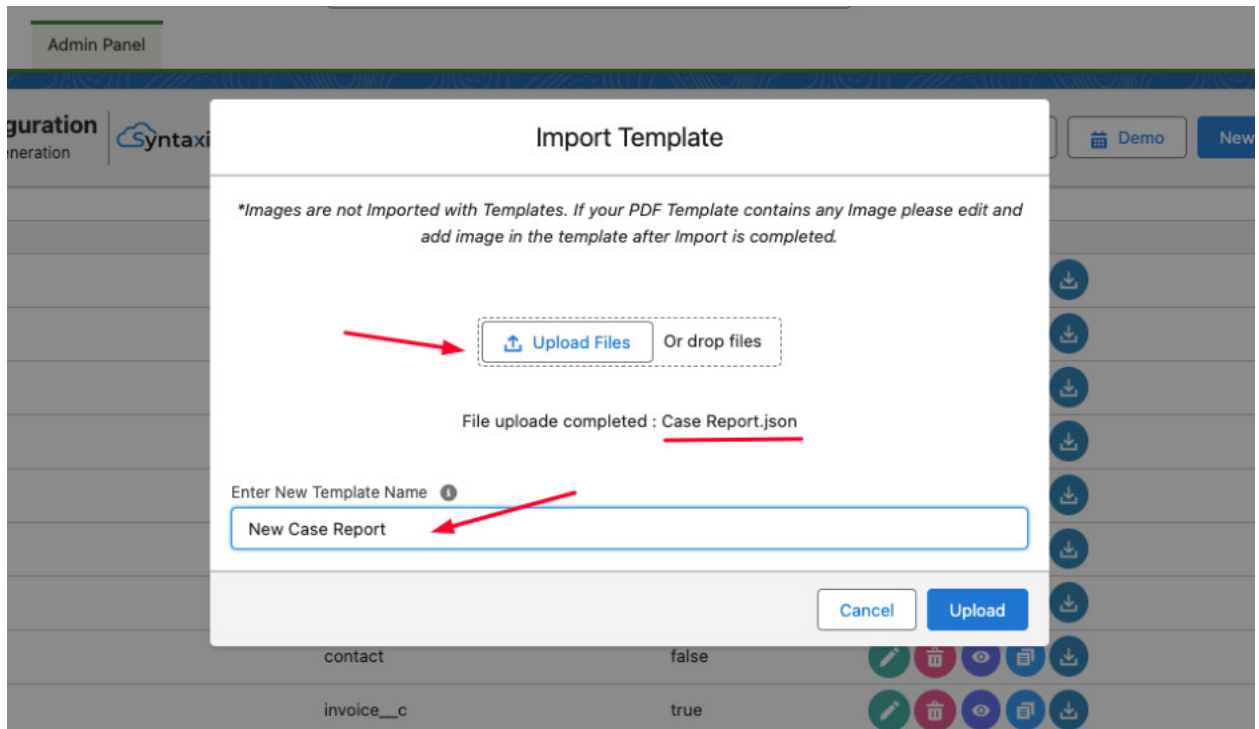
- This action will save a JSON file containing all the configuration details of the selected template to your local device.

2. Importing a PDF Template:

- Access the Admin panel in the target environment (sandbox or production).
- Navigate to the PDF Template Configuration section.
- Click on the "Import Template" button.



- Select the previously downloaded JSON file from your local device and click on the “Upload” button.



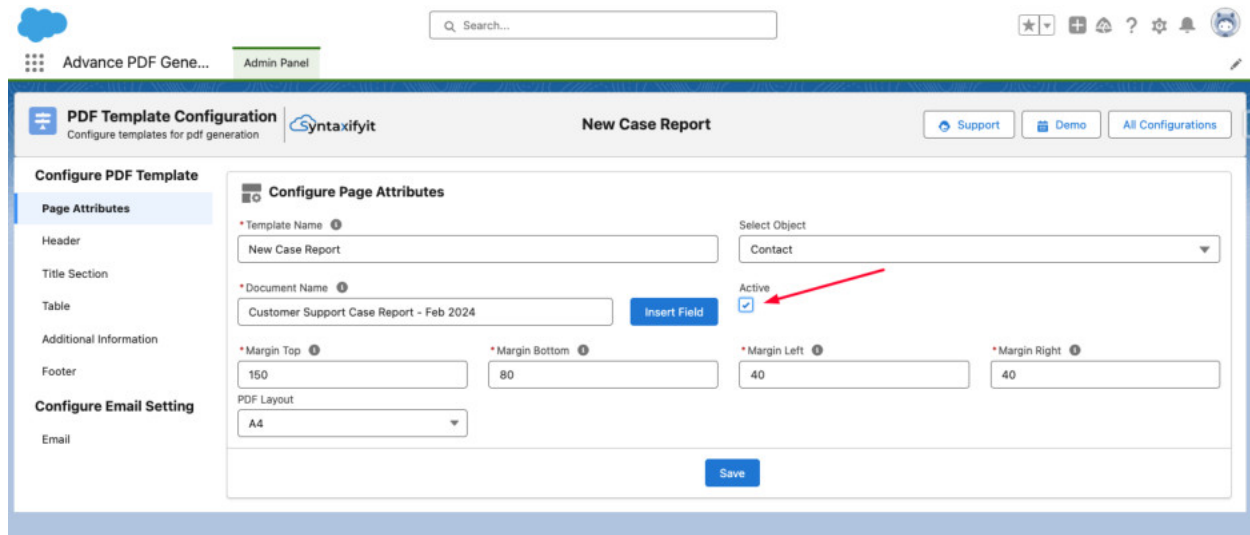
- This action will upload and import the template configuration into the current environment.

3. Reviewing Imported Template:

- Once the import process is complete, you can review the imported template in the list of available templates within the PDF Template Configuration section.
- Each and every element, including Page Attributes, Header, Title Section, Table, Additional Information, and Footer, will be imported from the original template, ensuring consistency and accuracy in template configurations across environments.

Note 1: Please note that images are not imported along with templates. If your PDF Template contains any images, you'll need to edit and add the images in the template after the import process is completed.

Note 2: The imported template will be inactive initially. Activate it by editing the template configuration and checking the active checkbox to make it available for use.



The screenshot shows the 'PDF Template Configuration' interface for 'New Case Report'. The 'Configure Page Attributes' section is active, showing fields for Template Name, Document Name, Margins, and PDF Layout. The 'Active' checkbox is checked, as indicated by a red arrow.

Field	Value
Template Name	New Case Report
Document Name	Customer Support Case Report - Feb 2024
Margin Top	150
Margin Bottom	80
Margin Left	40
Margin Right	40
PDF Layout	A4

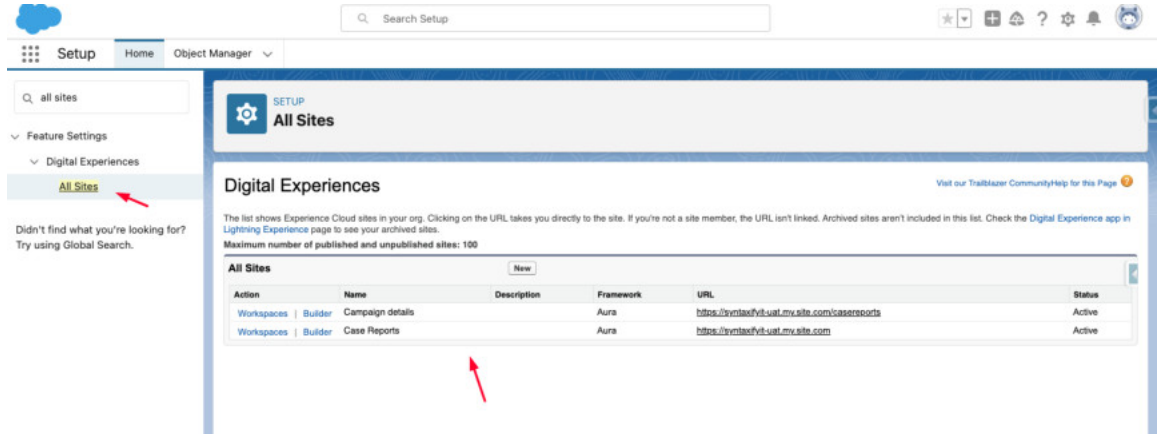
By enabling the export and import of PDF templates via JSON files, the Pro version of the Advanced PDF Generator ensures consistency and accuracy in template configurations, allowing you to seamlessly transfer templates between sandbox and production environments without the need for manual reconfiguration.

8. Unlimited Version: Integration of Advanced PDF Generator into Community Pages

In addition to its core functionalities within Salesforce, the Advanced PDF Generator also provides an integrated solution for Salesforce Communities. Admins have the capability to seamlessly add the PDF Generator to Community pages, enabling Community or Experience users to generate PDF documents directly within their community environment. Here's how this feature works:

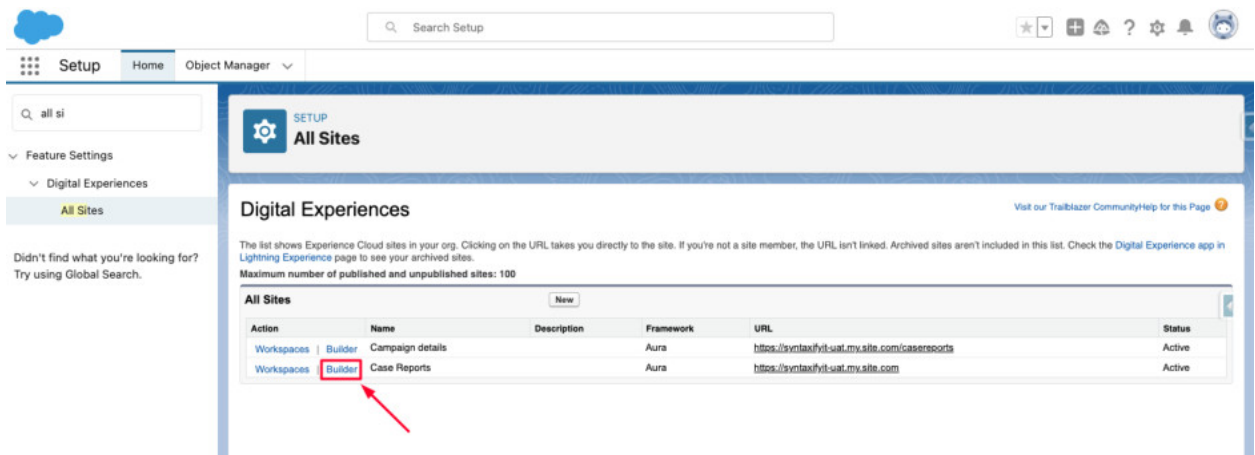
1. Create or edit a community:

- In the Setup menu, type "All sites" in the Quick Find box and select "All sites."
- Choose the community you want to edit or click "New" to create a new one.



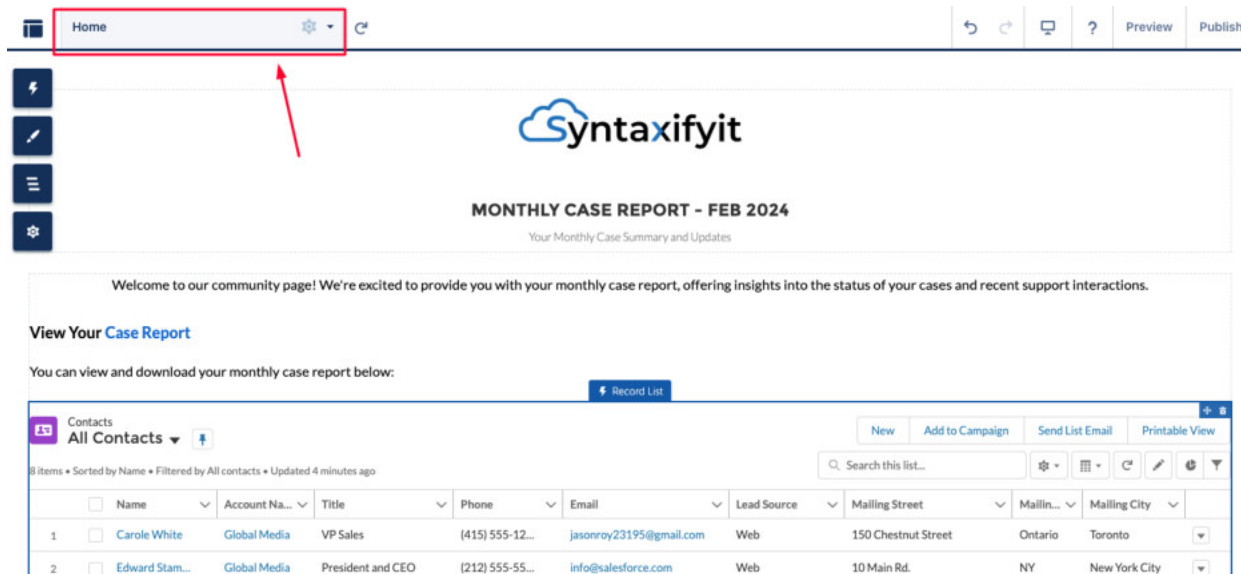
2. Access the Community Builder:

- In the Action column of the community you selected, click on "Builder". This will launch the Community Builder interface.



3. Create an Object Page:

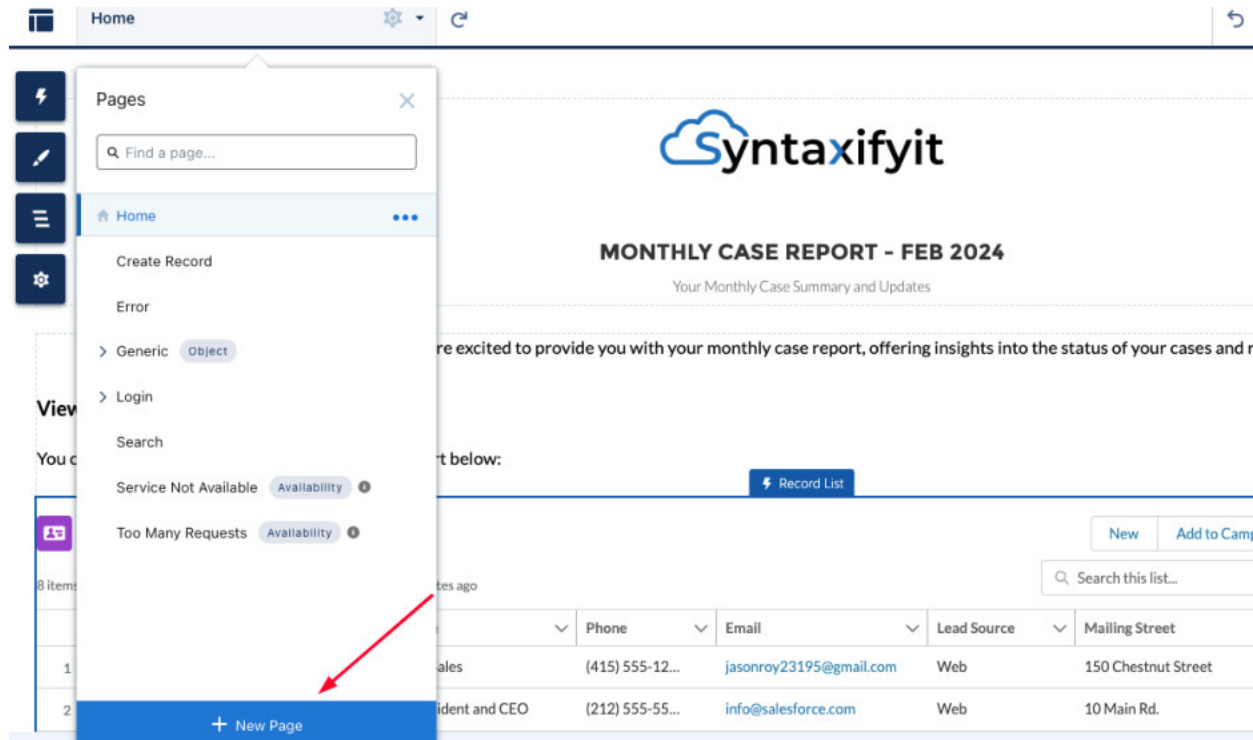
- In the Community Builder, navigate to the page where you want to add the custom component.
- Click on the "Pages" tab in the left sidebar.



The screenshot shows the Syntaxifyit Community Builder interface. At the top, there is a navigation bar with a 'Home' tab highlighted by a red box. A red arrow points to the 'Pages' tab in the left sidebar. Below the navigation bar, the main content area displays the 'MONTHLY CASE REPORT - FEB 2024' and a welcome message. A table of contacts is shown below the report.

Name	Account Na...	Title	Phone	Email	Lead Source	Mailing Street	Mailing...	Mailing City	
1	Carole White	Global Media	VP Sales	(415) 555-12...	jasonroy23195@gmail.com	Web	150 Chestnut Street	Ontario	Toronto
2	Edward Stam...	Global Media	President and CEO	(212) 555-55...	info@salesforce.com	Web	10 Main Rd.	NY	New York City

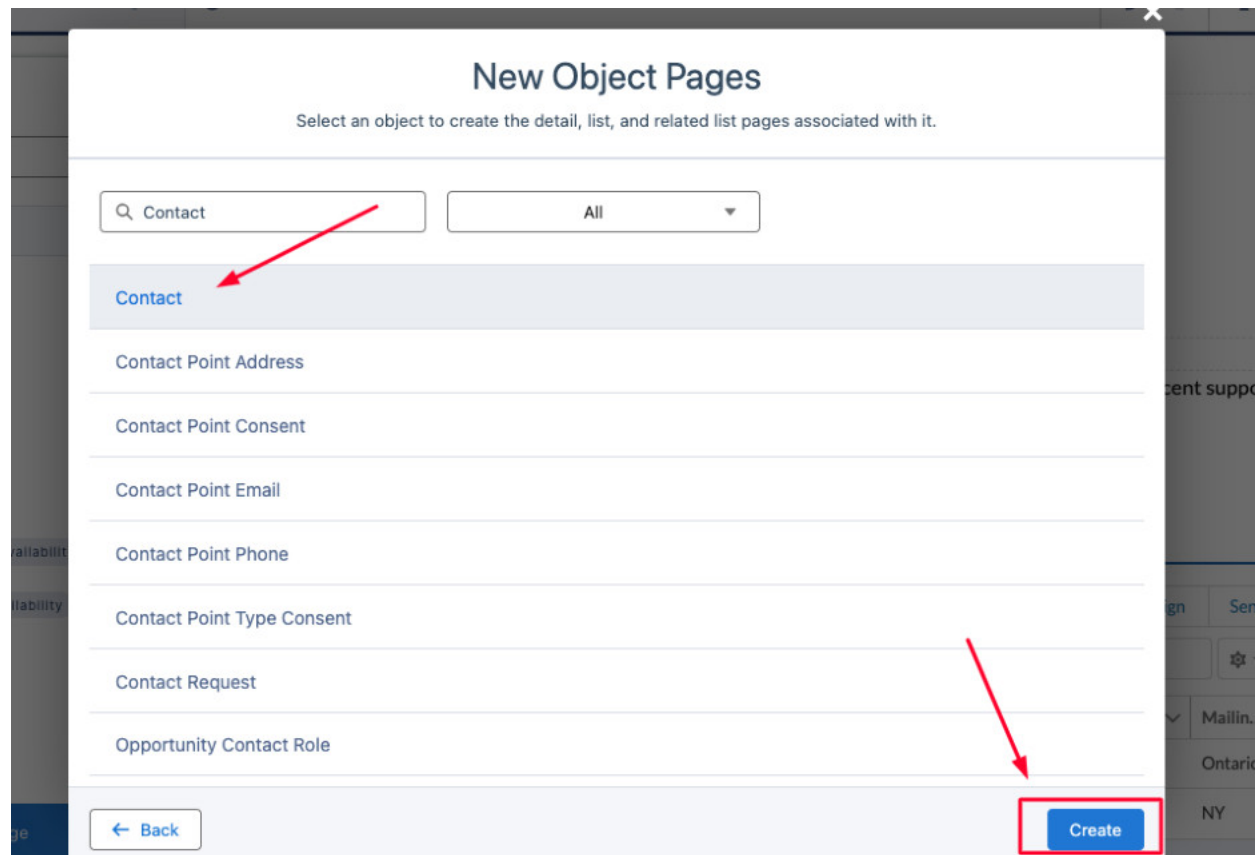
- c. Click on "New Page" to create a new page or select an existing page.



The screenshot shows the Syntaxifyit dashboard. On the left, a sidebar menu is open, displaying a list of pages. At the bottom of this menu is a blue button labeled '+ New Page', which is highlighted by a red arrow. The main content area of the dashboard displays the 'MONTHLY CASE REPORT - FEB 2024' and a table of case records.

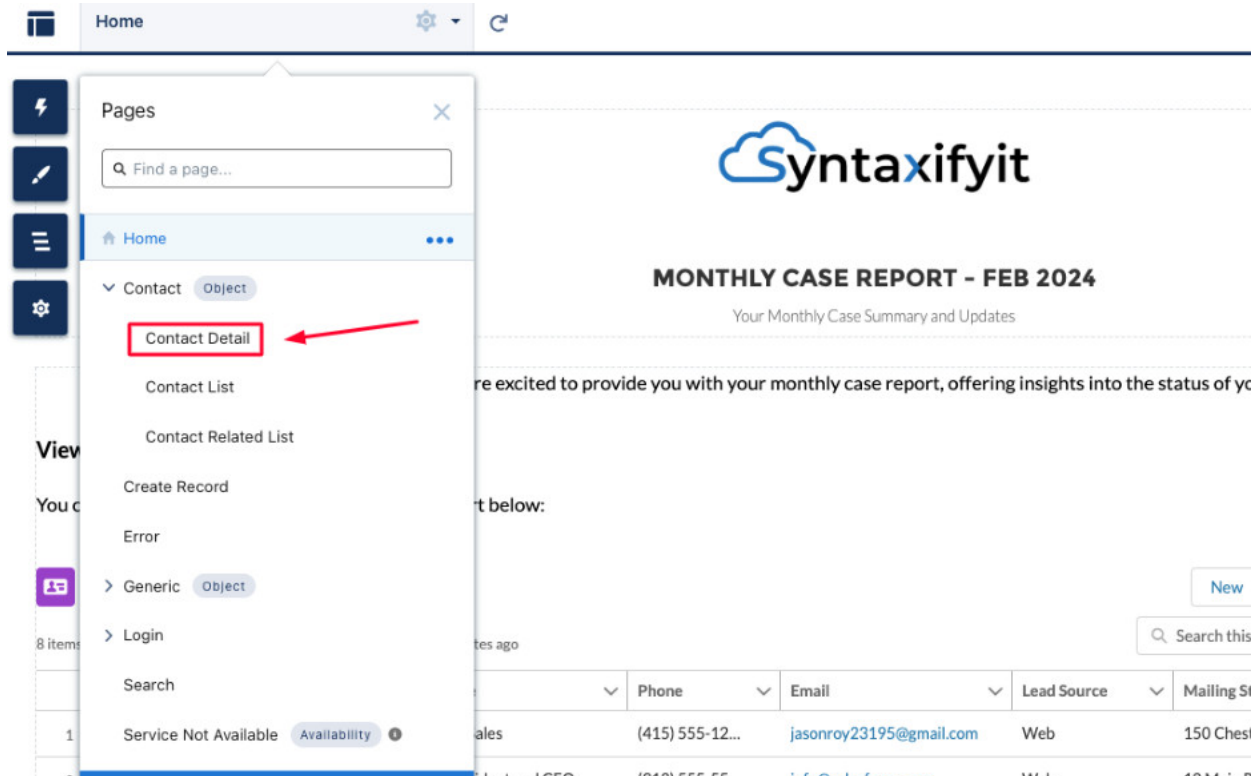
	Phone	Email	Lead Source	Mailing Street
1	(415) 555-12...	jasonroy23195@gmail.com	Web	150 Chestnut Street
2	(212) 555-55...	info@salesforce.com	Web	10 Main Rd.

- d. Choose the 'Object Pages' option and then select an object for which you want to create the page (e.g., Contact) and click on the 'Create' button.

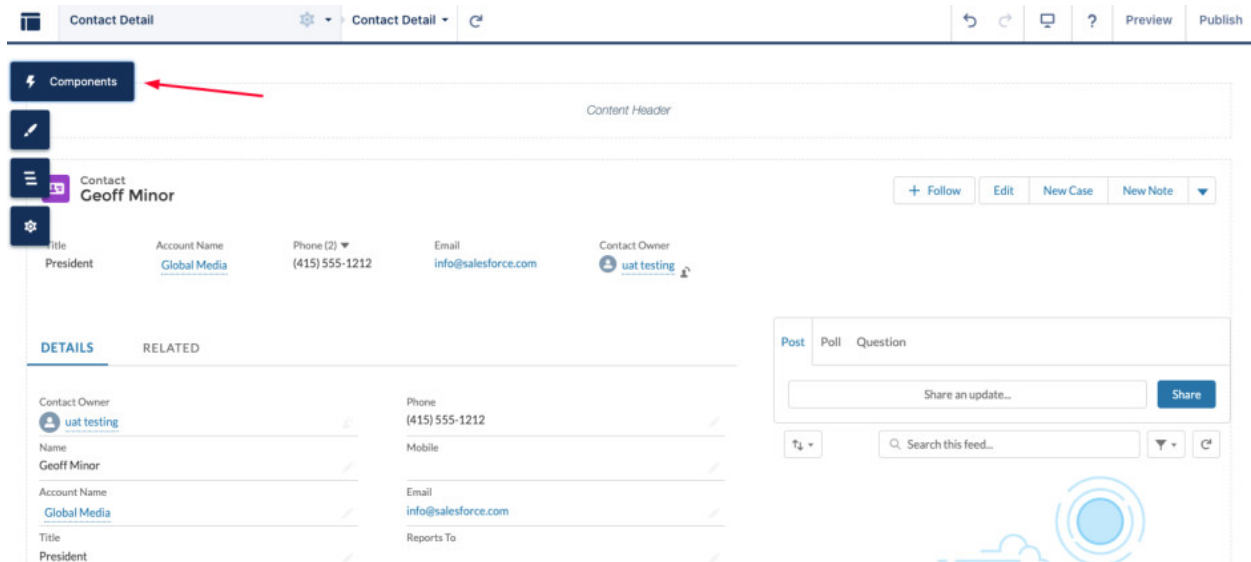


- e. Configure the page layout and components as desired.
4. Add the Advanced PDF Generator Component to the Contact Detail Page Layout:

- a. Once you've created the object page, Salesforce automatically generates a contact detail page.

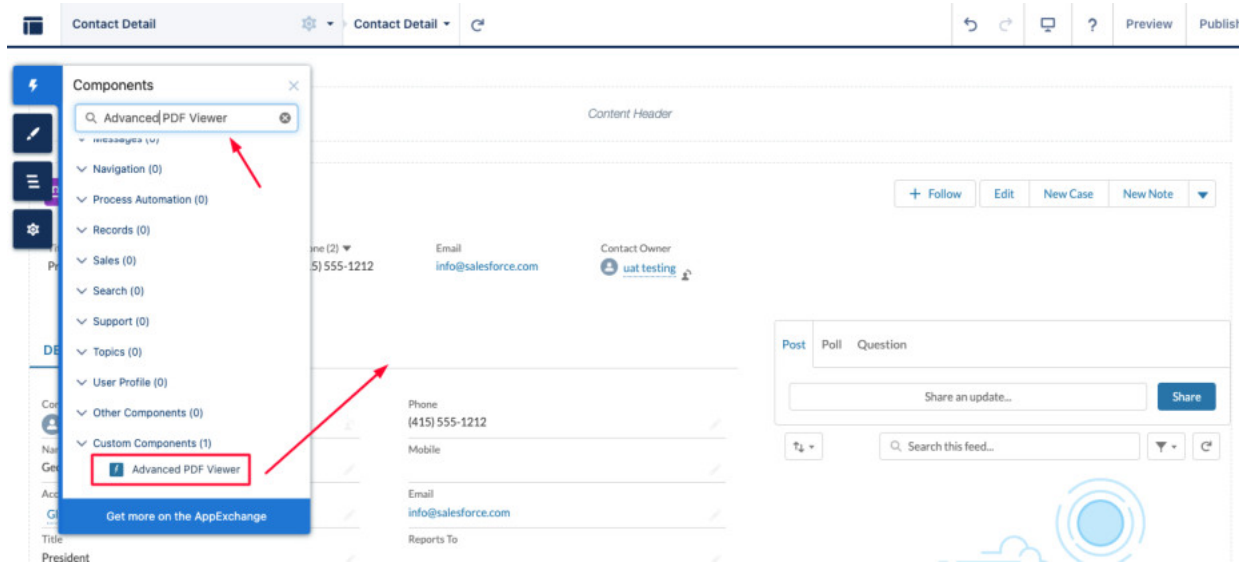


- b. Navigate to the contact detail page and Click on the "Components" tab in the left sidebar.



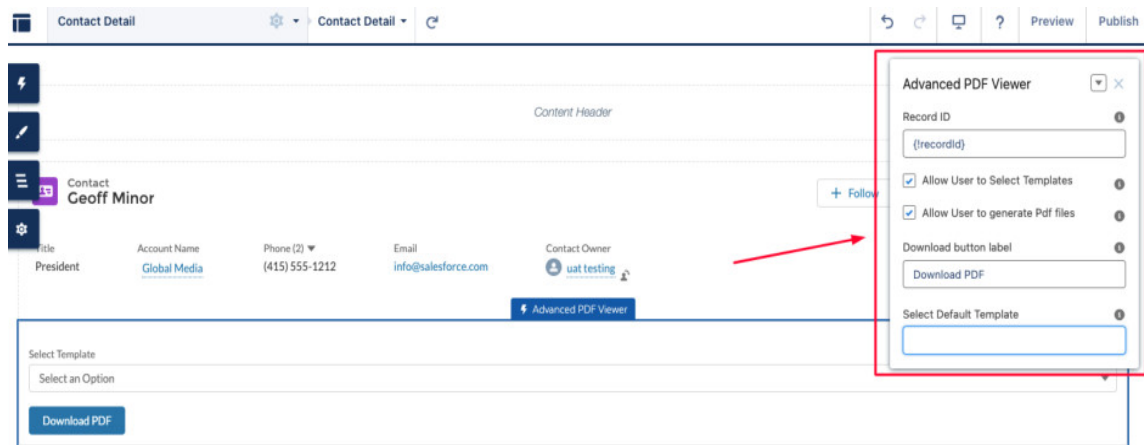
- c. Search for "Advanced PDF Viewer" component in the search bar.

- d. Drag the "Advanced PDF Generator" component onto the desired section of the page layout.



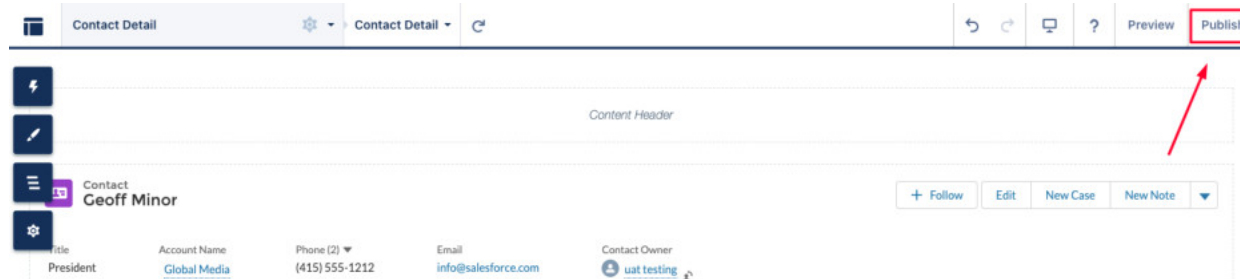
- e. Configure the component settings as necessary. This includes:

- Entering Record ID as **{!recordId}**.
- Checking or unchecking the "Allow User to Select Templates" checkbox.
- Checking or unchecking the "Allow User to generate Pdf files" checkbox.
- Setting the Download button label and selecting the Default Template.
- Save the changes to the page.



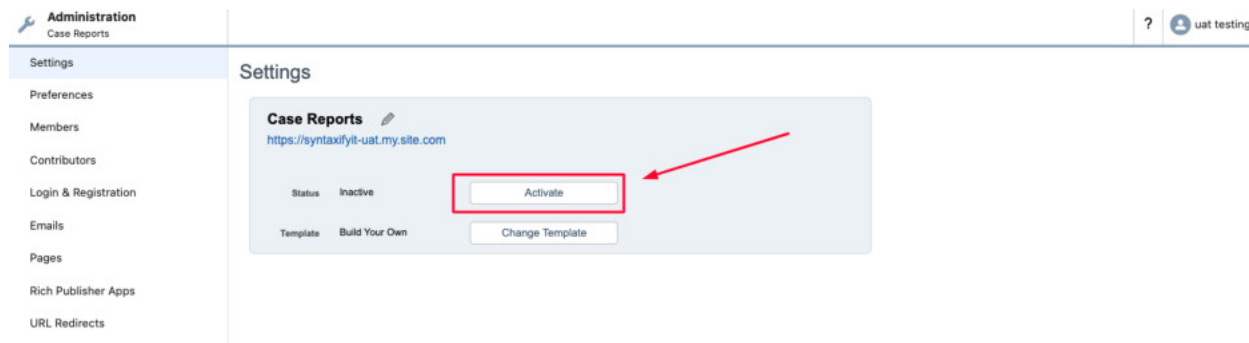
5. Publish the changes:

- a. Once you have finished configuring the object page and adding the custom component, click on the "Publish" button in the top-right corner of the Community Builder to make your changes live.



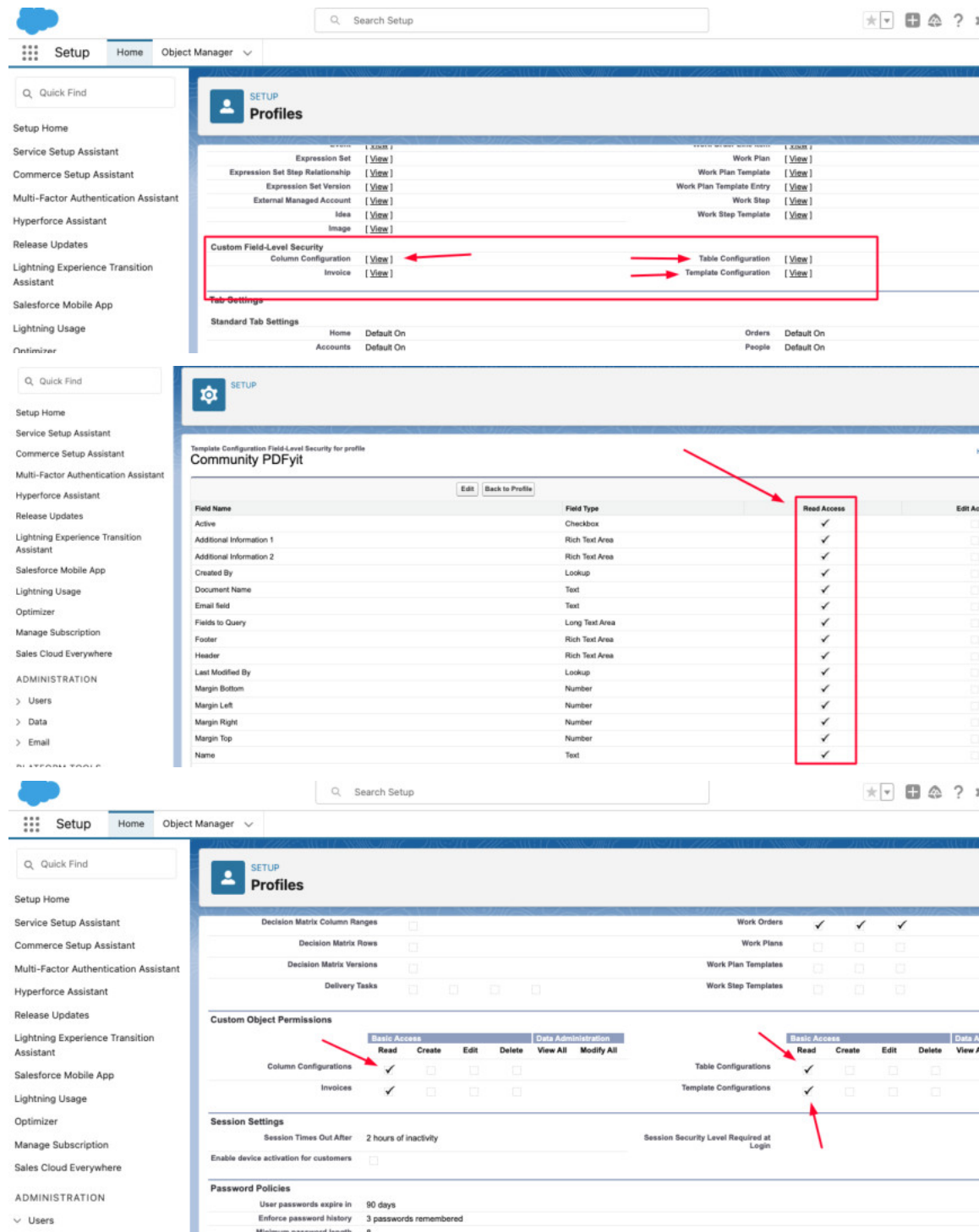
6. Activate the Site/Community:

- a. Still in the WorkSpace of the Community Builder, go to the Settings section.
- b. Activate the site/community.



7. Assign Permission Set:

- a. Now, assign the "PDF Generator Viewer Access" permission set to the Community users for appropriate permissions.
 - If you encounter an error while assigning the "PDF Generator Viewer Access" permission set to the community user, such as '**Can't assign permission set PDF Generator Viewer Access to user [username]. The user license doesn't allow the permission:**', follow these steps:
 - Provide FLS Read permissions (all the fields) to the community user profile for Column Configuration, Table Configuration, and Template Configuration custom objects and Object Permissions.



The first screenshot shows the 'Profiles' page in the Salesforce Setup interface. A red box highlights the 'Custom Field-Level Security' link, which is used to configure field-level security for the profile.

The second screenshot shows the 'Template Configuration Field-Level Security for profile Community PDFyit' page. A red box highlights the 'Read Access' column, which is used to configure read access for the profile.

The third screenshot shows the 'Custom Object Permissions' page. A red box highlights the 'Read' checkbox for 'Table Configurations', which is used to configure read access for the profile.

8. Setup Sharing Settings for Template Configuration object:

Please Note: Sharing setting is only required if you are not able to assign permission set to the users.

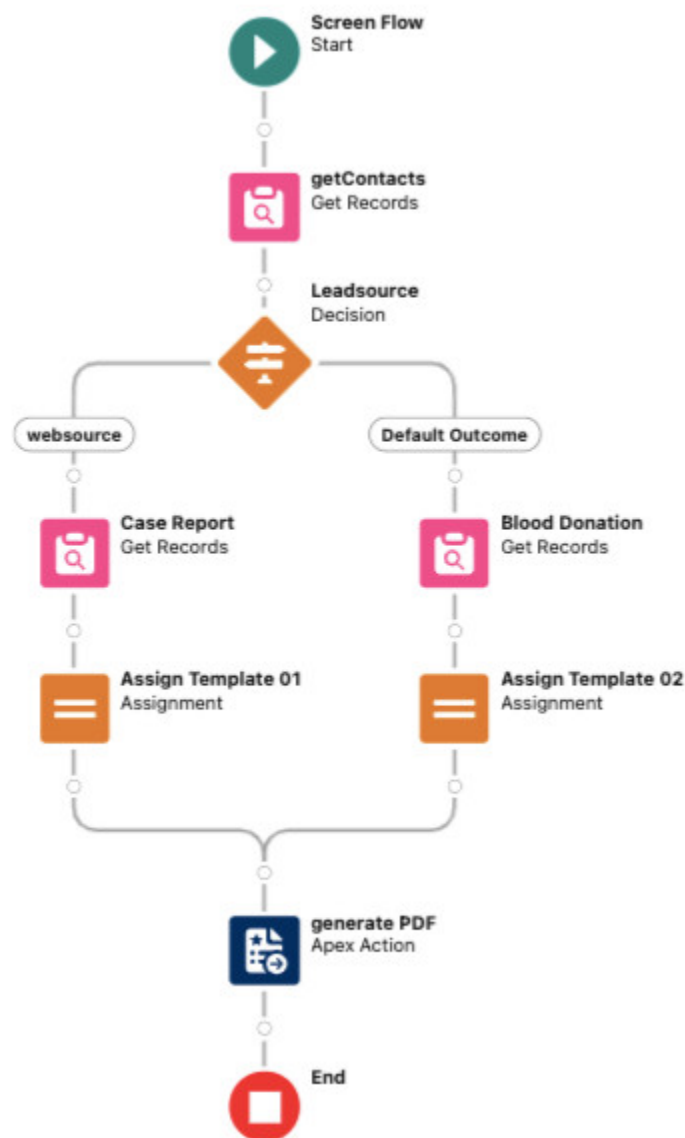


By integrating the PDF Generator into Community pages, admins empower Community or Experience users to leverage its functionalities within the context of their Community environment. This seamless integration enhances collaboration, communication, and document generation capabilities within Salesforce Communities, contributing to a more efficient and streamlined user experience.

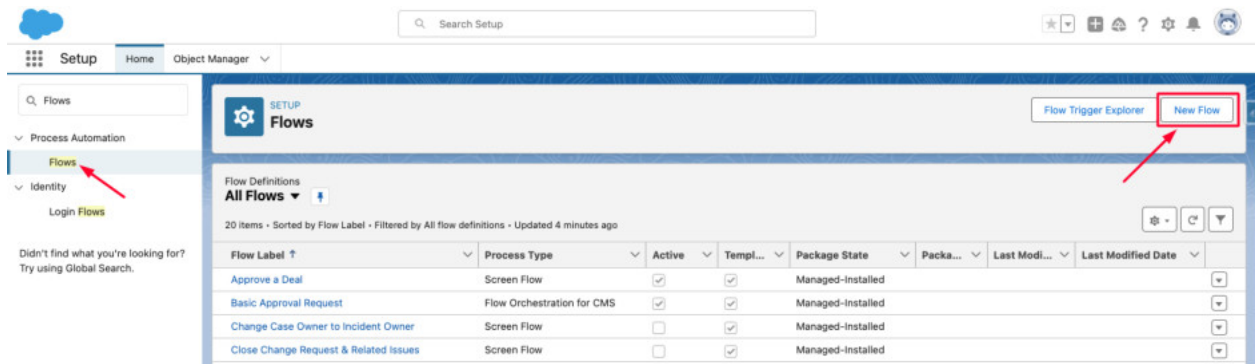
9. Pro version: Automation with Advanced PDF Generation

a. Generate PDF

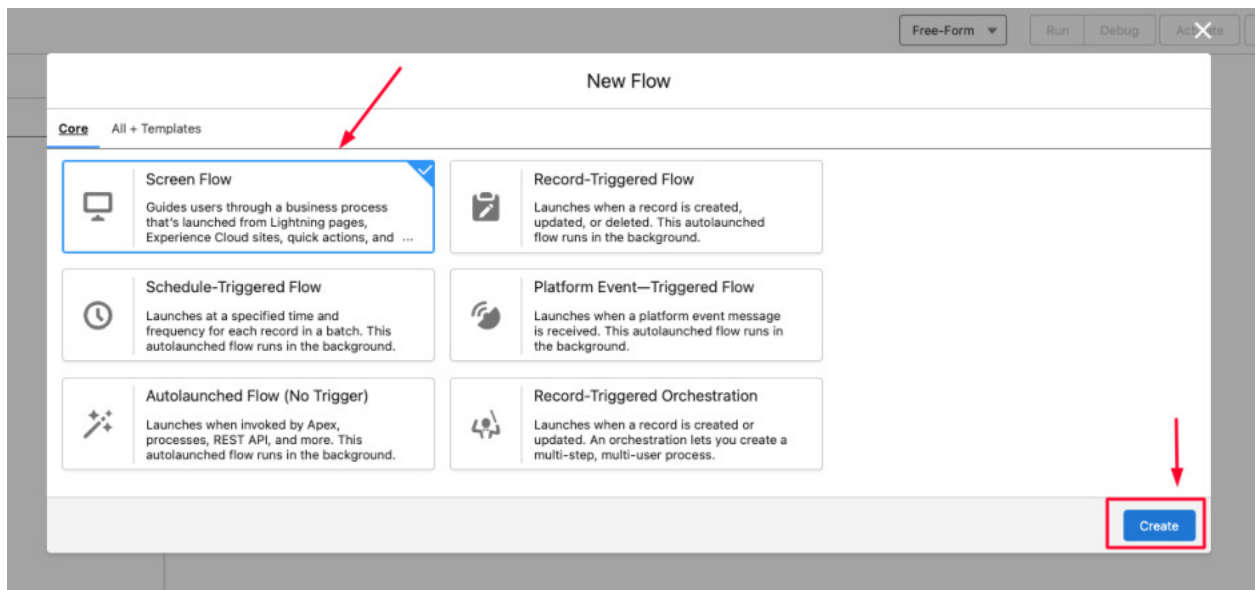
The Advanced PDF Generator for Salesforce seamlessly integrates with Salesforce Flows, particularly Screen Flows, enabling you to effortlessly generate PDF documents within your workflow processes. Below is an illustrative example of how you can generate PDFs while updating or creating a record:



1. Navigate to Salesforce Setup → Flows.
2. Click on 'New Flow.'

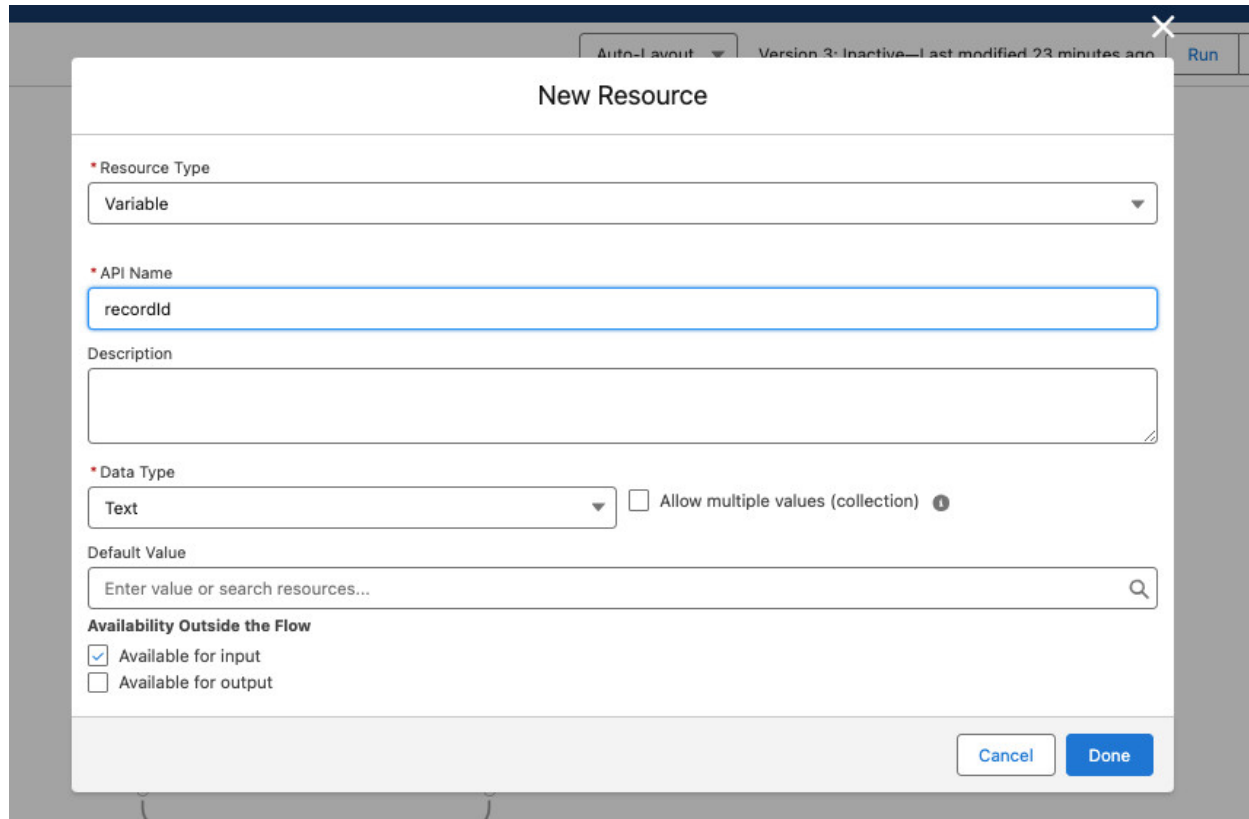


3. Choose 'Screen Flow' and click on 'Create' button.



4. Open the toolbox on the left sidebar and add a new resource:
 - a. Resource Type: Variable
 - b. API Name: recordId
 - c. Data Type: Text

- d. Availability Outside the Flow: Available for Input



New Resource

* Resource Type
Variable

* API Name
recordId

Description

* Data Type
Text

☐ Allow multiple values (collection) ⓘ

Default Value
Enter value or search resources...

Availability Outside the Flow

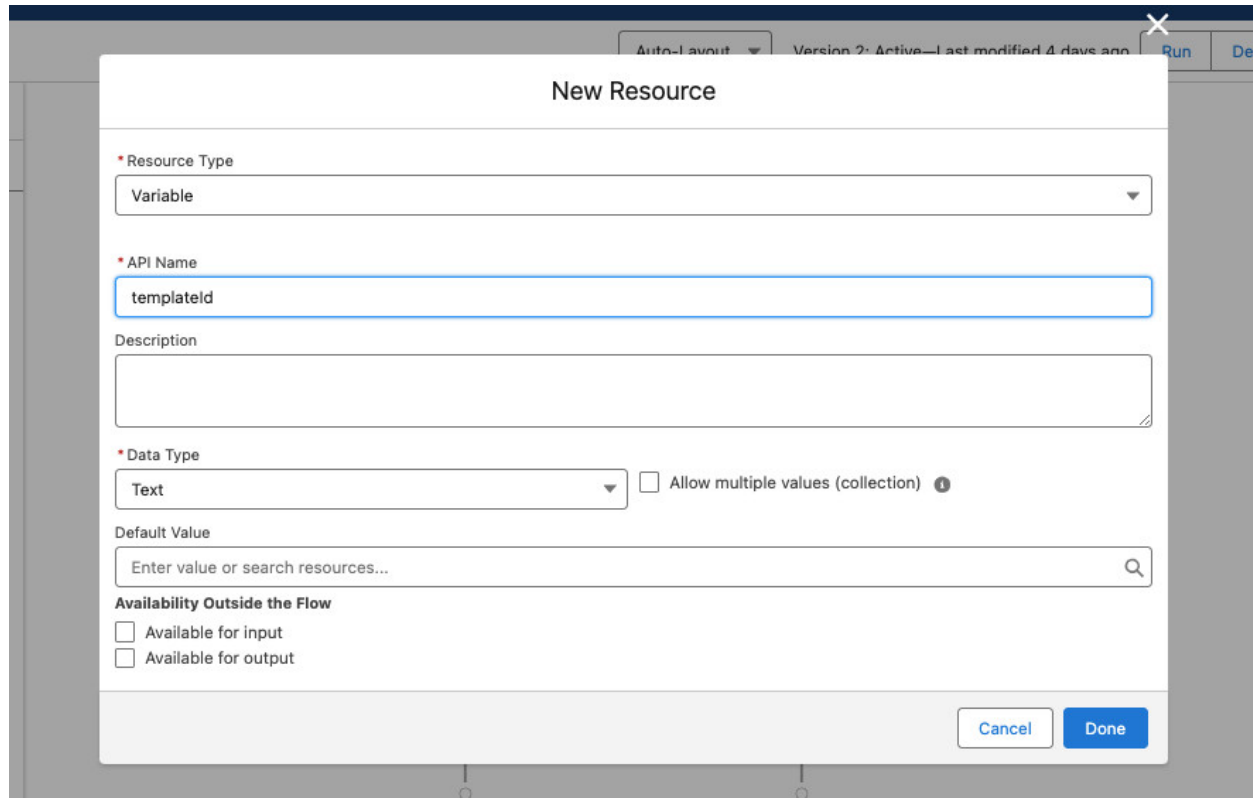
☒ Available for input

☐ Available for output

Cancel Done

5. Repeat step 4 for another variable:
 - a. Resource Type: Variable
 - b. API Name: templateId

c. Data Type: Text



New Resource

* Resource Type
Variable

* API Name
templateId

Description

* Data Type
Text

☐ Allow multiple values (collection) ⓘ

Default Value
Enter value or search resources...

Availability Outside the Flow

☐ Available for input

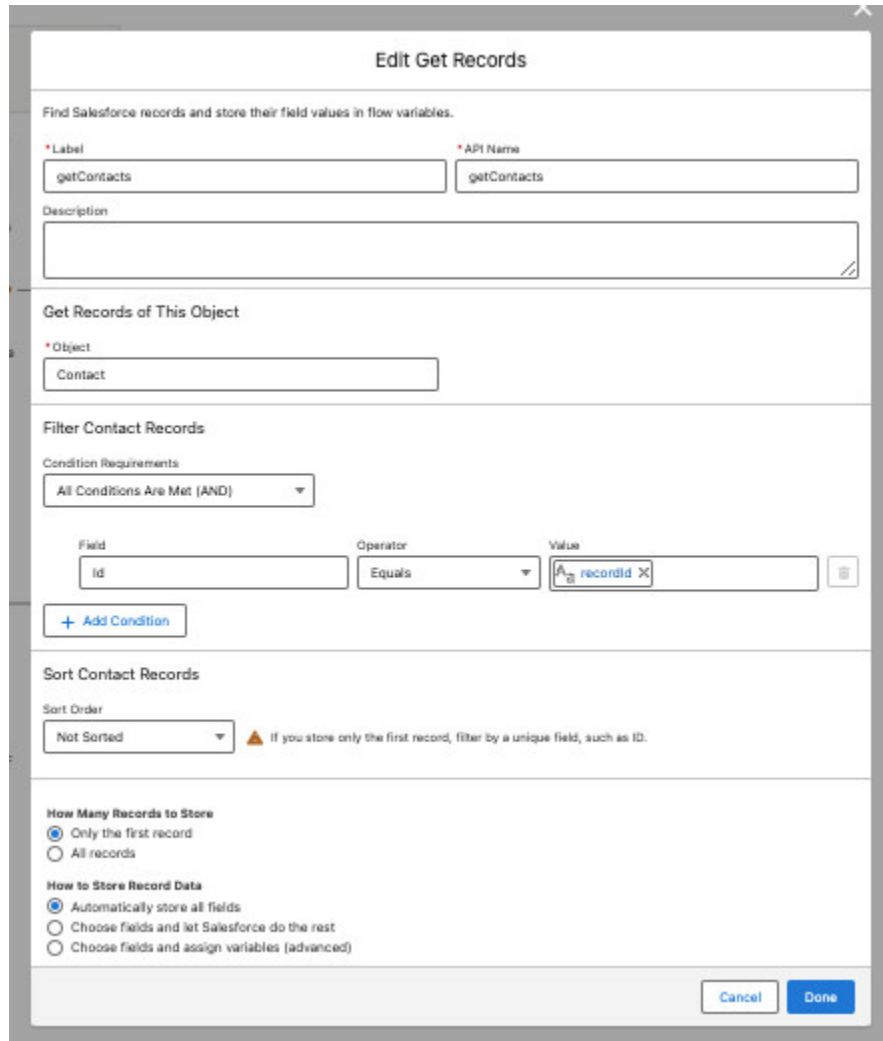
☐ Available for output

Cancel Done

6. Add an element - 'Get Records':

- a. Label: getContacts
- b. Object: Contact
- c. Filter Contact record: Condition Requirements to Execute Outcome: All Conditions are met (AND)
 - Field: Id
 - Operator: Equals
 - Value: recordId (variable)
- d. How many records to save: Only the first record

- e. How to Store Record Data: Automatically store all fields



Edit Get Records

Find Salesforce records and store their field values in flow variables.

*Label: getContacts *API Name: getContacts

Description:

Get Records of This Object

*Object: Contact

Filter Contact Records

Condition Requirements: All Conditions Are Met (AND)

Field	Operator	Value
Id	Equals	recordId

+ Add Condition

Sort Contact Records

Sort Order: Not Sorted

How Many Records to Store

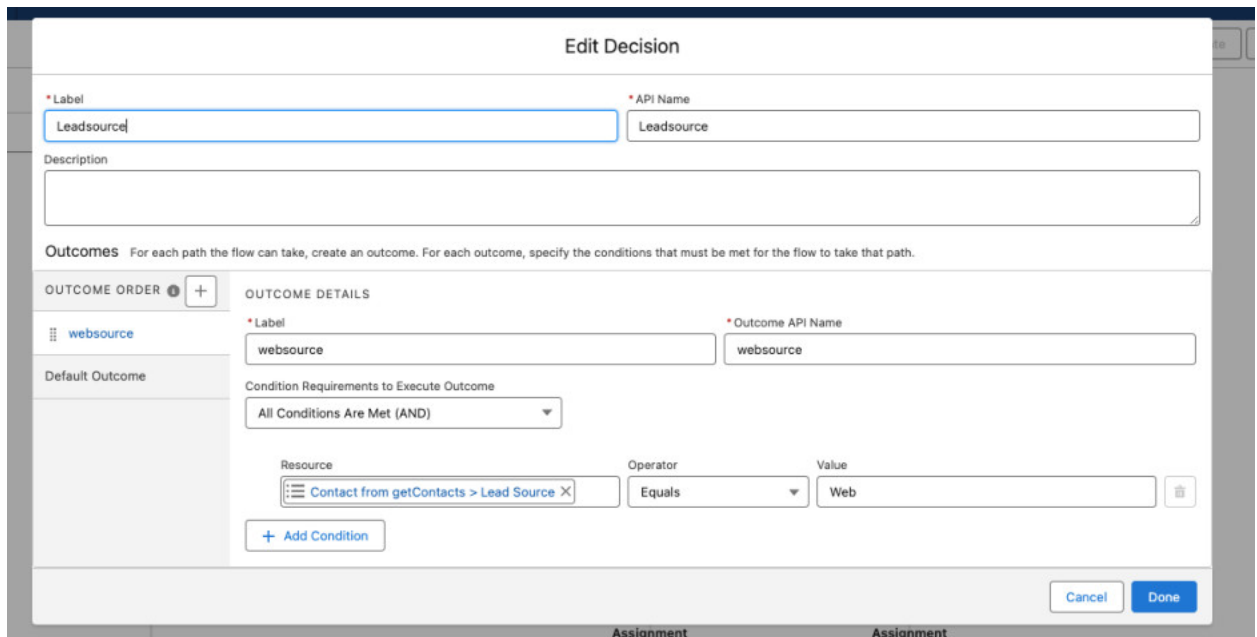
☒ Only the first record
☐ All records

How to Store Record Data

☒ Automatically store all fields
☐ Choose fields and let Salesforce do the rest
☐ Choose fields and assign variables (advanced)

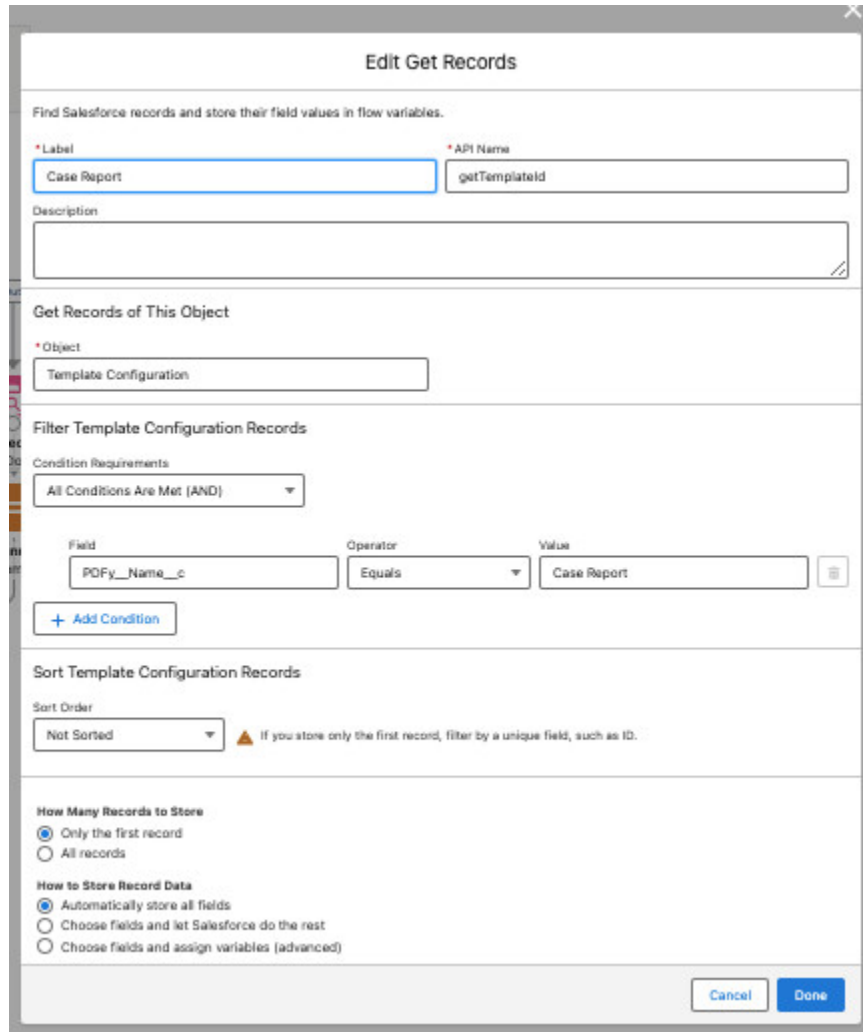
Cancel Done

7. Add an element - 'Decision':
- Label: web source
 - Condition Requirements to Execute Outcome: All Conditions are met (AND)
 - Resource: {!getContacts.LeadSource}
 - Operator: Equals
 - Value: Web



8. In the 'web source' outcome, add an element - 'Get Records':
 - a. Label: Case Report
 - b. Object: Template Configuration
 - c. Filter Template Configuration Records: All Conditions Are Met (AND)
 - Field: PDFy__Name__c
 - Operator: Equals
 - Value: Case Report
 - d. How many records to save: Only the first record

- e. How to Store Record Data: Automatically store all fields



Edit Get Records

Find Salesforce records and store their field values in flow variables.

* Label: * API Name:

Description:

Get Records of This Object

* Object:

Filter Template Configuration Records

Condition Requirements:

Field	Operator	Value
PDFy__Name__c	Equals	Case Report

+ Add Condition

Sort Template Configuration Records

Sort Order: ⚠ If you store only the first record, filter by a unique field, such as ID.

How Many Records to Store

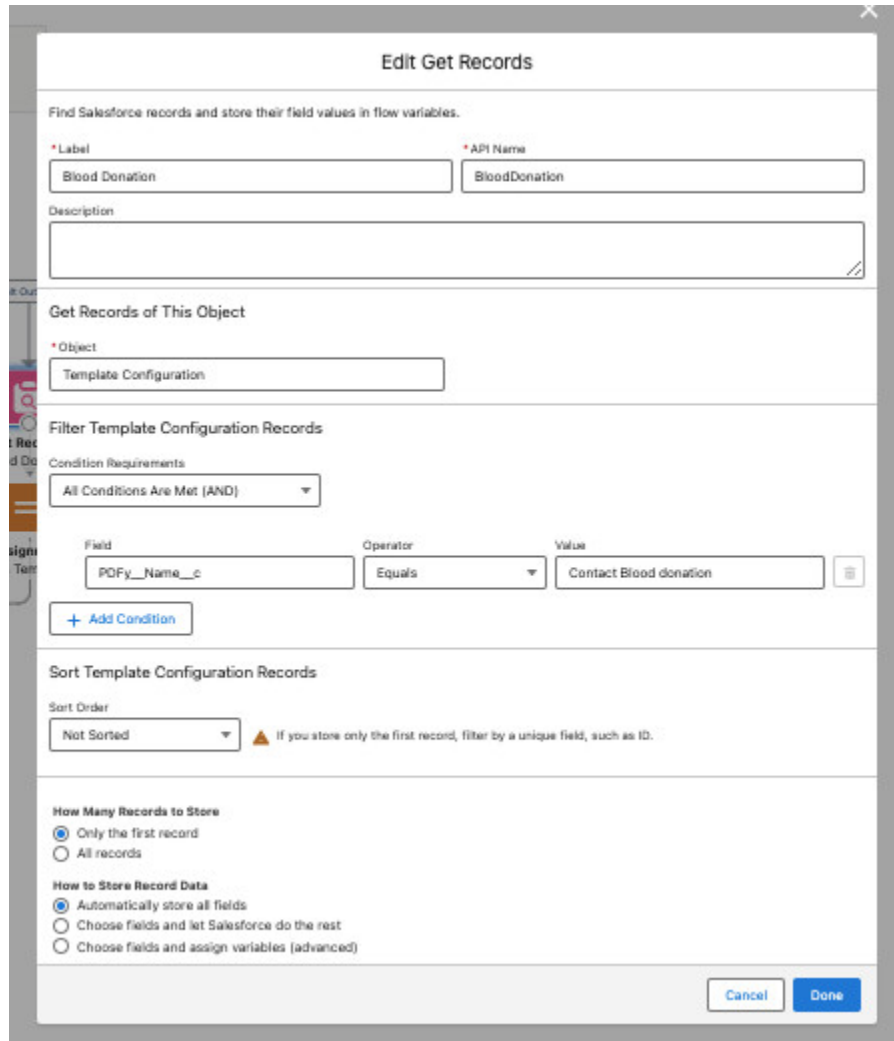
☒ Only the first record
☐ All records

How to Store Record Data

☒ Automatically store all fields
☐ Choose fields and let Salesforce do the rest
☐ Choose fields and assign variables (advanced)

9. For the Default Outcome, add an element - 'Get Records':
 - a. Label: Blood Donation
 - b. Object: Template Configuration
 - c. Filter Template Configuration Records: All Conditions Are Met (AND)
 - Field: PDFy__Name__c
 - Operator: Equals
 - Value: Contact Blood Donation
 - d. How many records to save: Only the first record

- e. How to Store Record Data: Automatically store all fields



Edit Get Records

Find Salesforce records and store their field values in flow variables.

* Label: Blood Donation * API Name: BloodDonation

Description:

Get Records of This Object

* Object: Template Configuration

Filter Template Configuration Records

Condition Requirements: All Conditions Are Met (AND)

Field	Operator	Value
POFy_Name__c	Equals	Contact Blood donation

+ Add Condition

Sort Template Configuration Records

Sort Order: Not Sorted

How Many Records to Store:

- ☒ Only the first record
- ☐ All records

How to Store Record Data:

- ☒ Automatically store all fields
- ☐ Choose fields and let Salesforce do the rest
- ☐ Choose fields and assign variables (advanced)

Cancel Done

10. Add an element - 'Assignment':
- Label: Assign Template 01
 - Set Variable Values:
 - Variable: TemplateId,
 - Operator: Equals,
 - Value: {!getTemplateId.Id}

Free-Form | version 3: inactive—Last modified 43 minutes ago | Run | Debug

Edit Assignment

* Label

* API Name

Description

Set Variable Values

Each variable is modified by the operator and value combination.

Variable	Operator	Value
TemplateId	Equals	Template Configuration from getTem...

[+ Add Assignment](#)

[Cancel](#) [Done](#)

11. Add another element - 'Assignment':
 - a. Label: Assign Template 02
 - b. Set Variable Values:
 - Variable: TemplateId,
 - Operator: Equals,
 - Value: {!getTemplateId.Id}

Free-Form version 3: inactive—Last modified 44 minutes ago Run Debug

Edit Assignment

* Label * API Name

Description

Set Variable Values

Each variable is modified by the operator and value combination.

Variable	Operator	Value
A_a Templated ×	Equals	A_a Template Configuration from BloodD... × 

[+ Add Assignment](#)

[Cancel](#) [Done](#)

12. Lastly, add an element - 'Apex Action':

- Label: Generate PDF
- Record Id: {!recordId}
- Template Id: {!TemplateId}

Edit Advanced PDF Generator - Generate PDF

Use values from earlier in the flow to set the inputs for the "Advanced PDF Generator - Generate PDF" Apex action. To use its outputs later in the flow, store them in variables.

*** Label**

*** API Name**

Description

Set Input Values for the Selected Action

*** Record Id**

*** Template Id**

13. Verify the flow:

- a. Create or update a Contact object record in Salesforce.
- b. If the Lead Source is "Web," the flow will be initiated.
 - Upon completion of the flow, a PDF (Case Report) will be generated and attached to the Contact record.
- c. For other Lead Source values/options:
 - The flow will proceed accordingly.
 - A PDF (Blood Donation) will be generated and attached to the Contact record upon completion.

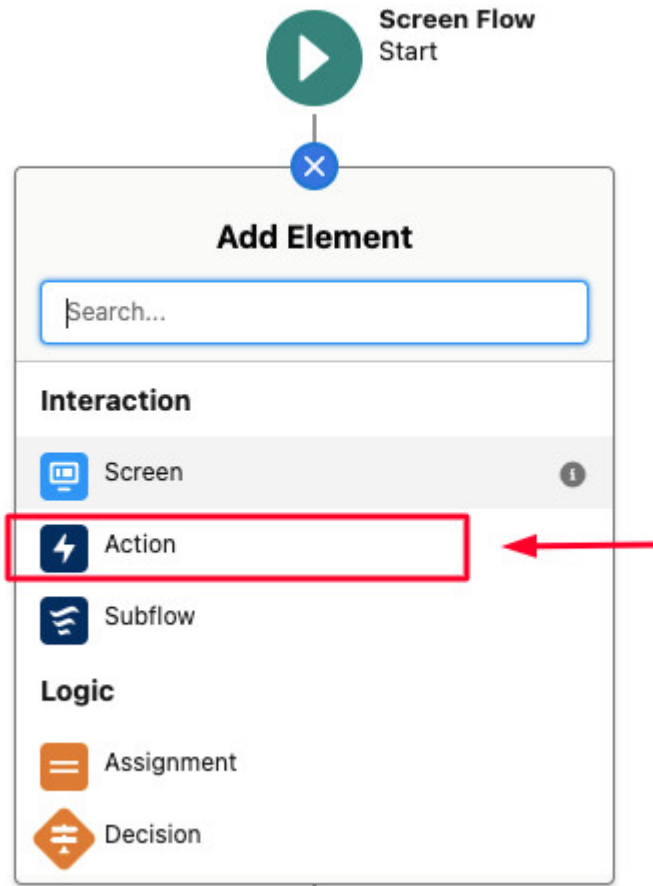
By integrating the Advanced PDF Generator with Salesforce Flows, specifically Screen Flows, you can seamlessly incorporate PDF generation capabilities into your automated workflow processes. This integration enhances productivity, efficiency, and user experience by providing a streamlined method for generating customized PDF documents within the context of your business processes.

b. Send Email

The Advanced PDF Generator for Salesforce not only facilitates PDF generation within flows but also enables you to seamlessly integrate email functionality, allowing you to send emails along with the generated PDFs. Below is an example of how you can utilize this feature within a flow:

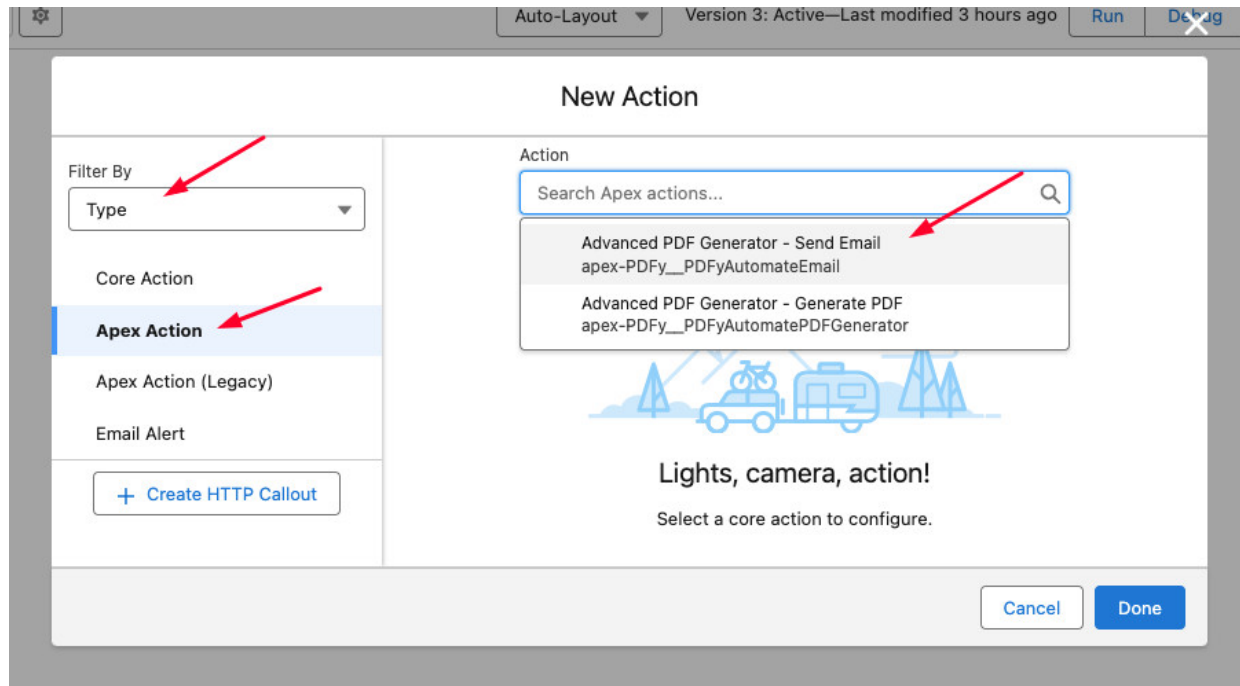


1. Begin by creating a Screen Flow (following the steps outlined in the earlier Flow for PDF Generation).



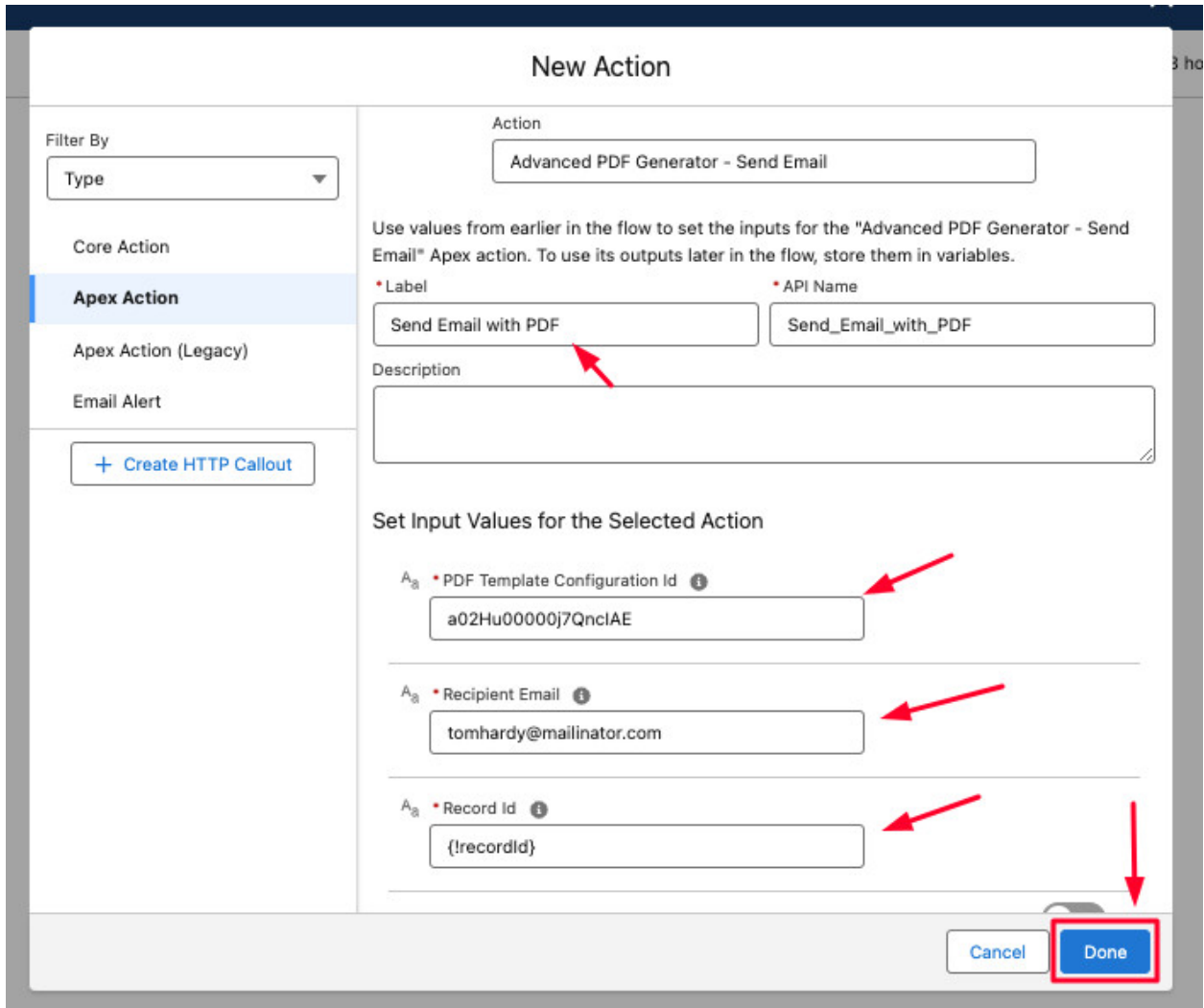
2. Add an element - 'Action':
 - a. Filter By: Type
 - b. Choose 'Apex Action'

- c. Select the 'Advanced PDF Generator - Send Email' option



- Label: Send Email with PDF
- Set Input Values for the Selected Action:
- PDF Template Configuration Id (*Pass the Pdf Template Configuration Id to generate and attach the PDF in email*) : Enter the PDF Template id you wish to generate.
- Recipient Email (*Pass the Recipient Email*): Enter the recipient email address.
- Record Id (*Pass the Id of the record for which email needs to be send*): Select the 'recordId' variable (following the step 4 outlined in the earlier Flow for PDF Generation)

d. Add any additional details if desired, then click on the 'Done' button.



New Action

Filter By
Type

Core Action
Apex Action
Apex Action (Legacy)
Email Alert

+ Create HTTP Callout

Action
Advanced PDF Generator - Send Email

Use values from earlier in the flow to set the inputs for the "Advanced PDF Generator - Send Email" Apex action. To use its outputs later in the flow, store them in variables.

* Label
Send Email with PDF

* API Name
Send_Email_with_PDF

Description

Set Input Values for the Selected Action

A₂ * PDF Template Configuration Id ⓘ
a02Hu00000j7QncIAE

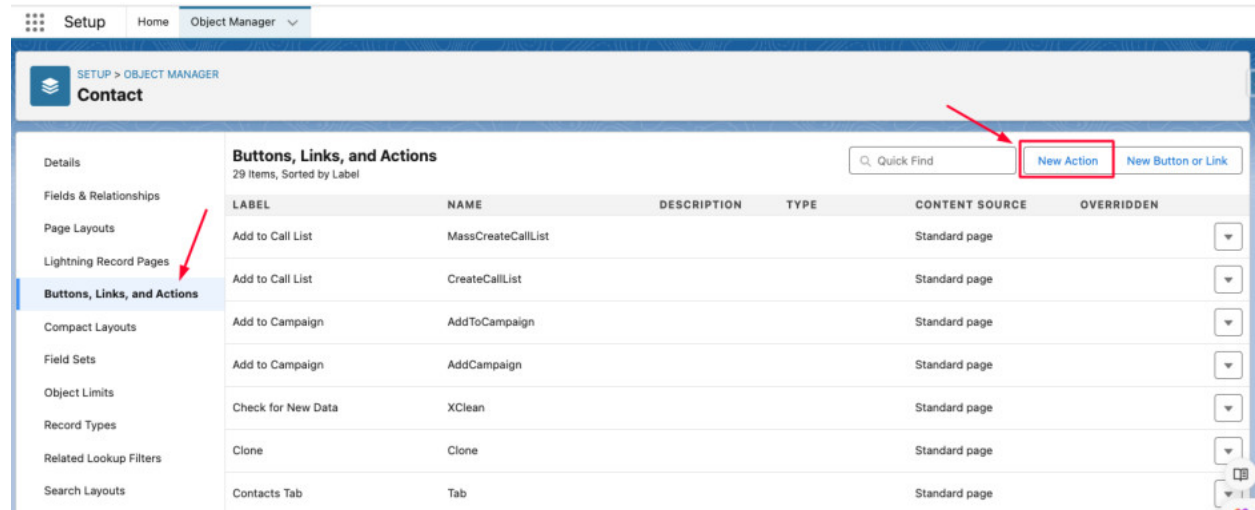
A₂ * Recipient Email ⓘ
tomhardy@mailinator.com

A₂ * Record Id ⓘ
{!recordId}

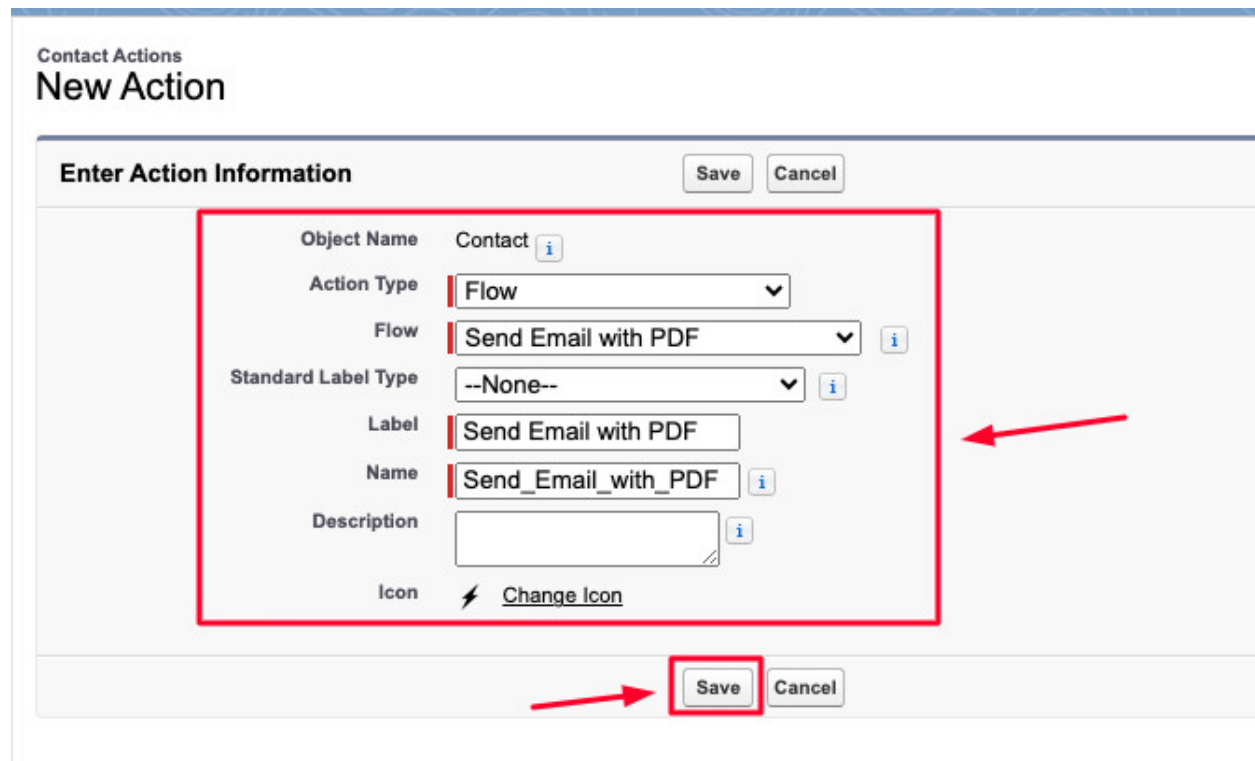
Cancel Done

3. Save and Activate the Flow.
4. Navigate to the object page from which you intend to run the flow (e.g., Contact).

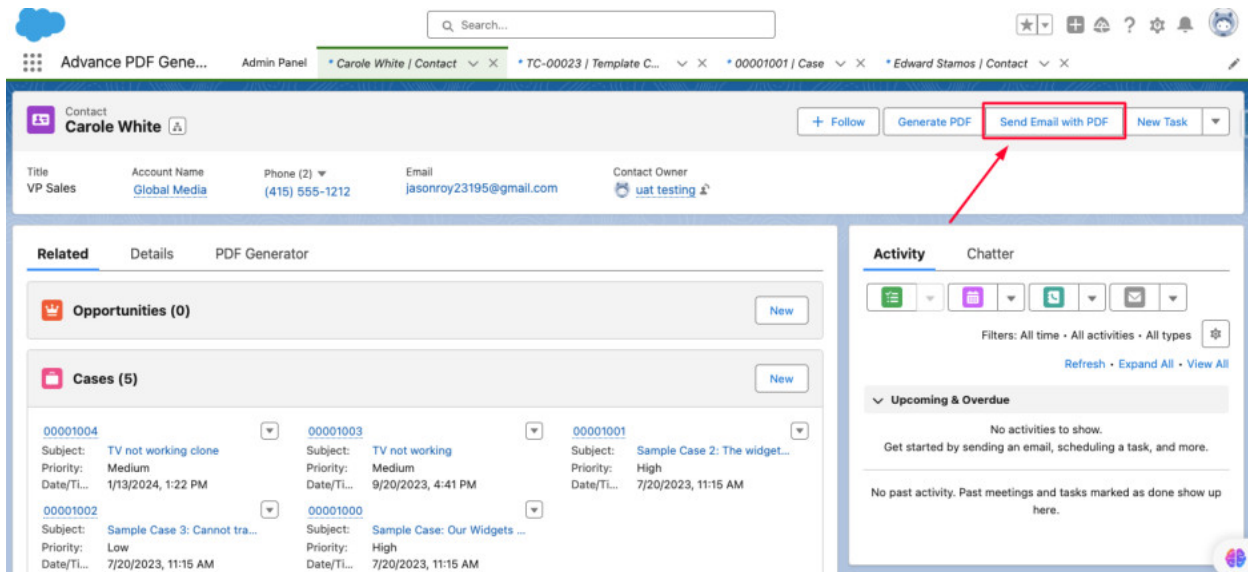
- a. Click on 'Buttons, Links and Actions,' then select 'New Action':



- b. Action Type: Flow
 c. Flow: Choose the flow you just created ('Send Email with PDF')
 d. Standard Label Type: None
 e. Label: Send Email with PDF
 f. Name: Send_Email_with_PDF
 g. Click on the 'Save' button.



To verify the flow, navigate to any contact object record and click on the 'Send Email with PDF' button. You should receive the email along with the selected PDF.



The screenshot shows the Syntaxifyit CRM interface for a contact named 'Carole White'. The top navigation bar includes a search bar and several tabs: 'Advance PDF Gene...', 'Admin Panel', 'Carole White / Contact', 'TC-00023 / Template C...', '00001001 / Case', and 'Edward Stamos / Contact'. The main header for the contact record shows 'Contact Carole White' with buttons for '+ Follow', 'Generate PDF', 'Send Email with PDF' (highlighted with a red box and an arrow), and 'New Task'. Below the header, the contact details are listed: Title (VP Sales), Account Name (Global Media), Phone (2) ((415) 555-1212), Email (jasonroy23195@gmail.com), and Contact Owner (uat testing). The main content area is divided into two sections: 'Related' and 'Activity'. The 'Related' section shows 'Opportunities (0)' and 'Cases (5)'. The 'Activity' section shows 'Chatter' with filters for 'All time', 'All activities', and 'All types'. The 'Upcoming & Overdue' section shows 'No activities to show. Get started by sending an email, scheduling a task, and more. No past activity. Past meetings and tasks marked as done show up here.'

Note: Ensure that the PDF Template you selected is active.

10. Troubleshooting

If you encounter any issues while using the Advanced PDF Generator, here are some basic troubleshooting steps you can follow:

- Check your internet connection to ensure it is stable and working.
- Verify that the app is installed correctly and has the necessary permissions.
- Ensure that you have configured the settings (header, footer, titles, email etc.) correctly.
- Check for any error messages or notifications displayed by the app or Salesforce.

If the problem persists, reach out to your Salesforce administrator or the app's support team for assistance.

11. Frequently Asked Questions

Q: Can I customize the PDF layout for different record types?

A: Yes, the Advanced PDF Generator allows you to set up different configurations for various record types, giving you the flexibility to generate different PDF layouts based on your needs.

Q: Can I include images in the header or footer?

A: Absolutely! You can add images, such as logos, to the header or footer by configuring the settings accordingly.

Q: Can I apply different styles or formatting to individual columns in the table?

A: Yes, the Column Configuration allows you to apply unique styles and formatting to each column in the table. You can customize column width, alignment, font, and other visual aspects.

Q: Can I use the generated PDFs for printing or sharing externally?

A: Absolutely! Once a PDF is generated, you can download it and use it for printing or share it externally with stakeholders, clients, or partners.

Q: Why upgrade to the Pro version?

A: The Pro version offers advanced features such as template cloning, exporting/importing templates between sandbox and production environments, and sending emails along with generated PDF documents. These features streamline workflow, enhance template management, and improve communication efficiency.

Q: What benefits does the Pro version provide for template management?

A: Pro simplifies template customization with cloning, ensures consistency across environments with export/import functionality, and allows for seamless integration of email communication with generated PDF documents.

Q: How does the Pro version enhance productivity and user experience?

A: Pro's features optimize workflow, save time, and provide priority support, resulting in increased productivity and user satisfaction. Whether it's creating variations of existing templates, managing templates across different environments, or sending emails directly from the application, the Pro version empowers users to achieve more in less time.

12. Support

For any further assistance, questions, or issues related to the Advanced PDF Generator, please contact our support team at support@syntaxifyit.com . We are here to help you make the most of our powerful PDF generation tool.