fibreCRM | HEART OF THE PRACTICE

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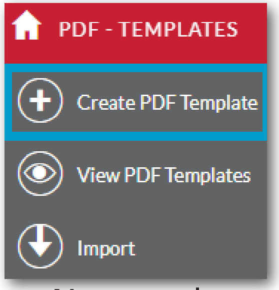
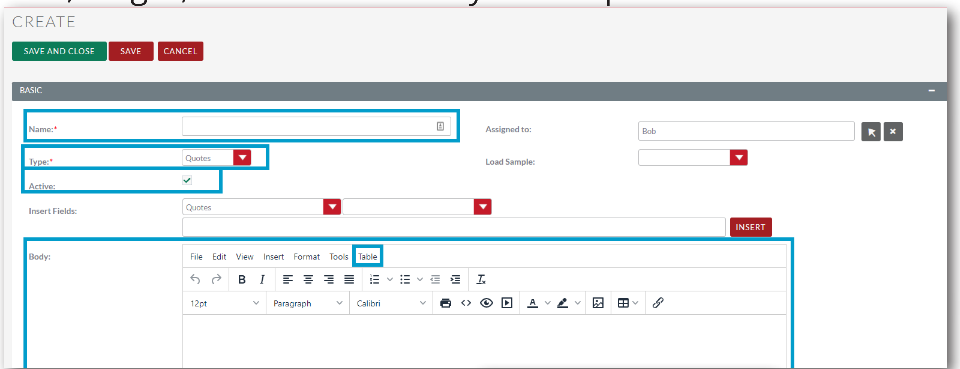
Creating PDF Templates

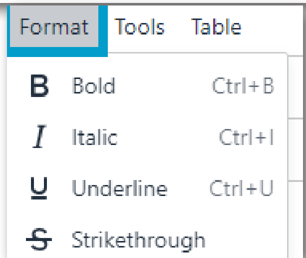
1. Go to the **All** option in the **Navigation Menu** and in the drop down select **PDF - Templates.** In the **PDF - Templates** module select **Create PDF Template** from the options on the left hand side.



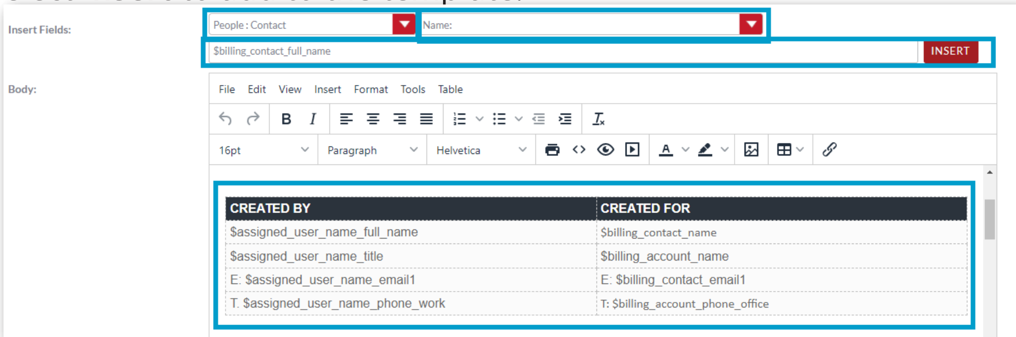
2. In the **Basic** section give the template a **Name**, select a **Type**. Then tick the **Active** box and if the template is for **Engagement Letters** tick the **For Engagement Letter?** box located below the **Footer**. In the **Body** you will add text,images,urls and tables for your template.



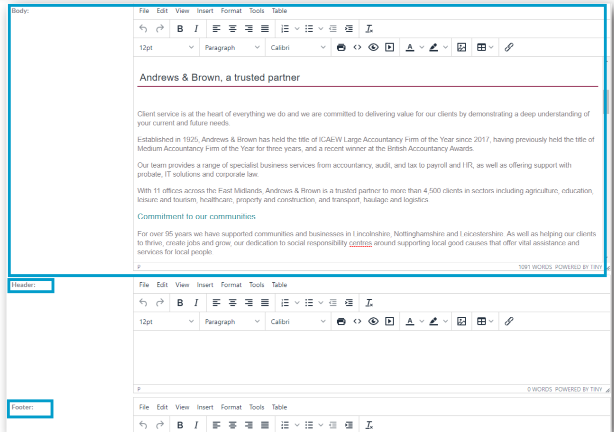
3. Use the **Format** option to bring up options to format your text.



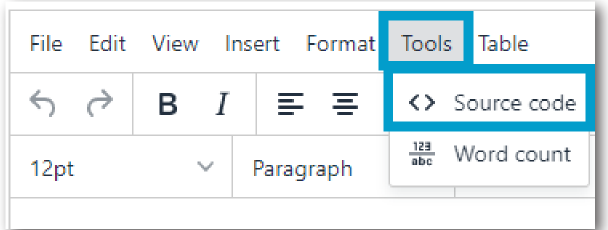
4. You can add in **Merge Codes** to pull information from records in the CRM.To create the merge code select an option from **Insert Fields**,then select an option from the second drop down field. A code will then appear in the third field for you to insert into the template. Select **Insert** to add to the template.



5. In the **Body** of the template you can format the text in the same way as you can in normal word processors, insert images, URLs and insert tables. Below the **Body** section you can add a **Footer** or **Header** to each page of the document and also create a **Front** and **Back** page for the document.



6. You can view the HTML of the template. A basic knowledge in this will help you create more complex templates.To access the code go to **Tools** and select **Source Code.**



7. Once you're happy with your template select **Save and Close.** This template can now be selected when sending out documents via the CRM.