PDF BUTLER UNIVERSITY

What is PDF Bulter?

Its a document generation and automation tool that integrates with Salesforce, allowing users to generate customized, professional-looking PDF documents directly within the Salesforce environment.

available on AppExchange

salesforce

What’s a problem?

- Salesforce users face numerous challenges when it comes to creating documents, merging data, collaborating, distributing and integrating e-signatures.

- To overcome these challenges, they rely on a tool called PDF Butler. However, using PDF Butler can be complex for first-time users who are unfamiliar with its interface and functions.

- **That's where PDF Butler University comes in to provide the necessary training and support!**

PDF Bulter University benefits

The opportunity to learn and acquire in-depth knowledge about the PDF Butler tool.

Get the comprehensive understanding by the training on the tool's features, functionalities, and best practices.

Even for experienced users, the PDF Butler University offers advanced courses that delve into more complex aspects of the tool.

pdfbutleruniversity.com

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PDF BUTLER

admin

Forgotten your username or password?

Log in

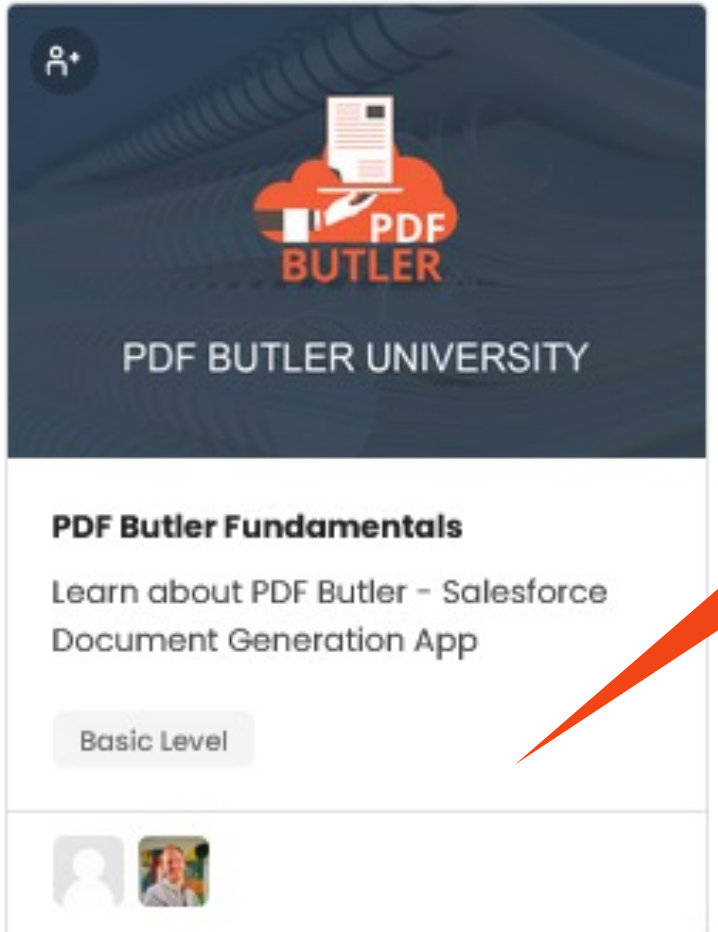
Log in using your account on:

LinkedIn

Simple authorization via LinkedIn

Cookies notice

Available courses



Students can choose the available courses

Each course contain Topics & Assignments

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My Courses 1

Home - My courses - PDFB Fundamentals

Participants Badges Competencies Grades

PDF Butler Fundamentals

Learn about PDF Butler - Salesforce Document Generation App

General

Site home

My Courses 1

PP

PDF Butler Fundamentals

Learn about PDF Butler - Salesforce Docume

Each Topic is described by short chapters

General

Install, Setup & Register

Configure & Generate a document

Done: View

First Document

Create your first quote document in just 15 minutes.

Learn the basics of selecting data, replacing mergefields and repeating rows. Use the

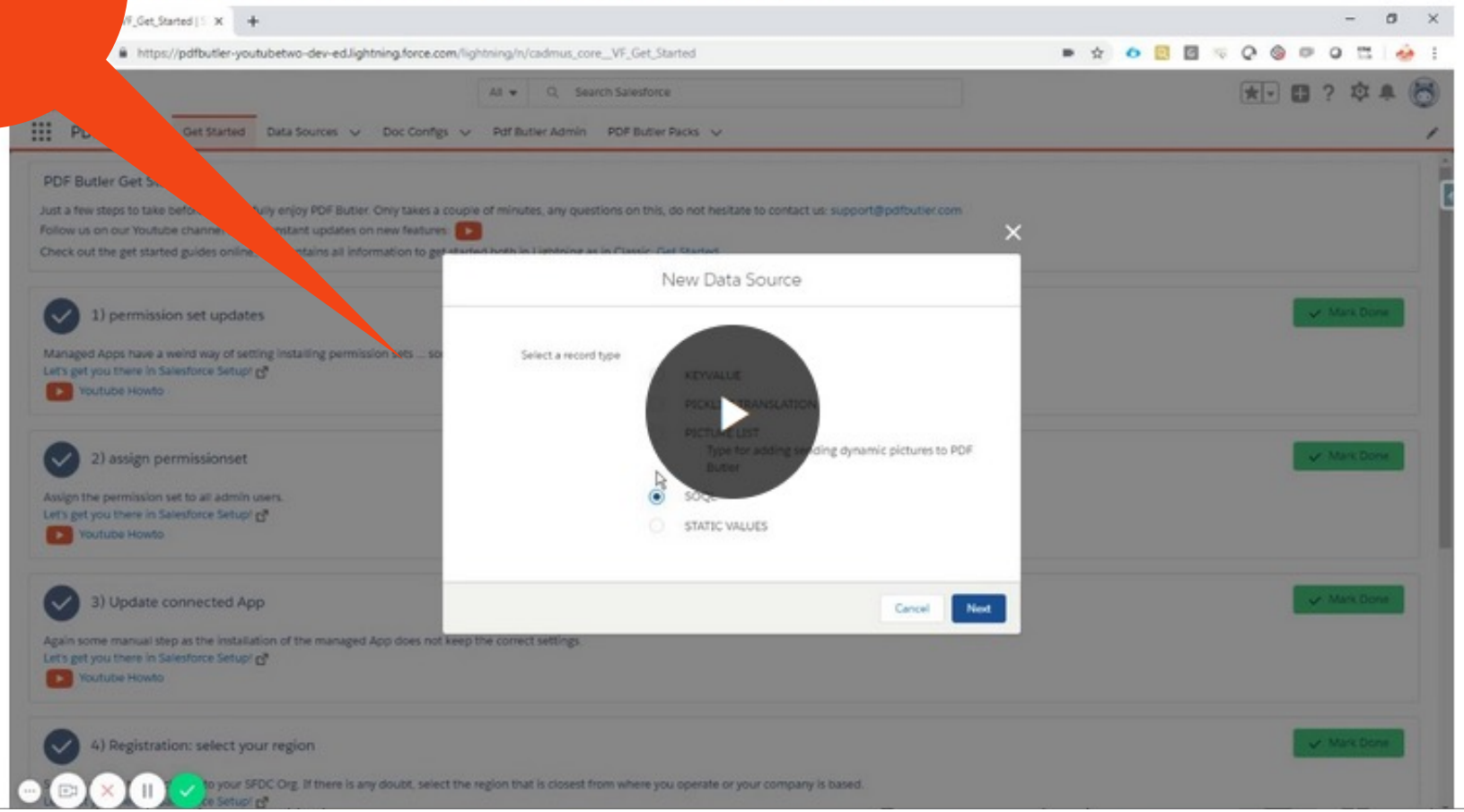
Edit mode

Video helps to understand the Topic on a deeper level

de good progress, and already learned how to Install PDF Butler.

t difficult at all, was it?

t video will help you to create your first document.



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PP

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Quiz helps to check the knowledge of the learned Topic

Quiz: Configure & Generate a document

Question 1 Not yet answered Marked out of 10.00

Your business has a word document that they want to use as a template to generate documents. How can you implement this requirement?

- To create a template in PDF Butler app which is similar to the word document provided by the business.
- To add merge fields into the word document places where you want to insert information. Then upload the document to PDF Butler and add configurations for the merge fields.
- To add merge fields into the word document places where you want to insert information. Then to convert the word document to pdf – the proper format supported by PDF Butler.

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