



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



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 Butler 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.



PDF BUTLER

[Forgotten your username or password?](#)

Log in

Log in using your account on:

 [LinkedIn](#)

Simple authorization via LinkedIn





Available courses

The screenshot shows a course card for 'PDF Butler Fundamentals'. The card has a dark blue header with the PDF Butler logo and the text 'PDF BUTLER UNIVERSITY'. Below the header, the course title 'PDF Butler Fundamentals' is displayed in bold. Underneath, a description reads 'Learn about PDF Butler - Salesforce Document Generation App'. A 'Basic Level' badge is visible. At the bottom, there are two profile icons.

PDF Butler Fundamentals

Learn about PDF Butler - Salesforce Document Generation App

Basic Level

Students can choose the available courses

Each course contain Topics & Assignments

Home - My courses - PDFB Fundamentals

Participants Badges Competencies Grades



PDF Butler Fundamentals

Learn about PDF Butler - Salesforce Document Generation App

General



PDF Butler Fundamentals

Site home

My Courses

1



Site home

My Courses

1



PP



PDF Butler Fundamentals



Learn about PDF Butler - Salesforce Document

General

Install, Setup & Register

Configure & Generate a document

Each Topic is described by short chapters

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.

The screenshot displays a Salesforce user interface. On the left, there is a navigation sidebar with 'Site home' and 'My Courses' (containing 1 item). The main content area shows a 'PDF Butler Get Started' page with a checklist of four steps: 1) permission set updates, 2) assign permissionset, 3) Update connected App, and 4) Registration: select your region. A 'New Data Source' dialog box is open in the foreground, featuring a large play button icon and the text 'Select a record type'. The dialog lists five options: KEYVALUE, PICKLIST TRANSLATION, PICTURE LIST (with a sub-note: 'Type for adding sending dynamic pictures to PDF Butler'), SOURCE (which is selected), and STATIC VALUES. The dialog has 'Cancel' and 'Next' buttons at the bottom.



Participants Badges Competencies Grades



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.

Quiz helps to check the knowledge of the learned Topic



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