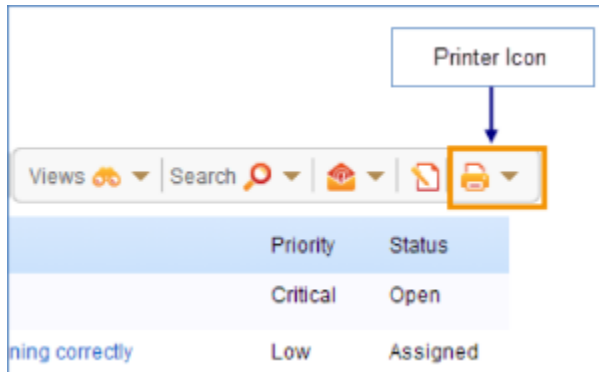


Print Templates for Word and PDF

Print templates can be used to create letters, invoices, contracts, or other documents in Word, PDF, or HTML format. Your browser will either open the document or ask to save it, depending on your settings. Templates must be created and published before they are available for most users. A user's [Group Permissions](#) settings determine whether they can print from templates.

Power users can access existing print templates, create new templates, and manage all templates from the Printer icon in the action bar.



Uses for Print Templates

After you've set up a print template, you can use it to:

- Create a document and attach it to a record
- Run a template to create a document preview, to be manually saved or attached
- Run a template on multiple records and combine the output into a single document, to be manually saved or attached
- Merge attached files into a new document

Print templates can be run manually, but more commonly they are run automatically or by clicking an action button. For more information about printing with an action, refer to [Document Actions](#).

To manually print records from a template...

1. Select one or more records in a table view.
2. Then, hover over the print icon and select the template name.

