

Pdf Renderers

Pdf Renderers

Purpose and when to use this record

Configure a printable document template for a particular record or list and control where users can select it.

At a glance

- **Identify it by: Name.**
- **Check its business context: Content Type.**
- **Why care:** A report is only trustworthy when its data source, date field, filters, grouping, and totals answer the intended business question.

Before you begin

You need the Brisk permission for the action you are taking on pdf renderers. If a Create, Edit, or Delete control is absent, do not work around it with another user's account; ask an administrator to review your role.

Have valid **Content Type** records ready first. Those selections determine where this PDF Renderer belongs and which later screens can find it.

Create a PDF Renderer

The Pdf Renderers create screen in the Brisk documentation demo.

Create a PDF Renderer after searching for the person, organization, item, location, or resource under alternate names and identifiers. Merge or correct an existing master record instead of creating a duplicate.

1. Select the business context first: **Content Type**.
2. Enter the required identifying and operational values: **Name**, **Description**, **Category**, and **Content Type**.
3. Review **Do Not Display**, **List View**, and **Printer Selection** deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the PDF Renderer, then confirm **Name** on its detail page before continuing.

After saving: Verify this PDF Renderer in **Email Templates**, and **Queued Prints** before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Delete a PDF Renderer

Delete this PDF Renderer only if it is an unused duplicate or setup mistake. Once other records refer to it, preserve that history and make the value inactive when the screen provides that option.

Before confirming, check for related **Email Templates**, and **Queued Prints**. Brisk may refuse deletion when another record depends on this one; resolve the duplicate or use the supported correction workflow instead of breaking the trail.

On the confirmation page, verify **Name**. After confirmation, return to the PDF Renderers list and make sure only the intended PDF Renderer was removed.

Review PDF Renderer details

Use the detail page as the shared record of what this PDF Renderer currently means. Verify **Printer Selection** before relying on it for a decision.

Follow **Content Type** to determine whether the issue is on this PDF Renderer or on one of those linked records.

Next check: Verify this PDF Renderer in **Email Templates**, and **Queued Prints** before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

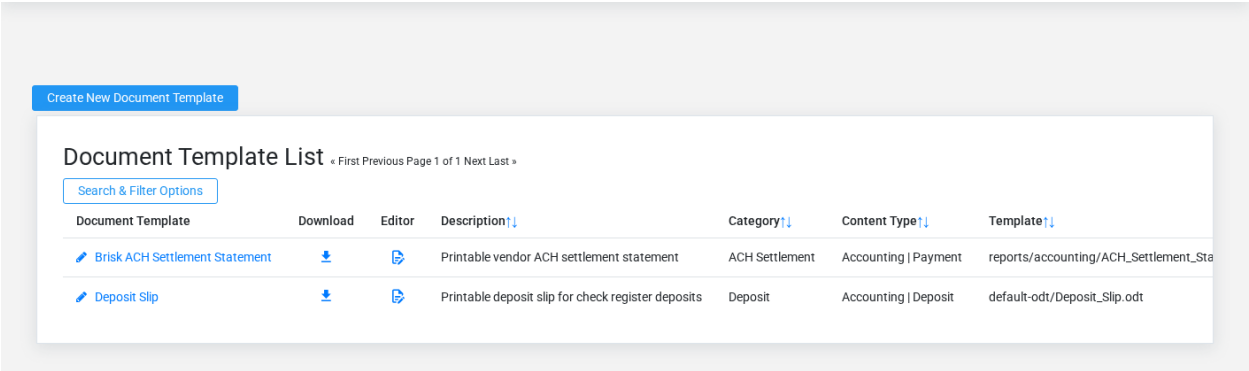
Edit an existing PDF Renderer

Edit this PDF Renderer to keep the same real-world party, item, location, or resource accurate. Do not repurpose it for a different entity after activity is attached.

1. Open the detail page. Compare **Content Type** with the supporting document or approved request.
2. Recheck **Printer Selection**. These values are most likely to change the population, date range, grouping, and totals users see.
3. Save the change, return to the list, and confirm that the PDF Renderer now appears under the expected **Printer Selection**.

After the change: Verify this PDF Renderer in **Email Templates**, and **Queued Prints** before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Find and review pdf renderers



The Pdf Renderers list screen in the Brisk documentation demo.

Use the Pdf Renderers list to find the correct record before opening or changing it. Compare **Name**. Records with similar names or numbers can still belong to different **Content Type**.

- The initial order emphasizes **Name**. Select a column heading when you need a different comparison.

Open the PDF Renderer whose **Name** match the task. If it is missing, clear the list filters and recheck **Printer Selection** rather than creating a replacement immediately.

Fields and business rules

Brisk stores 9 user-relevant fields for this PDF Renderer, including 1 linked-record selection and 1 controlled-choice field. Create and edit screens may hide calculated or workflow-managed values from this full reference.

Field	Required	What it controls
Name	Yes	Human-readable name for this pdf renderer.
Description	Yes	Description of this pdf renderer.
Category	Yes	The category recorded for this pdf renderer.
Content Type	Yes	The content type associated with this pdf renderer.
Template	No	File stored as template for this pdf renderer.
Do Not Display	No	Do not display this template as a button on its selected content type.
List View	No	Display this template on lists instead of detail views.
Printer Selection	No	If this field has a value, the system will attempt to automatically print this document to the selected printer after a sales transaction has been saved, if the end user has chosen to print. Available values: Label Printer, Report Printer, Receipt Printer.
Copies	No	If a printer has been selected for this document, this field specifies the number of copies that will be automatically be printed.

What happens next

Verify this PDF Renderer in **Email Templates**, and **Queued Prints** before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Common mistakes and troubleshooting

- **The record will not save:** Recheck **Name**, **Description**, **Category**, and **Content Type** and any message beside the field. A required related record may also be inactive or unavailable to your role.
- **The values look right but the result is wrong:** Open **Content Type** from the detail page. Correct the specific relationship that is wrong instead of forcing a total or status to compensate for it.

Revision #4

Created 2026-08-10 16:09:30 UTC by Brisk

Updated 2026-08-11 06:01:06 UTC by Brisk