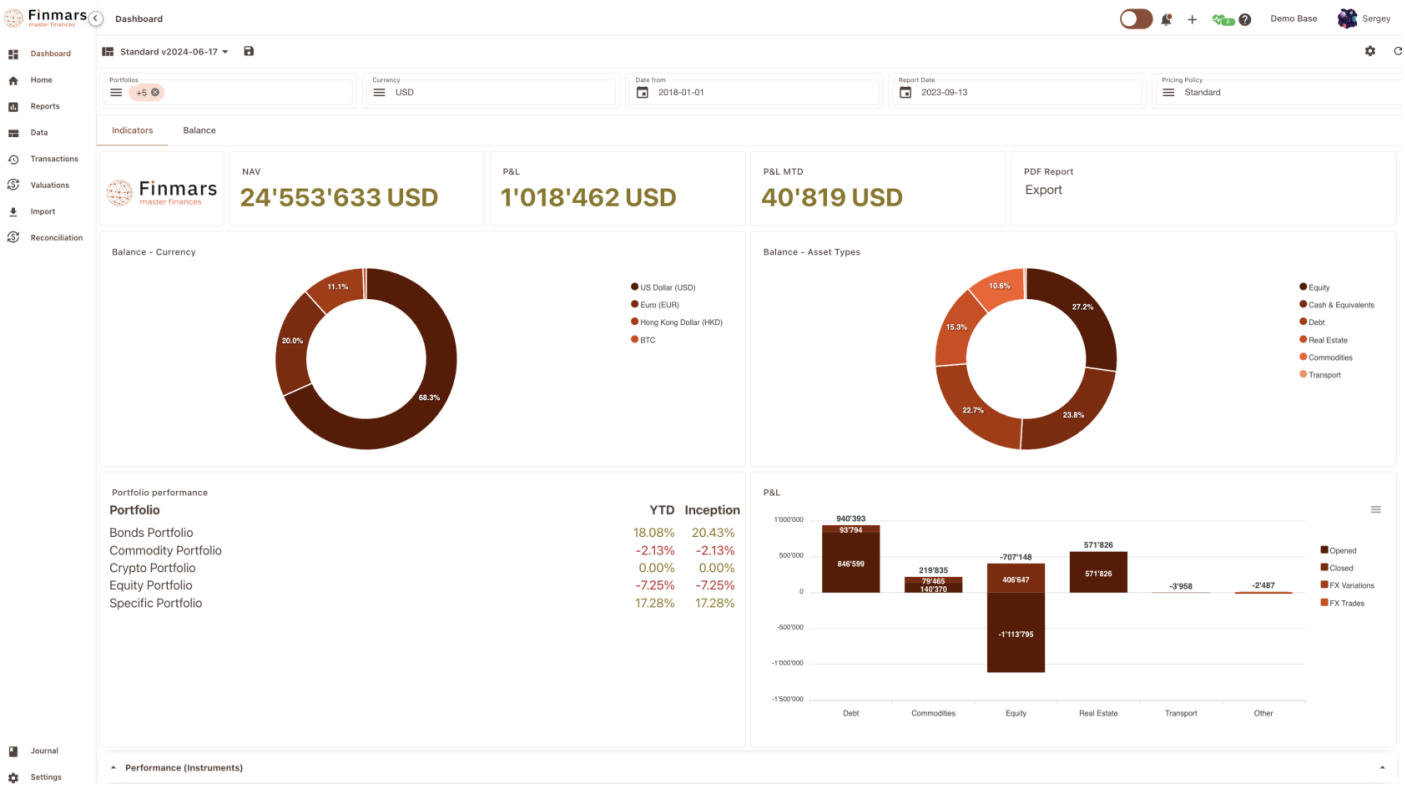
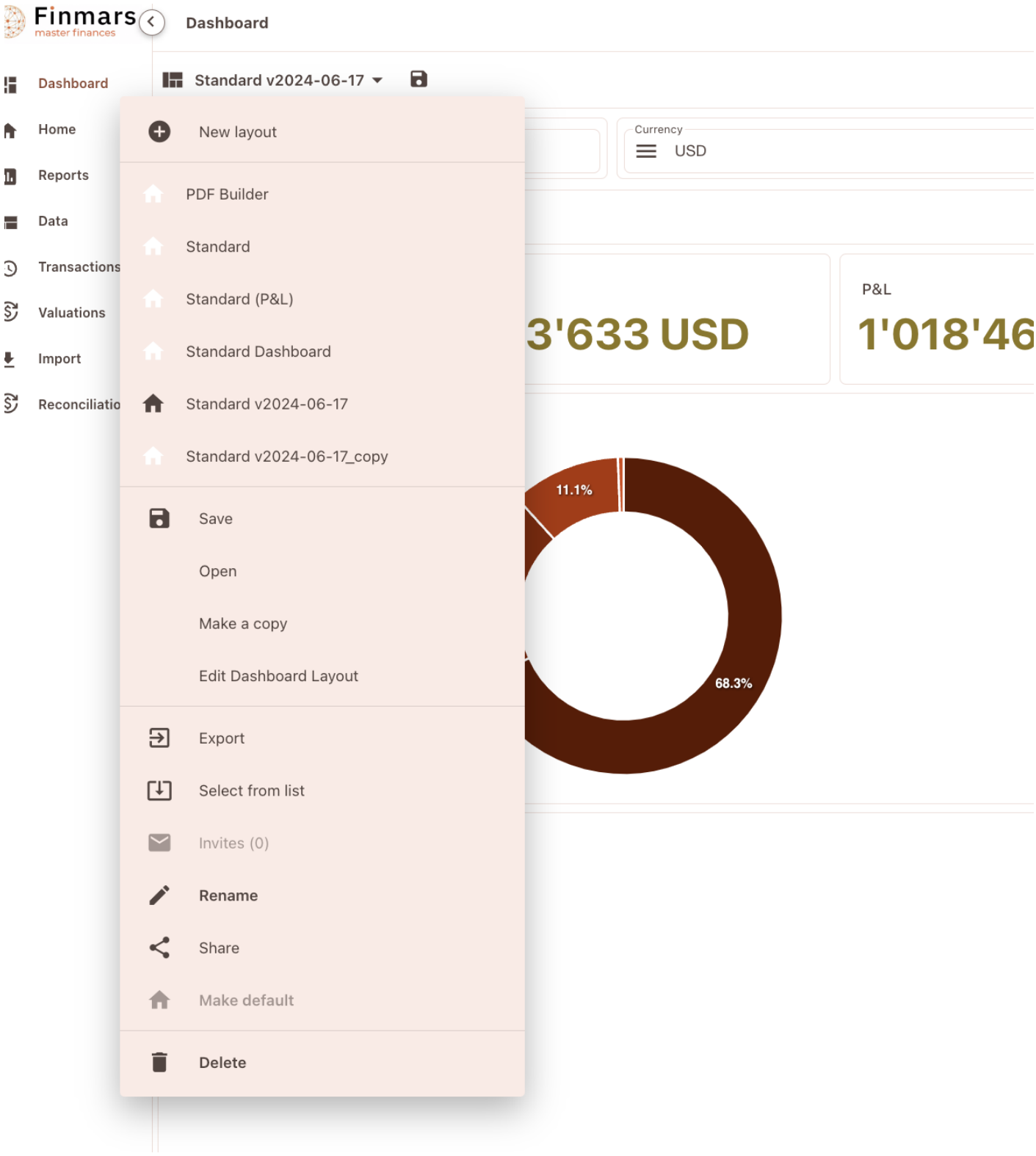
Add Export Button to your Dashboard

Here, we found out how to add Export Button that generates PDF and saves it locally on User Device when pressed.

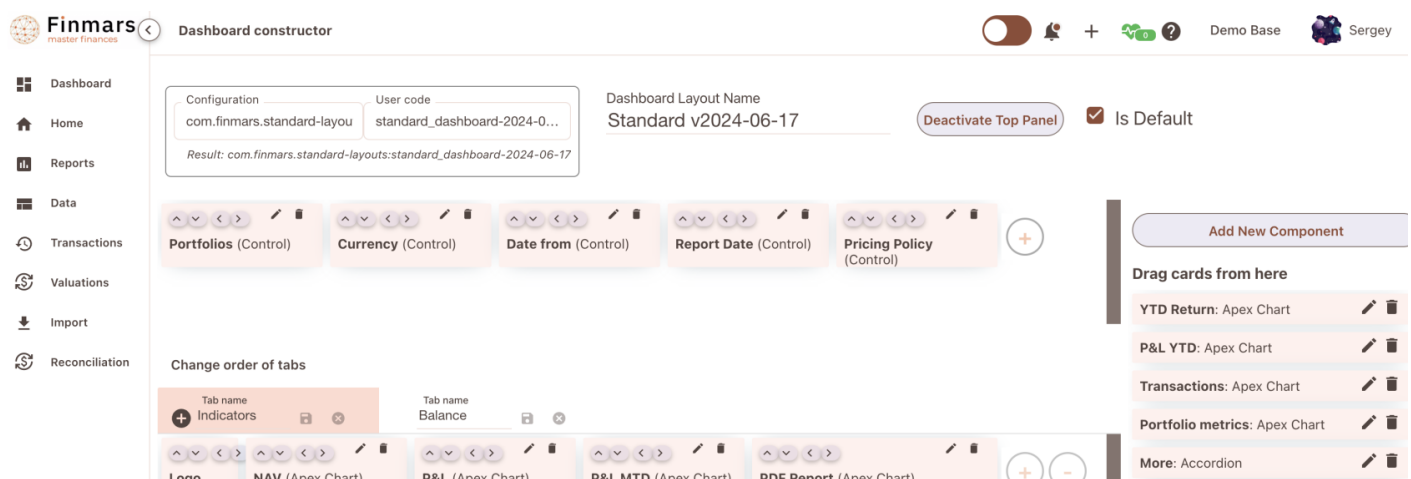
Here is result, on right corner we have block with Export Button



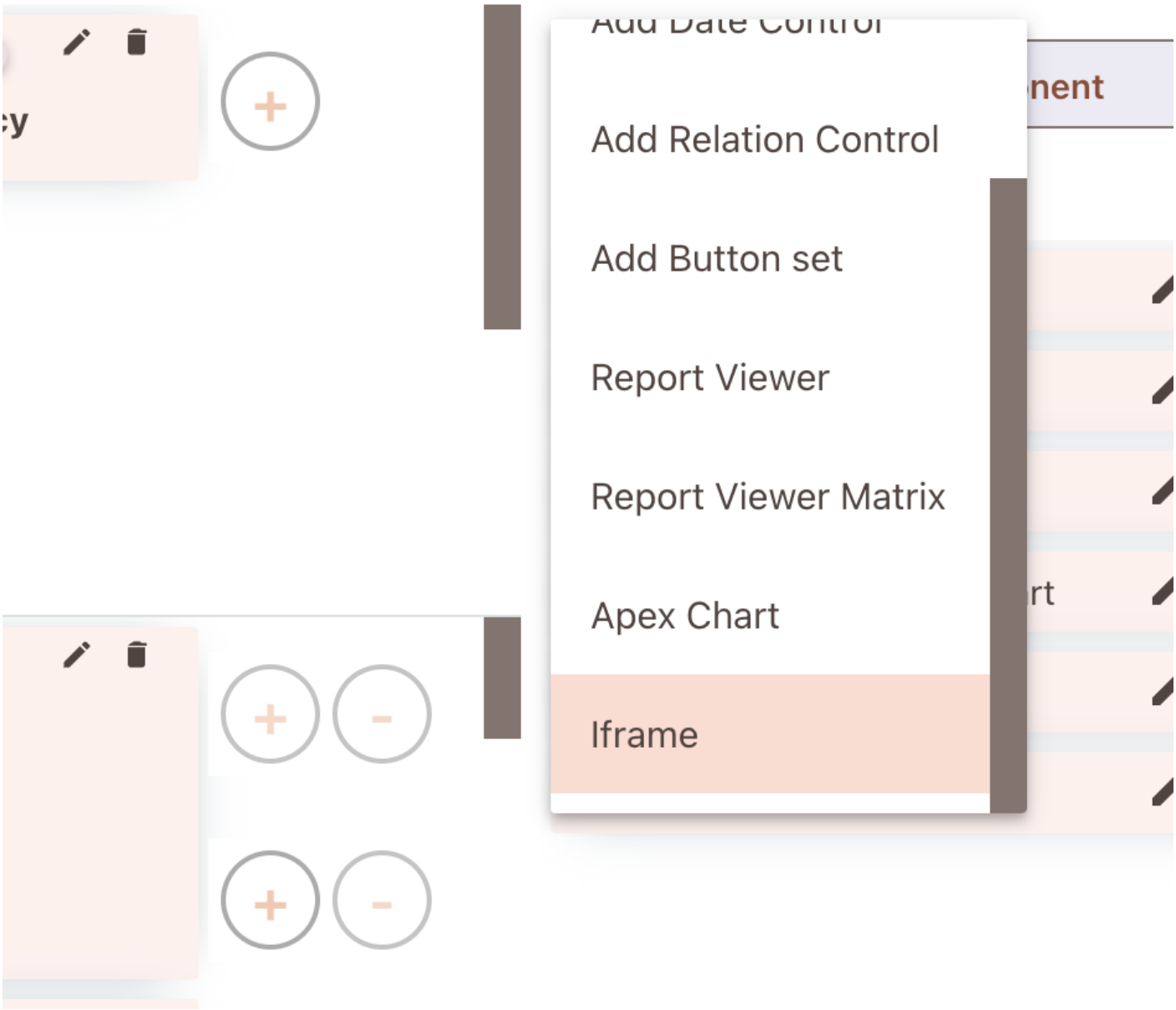
To achieve that, lets edit Dashboard Layout. Proceed to Edit Dashboard Layout



So here a Dashboard Constructor, press Add New Component



Add Apex Chart (soon will be renamed to Custom Code Component)



To make it all work, we borrow code from PDF Builder

```
var selector = '.dashboard-apex-chart-' + scope.vm.componentData.id


var element = document.querySelector(selector);
```

```
element.innerHTML = '<button>Export</button>'

function getCookieValue(name) {
            const cookies = document.cookie.split('; '); // Split cookies into array of
"name=value"
            for (let i = 0; i < cookies.length; i++) {
                const cookie = cookies[i].split('='); // Split each "name=value" into [name,
value]
                if (cookie[0] === name) {
                    return decodeURIComponent(cookie[1]); // Return the decoded value if the
name matches
                }
            }
            return null; // Return null if the cookie is not found
        }


element.addEventListener('click', function() {

    let currentUrl = window.location.href;

    let base_url = window.location.href.split('/a/')[0]

    var portfolios = filters.outputs.portfolios || [];
    var report_date = filters.outputs.report_date || utils.getYesterdayDate();

    var portoflio = 'Bonds Portfolio'

    if (filters.outputs.portfolios.length){
     portoflio = filters.outputs.portfolios[0]
    }

    let url_path = '/api/storage/workflows/com/finmars/pdf-
builder/example/report.html?report_date='+filters.outputs.report_date+'&portfolio=' +
portoflio

    // Replace '_builder.html' with '.html' in the URL
    let targetUrl = base_url + url_path
```

```
    fetch(window.location.origin + '/services/pdf-engine/print/', {
        method: "POST",
        credentials: 'include',
        body: JSON.stringify({
            "url": targetUrl,
            "access_token": getCookieValue('access_token')
        }),
        headers: {
            Accept: 'application/json',
            'Content-type': 'application/json'
        }
    }).then(response => {
        if (response.ok) return response.blob();
        throw new Error('Failed to generate PDF.');
    })
    .then(blob => {
        // Create a URL for the blob object
        const url = window.URL.createObjectURL(blob);

        // Create a link element
        const a = document.createElement('a');
        a.style.display = 'none';
        a.href = url;

        // Extract filename for the PDF
        let baseName = targetUrl.split('/').pop().replace('.html', '').split('?')[0]; // Strip
the path and extension

        a.download = baseName + '.pdf'; // You can set the default filename here

        // Append the link, trigger the download, and remove the link
        document.body.appendChild(a);
        a.click();
        window.URL.revokeObjectURL(url);
        document.body.removeChild(a);
    })
    .catch(error => {
        console.error('Error during PDF export:', error);
        alert('Error exporting PDF. Check the console for more details.');
    });
```

```
})
```

Idea is simple, we just add <button> and add Event Listener To it, in Event Listener we make an REST API call to PDF Printer Service (pupeteer)

Things to Consider

```
let url_path = '/api/storage/workflows/com/finmars/pdf-
builder/example/report.html?report_date='+filters.outputs.report_date+'&portfolio=' +
portoflio


let targetUrl = base_url + url_path
```

We hardcoded url_path of our report.html

Place instead of it path to your .html PDF report, also provide extra settings if required like

```
?report_date='+filters.outputs.report_date+'&portfolio=' + portoflio
```

Thats it! Now your clients can just press button on dashboard to get .pdf Report

Finmars
master finances

Portfolio: Bonds Portfolio
NAV: 7 849 035
Report Currency: USD

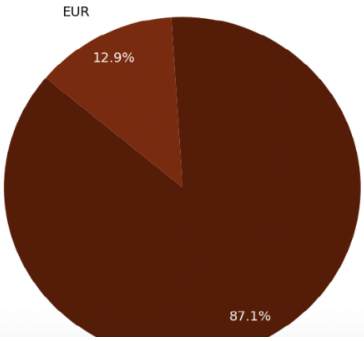
Report Date: 2023-09-13
Pricing Policy: com.finmars.standard-pricing:standard
Period Type: YTD

Generated at: 16/08/2024 20:31

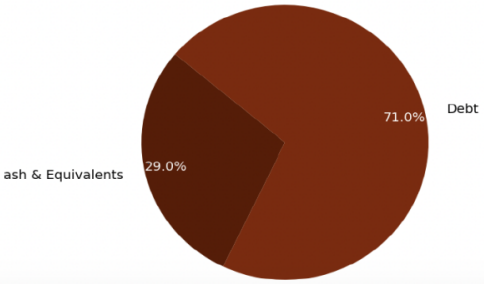
Portfolio Overview

Start valuation as of 2022-12-30	2 046 371 USD
Cash/Security Deposits	4 928 914 USD
Cash/Security Withdrawals	0 USD
End valuation as of 2023-09-13	7 849 035 USD
Performance	873 749 USD
Return (Modified Dietz)	18.08%

Allocation by Exposure Currency



Allocation by Asset Type



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