

# Getting Started

To install module

Go to Settings -> Marketplace

Type PDF Builder in search input

The screenshot shows the Finmars Marketplace interface. On the left is a navigation sidebar with icons for Dashboard, Home, Reports, Data, Transactions, Valuations, Import, Reconciliation, Journal, and Settings. The main area is titled 'Marketplace' and contains a search bar with 'pdf b' entered. Below the search bar, a card for the 'PDF Builder' module is displayed. The card includes a red PDF icon, the text 'PDF Builder', the code 'code: com.finmars.pdf-builder', the version 'version: 1.0.3', and the status 'Current: (1.0.3 stable)'. An 'Install' button is prominently shown on the card. Below the card, there is a 'Previous' button and a badge with the number '1'. The top right of the interface shows a toggle switch, a notification bell, a plus sign, a refresh icon, a help icon, and the text 'Demo Base' and 'Sergey'.

Then press Install

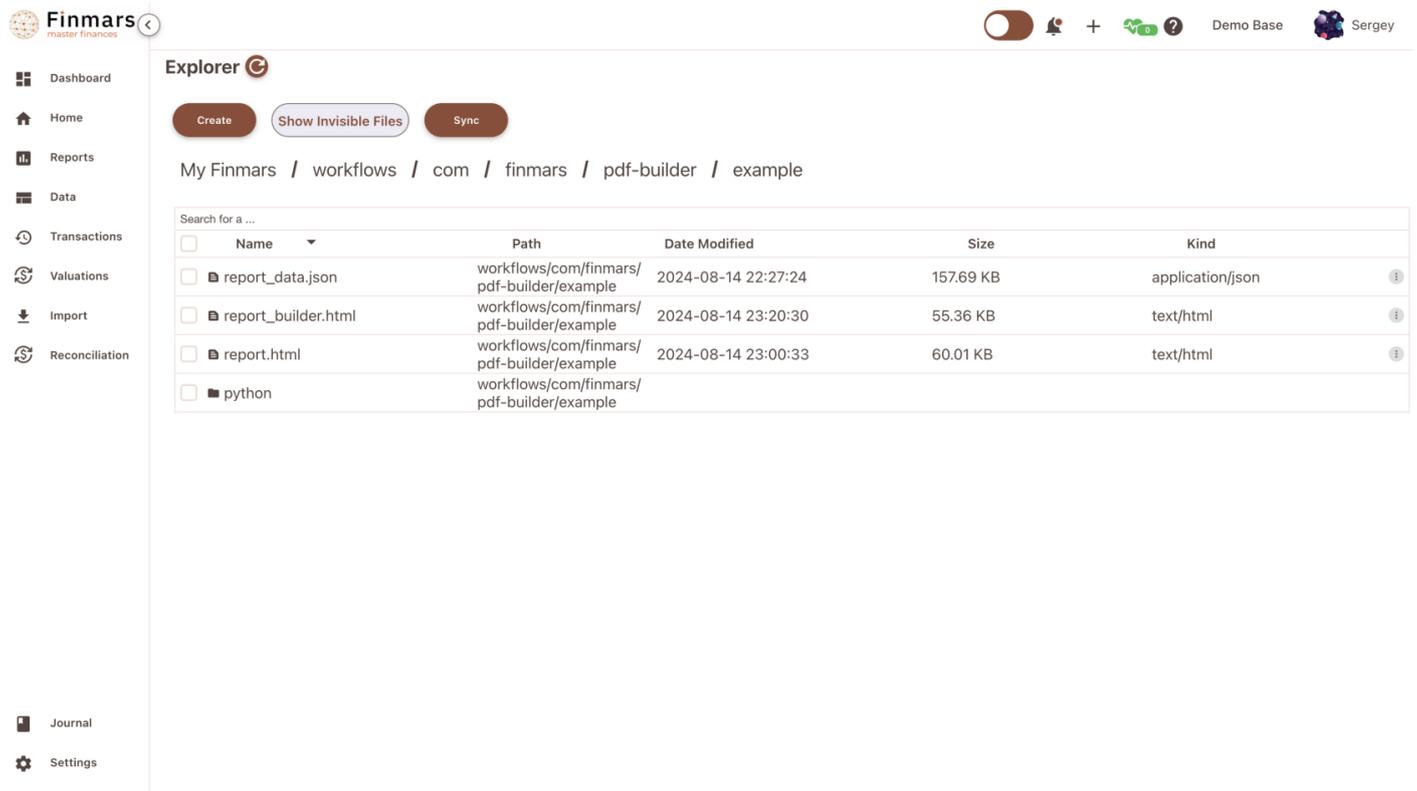
Wait until installation is finished

Then go to Explorer -> workflows -> com -> finmars -> pdf-builder

The screenshot shows the Finmars Explorer interface. The top navigation bar is the same as in the previous screenshot. The main area is titled 'Explorer' and features three buttons: 'Create', 'Show Invisible Files', and 'Sync'. Below these buttons is a breadcrumb path: 'My Finmars / workflows / com / finmars / pdf-builder'. A search bar is present with the text 'Search for a ...'. Below the search bar is a table with columns for 'Name', 'Path', 'Date Modified', 'Size', and 'Kind'. The table contains one entry: a folder named 'example' located at the path 'workflows/com/finmars/pdf-builder'. The top right of the interface shows the same toggle switch, notification bell, plus sign, refresh icon, help icon, and the text 'Demo Base' and 'Sergey'.

Here you could see an Example folder, which contains all necessary files to prepare PDF Report

Basic Structure of module:



So to create own PDF report is best to create own folder (as the way "example" folder ) and copy all files from it

So, pattern is following

**%page\_name%\_builder.html** - Actual PDF Engine when user can create own PDF Report using WYSWYG editor with Drag & Drop Functionality

**%page\_name%\_data.json** - its a meta file, you dont need to touch it, if you start from scratch, you probably even dont needed. Its result of pressing "Save" in %page\_name%\_builder.html. It contains your State - your components, html, styles and everything that needs to PDF Builder to work.

**%page\_name%.html** - Also optional page, its just result of PDF Builder, it can be outputed not only to PDF but to HTML as well

Actually to make it all clear, here is simple schema

PDF Builder -> HTML page -> PDF Services - PDF file

So pdf builder always outputs HTML page that later will be sent to PDF Printer Service (puppeteer

tool) and in return user will receive PDF page as he printed it in Web Browser

**/python** - that user content, it holds basically files of .ipynb python scripts, where **first cell** being executed and output returns to .html page

The screenshot shows the Finmars Explorer interface. The top navigation bar includes the Finmars logo, a search icon, a toggle switch, a plus sign, a help icon, and the text "Demo Base" and "Sergey". The left sidebar contains a "Dashboard" button and a list of menu items: Home, Reports, Data, Transactions, Valuations, Import, Reconciliation, Journal, and Settings. The main area is titled "Explorer" and contains three buttons: "Create", "Show Invisible Files", and "Sync". Below these buttons is a breadcrumb path: "My Finmars / workflows / com / finmars / pdf-builder / example / python". A search bar is present above a table of files. The table has columns for "Name", "Path", "Date Modified", "Size", and "Kind".

Name	Path	Date Modified	Size	Kind
<input type="checkbox"/> overview_block.ipynb	workflows/com/finmars/pdf-builder/example/python	2024-08-14 16:46:18	7.28 KB	
<input type="checkbox"/> instrument_type_pie_chart.ipynb	workflows/com/finmars/pdf-builder/example/python	2024-08-14 09:56:47	3.22 KB	
<input type="checkbox"/> historical_performance_line_chart.ipynb	workflows/com/finmars/pdf-builder/example/python	2024-08-14 17:29:50	6.35 KB	
<input type="checkbox"/> header_summary.ipynb	workflows/com/finmars/pdf-builder/example/python	2024-08-14 09:56:47	3.11 KB	
<input type="checkbox"/> fx_rates_block.ipynb	workflows/com/finmars/pdf-builder/example/python	2024-08-14 09:56:47	45.36 KB	
<input type="checkbox"/> currency_pie_chart.ipynb	workflows/com/finmars/pdf-builder/example/python	2024-08-14 17:15:29	3.41 KB	
<input type="checkbox"/> balance_table.ipynb	workflows/com/finmars/pdf-builder/example/python	2024-08-14 09:56:46	3.62 KB	
<input type="checkbox"/> asset_type_pie_chart.ipynb	workflows/com/finmars/pdf-builder/example/python	2024-08-14 09:56:47	3.28 KB	
<input type="checkbox"/> account_pie_chart.ipynb	workflows/com/finmars/pdf-builder/example/python	2024-08-14 09:56:47	3.21 KB	

https://eu-central.finmars.com/real0v4ry/space0d59/a/#/dashboard

So far we support two types of .ipynb scripts:

- 1) Output Text Content (html, text, json, xml, etc)
- 2) Output Img Content (basically for plotly charts)

Okay, lets sum it up, to create own report, here is list todo list:

- 1) Create folder **/workflows/com.finmars.pdf-builder/client-report** (BTW you are not forced to use exact that path, you can create own modules, or if only for private use, pick any path you like)
- 2) Copy report\_builder.html to **/workflows/com.finmars.pdf-builder/client-report/client\_report\_builder.html**
- 3) Create folder **/workflows/com.finmars.pdf-builder/client-report/python**
- 4) Create Example python file where **/workflows/com.finmars.pdf-builder/client-report/python/test.ipynb**
- 5) Add in first cell something like `print("<h1>Hello World</h1>")`

Thats it, you ready to start! Now you could dive into creating own PDF Report Template

Go to <https://docs.finmars.com/books/pdf-builder/page/creating-simple-report>

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