



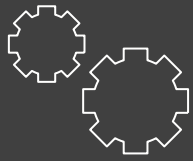
Doc Parser



URDHVA TECH



Version 1.0



KEY FEATURES

- ✓ Download the parsed document locally
- ✓ Link the parsed document to the Documents module
- ✓ Works with custom modules
- ✓ Sample templates provided
- ✓ Design templates yourself easily

Introduction

For any business organization, generating documents is essential requirement. Generated documents are in the form of contracts, proposals, notices or any information.

Through DocParser, a user can create WordDoc or PDF which can show relationship information from a built-in or custom module.

It allows a user to create an informative(Attractive) template to parse information, which can be used for multiple time.

(1) Easily generate WordDoc/PDF from any module your users need.

(2) DocParser allows to either download document or relate it within SuiteCRM's Documents module.

(3) Generated WordDoc/PDF can also include the records from relational module. For example, we have template for Contact module with information about related Meetings, Tasks or Cases. Now, when you want to have all the information in single Word/PDF. You just need to download document from DetailView of that particular Contact's profile.

(4) The document can be generated from DetailView and ListView.

(A) User's will have a button on DetailView from where he will have the option to choose Word Doc, PDF or relate it with SuiteCRM's Documents module.

(B) If a user wants to have download multiple documents in one shot. He can download it via List View button. Each record will be parsed individually and it generates Zip file to download. Similarly, If you want to relate document in one shot. It can be achieved from List view itself.

How to get the plugin?

- For SuiteCRM, Buy it from the link below.

[DocParser - SuiteCRM Store](#)

How to install?

- Navigate to Admin > Module Loader and select the zip file, that you would have received upon the purchase. Follow the installation process.

Validate the license

- Once add-on is installed successfully, you have to provide valid license. Go to **Admin** and access “DocParser License Configuration” link shown as below.

DocParser License Configuration

DocParser is a tool that can be used to merge information from any module into a presentation-quality document and create an MS Word and PDF documents.



DocParser License

Manage and configure the license for DocParser

- Provide the license key that you have received upon purchase and validate it.

DOCPARSER LICENSE CONFIGURATION: DOCPARSER LICENSE

To Locate Your Key

1. Login to [SuiteCRM Store](#)
2. Go to Account->Purchases
3. Locate the key for the purchase of this add-on
4. Paste into the License Key box below
5. Hit "Validate"

License Key

VALIDATE

✔ Success!

CONTINUE

Create Doc Parser Template

- Select the module for which you want to generate the template. The list of modules supports the built-in and custom modules, if any.

ACCOUNTS CONTACTS OPPORTUNITIES LEADS QUOTES MORE CREATE 🔍 🔔 👤

SAMPLE MEETING WITH ATTENDES » EDIT

SAVE CANCEL SAVE AND CONTINUE VIEW CHANGE LOG < PREVIOUS (3 of 7) NEXT >

BASIC

Name: * Sample Meeting with attendees Assigned to: Urdhva Tech

Base Module: * Meetings

Field Selection: Subject INSERT FIELD

Choose relational data: CHOOSE RELATIONSHIP DATA ⓘ

Template Body:

HTML | B I U ABC | [List, Bulleted, Numbered] | [Link, Unlink] | Styles | Format | Font Family | Font Size

Agenda:

\$meetings|_|name

Account: \$meetings|_|parent_name

Status: \$meetings|_|status

Start Date: \$meetings|_|date_start

Assigned to: \$meetings|_|assigned_user_name

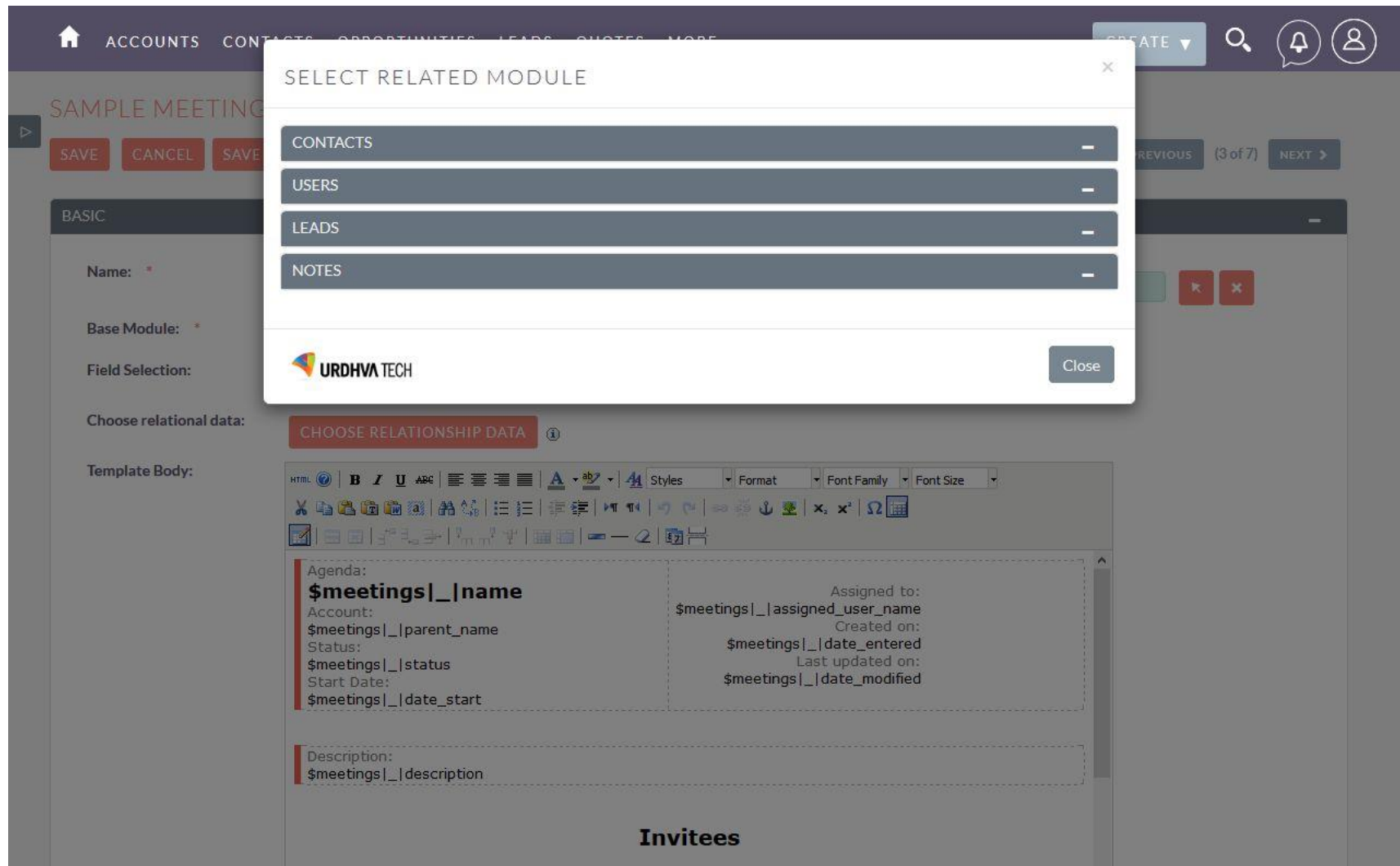
Created on: \$meetings|_|date_entered

Last updated on: \$meetings|_|date_modified

Description: \$meetings|_|description

Invitees

- ❖ **Base Module:** Module selection for which user wants to create Doc Parser template.
 - ❖ **Field Selection:** Select field(s) for display into template. After field selection, user has to click “Insert Field” button to include field into template body.
 - ❖ **Choose Relationship Data Button:** Select subpanel(s) for display into template.
- When user clicked on “Choose Relationship Data” button then popup will open as follows. Popup contains all the subpanel(s) which is display under Base Module. We have selected “Meetings” module as base module that’s why popup allows option to include records from Contacts, Users, Leads and Notes module.



- Let's try to add "Contacts" record into template. When users clicked on "Contacts", popup will allow selecting field(s) for display, set limit to display records into document, option to add user define blank column, set order by field, option to add sequence number column and option to select theme. Have a look on following screenshot.

The screenshot shows a 'SELECT RELATED MODULE' dialog box for the 'CONTACTS' module. The dialog is divided into two main sections: 'Available fields' and 'Selected fields'. The 'Available fields' list includes Name, Date Created, Date Modified, Modified By Name, Created By, Description, Assigned to, Photo, and Department. The 'Selected fields' list includes Name, Title, Mobile, and Email. Below these lists are several configuration options: 'SET RECORD LIMIT' (set to 2), 'ADD BLANK COLUMN' (with a text input 'Remark'), 'ORDER BY FIELD' (set to Name), 'ADD SEQUENCE NO' (set to Yes), and 'SELECT THEME' (set to Red). There are also 'ADD TABLE' and 'REMOVE TABLE' buttons. At the bottom, there are tabs for 'USERS' and 'LEADS'. Several callout boxes provide additional information: 'Set the limit on fetching the relationship records.' points to the record limit input; 'Allow option to add a blank column which will display along with the related records.' points to the 'Remark' input; 'Set the order by field. Relationship records will be sorted based on the selected field and order.' points to the 'Name' dropdown; 'Allow option to add the sequence number column. This column will be added as the first column into the templates. Record counter/sequence will be displayed along with the related records.' points to the 'Yes' dropdown; and 'Allow option to apply the predefined format on the related records table.' points to the 'Red' theme dropdown.

SELECT RELATED MODULE

CONTACTS

Available fields

- Name
- Date Created
- Date Modified:
- Modified By Name
- Created By
- Description:
- Assigned to:
- Photo
- Department:

Selected fields

- Name
- Title
- Mobile
- Email

SET RECORD LIMIT ⓘ 2

ADD BLANK COLUMN ⓘ Remark **INSERT**

ORDER BY FIELD ⓘ Name Descending

ADD SEQUENCE NO ⓘ Yes

SELECT THEME ⓘ Red

ADD TABLE **REMOVE TABLE**

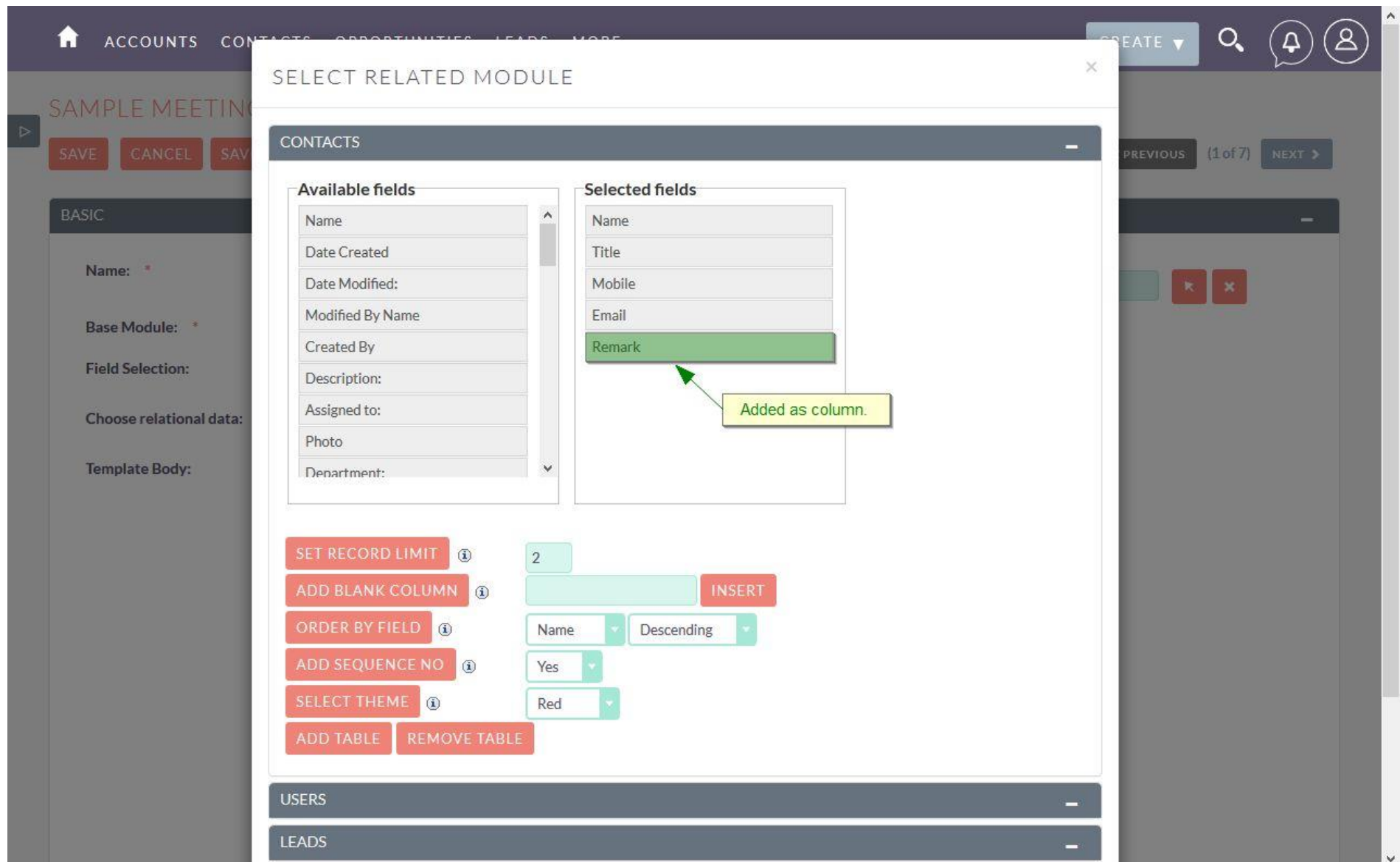
USERS -

LEADS -

Callouts:

- Set the limit on fetching the relationship records.
- Allow option to add a blank column which will display along with the related records.
- Set the order by field. Relationship records will be sorted based on the selected field and order.
- Allow option to add the sequence number column. This column will be added as the first column into the templates. Record counter/sequence will be displayed along with the related records.
- Allow option to apply the predefined format on the related records table.

- ❖ **Set Record Limit:** User can set limit to fetch the relationships records.
- ❖ **Add Blank Column:** When user clicked on “Add Blank Column” button then empty textbox and Insert button will be display. User has to provide value into textbox and need to click on “Insert” button. Once “Insert” button is clicked, textbox value will be added into “Selected fields” portion as new blank column. Look at below image.



- ❖ **Order By Field:** Set the order by field. Relationship records will be sorted based on the selected field and order.
- ❖ **Add Sequence No:** Allow option to add the sequence number column. This column will be added as the first column into the templates. Record counter/sequence will be displayed along with the related records.
- ❖ **Select Theme:** Allow option to apply the predefined format on the related records table. DocParser provide some predefined format option for select. You can change it as per your needs.

➤ When user clicks on "Add Table" button, table will be added into template body. We have selected the theme "Red" into previous step so table will be added as follows into template body. But users can change the format as per their needs.

The screenshot shows a CRM interface with a dark top navigation bar containing a home icon, menu items (ACCOUNTS, CONTACTS, OPPORTUNITIES, LEADS, QUOTES, MORE), a CREATE button, and search, notification, and user profile icons. The main content area is a form for a meeting record. The form fields include:

- Name:** Sample Meeting with attendees
- Assigned to:** Urdhva Tech
- Base Module:** Meetings
- Field Selection:** An empty dropdown menu with an INSERT FIELD button.
- Choose relational data:** A button labeled CHOOSE RELATIONSHIP DATA.
- Template Body:** A rich text editor containing:
 - Agenda:
 - \$meetings|_|name**
 - Account: \$meetings|_|parent_name
 - Status: \$meetings|_|status
 - Start Date: \$meetings|_|date_start
 - Assigned to: \$meetings|_|assigned_user_name
 - Created on: \$meetings|_|date_entered
 - Last updated on: \$meetings|_|date_modified
 - Description: \$meetings|_|description
 - Invitees**
 - \$meetings_contacts__Contacts_ut_header**
 - A table with a red header and white body:

Sr #	Name	Title	Mobile	Email	Remark
ut_sr_no	full_name	title	phone_mobile	email1	Remark_ut_blank_column

The table of invitees is highlighted with a green border. The path for the table is shown as "Path: table" at the bottom left of the editor area.

We have added the relationship table for the Contacts module. Now let's add the relationship table for the Users and Leads module. Template body will be displayed as follows.

ACCOUNTS CONTACTS OPPORTUNITIES LEADS QUOTES MORE CREATE 🔍 🔔 👤

SAMPLE MEETING WITH ATTENDES » EDIT

SAVE CANCEL SAVE AND CONTINUE VIEW CHANGE LOG < PREVIOUS (1 of 7) NEXT >

BASIC

Name: * Sample Meeting with attendees Assigned to: Urdhva Tech

Base Module: * Meetings

Field Selection: INSERT FIELD

Choose relational data: CHOOSE RELATIONSHIP DATA ⓘ

Template Body:

Agenda:

\$meetings|_|name Account: \$meetings|_|parent_name Status: \$meetings|_|status Start Date: \$meetings|_|date_start

Assigned to: \$meetings|_|assigned_user_name Created on: \$meetings|_|date_entered Last updated on: \$meetings|_|date_modified

Description: \$meetings|_|description

Invitees

\$meetings_contacts__Contacts_ut_header

Sr #	Name	Title	Mobile	Email	Remark
ut_sr_no	full_name	title	phone_mobile	email1	Remark_ut_blank_column

\$meetings_users__Users_ut_header

Full Name	Title	Department	Mobile	Email
full_name	title	department	phone_mobile	email1

\$meetings_leads__Leads_ut_header

Name	Title	Mobile	Email	Lead Source	Remark
full_name	title	phone_mobile	email1	lead_source	Remark_ut_blank_column

Path: table

Example

- In above template creation steps we have selected “Meetings” module and its related Contacts, Users and Leads records for display. To generate WordDoc/PDF, user has to click “Parse Document” button either from DetailView or ListView. When user clicks on Parse Document, a popup will be open. A user can able to generate the PDF or WordDoc from there. Let’s see from DetailView.

The screenshot displays a CRM interface for a meeting record titled "DISCUSS PRICING". The top navigation bar includes "ACCOUNTS", "CONTACTS", "OPPORTUNITIES", "LEADS", "QUOTES", and "MORE", along with a "CREATE" button and search, notification, and user icons. The meeting details are as follows:

- Title:** Discuss pricing
- Status:** Held
- Date:** 05/22/2019 11:15am
- Duration:** 3h 45m
- Reminders:**
 - Actions:
 - Popup 30 minutes prior
 - Email invitees 1 hour prior
 - Attendee: WILLIS LEITCH
- Description:** Meeting to discuss project plan and hash out the details of implementation. Objective is to explain the complete system and pricing terms and conditions as per our last meeting.

The "ACTIONS" dropdown menu is open, showing options: Edit, Duplicate, Delete, and Parse Document (highlighted with a green border). Below the meeting details is an "OTHER" section with the following information:

- Assigned to:** Sarah Smith
- Date Modified:** 09/18/2018 12:10pm by Urdhva Tech
- Date Created:** 09/17/2018 03:07pm by Urdhva Tech

- Popup will display all the templates created for base module. Each template record has dropdown button for generate WordDoc/PDF file and download it. If base module has relationship with "Documents" module then user can also have option to relate WordDoc/PDF file directly to SuiteCRM's "Documents" module.

The screenshot displays the SuiteCRM interface with a modal dialog box titled "CHOOSE THE DOCPARSER TEMPLATE". The dialog has three columns: "Templates", "Download", and "Save to Documents". Under the "Download" column, a dropdown menu is open, showing "Word file" and "PDF file" options. The background shows a record for "DISCUSS PRICING" with fields for Subject, Start Date & Time, Duration, Reminders, and Description. The "Reminders" section has checkboxes for "Popup" and "Email". The "Description" field contains the text "Meeting to... as per our la...". The "OTHER" section at the bottom shows "Assigned to: Sarah Smith", "Date Modified: 09/18/2018 12:10pm by Urdhva Tech", and "Date Created: 09/17/2018 03:07pm by Urdhva Tech".

- When user click on the PDF file option system will ask for the PDF file to open or download as follows.

The screenshot displays a CRM interface for a record titled "DISCUSS PRICING". The top navigation bar includes "ACCOUNTS", "CONTACTS", "OPPORTUNITIES", "LEADS", "QUOTES", and "MORE", along with a "CREATE" button and search, notification, and user icons. The record details are as follows:

- Subject:** Discuss pricing
- Status:** Held
- Start Date & Time:** 05/22/2019 11:15am
- Duration:** 3h 45m
- Reminders:**
 - Popup 30 minutes prior
 - Email invitees 1 hour prior
- Description:** Meeting to discuss project plan and hash out the details of implementation. Objective is to explain the complete system and pricing terms and conditions as per our last meeting.

The "ACTIONS" tab is active, showing a "WILLIS LEITCH" notification. A Firefox file dialog box is overlaid on the interface, titled "Opening Discuss_pricing.pdf". The dialog contains the following text:

You have chosen to open:
Discuss_pricing.pdf
which is: PDF file
from: http://localhost

What should Firefox do with this file?

- Open with TWINUI (default)
- Save File
- Do this automatically for files like this from now on.

The dialog has "OK" and "Cancel" buttons at the bottom.

At the bottom of the page, the "OTHER" section shows:

- Assigned to:** Sarah Smith
- Date Modified:** 09/18/2018 12:10pm by Urdhva Tech
- Date Created:** 09/17/2018 03:07pm by Urdhva Tech

- We have set limit and order by for fetching "Contacts" record. There are 3 contacts are related with the meeting record as shown below. Generated WordDoc/PDF will contain 2 records as per the limit set by user and also records are order by on Name field.

CONTACTS					
Accept Status	Name ↕	Account Name	Email	Office Phone ↕	
None	Willis Leitch	Bay Funding Co	sugar.info@example.net	(174) 665-7684	Edit ▼
None	Nannie Dubay	Bay Funding Co	section.qa@example.info	(532) 385-1051	Edit ▼
None	Alberta Bivona	Bay Funding Co	support.hr.kid@example.edu	(648) 312-5561	Edit ▼

➤ Generated PDF.

Agenda:

Discuss pricing

Account:

Status:

Held

Start Date:

05/22/2019 11:15am

Assigned to:

Sarah Smith

Created on:

09/17/2018 03:07pm

Last updated on:

09/18/2018 12:10pm

Description:

Meeting to discuss project plan and hash out the details of implementation. Objective is to explain the complete system and pricing terms and conditions as per our last meeting.

Invitees

Contacts

Sr #	Name	Title	Mobile	Email	Remark
1	Willis Leitch	Senior Product Manager	(640) 571-0554	sugar.info@example.net	
2	Nannie Dubay	Director Operations	(485) 603-2077	section.qa@example.info	

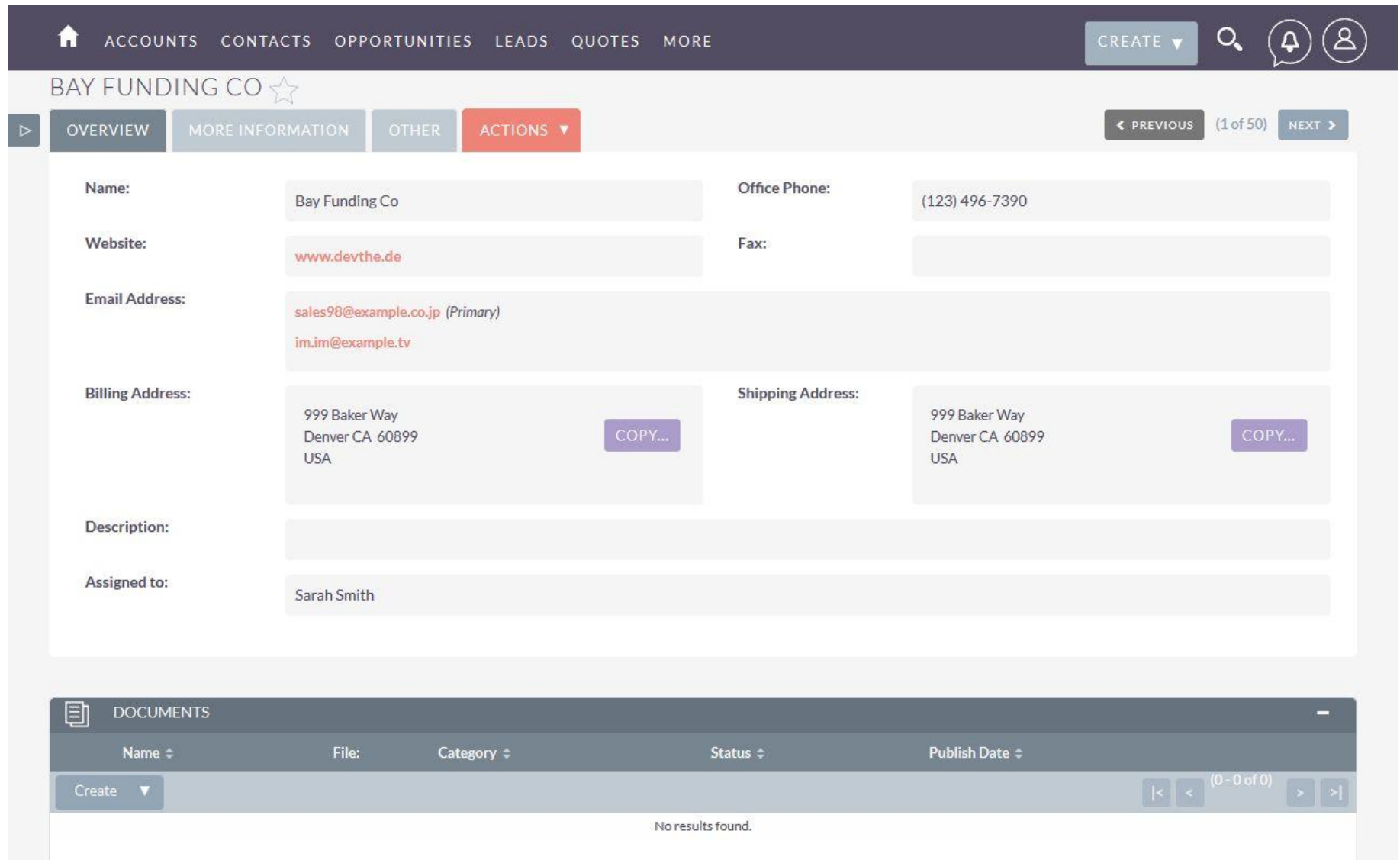
Users

Full Name	Title	Department	Mobile	Email
Chris Olliver	Senior Account Rep			chris@example.com
Will Westin	Sales Manager East			will@example.com
Sarah Smith	Sales Manager West			sarah@example.com

Leads

Name	Title	Mobile	Email	Lead Source	Remark
Joanna Arno	IT Developer	(277) 245-2909	hr.the.kid@example.name	Existing Customer	
Stewart Heasley	IT Developer	(555) 860-0914	section.the@example.de	Direct Mail	
Floyd Mcquay	Director Sales	(461) 853-8366	section.im.beans@example.name	Existing Customer	

- In the previous example, Meetings module doesn't have any relationship with the SuiteCRM's Documents module. So DocParser doesn't allow to relate WordDoc/PDF directly to Documents module.
- Let's check with Accounts module which has a relationship with the Documents module. So we can relate the doc to Documents module directly through DocParser. Following is the Account record which doesn't have any documents associated yet.



The screenshot displays the SuiteCRM interface for an account record. The top navigation bar includes 'ACCOUNTS', 'CONTACTS', 'OPPORTUNITIES', 'LEADS', 'QUOTES', and 'MORE'. The account name is 'BAY FUNDING CO'. The 'ACTIONS' tab is selected, showing a list of fields: Name, Website, Email Address, Billing Address, Shipping Address, Description, and Assigned to. The 'Documents' module is open at the bottom, showing a table with columns for Name, File, Category, Status, and Publish Date. The table is empty, and the message 'No results found.' is displayed.

Name	File	Category	Status	Publish Date
No results found.				

- While clicked on the "Parse Document" button popup will be open as follows with the "Save to Documents" column.

The screenshot shows a CRM interface for 'BAY FUNDING CO'. A modal window titled 'CHOOSE THE DOCPARSER TEMPLATE' is open. The modal contains a table with three columns: 'Templates', 'Download', and 'Save to Documents'. The 'Save to Documents' column is highlighted with a green box, and its dropdown menu is open, showing 'Word file' and 'PDF file' options. The background interface includes navigation tabs like 'OVERVIEW' and 'MORE INFORMATION', and a sidebar with 'DOCUMENTS', 'ACTIVITIES', 'HISTORY', and 'CONTACTS'. The 'URDHVA TECH' logo is visible at the bottom of the modal.

Templates	Download	Save to Documents
Sample Account profile	Select ▾	Select ▾
Sample Business Letter	Select ▾	Word file PDF file

- Once user clicked on the Word file/PDF file then Document record will be created and relate with the Account module as follows.

The screenshot displays a CRM interface for an account named 'BAY FUNDING CO'. At the top, there is a navigation bar with 'ACCOUNTS', 'CONTACTS', 'OPPORTUNITIES', 'LEADS', 'QUOTES', and 'MORE'. A 'CREATE' button and search, notification, and user icons are also present. Below the navigation bar, a message box states: 'Document saved. Click here to view it.' and 'Message will be display into DetailView once document record is created. User can click and view the document record from there.'

The account details are organized into tabs: 'OVERVIEW', 'MORE INFORMATION', 'OTHER', and 'ACTIONS'. The 'OVERVIEW' tab is active, showing the following information:

- Name:** Bay Funding Co
- Office Phone:** (123) 496-7390
- Website:** www.devthe.de
- Fax:**
- Email Address:** sales98@example.co.jp (Primary), im.im@example.tv
- Billing Address:** 999 Baker Way, Denver CA 60899, USA (with a 'COPY...' button)
- Shipping Address:** 999 Baker Way, Denver CA 60899, USA (with a 'COPY...' button)
- Description:**
- Assigned to:** Sarah Smith

At the bottom, there is a 'DOCUMENTS' section with a table listing document records. A green box highlights the following record:

Name	File	Category	Status	Publish Date	
Bay_Funding_Co-Sample_Account_profile.pdf	Bay_Funding_Co-Sample_Account_profile.pdf		Active	09/20/2018	Edit

- Let's open the document record and download the PDF file from there.

The screenshot shows a CRM interface with a document record for 'BAY_FUNDING_CO-SAMPLE_ACCOUNT_PROFILE.PDF'. The record details include:

- File Name:** Bay_Funding_Co-Sample_Account_profile.pdf
- Status:** Active
- Document Name:** Bay_Funding_Co-Sample_Account_Profile
- Document Type:** Profile
- Publish Date:** 09/20/2018
- Category:** Profile
- Related Document:** Profile
- Assigned to:** Sarah Smith

A Firefox dialog box is overlaid on the record, titled 'Opening Bay_Funding_Co-Sample_Account_profile.pdf'. It displays the file name and size (31.9 KB) and asks for the user's preference for handling the file. The 'Save File' option is selected.

At the bottom of the page, there is a 'DOCUMENT REVISIONS' table:

File	Revision	Date Created	Created by	Change Log
Bay_Funding_Co-Sample_Account_profile.pdf	1	09/20/2018 01:43pm	Urdhva Tech	Document Created

➤ DocParser allow to generate the document from ListView also as follows.

The screenshot shows a CRM interface with a top navigation bar containing 'ACCOUNTS', 'CONTACTS', 'OPPORTUNITIES', 'LEADS', 'QUOTES', and 'MORE'. A 'CREATE' button and search, notification, and user icons are on the right. The main section is titled 'MEETINGS' and displays a table of meeting records. A bulk action menu is open over the table, listing options: 'Mass Update', 'Export', 'Map', 'Delete', and 'Parse Document'. The 'Parse Document' option is highlighted with a green box. The table columns are: Close, Subject, Contact, Related to, Start Date, Assigned User, and Date Created. The table contains 20 rows of meeting data.

Close	Subject	Contact	Related to	Start Date	Assigned User	Date Created
<input checked="" type="checkbox"/>	Disc	Alberta Bivona		05/22/2019 11:15am	Sarah Smith	09/17/2018 03:07pm
<input checked="" type="checkbox"/>	Disc	Willis Leitch		05/22/2019 11:15am	Sarah Smith	09/17/2018 03:07pm
<input checked="" type="checkbox"/>	Disc	Nannie Dubay		05/22/2019 11:15am	Sarah Smith	09/17/2018 03:07pm
<input checked="" type="checkbox"/>	Demo		Isaac A erggren	04/18/2019 11:45am	Max Jensen	09/17/2018 03:07pm
<input checked="" type="checkbox"/>	Disc		Isaac A erggren	02/11/2019 08:00am	Max Jensen	09/17/2018 03:07pm
<input checked="" type="checkbox"/>	Review needs		Isaac A erggren	09/04/2019 04:30pm	Max Jensen	09/17/2018 03:07pm
<input checked="" type="checkbox"/>	Initial discussion		Isaac A erggren	11/10/2018 10:00am	Will Westin	09/17/2018 03:07pm
<input checked="" type="checkbox"/>	Review needs		Insight Marketing Inc	03/31/2019 12:45pm	Sally Bronsen	09/17/2018 03:07pm
<input checked="" type="checkbox"/>	Discuss pricing		Draft Diversified Energy Inc	09/29/2018 09:15pm	Sally Bronsen	09/17/2018 03:07pm
<input checked="" type="checkbox"/>	Discuss pricing		Pullman Cart Company	10/12/2018 09:45am	Sarah Smith	09/17/2018 03:07pm
<input checked="" type="checkbox"/>	Follow-up on proposal		Bay Funding Co	08/25/2019 02:15pm	Sarah Smith	09/17/2018 03:07pm
<input checked="" type="checkbox"/>	Demo		Dirt Mining Ltd	11/21/2018 11:30am	Will Westin	09/17/2018 03:07pm
<input checked="" type="checkbox"/>	Initial discussion		Anytime Air Support Inc	05/01/2019 03:45pm	Chris Olliver	09/17/2018 03:07pm
<input checked="" type="checkbox"/>	Discuss pricing		Underwater Mining Inc.	03/04/2019 07:00am	Max Jensen	09/17/2018 03:07pm
<input checked="" type="checkbox"/>	Review needs		SuperG Tech	11/06/2018 08:45am	Max Jensen	09/17/2018 03:07pm
<input checked="" type="checkbox"/>	Initial discussion		OTC Holdings	05/01/2019 06:00pm	Will Westin	09/17/2018 03:07pm
<input checked="" type="checkbox"/>	Demo		EEE Endowments LTD	04/23/2019 05:15pm	Sally Bronsen	09/17/2018 03:07pm
<input checked="" type="checkbox"/>	Demo		T-Squared Techs	05/29/2019 03:00pm	Will Westin	09/17/2018 03:07pm

- If a user has selected more than one record into ListView then DocParser will create zip file and allow a user to download it. Zip will include all the records with the filename as RECORDNAME_DATE("YMDHIS).pdf/.doc

The screenshot displays a CRM interface with a top navigation bar containing 'ACCOUNTS', 'CONTACTS', 'OPPORTUNITIES', 'LEADS', 'QUOTES', and 'MORE'. A 'CREATE' button and search, notification, and user icons are on the right. The main section is titled 'MEETINGS' and features a table with columns: 'Close', 'Subject', 'Contact', 'Related to', 'Start Date', 'Assigned User', and 'Date Created'. The table shows 20 selected records. A modal dialog box is open in the foreground, titled 'Opening Meetings_20180920174456.zip'. The dialog contains the following text: 'You have chosen to open: Meetings_20180920174456.zip which is: WinRAR ZIP archive (272 KB) from: http://localhost'. Below this, it asks 'What should Firefox do with this file?' with three options: 'Open with WinRAR archiver (default)', 'Save File' (selected), and 'Do this automatically for files like this from now on.' (unchecked). 'OK' and 'Cancel' buttons are at the bottom.

Close	Subject	Contact	Related to	Start Date	Assigned User	Date Created
<input checked="" type="checkbox"/>	Discuss pricing	Alberta Bivona		05/22/2019 11:15am	Sarah Smith	09/17/2018 03:07pm
<input checked="" type="checkbox"/>	Discuss pricing	Willis Leitch		05/22/2019 11:15am	Sarah Smith	09/17/2018 03:07pm
<input checked="" type="checkbox"/>	Discuss pricing	Nannie Dubay		05/22/2019 11:15am	Sarah Smith	09/17/2018 03:07pm
<input checked="" type="checkbox"/>	Demo			05/22/2019 11:15am	Max Jensen	09/17/2018 03:07pm
<input checked="" type="checkbox"/>	Discuss pricing			05/22/2019 08:00am	Max Jensen	09/17/2018 03:07pm
<input checked="" type="checkbox"/>	Review needs			05/22/2019 04:30pm	Max Jensen	09/17/2018 03:07pm
<input checked="" type="checkbox"/>	Initial discussion			05/22/2019 10:00am	Will Westin	09/17/2018 03:07pm
<input checked="" type="checkbox"/>	Review needs			05/22/2019 12:45pm	Sally Bronsen	09/17/2018 03:07pm
<input checked="" type="checkbox"/>	Discuss pricing			05/22/2019 09:15pm	Sally Bronsen	09/17/2018 03:07pm
<input checked="" type="checkbox"/>	Discuss pricing			05/22/2019 09:45am	Sarah Smith	09/17/2018 03:07pm
<input checked="" type="checkbox"/>	Follow-up on proposal			05/22/2019 02:15pm	Sarah Smith	09/17/2018 03:07pm
<input checked="" type="checkbox"/>	Demo			05/22/2019 11:30am	Will Westin	09/17/2018 03:07pm
<input checked="" type="checkbox"/>	Initial discussion			05/22/2019 03:45pm	Chris Olliver	09/17/2018 03:07pm
<input checked="" type="checkbox"/>	Discuss pricing		Underwater Mining Inc.	03/04/2019 07:00am	Max Jensen	09/17/2018 03:07pm
<input checked="" type="checkbox"/>	Review needs		SuperG Tech	11/06/2018 08:45am	Max Jensen	09/17/2018 03:07pm
<input checked="" type="checkbox"/>	Initial discussion		OTC Holdings	05/01/2019 06:00pm	Will Westin	09/17/2018 03:07pm
<input checked="" type="checkbox"/>	Demo		EEE Endowments LTD	04/23/2019 05:15pm	Sally Bronsen	09/17/2018 03:07pm
<input checked="" type="checkbox"/>	Demo		T-Squared Techs	05/29/2019 03:00pm	Will Westin	09/17/2018 03:07pm

- If user has selected only single record into ListView then DocParser allow to download individual WordDoc/PDF file.

The screenshot displays a CRM interface with a top navigation bar containing 'ACCOUNTS', 'CONTACTS', 'OPPORTUNITIES', 'LEADS', 'QUOTES', and 'MORE'. A 'CREATE' button and search, notification, and user icons are on the right. The main section is titled 'MEETINGS' and features a table with columns: 'Close', 'Subject', 'Contact', 'Related to', 'Start Date', 'Assigned User', and 'Date Created'. A toolbar above the table shows 'Selected: 1' and 'BULK ACTION' options. The table lists 20 meeting records. A modal dialog titled 'Opening Review_needs.pdf' is open, showing the file name, its type (PDF), and the source (http://localhost). The dialog asks 'What should Firefox do with this file?' and offers three options: 'Open with TWINUI (default)', 'Save File' (selected), and 'Do this automatically for files like this from now on.' 'OK' and 'Cancel' buttons are at the bottom.

Close	Subject	Contact	Related to	Start Date	Assigned User	Date Created
<input type="checkbox"/>	Discuss pricing	Alberta Bivona		05/22/2019 11:15am	Sarah Smith	09/17/2018 03:07pm
<input type="checkbox"/>	Discuss pricing	Willis Leitch		05/22/2019 11:15am	Sarah Smith	09/17/2018 03:07pm
<input type="checkbox"/>	Discuss pricing	Nannie Dubay		05/22/2019 11:15am	Sarah Smith	09/17/2018 03:07pm
<input type="checkbox"/>	Demo			09/17/2019 11:45am	Max Jensen	09/17/2018 03:07pm
<input type="checkbox"/>	Discuss pricing			09/17/2019 08:00am	Max Jensen	09/17/2018 03:07pm
<input checked="" type="checkbox"/>	Review needs			09/17/2019 04:30pm	Max Jensen	09/17/2018 03:07pm
<input type="checkbox"/>	Initial discussion			09/17/2018 10:00am	Will Westin	09/17/2018 03:07pm
<input type="checkbox"/>	Review needs			09/17/2018 12:45pm	Sally Bronsen	09/17/2018 03:07pm
<input type="checkbox"/>	Discuss pricing			09/17/2018 09:15pm	Sally Bronsen	09/17/2018 03:07pm
<input type="checkbox"/>	Discuss pricing			09/17/2018 09:45am	Sarah Smith	09/17/2018 03:07pm
<input type="checkbox"/>	Follow-up on proposal			09/17/2018 02:15pm	Sarah Smith	09/17/2018 03:07pm
<input type="checkbox"/>	Demo			09/17/2018 11:30am	Will Westin	09/17/2018 03:07pm
<input type="checkbox"/>	Initial discussion			09/17/2018 03:45pm	Chris Olliver	09/17/2018 03:07pm
<input type="checkbox"/>	Discuss pricing		Underwater Mining Inc.	03/04/2019 07:00am	Max Jensen	09/17/2018 03:07pm
<input type="checkbox"/>	Review needs		SuperG Tech	11/06/2018 08:45am	Max Jensen	09/17/2018 03:07pm
<input type="checkbox"/>	Initial discussion		OTC Holdings	05/01/2019 06:00pm	Will Westin	09/17/2018 03:07pm
<input type="checkbox"/>	Demo		EEE Endowments LTD	04/23/2019 05:15pm	Sally Bronsen	09/17/2018 03:07pm
<input type="checkbox"/>	Demo		T-Squared Techs	05/29/2019 03:00pm	Will Westin	09/17/2018 03:07pm

➤ Same way, user can also create the multiple Documents module's records from the ListView.

The screenshot shows a CRM application interface with a modal window titled "CHOOSE THE DOCPARSER TEMPLATE". The modal contains a table with the following structure:

Templates	Download	Save to Documents
Sample Account profile	Select	Select
Sample Business Letter	Select	Word file PDF file

The "PDF file" option is highlighted with a green box. The background shows a list of accounts with columns for Name, Date Created, and other details. The URDHVA TECH logo is visible at the bottom left of the modal, and a "Close" button is at the bottom right.

- All the Documents record will be relate to their respective base module record. Message will be display as follows into ListView.

The screenshot displays a CRM interface with a dark navigation bar at the top containing a home icon, menu items (ACCOUNTS, CONTACTS, OPPORTUNITIES, LEADS, QUOTES, MORE), a 'CREATE' button, and icons for search, notifications, and user profile. A red message banner at the top reads: "Document(s) are saved. Please check Documents subpanel under Accounts DetailView." Below this, the "ACCOUNTS" section is visible, featuring a table with columns: Name, City, Billing Country, Phone, User, Email Address, and Date Created. The table contains 14 rows of account data. A green callout box with the text "Message will be display into ListView once document records are created." has an arrow pointing to the message banner.

Name	City	Billing Country	Phone	User	Email Address	Date Created
<input type="checkbox"/> Bay Funding Co	Denver	USA	(123) 496-7390	Sarah Smith	sales98@example.co.jp	09/17/2018 03:07pm
<input type="checkbox"/> RRR Advertising Inc.	Persistence	USA	(719) 914-3897	Sarah Smith	hr.the@example.cn	09/17/2018 03:07pm
<input type="checkbox"/> South Sea Plumbing Products	Cupertino	USA	(409) 205-4670	Max Jensen	im20@example.tw	09/17/2018 03:07pm
<input type="checkbox"/> 5D Investments	Kansas City	USA	(865) 290-7718	Max Jensen	section.kid@example.biz	09/17/2018 03:07pm
<input type="checkbox"/> J.K.M. Corp (HA)	Alabama	USA	(622) 508-8887	Will Westin	kid16@example.name	09/17/2018 03:07pm
<input type="checkbox"/> Lexington Shores Corp	Santa Monica	USA	(638) 751-2866	Sarah Smith	kid.beans.support@example.net	09/17/2018 03:07pm
<input type="checkbox"/> Anytime Air Support Inc	San Jose	USA	(406) 855-2375	Chris Olliver	vegan.the.sugar@example.tv	09/17/2018 03:07pm
<input type="checkbox"/> JBC Banking Inc	San Francisco	USA	(837) 096-8330	Sally Bronsen	kid.kid.section@example.name	09/17/2018 03:07pm
<input type="checkbox"/> Kringle Bell IncK.A. Tower & Co	Kansas City	USA	(289) 195-1907	Will Westin	sugar.section@example.tw	09/17/2018 03:07pm
<input type="checkbox"/> P Piper & Sons	San Mateo	USA	(094) 328-8586	Chris Olliver	qa.kid.section@example.info	09/17/2018 03:07pm
<input type="checkbox"/> SuperG Tech	St. Petersburg	USA	(715) 898-9169	Max Jensen	im.kid@example.cn	09/17/2018 03:07pm
<input type="checkbox"/> Pullman Cart Company	Kansas City	USA	(082) 379-0250	Max Jensen	qa.kid.section@example.biz	09/17/2018 03:07pm
<input type="checkbox"/> King Software Inc	Kansas City	USA	(380) 738-8030	Will Westin	the.im@example.org	09/17/2018 03:07pm
<input type="checkbox"/> DD Furniture Inc	Alabama	USA	(023) 233-0250	Max Jensen	hr.vegan.sugar@example.co.uk	09/17/2018 03:07pm



CONTACT US



CONTACT@URDHVA-TECH.COM



[URDHVATECH](https://www.snapchat.com/add/URDHVATECH)



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