

Advanced PDF/HTML Templates

Wednesday, March 18, 2015

RMNSUG Meeting Minutes 3/18/15 – Advanced PDF/HTML Templates

1. Membership News

- Over 200 members
- Board member position open
 - i. Can be end user or VAR (partner)
 - ii. Membership Chair position needs to be filled
- RMNSUG LinkedIn forum now has over 100 members
 - i. Purpose:
 1. Support fellow members with Q&A
 2. Share contacts and white papers
 3. Announcements posted – presentations, notes, discounts to SuiteWorld
 4. Post job openings
 5. Post upcoming events
- Solidfire looking for Netsuite expert doing scripting and workflows
- Musclepharm looking for Netsuite administrator
- SuiteWorld
 - i. RMNSUG members get a \$300 discount good through 4/22/15
 - ii. RMNSUG has one full price conference pass to give away by random drawing
 1. Details of drawing to be posted on LinkedIn

2. Upcoming Meeting Topics

- May 20th – Flodocs at Smoky Hill Library
- July – ? unknown so far
- September – Custom records and Fields (filtering and sourcing) Sam Stetler from Solidfire

3. Feature Presentation – Advanced PDF / HTML Templates with Daniel Matyas, Netsuite Platform Product Manager

- Advanced Printing Goals
 - i. Customize every aspect of printing
 1. Basic printing offers limited customization capability
 - ii. Print arbitrary record
 - iii. Printing framework for developers
 - iv. Replacement for basic printing
 - v. Target Audience

1. Business user with appropriate permission (no special knowledge)
 2. Administrator (HTML and scripting knowledge)
 3. Suitescript developer
- Template Editor
 - i. Feature activation
 1. Setup -> Company -> Enable Features
 - a. Suite cloud tab, then check Advanced PDF/HTML templates
 - ii. List of Templates
 1. Customization -> Forms -> Advanced PDF/HTML Templates
 - iii. Template editor
 1. Visual mode
 - a. Template setup comes up in a pop up window
 - b. Portrait vs. landscape now an option in setup
 - c. New Element tab
 - i. Select from fields, text, image, header and footer etc. . .
 - ii. Can be used to add one of the elements to the template wherever the cursor is
 - iii. Header and footer is not really visible right now and will be changed later
 1. A thin blue line represents the header and footer area
 - iv. Fields can be dragged to move them anywhere on the template
 - v. Hovering over the field will show the internal tag format i.e.
`${record.total@label}`
 - vi. To add and search for fields a pop up will let you search for record fields that are available
 1. This does include custom fields from the records as well
 - d. Styles tab
 - i. Gives basic word processor editing and formatting functions such as fonts, centering, bold etc. . .
 2. Source code mode
 - a. Use free marker syntax in the template
 - b. Also use HTML to customize the template
 - i. Should be familiar with HTML and free marker to use the source code mode

- c. If you make a mistake, the template will throw an error when you try to save. The error should show you which expression is throwing the error.
 - iv. Transaction form setup
 - 1. Go to form you want to customize
 - a. Then customize the form in the upper right corner
 - 2. Printing type on the form needs to be set to “Advanced”
 - 3. Then choose the custom template that you want to assign to that form in the drop down menu
 - 4. Then save
 - 5. When using the advanced printing, the Disclaimer field on the custom form does not work any more. The Disclaimer would have to be set up on the advanced template.
 - 6. Also the printing fields used on the Basic format does not determine what will be printed anymore. Anything that will be printed has to be set up on the advanced template.
 - 7. You can use Advanced and Basic printing options on different forms. But not on the same form. You would need to create a different form for that transaction type to be able to have one version that uses the Advanced and one version that uses Basic layout.
- Printing via Suitescript (see slides for more detailed how-to)
 - i. Record types supported
 - 1. Transaction
 - 2. Entity records
 - 3. Custom Records
 - 4. (any record available via suitescript)
 - ii. Search supported
 - iii. Combination of records and searches
 - iv. Free format template
- Use case (see slides for more detailed how-to)
 - i. Print employee record using custom template
 - 1. Employee basic data
 - 2. Expenses visualized as a graph
- **Daniel’s slideshow, presentation, and sample code available on RMNSUG.org member page**
- Resources
 - i. Netsuite Help
 - ii. BFO Userguide
 - 1. <http://bfo.com/products/report/docs/userguide.pdf>
 - iii. FreeMarker manual
 - 1. <http://freemarker.org/docs/>

- Currently any advanced templates created during the beta time are not available to be edited with the new WYSIWYG editor. But Netsuite is going to release a fix that will allow that in the future.
- There is a Save As to be able to copy advanced templates
- A delete function will also be added

4. Tips & Tricks (see RMNSUG.org for detailed slides)

- Create a shortcut to a folder in the File Cabinet
 - i. When you create a shortcut to a folder in the File Cabinet, the shortcut doesn't save to the folder, just the File Cabinet in general
 - ii. This tip shows how to save the shortcut to the sub folder
- Kit/Package quantity availability to sell
 - i. Netsuite does not give functionality to export Kit/Package available to sell quantities.
 - ii. This tip shows how to calculate the quantities in a saved search.
 - iii. The data can then be exported or used to populate a custom field in a custom field