

Advanced PDF/HTML Templates: Customizing Printouts and Emails

Course Description

Advanced PDF/HTML Templates: Customizing Printouts and Emails will help you master the customization of NetSuite Advanced PDF/HTML Templates and creation of Scriptable Templates. Don't worry if you're a newbie. You'll start with the basics, such as identifying everything you can do with the WYSIWYG editor of Advanced PDF/HTML Templates. Then you'll explore all you can do in source code editing mode. Of interest to developers in particular, you'll also have access to content on how to add power to Advanced PDF/HTML Templates using SuiteScript 2.0.

Through real-world use cases and hands-on exercises, you will learn how to customize Advanced PDF/HTML Templates and Scriptable Templates in WYSIWYG and Source Code editing modes, utilizing FreeMarker and BFO (Big Faceless Organization) technologies.

Who Should Attend

- Administrators and software developers who need to customize printouts with Advanced PDF/HTML Templates and email communications using Scriptable Templates.

Prerequisites

- Participants should have at least 3 months' experience using NetSuite, including familiarity with NetSuite navigation and features. To learn how to navigate NetSuite and perform common tasks, view the Getting Started training videos available on SuiteAnswers.
- Participants should have working knowledge of HTML tags, HTML attributes and CSS, including their syntax. If you do not have the required knowledge, search the internet to find numerous tutorials on HTML and CSS to get the background you need.
- Experience using SuiteScript 2.0 is necessary only for participants who intend to automate the processing of Advanced PDF/HTML Templates with SuiteScript. Content using SuiteScript is at the end of the course and can be skipped.

Key Tasks

How do I:

- Customize Advanced PDF/HTML Templates using WYSIWYG and Source Code editing modes?
- Create Scriptable Templates using WYSIWYG and Source Code editing modes?
- Embed FreeMarker expressions and directives in Advanced PDF/HTML Templates and Scriptable Templates?
- Embed BFO (Big Faceless Organization) tags in Advanced PDF/HTML Templates?
- Render Advanced PDF/HTML Templates via SuiteScript 2.0 (*optional – for software developers only*)

Day 1 Agenda

Get Started with PDFs: Generate transaction printouts using Standard Advanced PDF/HTML Templates; determine available Advanced PDF/HTML Template printouts in common sales workflows; identify company, customer, and user preference settings that impact printing.

Customize PDFs via WYSIWYG Mode: Use customized Advanced PDF/HTML Templates for transaction printouts; add HTML elements to templates via the WYSIWYG editor; insert fields and field labels using the WYSIWYG editor.

Manually Include Fields: Incorporate fields from Record and Company data sources; incorporate fields from related records; incorporate fields from the Subsidiary data source.

Access Additional Fields: Incorporate custom fields from transactions and their related records; incorporate additional data via custom field sourcing; incorporate additional data via custom field formulas.

Transform and Calculate Data: Calculate and transform data using FreeMarker expressions; incorporate FreeMarker built-ins within FreeMarker expressions; test and debug FreeMarker expressions.

Day 2 Agenda

Investigate Architecture: Identify the process to generate a PDF from an Advanced PDF/HTML Template; identify technologies used in Advanced PDF/HTML Printing; identify the structure of an Advanced PDF/HTML Template.

Implement FreeMarker Use Cases: Incorporate FreeMarker built-ins containing parameters; incorporate FreeMarker directives; use FreeMarker expressions inside FreeMarker directives; identify use cases for FreeMarker directives; enter FreeMarker in Source Code mode; test and debug FreeMarker directives.

Implement BFO Use Cases: Identify the relationship between FreeMarker and BFO; utilize BFO to load fonts; utilize BFO to embed barcodes; utilize BFO to configure headers and footers.

Create Scriptable Templates: Identify the similarities and differences between Advanced PDF/HTML Templates and Scriptable Templates; create Scriptable Templates for entity, transaction and case records.

Localize Content: Identify how printouts are localized based upon user & customer preferences, and subsidiary settings; modify localized labels across custom forms; alter content in printouts based upon locale.

Leverage SuiteScript 2.0 (*software developers only*): Mimic the process of printing a transaction in the UI via SuiteScript; mimic the process of emailing a transaction in the UI via SuiteScript; render a transaction printout in SuiteScript differently from that in the UI by utilizing different templates and data sources; combine PDFs via SuiteScript; use custom data sources in SuiteScript; utilize SuiteScript to expose additional data to UI printouts, such as standard sublists not typically available, custom record child sublists, and any other desired data.

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Features and functions covered in this course might not reflect those in your purchased NetSuite account.