

# REPORT360

## Tips & Tricks

### REPORT360 – TIPS & TRICKS

#### 1. *Use value fields to control the PDF*

Value fields (defined in the Data Collector) can be used to decide whether to include information in the report or not.

Example: You want to decide at runtime whether to include a table or not.

- a. Create a value field `custpage_show_table` of type checkbox in the Data Collector.
- b. Add the following if-statements before and after the table definition in the html editor:

```
<#if custpage_show_table='T'>
<TABLE class="table fullwidth" page-break-before="always">
...
</#if>
```

#### 2. *Including images in the PDF*

If you include images from records or saved searches in your printout, make sure that the image field contains an image by using an “if” statement in the html code, for example:

```
<#if customer.image1.value?length != 0>

</#if>
```

Otherwise the printout will return an error when trying to print the empty image.

### 3. *Including URL links in the PDF*

When working with URL links you have to replace every occurrence of "&" with "&";

For example:

`https://forms.netsuite.com/app/site/crm/externalcustrecordpage.nl?compid=645889&formid=&redirect_count=1&did_javascript_redirect=T`

must be written as:

`https://forms.netsuite.com/app/site/crm/externalcustrecordpage.nl?compid=645889&amp;formid=&amp;redirect_count=1&amp;did_javascript_redirect=T`

### 4. *Value fields to filter a saved search*

If you want to limit a search result in the report by a specific date, define a "date" value field in the Data Collector and use an "if"-statement adding "?date" after the field names so they are interpreted as dates (instead of strings)

See example below, where `custpage_trx_creation_date` is the data value field defined in the Data Collector and `item.Date` is the value from the saved search:

```
<#if ((custpage_trx_creation_date?date) < (item.Date?date))>

  <tr>
    <td>${item.TrxType}</td>
    <td>${item.Number}</td>
    <td>${item.Date}</td>
    <td>${item.DueDate}</td>
    <td align="right">${item.Amount}</td>
    <td>${item.Status}</td>
  </tr>
</#if>
```

## 5. Editor folding

To minimize scrolling in the HTML editor when building your PDF-report, you can use the folding functionality, allowing you to hide parts of the HTML code. Click on the small arrow next to the row number to hide your selected section. In the example below the Style section has been hidden using the editor folding functionality.

```
122 <!-- Style sheet definitions starts here -->
123
124 * <style type="text/css">
125 <!-- Change color on a striped table -->
126 *   tr.oddRow td {
127       background-color: #F0F0F0; color: black;
128   }
129 *   tr.evenRow td {
130       background-color: #ffffff; color: black;
131   }
132 <!-- standard horizontal ruler -->
133
122 <!-- Style sheet definitions starts here -->
123
124 * <style type="text/css">==</style>
125
126 * <!-- Style sheet definitions ends here -->
127
128
129
130 </head>
```

## 6. QR and Bar Codes

The Report 360 enables you to include QR-codes and Bar codes in your PDF-document by adding these elements from the Tag library. You can add a static value for the QR/Bar code by changing “insert qr value here” to your selected value (a web address for instance).

### QR CODE

```
<barcode codetype="qrcode" value="insert qr value here" width="120" background="#FFFFFF" />
```

Alternatively, you can combine the HTML-code for QR/Bar code with a “Value” field (defined in the Data Collector) to create a dynamic code by referring to the “Value” field as value for QR/Bar code (that will be enter as parameter to the printout)

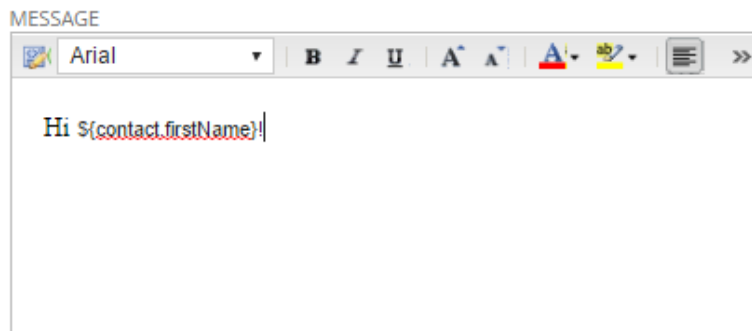
Below is an example of a Dynamic QR Code.<br/>

You have used the following value: \${custpage\_qrcode}<br/>

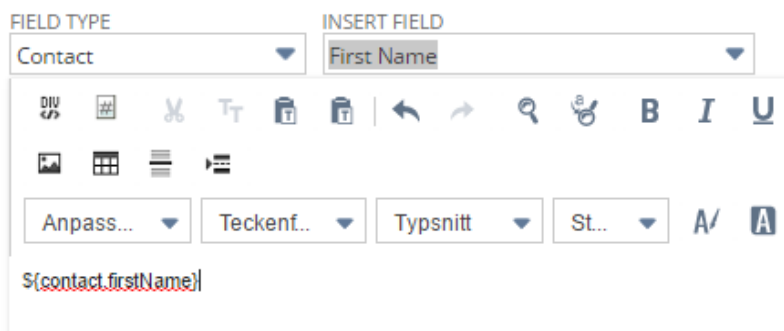
```
<barcode codetype="qrcode" value="${custpage_qrcode}" width="120" />
```

## 7. Include Netsuite Fields in Bulk eMail Messages

When working with Bulk eMail it is possible to include fields from NetSuite to personalize your message. The example below will send an email to a contact and print the first name of the contact in the message ("Hi Firstname !")

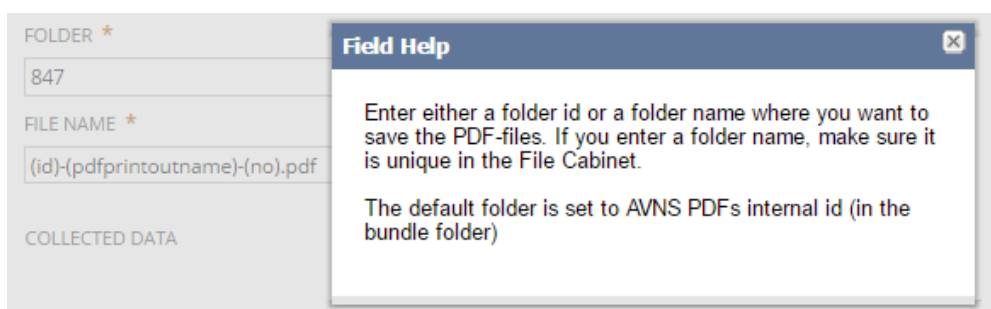


The easiest way to find out how to refer to your selected field is to use NetSuite standard Email template.



## 8. Create Protected Folders for sensitive PDF documents

When you define the printout, you have the possibility to select the folder where the generated documents will be saved. If the PDF-documents contain sensitive information it is advised to save these documents in a protected folder. Create a folder and make sure to restrict the access to this folder according to your needs (by department/class/location/etc.). Then simply select this folder by typing the internal ID or the name of it in the "Folder" field of the layout definition (Edit-mode of your selected PDF-report).



## 9. Password protect your PDF documents

To set a password to protect your PDF-document, simply add the Password Protection tag from the Tag library. Place the cursor right under the <head> section in the HTML-editor and double click on "Password Protection" in the Tag library. Adjust the password value "choose password" to a password of your choice. The generated PDF will only be accessible by those who know the password.

```
2 * <pdf>
3 *   <head>
4 *     <meta name="password" value="choose password" />
5 *     <#setting number_format="computer">
6 *     <#assign aDateTime = .now>
7 *     <#assign aDate = aDateTime?date>
```