



Solution Guide

SuiteSolutions - PDF Generator

Solution Version: 1.0

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NetSuite Inc.
2955 Campus Drive, Suite 100
San Mateo, CA. 99403-2511

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1 Document Overview

SuiteSolutions are pre-built offerings used to accelerate the delivery of custom functionality into Customer's account. These solutions were designed and developed by NetSuite Professional Services. SuiteSolutions are delivered as Non-Managed bundles i.e. the custom code/configurations delivered with the bundle is not locked and can be further customized on a customer account to meet unique business requirements. For the Terms of Service for SuiteSolutions, refer to <http://www.netsuite.com/tos>. Notwithstanding anything to the contrary in this Solutions Guide or on SuiteAnswers, in the event of any conflict between this Solution Guide and the Terms of Service for SuiteSolutions, the Terms of Service for SuiteSolutions shall supersede and control.

This is the Solution Guide for SuiteSolution – PDF Generator. This documentation will guide the user how to setup, configure and work with the solution with the given use cases/scenarios as examples.

1.1 Symbols and Conventions

Symbol	Description
	Indicates situation the user should be specifically aware of when completing a task.
 	Indicates helpful tips, shortcuts and suggestions. The 'bulb' icon explains general information around NetSuite while the 'record' icon gives important details related to records, fields, forms and validations.

Convention	Description
Customization> Scripting> Script	The (>) symbol indicates a sequence of actions, such as selecting items from a menu or toolbar, or pressing buttons in a window. This example directs you to go to Customization tab and hover to Scripting and select Script

2 Solution Overview

The PDF/HTML Generator is designed for NetSuite to have a more flexible styling on printing and email functionality for transaction/custom records. This solution allows the users to create their own templates in case of transactions that support printing out of the box. For transactions that don't have print functionality, this solution can be used to add print functionality for those records.

Using this solution, a single record can be printed via the print button or multiple records can be printed using the bulk print functionality.

Single PDF Printing



Bulk PDF printing

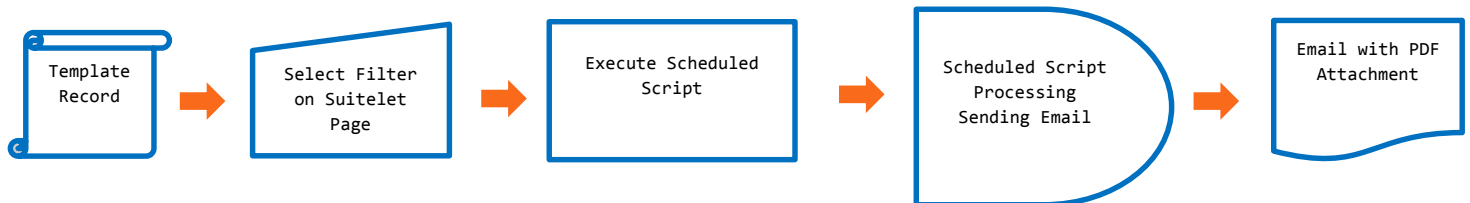


Figure 1 – PDF Generator Process Flow

2.1 Supported Features

1. HTML template creation with support to custom PDF generation for transactions, custom records and entities.
2. A template must be created for each transaction type in order to have a PDF file created from the transaction form. There are sample templates provided in the bundle.
3. Allows to create Custom Layout to replace NetSuite layout for transactions.
 - a. A saved search to be used to source data from the NetSuite and feed then into the custom template.
 - b. Option to change the saved search and layout and add additional fields or columns if needed.
4. It will provide further functionality:
 - a. Individual printing from the transaction/custom record
 - b. Bulk printing functionality.
 - c. Bulk emailing functionality.

5. UI designer for template is provided. Editing HTML code directly can also be done to customize template.
6. Provides ability to create HTML templates for Custom Record type.
7. Custom Record “HTML Templates” holds all different templates that can be used for printing/email. Each template definition defines data source (Saved Search), email’s body, email’s subject and PDF template.
8. One saved search allowed per template, it does not allow combining saved searches in one template. Only one default template is used per transaction/custom record.
9. Saved search is used as data feed that replaces any variables defined within the template. Template should not hold any customer specific data; they should be defined within saved search including fixed values.
 - a. All custom record fields and sub-record fields selectable within saved search can be included within template.
10. Output is always provided in PDF format. The output can be viewed in a new window, downloaded or can be sent via email.
11. For Single Record Printing- ‘Print PDF’ button is added to print the record straight from the form in PDF format.
12. For Bulk Emailing/Printing, custom interface is provided, it is accessible via *Transaction> Management> Bulk Printing/Emailing*.
 - a. This interface allows the user to export bulk transactions into one PDF file and send via email to the current user.
 - b. Filter options:
 - Transaction From Date
 - Transaction End Date
 - Record Type
 - Vendor
 - Subsidiary
 - Accounting Period
 - Status



Bulk Printing/Emailing is used for transaction records.

2.2 Dependencies

Listed below are the solution's dependencies.

1. 5 sample templates are provided as part of the solution. Each template consists of a header, body and footer, with basic CSS formatting.
2. The data is sourced from the actual nlobjRecord of the transaction, custom record or scriptable native record like entity, employee etc. Additional fields can be added to the data feed by modifying the saved search.
3. Big Faceless Java PDF Library is used to generate PDF files. Only formatting supported within this library is supported within the HTML template.
4. Combine PDFs attached to queried transaction/custom record into a combination PDF up to a max size of 5MB.
5. Save Search runs from all searchable and scriptable record. All fields within the saved search can be included within the template. Only one saved search can be used per template. Two different line types can be done using a saved search but these lines needs to be separated through the PDF Template.
6. Bulk printing/emailing function is available for transactions only. It allows maximum (50) fifty transactions to be selected at once.
7. Script is deployed across all scriptable record types however functionality is only enabled for transactions defined within the custom record – HTML Templates.
8. The TARGET DIRECTORY (required only if return type is File ID) should be the internalID (integer type) of the folder in the File Cabinet
9. The RECORD FIELD (optional and enabled only if the return type is file id) The file id of the generated pdf file will be stored in this field.
10. Only one type of record type line data is supported within the saved search (i.e. Expense and Item lines can't be combined).
11. HTML TEMPLATE BODY and HEADER fields should not contain any JavaScript and it should be purely HTML, HTML with FREEMARKER or LODASH template syntax or HTML with FREEMARKER and LODASH template syntax.
12. Output format is always PDF file either if it's printed or emailed.

3 Setup and Configuration

3.1 Bundle Installation

To install the SuiteSolutions – PDF Generator, a user has to have an Administrator or SuiteBundler permission in an account.

1. Go to **Customization> SuiteBundler> Search & Install Bundles**.
2. Search for the SuiteSolutions – PDF Generator bundle and click the name.
3. Click the **Install** button to begin the installation process.

Please refer to these NetSuite Help links for more information about bundle installation: [Installing a Bundle](#), [Choosing a Bundle to Install](#), [Understanding Bundle Searches](#).



It is recommended that process is validated in a sandbox prior to installation in a production account.

3.2 Feature Dependencies

The following needs to be enabled in the account:

3.2.1 SuiteCloud Features

- Client SuiteScript
- Server SuiteScript
- SuiteFlow
- Custom Records
- Advance PDF/HTML Templates

3.3 Configuration

3.3.1 PDF Template Generator

A template must be created for a transaction type in order to have a PDF file that can be automatically created within the transaction form.

In order to create a PDF Generator Template:

1. Access via **List> Custom> PDF Generator Templates**
2. Find and click **NEW PDF Gen Template Generator**.

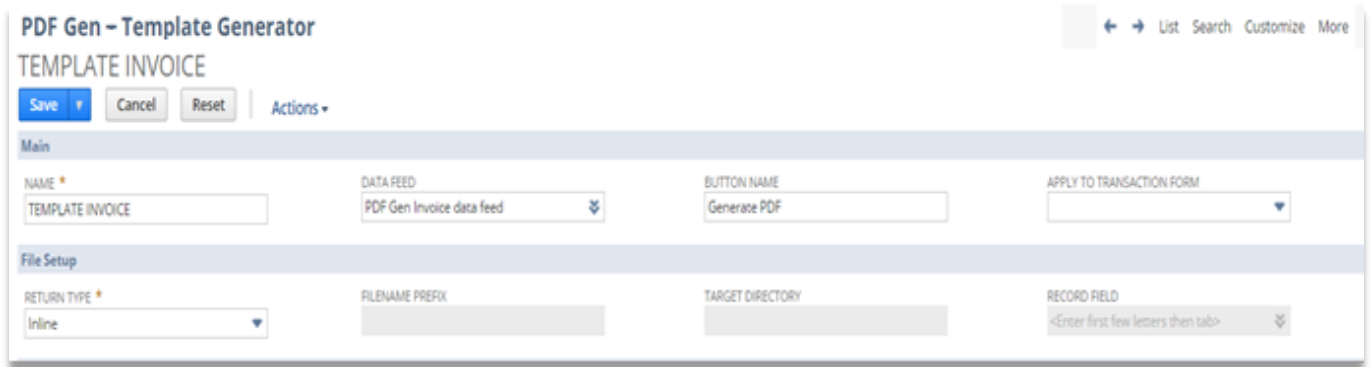


Figure 2 – PDF Gen – Template Generator Record

3. A form for creating a template for a transaction will display.
4. In the Main section, set the following fields:
 - **Name** – Name of the template.
 - **Data Feed** – (Optional) additional data source. The saved search type must match the record type to provide optimal results.
 - **Button Name** – **Print button name to appear on the record form where you deploy and apply the template record.**
 - **Apply to Transaction Form** - The form where the template will be applied. If no form is selected, the template will apply on transaction regardless of what form is used.
5. In the File Setup section, set the following fields:
 - **Return Type** – The method on how the PDF will be generated. There are 3 different return types:
 - A. **Inline** – the output will be displayed in the browser.
 - B. **Attachment** – user will be requested to download the file generated.
 - C. **File ID** – mainly used if printout is requested via server side script and the file generated is saved in the file cabinet.

For Bulk Printing, return type will be Email Attachment PDF.

- **Filename Prefix** – The filename Prefix for the file to be saved in file cabinet. On bulk print, default filename will be 'recordtype_datetimestamp'.
- **Target Directory** - this is required only if return type is File ID and should be the internalID (integer type) of the folder in the File Cabinet. In case the Folder ID is incorrect, the target directory will be 'NSTSTransaction Export - BULK PRINT FILES'.
- **Record Field** – this is optional and enabled only if the return type is File ID. This a native/custom field that which types such as Decimal Number, Document, Integer Number, Long Text, Rich Text, and Text Area can be specified here. The File ID will be stored in the record that is printed.

It is recommended to use a Document type field in order to display the generated filename with the link of it to the file cabinet.

6. In the Record Type section, set the following fields:

- **Transaction Type** - The record type the HTML Template will be used for.
- **Entity Type** – The Customer or Vendor to which the template will be made to.
- **CRM Type (All Record Types)** – List of all record type to which the template will be made to. Custom records can be selected on this field too.
- **Email Subject** - The email subject for bulk printing.
- **Email Template** - the email body to be set on bulk printing.



Only 1 from the Transaction Type, Entity Type and CRM Type can have a value and the rest will be disabled.

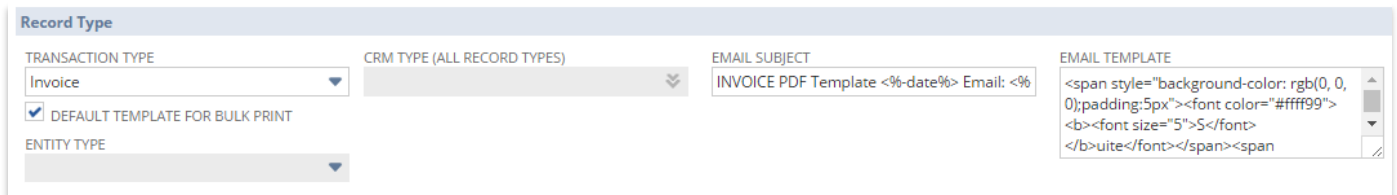


Figure 3 - Record Type Section

- **Default Template for Bulk Printing** - The template will be used in bulk printing/emailing. This denotes what HTML Template custom record will be used on a transaction type.

7. In the Template section, set the following fields:

- **Header Name** - The header name for the template. This should be specified to be able to use it in the template source code.
- **Header Height (In MM)** - the header height for the template. This should be a positive value.
- **Footer Name** - The footer name for the template. This should be specified to be able to use it in the template source code.
- **Paper Size** - The paper size (A4, A5, Legal, Letter) for the generated file.
- **Orientation** - The paper orientation (Portrait, Landscape) for the generated file.

8. Set the desired template body and header using the HTML editor box.

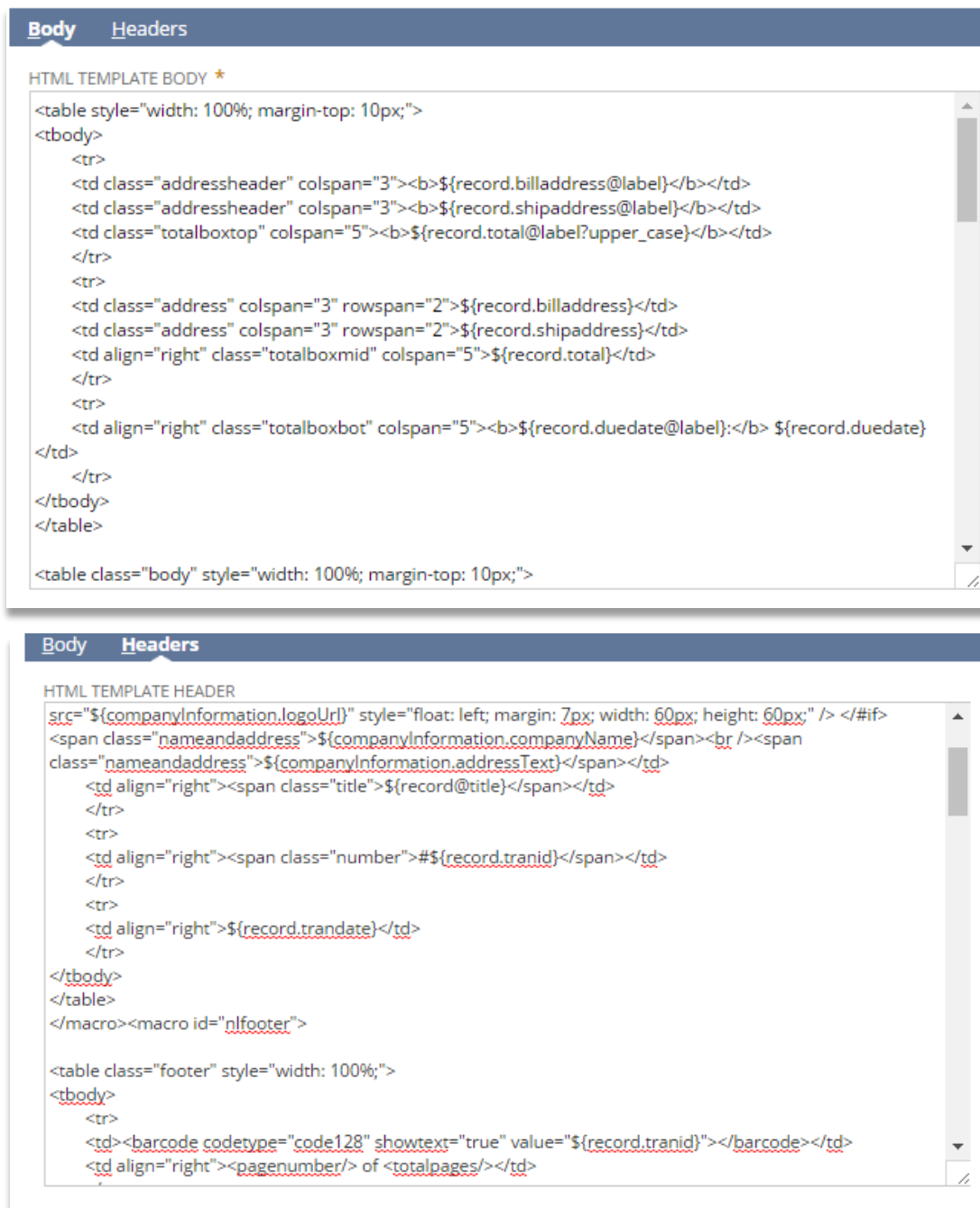


Figure 4 - Editor for Body and Header



There is no validation of HTML syntax/code in the PDF Template Generator record.

3.3.1.1 Template Engines

A template engine is a Java library to generate text output based on templates or changing data on HTML web pages, configuration files, source code, etc.

For SuiteSolutions PDF Generator, 2 template engines are used to display data on the PDF output. It is necessary to know the versions of the template engine to be used to determine the limitation of the HTML code.



Warning: Do not modify markup source directly unless you have sufficient CSS and HTML knowledge. NetSuite does not provide support or training in CSS or HTML. Be aware that the template editor may not function properly if you switch back to WYSIWYG mode after you have made edits in markup source mode. Some template content may not be represented

3.3.1.1.1 FreeMarker

FreeMarker is commonly used to reference fields on transaction records. An **interpolation** is an expression, such as `${record.entity}` that FreeMarker replaces in the output with the actual value of the expression.

For example, the syntax to reference a transaction field is `${record.fieldId}`. In the output, this interpolation is replaced with a text representation of the field's value.

An example of loop using FreeMarker:

```
<#list record.item as itm>
  <tr class="item-row">
    <td>${itm.account}</td>
    <td>${itm.amount}</td>
    <td>${itm.department}</td>
    <td>${itm.history}</td>
    <td>${itm.location}</td>
  </tr>
</#list>
```

FreeMarker version used: **2.3.19**. To check the FreeMarker version, add `${.version}` to the bottom of the HTML source code.

For complete information about FreeMarker, see the [FreeMarker documentation](#) or [HTML Markup Source Editing to Customize Advanced Templates on SuiteAnswers](#) and find “Using FreeMarker to Include NetSuite data.”

3.3.1.1.2 LoDash

A modern JavaScript utility library that uses modular methods for arrays, objects, strings, etc. For complete information about LoDash, see the [LoDash documentation](#).

For SuiteSolution PDF Generator, LoDash uses the Saved Search defined in the PDF Template Generator's data feed source the field values. LoDash variable is defined as `<%=variable_name%>` where variable name is the specified custom/summary label in the Saved Search.



To comply with NetSuite Security, it is advisable to use the tags `<%- %>` (instead of `<%= %>`) for fields that might contain special characters.

For LoDash, Variable Definition page that can be accessed inside the template can be used as reference.

An example of loop using LoDash.

LoDash loop:

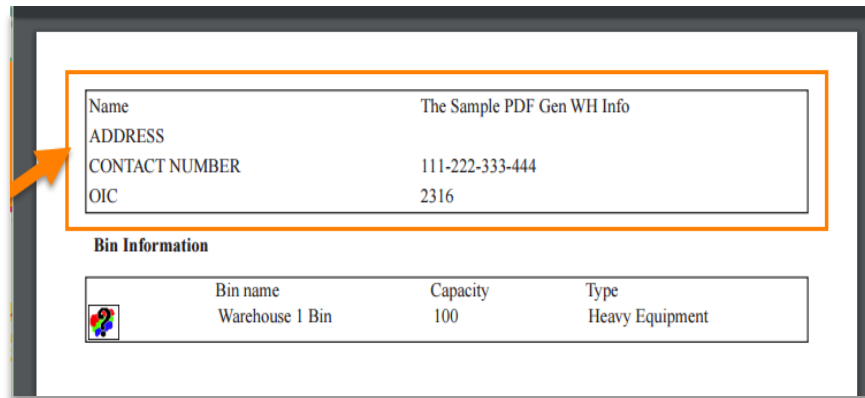
```
<% _.each(item_array, function(ln) {%>
<tr>
  <td><%=ln.item%></td>
  <td><%=ln.description%></td>
  <td><%=ln.rate%></td>
  <td><%=ln.quantity%></td>
  <td><%=ln.amount/exchangerate%></td>
</tr>
<%}) %>
```

Currently for returned Saved Search values that have new-line key, LoDash replaces it by a whitespace. Null check and replace function should be added when the LoDash variable contains a new-line key.

In the sample code below, a field is displayed in a row table.


```
<table border="1" style="width:100%;">
<tbody>
  <tr>
    <td>Name</td>
    <td><%-Name%></td>
  </tr>
  <tr>
    <td>ADDRESS</td>
    <td><%-address%></td>
  </tr>
  <tr>
    <td>CONTACT NUMBER</td>
    <td><%-ContactNumber%></td>
  </tr>
  <tr>
    <td>OIC</td>
    <td><%-OIC%></td>
  </tr>
</tbody>
</table>
```

Actual PDF Generated:



Name	The Sample PDF Gen WH Info		
ADDRESS			
CONTACT NUMBER	111-222-333-444		
OIC	2316		

Bin Information

	Bin name	Capacity	Type
	Warehouse 1 Bin	100	Heavy Equipment

LoDash version used: **4.0.0**,

Based on Underscore.js **1.8.3** <http://underscore.js.org/LICENSE>.

3.3.1.1.2.1 Saved Search

This is the additional data source if your template needs to be combined from other record. For example, a transaction to custom record. To access the saved search, you need to use the LoDash syntax (see [LoDash](#)).



The saved search type to be used in the template record should also match the record type of its template record.

Columns • Drill Down Fields					
Remove All		Add Multiple			
FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL
:: Tracking Numbers					
:: Item					line.itemid
:: Item					text_line.item
:: Item : Display Name					line.itemname
:: Item Rate					line.rate
:: Warehouse Info (for PDF GEN DEMO) : Name					Warehousename
:: Warehouse Info (for PDF GEN DEMO) : OIC					Warehouseoic
:: Warehouse Info (for PDF GEN DEMO) : Contact Number					Warehousecontact
:: Warehouse Info (for PDF GEN DEMO) : address					Warehouseaddress

Figure 5 – Sample Saved Search Columns with Custom Label

Saved Search considerations for LoDash:

1. There is no validation in custom label of the saved search define in the data feed. Duplicates on Custom Labels must be checked by the user.
2. For formula fields, a Custom Label is required.
3. For fields with Summary Type, a Summary Label counterpart is required.
4. Only alphanumeric characters can be used in the saved search except for the following prefixes:
 - `text_[varname/fieldname]`
 - `line.[varname/fieldname]`
 - `text_line.[varname/fieldname]`
 - `line|[array_varname].[varname/fieldname]`
 - `text_line|[array_varname].[varname/fieldname]`
5. Variable Declaration and prefix on Data Feed (save Search Custom Label).

<code>[varname]</code>	<p>Declare a specific variable name. If varname is not declared, the name will be the field label name where whitespace and special characters are removed. Example: Date/Time -> DateTime.</p> <p>Ex: account name</p>
<code>text_[varname]</code>	<p>Declare a specific variable name. <code>text_</code> prefix converts the field value to text. If varname is not declared, the name will be the field label name where whitespace and special characters are removed.</p> <p>Ex: text_account text_name</p>
<code>line.[varname]</code>	<p>Add the field as an element of array line and declare specific variable name for the element. If varname is not declared, the name will be "line." and concatenated with the internal id of the field.</p> <p>Ex. line.item line.amount</p>
<code>text_line.[varname]</code>	<p>Add the field as an element of array line and declare specific variable name for the element. <code>text_</code> prefix converts the field value to text. If varname is not declared, the name will be "line." and concatenated with the internal id of the field.</p> <p>Ex. text_line.item text_line.amount</p>
<code>line array_varname.[varname]</code>	<p>Declare a specific array name replacing line array name. Add the field as an element of <code>array_varname</code> and declare specific variable name for the element. If varname is not declared, the name will be "[array_varname]." and concatenated with the internal id of the field.</p>

	Ex. line expense.account line expense.amount
text_line array_varname.[varname]	Declare a specific array name replacing line array name. Add the field as an element of array_varname and declare specific variable name for the element. text_ prefix converts the field value to text. If varname is not declared, the name will be "[array_varname]." and concatenated with the internal id of the field. Ex. text_line expense.account text_line expense.amount

6. Summary saved search is supported.
7. Reserved words 'subsidiaryRecord' and 'companyRecord' are not allowed to be used as Custom Labels in the Saved Search.

3.3.1.1.2.1 Different Line Type

Two different line type (e.g., item and expense) can be done using a saved search but these lines needs to be separated through the PDF Template.

An example of this is a Bill Credit transaction with more than one-line type. In this, the saved search returns the text 'item' if there is no Account on the line. This means that the line type is Item and no Expense. This is applicable if the user wants to show a certain identification for the different line types.

FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL
Formula (Text)			CASE WHEN {expense.account} != " THEN 'item'		line.isitem
⋮					

Figure 6 - A Transaction Saved Search with 2 Line Type

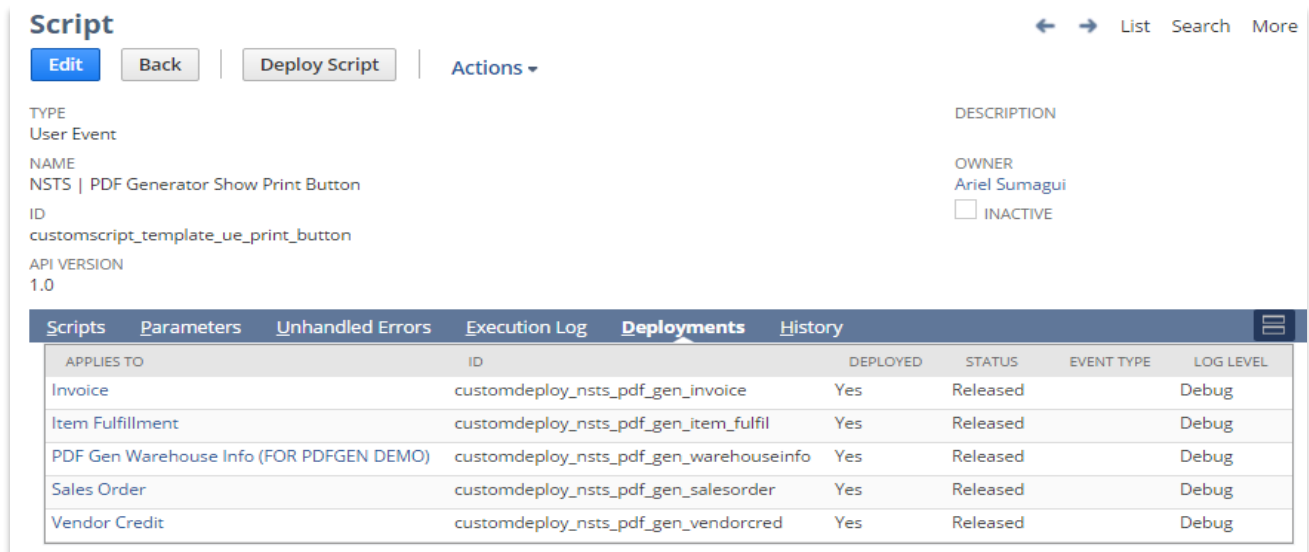
Below is an example on how the line type can be identified and defined on the template.

```
<% if(ln.isitem == 'item'){ %>
  <tr>
    <td class="brdL"><%=ln.item%></td>
    <td class="brdL"><%=ln.itemupc%></td>
    <td class="brdL"><%=ln.itemname%></td>
    <td class="brdL"><%=ln.rate%></td>
  </tr>
<% } else {
  ...
```


3.3.2 Script Deployment on Record

The script must be deployed to the transaction type after creating a template for it.

1. Find and view the **NSTS | PDF Generator Show Print Button** script by going to **Customization> Scripting> Script**
2. Under Deployments tab, click the record type where you want to apply the HTML Template. (E.g., Invoice)



Script

TYPE: User Event
NAME: NSTS | PDF Generator Show Print Button
ID: customscript_template_ue_print_button
API VERSION: 1.0

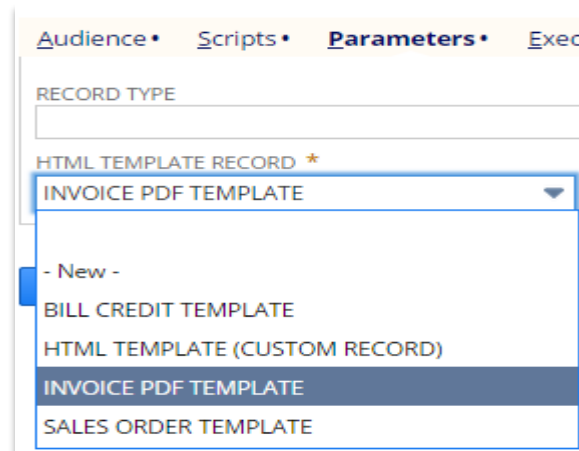
OWNER: Ariel Sumagui
☐ INACTIVE

Buttons: Edit, Back, Deploy Script, Actions

APPLIES TO	ID	DEPLOYED	STATUS	EVENT TYPE	LOG LEVEL
Invoice	customdeploy_nsts_pdf_gen_invoice	Yes	Released		Debug
Item Fulfillment	customdeploy_nsts_pdf_gen_item_fulfil	Yes	Released		Debug
PDF Gen Warehouse Info (FOR PDFGEN DEMO)	customdeploy_nsts_pdf_gen_warehouseinfo	Yes	Released		Debug
Sales Order	customdeploy_nsts_pdf_gen_salesorder	Yes	Released		Debug
Vendor Credit	customdeploy_nsts_pdf_gen_vendorcred	Yes	Released		Debug

Figure 7 - Deploying Script to the Record

3. Edit the Script Deployment and go to Parameters tab.
4. On the HTML Template Record field, select the created template from [PDF Gen Template](#).



Audience • Scripts • **Parameters** • Exec

RECORD TYPE

HTML TEMPLATE RECORD *

INVOICE PDF TEMPLATE

- New -

BILL CREDIT TEMPLATE

HTML TEMPLATE (CUSTOM RECORD)

INVOICE PDF TEMPLATE

SALES ORDER TEMPLATE

Figure 8 - Created Template Record

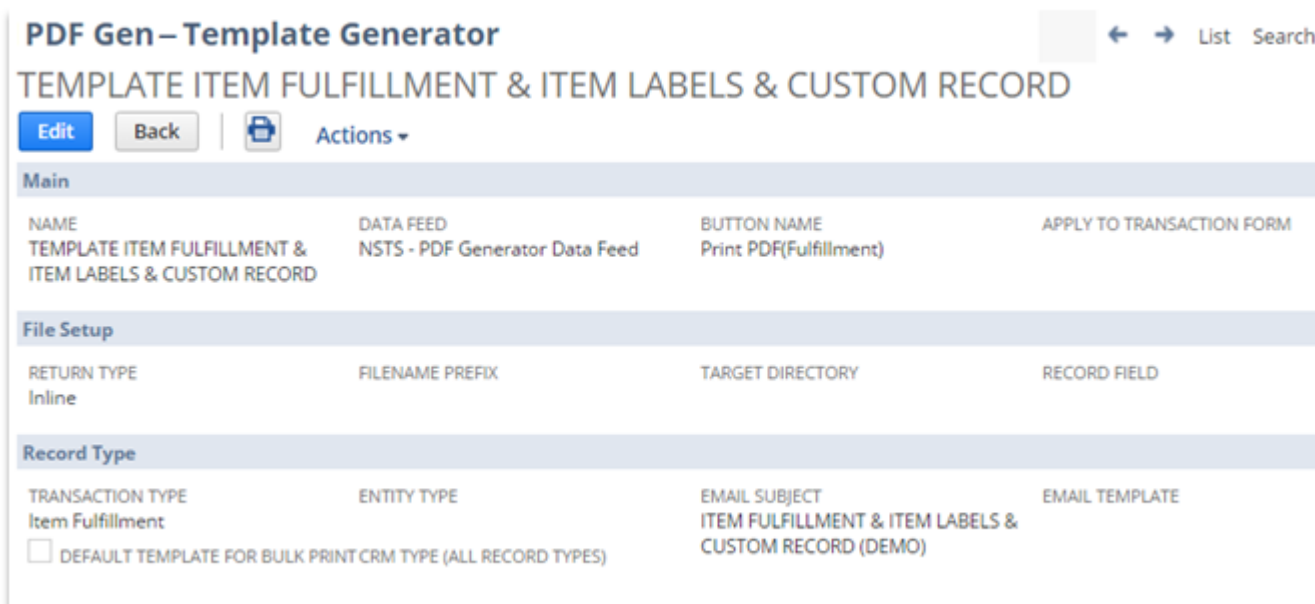
5. **Save.**

4 Working with PDF Generator

4.1 Print an Individual Transaction/Custom Record

In order to print out a custom invoice layout from the transaction record, view the record you want to print. A custom button will get added based on the configuration. Click the 'Print PDF' button on the form.

1. Create a PDF template for Item Fulfillment (in this case there is a preset template named TEMPLATE ITEM FULFILLMENT & ITEM LABELS & CUSTOM RECORD)



PDF Gen – Template Generator

← → List Search

TEMPLATE ITEM FULFILLMENT & ITEM LABELS & CUSTOM RECORD

[Edit](#) [Back](#) [Print](#) Actions ▾

Main			
NAME	DATA FEED	BUTTON NAME	APPLY TO TRANSACTION FORM
TEMPLATE ITEM FULFILLMENT & ITEM LABELS & CUSTOM RECORD	NSTS - PDF Generator Data Feed	Print PDF(Fulfillment)	

File Setup			
RETURN TYPE	FILENAME PREFIX	TARGET DIRECTORY	RECORD FIELD
Inline			

Record Type			
TRANSACTION TYPE	ENTITY TYPE	EMAIL SUBJECT	EMAIL TEMPLATE
Item Fulfillment		ITEM FULFILLMENT & ITEM LABELS & CUSTOM RECORD (DEMO)	
<input type="checkbox"/> DEFAULT TEMPLATE FOR BULK PRINT CRM TYPE (ALL RECORD TYPES)			

Figure 9 - PDF Template Record

For this case, the fulfillment template is linked to a custom record Warehouse Info via saved search named NSTS – PDF Generator Data Feed.

PDF Gen - Data Feed

Save Reset Cancel Preview Change ID Actions

SEARCH TITLE *
PDF Gen - Data Feed

ID
customsearch_nsts_pdf_gen_data_feed

OWNER
Den D Geronimo

☒ PUBLIC
☐ AVAILABLE AS LIST VIEW

☐ AVAILABLE AS DASHBOARD VIEW
☐ AVAILABLE AS SUBLIST VIEW
☐ AVAILABLE FOR REMINDERS
☒ SHOW IN MENU

Criteria Results Highlighting Available Filters Audience Roles Email Audit Trail Execution Log

Use this tab to indicate columns to be included in the search results as well as sort order.

SORT BY
Date ☐ DESCENDING

THEN BY
☐ DESCENDING

THEN BY
☐ DESCENDING

OUTPUT TYPE
Normal

CONSOLIDATED EXCHANGE RATE
Per-Account

☐ SHOW TOTALS

☐ RUN UNRESTRICTED ☐ DISALLOW DRILL DOWN

☐ MY PREFERRED SEARCH RESULTS

Columns * Drill Down Fields

Remove All Add Multiple

FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	SUMMARY LABEL
Tracking Numbers						
Item					line.itemid	
Item					text_line.item	
Item : Display Name					line.itemname	
Item Rate					line.rate	
Account					line.account	
Quantity					line.qty	
Warehouse Info (for PDF GEN DEMO) : Name					Warehousename	
Warehouse Info (for PDF GEN DEMO) : OIC					Warehouseoic	
Warehouse Info (for PDF GEN DEMO) : Contact Number					Warehousecontact	
Warehouse Info (for PDF GEN DEMO) : address					Warehouseaddress	

Figure 10 - Saved Search used in the PDF Template

Use the LoDash template engine to source and display the fields from the custom record defined in the saved search.

Sample syntax used:

```
<td class="brdL"><%-Warehousename%></td>
<td class="brdL"><%-Warehousecontact%></td>
<td class="brdL"><%-Warehouseaddress%></td>
<td class="brdL"><%-Warehouseoic%></td>
```

- On script **NSTS | PDF Generator Show Print Button**, create a script deployment for fulfillment with the **HTML TEMPLATE RECORD** set to the template name or for this case, TEMPLATE ITEM FULFILLMENT & ITEM LABELS & CUSTOM RECORD.



- Open an existing transaction. (E.g., Item Fulfillment)
- Click the 'Print PDF' button located at the top of the form.

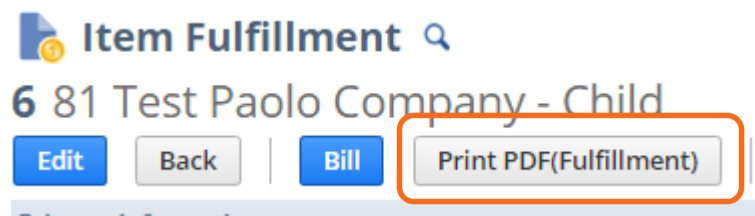


Figure 11 - Print PDF Button on the Transaction

- A new browser window will open with PDF displayed containing the transaction details from the originating form.



ITEM FULFILLMENT AND ITEM LABELS AND CUSTOM RECORD (DEMO)

SuiteSolutions -OW Dev Account One
[4125731]-Phase 0

SHIPPING ADDRESS					
United States					
WAREHOUSE INFO (CUSTOM RECORD)					
NAME		CONTACT	ADDRESS	OIC	
ITEM	UPC	DISPLAY NAME	URATE	QTY	ACCOUNT
bacon				1	
bacon			844.33416667	1	55
bacon			844.33416667	-1	10
chicken				1	
chicken			50.17030374	1	55
chicken			50.17030374	-1	10
toast				1	
toast			250.00	1	55
toast			250.00	-1	10

Figure 12 - Generated PDF from the Transaction

4.2 Bulk Printing/Emailing

In order to print out transactions in bulk, the Bulk Printing page must be accessed and filters must be provided.

1. Navigate to **Transactions > Management > Bulk Printing/Emailing**
2. Provide value for the following filters:
 - Record Type
 - Vendor
 - Subsidiary
 - Accounting Period
 - Status
 - Transaction Start Date
 - Transaction End Date

Bulk Printing/Emailing

RECORD TYPE ★

VENDOR

SUBSIDIARY

ACCOUNTING PERIOD

STATUS

TRANSACTION FROM DATE

TRANSACTION END DATE

Figure 13 - Bulk Printing/Emailing Page

3. **Submit** the form.
4. The Saved Search Result page will display with transaction results from the previous filters.
5. Select the transactions to print and click **'Print'**.

Save Search Result

Save Search List

MARK	INTERNAL ID	DATE	PAYMENT DATE	TYPE	NAME	AMOUNT	BILL/CREDIT MEMO REF. NO	SUPPLIER REF NO	COMMENT
<input checked="" type="checkbox"/>	41762	7/8/2015		Invoice	43 CI Company Parent11	463.91	11052	Recurring Billing 5	8
<input checked="" type="checkbox"/>	41764	7/9/2015		Invoice	100 CUST_PERF_441_parent	1,366.01	11053		
<input type="checkbox"/>	42168	7/12/2015		Invoice	135 CUST_PERF_781_parent	105.75	11054		

Figure 14 - Save Search Results Page

6. The Bulk Print Result page will display with the message of "All Selections Are Scheduled To Be Send via Email. You Will Receive An Email With The Output Once The Action Is Finished."



Figure 15 - Bulk Print Email

- If your template record **RETURN TYPE** is equal to **File ID** when used in bulk printing. All file will be stored on the **TARGET DIRECTORY**, but all PDF will be attached on the email whether the **RETURN TYPE** is Inline, Attachment, File ID.









NSTSTransaction Export - BULK PRINT FILES						Total: 7 
EDIT	INTERNAL ID	NAME ▲	SIZE	LAST MODIFIED	TYPE	DOWNLOAD
Edit	59231	 invoice_08052015_164052.pdf	7 KB	08/05/2015 4:41 pm	PDF File	Download
Edit	59333	 invoice_08052015_174102.pdf	59 KB	08/05/2015 5:41 pm	PDF File	Download
Edit	59433	 invoice_08052015_174634.pdf	54 KB	08/05/2015 5:46 pm	PDF File	Download
Edit	59533	 invoice_08052015_175321.pdf	132 KB	08/05/2015 5:55 pm	PDF File	Download
Edit	64541	 invoice_10072015_233302.pdf	11 KB	10/07/2015 11:33 pm	PDF File	Download
Edit	63537	 salesorder_09092015_131759.pdf	15 KB	09/09/2015 1:18 pm	PDF File	Download
Edit	64441	 salesorder_10072015_180630.pdf	13 KB	10/07/2015 6:06 pm	PDF File	Download

Figure 16 - Saved File in File Cabinet


Items Shipping Billing Accounting Relationships Communication Related Records System Information Custom Approver List Collections									
Messages • Activities Files • User_Notes									
ATTACH EXISTING FILES									
<input type="text"/>									
<input type="button" value="Attach"/> <input type="button" value="New File"/>									
ATTACHED FILES	FOLDER	SIZE (KB)	LAST MODIFIED	DOCUMENT TYPE	REMOVE	EDIT	DOWNLOAD		
 invoice_10072015_233302.pdf	NSTSTransaction Export - BULK PRINT FILES	11	10/7/2015 11:33 pm	PDF File	Remove	Edit	download		

Figure 17 - Attached File in Communication Subtab



An incorrect saved search set-up or in HTML code will result to **No** PDF generation. It is advised that the saved search and HTML code is properly set-up to prevent this scenario.

4.3 Included Sample Template (Warehouse Info)

The Warehouse Info template is provided by the solution as an example of a custom record used for PDF Generator.

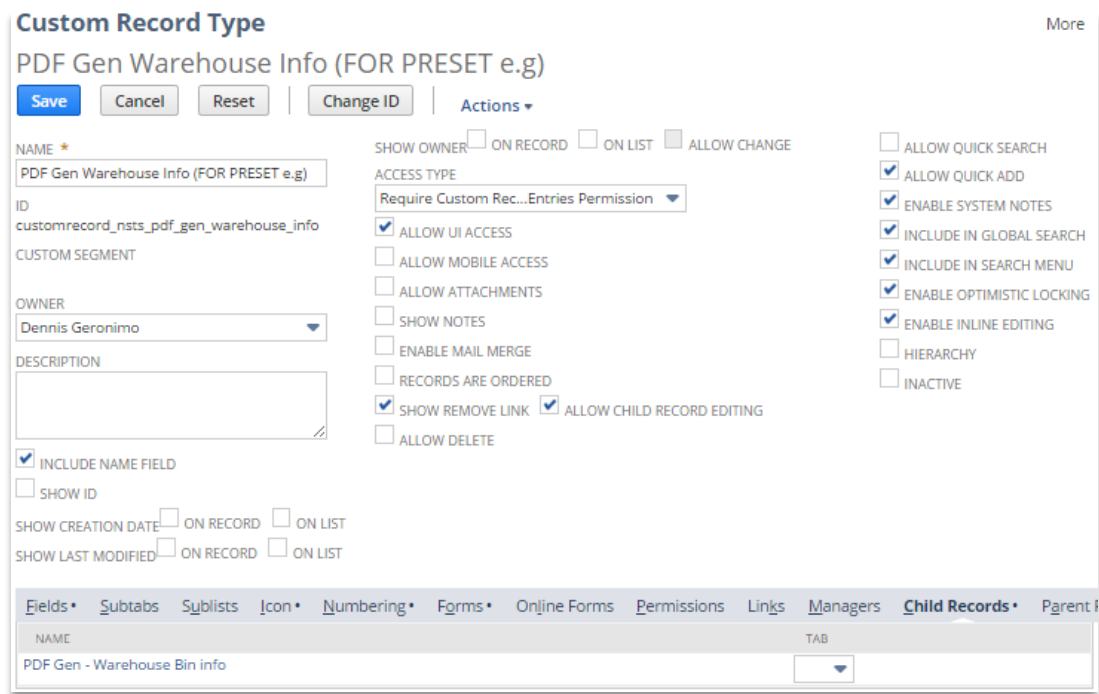
Below components are part of the bundle:

1. Custom Record

Parent Record: PDF Gen Warehouse Info (FOR PRESET e.g)

Child Record: PDF Gen - Warehouse Bin info

This custom record is provided as a sample for recording basic warehouse information. The record can be accessed and customized further by going to **Customization > Lists, Records & Fields > Record Types** and find the parent record **PDF Gen Warehouse Info (FOR PRESET e.g)**. For more information about custom records, see [Custom Records - SuiteAnswers ID: 10144](#).



The screenshot shows the 'Custom Record Type' configuration page in NetSuite. The title is 'PDF Gen Warehouse Info (FOR PRESET e.g)'. Below the title are buttons for 'Save', 'Cancel', 'Reset', 'Change ID', and 'Actions'. The form is divided into several sections:

- NAME:** 'PDF Gen Warehouse Info (FOR PRESET e.g)'
- ID:** 'customrecord_nsts_pdf_gen_warehouse_info'
- CUSTOM SEGMENT:** (Empty)
- OWNER:** 'Dennis Geronimo' (Dropdown)
- DESCRIPTION:** (Text area)
- SHOW OWNER:** Checkboxes for 'ON RECORD' and 'ON LIST' are unchecked. 'ALLOW CHANGE' is checked.
- ACCESS TYPE:** 'Require Custom Rec...Entries Permission' (Dropdown)
- Permissions:**
 - ☒ ALLOW UI ACCESS
 - ☐ ALLOW MOBILE ACCESS
 - ☐ ALLOW ATTACHMENTS
 - ☐ SHOW NOTES
 - ☐ ENABLE MAIL MERGE
 - ☐ RECORDS ARE ORDERED
 - ☒ SHOW REMOVE LINK
 - ☒ ALLOW CHILD RECORD EDITING
 - ☐ ALLOW DELETE
- Other Options:**
 - ☒ INCLUDE NAME FIELD
 - ☐ SHOW ID
 - SHOW CREATION DATE:** ☐ ON RECORD, ☐ ON LIST
 - SHOW LAST MODIFIED:** ☐ ON RECORD, ☐ ON LIST
 - ☐ ALLOW QUICK SEARCH
 - ☒ ALLOW QUICK ADD
 - ☒ ENABLE SYSTEM NOTES
 - ☒ INCLUDE IN GLOBAL SEARCH
 - ☒ INCLUDE IN SEARCH MENU
 - ☒ ENABLE OPTIMISTIC LOCKING
 - ☒ ENABLE INLINE EDITING
 - ☐ HIERARCHY
 - ☐ INACTIVE

At the bottom, there is a tabbed interface with tabs for 'Fields', 'Subtabs', 'Sublists', 'Icon', 'Numbering', 'Forms', 'Online Forms', 'Permissions', 'Links', 'Managers', 'Child Records', and 'Parent'. The 'Child Records' tab is selected, showing a table with columns 'NAME' and 'TAB'. The first row is 'PDF Gen - Warehouse Bin info'.

Figure 18 – Sample Custom Record for Warehouse Info






2. Saved Search (Data Feed): PDF Gen template Warehouse info datafeed preset sample

Although this field is optional and is primarily used for [LoDash template engine](#), a sample saved search for the Warehouse Info is provided in the bundle. The saved search can be accessed via **Lists > Search > Saved Searches**.

PDF Gen template Warehouse info datafeed preset sample: Results

[Return To Criteria](#) [Edit this Search](#)

FILTERS

EDIT VIEW	NAME #	ADDRESS	CONTACT NUMBER	OIC	LINE BIN	LINE BIN	LINE BIN
Edit View	Warehouse Information for WH444		1968 2333 45 45	Mariz Del Rosario	Bin B - WH4444	1,500	Business Storage
Edit View	Warehouse Information for WH444		1968 2333 45 45	Mariz Del Rosario	Bin A - WH4444	1,000	Internal Storage

Figure 19 - Sample Saved Search for Warehouse Info

3. **PDF Generator Template:** Template Warehouse Information (Custom Record)

PDF Gen - Template Generator

TEMPLATE WAREHOUSE INFORMATION (CUSTOM RECORD)

[Save](#) [Cancel](#) [Reset](#) | [Actions](#)

Main

NAME *
 DATA FEED
 BUTTON NAME

File Setup

RETURN TYPE *
 FILENAME PREFIX
 TARGET DIRECTORY

Record Type

TRANSACTION TYPE
 ENTITY TYPE
 EMAIL SUBJECT

☐ DEFAULT TEMPLATE FOR BULK PRINT
 CRM TYPE (ALL RECORD TYPES)

Figure 20 - Sample PDF Generator Template for Warehouse Info

PDF Gen Warehouse Info (FOR PRESET e.g)

Warehouse Information for WH444

[Edit](#)
[Back](#)
[Print PDF](#)
[PDF](#)
[Actions](#)

NAME
Warehouse Information for WH444
☐ INACTIVE
ADDRESS

CONTACT NUMBER
1968 2333 45 45
OIC
Mariz Del Rosario

Workflow Custom

PDF Gen - Warehouse Bin Info

VIEW PDF GEN - WAREHOUSE BIN INFO
Default View

[New PDF Gen - Warehouse Bin info](#)
[Attach](#)
[Customize View](#)



EDIT	NAME ▲	CAPACITY	TYPE	ICON
Edit	Bin A - WH4444	1,000	Internal Storage	
Edit	Bin B - WH4444	1,500	Business Storage	

Figure 21 - Warehouse Info Record

A template is also provided in the bundle with the custom record and data feed already set on it. This will add a button to the record to enable the generation of PDF for the **PDF Gen Warehouse Info (FOR PRESET e.g)** custom record.

scriptlet.nl 1 / 1

Name Warehouse Information for WH444
ADDRESS
CONTACT NUMBER 1968 2333 45 45
OIC 16

Bin Information



	Bin name	Capacity	Type
	Bin B - WH4444	1500	Business Storage
	Bin A - WH4444	1000	Internal Storage

Figure 22 - Sample PDF Generated for Warehouse Info

5 Appendix

5.1 Bundle Components

Listed on this section are the components of the solution such as the custom record, custom fields, saved searches, scripts, etc., that were not mentioned in 3 Setup and Configuration.

Solution Name: SuiteSolutions - PDF Generator

Solution Version: 1.0

5.1.1 Transaction Header Fields

These custom fields needs to be exposed for ALL transaction types and located under Communication tab. These fields will not display on the transaction form.

Field Name	Description
To be emailed	Un-ticked by default
To Address	
CC Address	

5.1.2 Custom Field

- Transaction Body Fields
 - Warehouse Info (for PDF GEN DEMO)

5.1.3 Custom Lists/Records

- Lists
 - NSTS | PDF Gen Paper Size (4 records)
 - NSTS |PDF Printout Orientation (2 records)
 - NSTS | PDF Gen Return Type (3 records)
 - NSTS | PDF Gen Output Type (3 records)
- Records
 - PDF Gen - Template Generator (include 5 records)
 - PDF Gen Warehouse Info (FOR PRESET e.g)
 - PDF Gen - Warehouse Bin info

5.1.4 File Cabinet

- NSTS_PDF_CS_validation.js
- NSTS_PDF_constants_and_config.js
- NSTS_PDF_CS_ActionTrigger.js
- NSTS_PDF_SS_bulk_process.js
- lodash.js
- NSTS_PDF_sl_generate_pdf.js
- NSTS_PDF_SL_Template_Suitelet_BulkProcess_UI.js
- NSTS_PDF_FeatureLib.js
- NSTS_PDF_UE_showPrintButton.js

- NSTS_PDF_XMLToPDF.js
- NSTS_PDF_NumberFormat_lib.js
- NSTS_PDF_utilities_lib.js
- NSTS_PDF_FunctionLib.js
- icon_operations.png
- icon_list.png

5.1.5 Saved Search

- PDF Gen Warehouse Info (FOR PRESET e.g)
 - PDF Gen template Warehouse info datafeed preset sample
- Transaction
 - PDF Gen - Invoice Data Feed
 - PDF Gen - Data Feed

5.1.6 SuiteScripts

- Client
 - NSTS | PDF Validation
 - NSTS | PDF HTML Action Trigger CS
- Scheduled
 - NSTS | PDF Bulk Process
- Suitelet
 - NSTS | PDF Template Generate
 - NSTS | PDF Template HTML Bulk Process UI
- User Event
 - NSTS | PDF Generator Show Print Button

5.2 Limitations

Listed are limitations of the solution:

1. Internet Explorer 10 or lower version has limitations. Only IE versions that will be supported by NetSuite will be versions 11 and above. Please see [SuiteAnswers Article 49101](#).
2. Bulk Printing/Emailing is used for transaction records only.
3. Email functionality from the transaction/custom record is not supported, emailing is only available on bulk printing for transaction record type.
4. Allowing the user to send email with PDF file to desired email addresses.
5. Custom Paper size it not supported.
6. Bulk printing is only applicable for transaction record.
7. Bulk printing/emailing function allows maximum (50) fifty transactions to be selected at once.
8. Script is deployed across all scriptable record types however functionality is only enabled for transactions defined within the custom record – HTML Templates.
9. If multi-currency feature is not enabled, the currency field or `#{record.currency}` will display the InternalID instead of the currency's name.

10. Data feed search record type should be the same as the template record type.
11. There is no pagination on bulk printing UI when listing on transaction.
12. The filter for entity on bulk printing is only for vendors.
13. You can manipulate the data feed result only by using LoDash, it is not accessible in FreeMarker.