Advanced PDF Assignment

Business Example: You have an invoice that goes out to your clients on the end of the month. But the problem is that it looks horrible! It's time to brand the invoice and make it look more professional.

Note:
Templates are probably the most technical piece to this beginner course because they almost always need a little HTML | Freemarker | Styling code work. Feel free to reach out with questions on customizing it.

1. Upload a logo to your file cabinet if one does not already exist (you can use the Anchor Group logo if you don't have one to practice with)
2. Customize a new sales order and rename it
3. Adjust the company logo image size and insert a break line
4. Change the color of the table text
5. Underneath the existing table, create a field that will show the memo
6. Enter or view a sales order in your account and see the end result (Do this in sandbox if creating a new sales order)
7. Look on the sales order to confirm the look
8. Add this new template to the sales order "customize form" and perform a "test print"
9. If you are an experienced developer, you can attempt to create the Advanced PDP before in HTML. This requires grouping that wasn't covered in this lesson. It is a very practical advanced assignment that many companies wish to implement.

BILL TO:	DUE DATE:	AMOUNT PAID:	TRACKING #:
CONTACT NAME	12/25/19	$300	222
ADDRESS 1			
ADDRESS 2	**ACCOUNT #:**	**AMOUNT REMAINING:**	**PAYMENT TERMS:**
CITY, STATE ZIP	1234567	$1200	NET 30

TYPE	AMOUNT
Inventory Items	{{sum of your data}}
Non-Inventory Items	{{sum of your data}}
Kit/Packages	{{sum of your data}}

TOTAL: ${{SUM}}

Lecture Notes

Figure 1: Where to customize the Advanced PDF

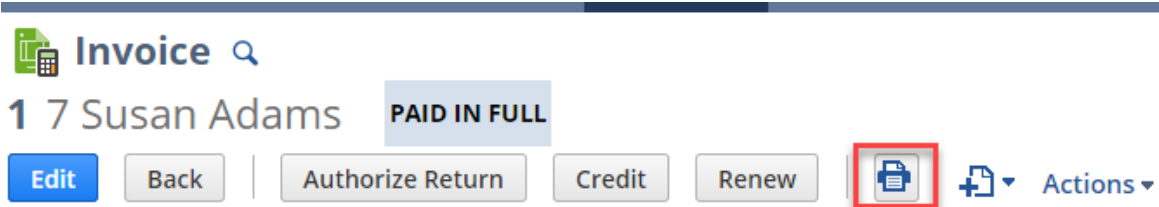Figure 2:Set which Advanced PDF to use
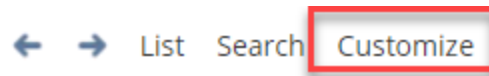
Figure 3: Print Advanced PDF

Figure 4: Select which transaction form to use for the invoice

- Use the native tool to get you the initial Advanced PDF form
- Consider hiring a consultant/developer (Anchor Group 😊) to further customize the look and functionality
- Understand that developers can customize the advanced PDF to insert complex information
- When in the code mode, remember to use Freemarker techniques
- You can group content with advanced techniques and perform math formulas on the advanced PDF