

Customization of order PDF printout

This article explains how to customize the purchase order PDF that is generated by Raley PO.

By default, Raley PO will generate a purchase order PDF when the purchase request is transitioned to the state APPROVED or a user with FINANCE permission makes a modification to approved purchase order number.

Raley is relying on PDF generator from HTML with value placeholders expressed in [Thymeleaf](#) templating language. Below you can find the default order template as well as example of a PDF that was generated from it:



Most likely, you'd want to make some adjustments to this template to conform with your organization's requirements. The good news is that you can make ANY kind of modification to the purchase order template!

Just log in as a user who has COMPANY ADMIN permission, choose Apps Raley Purchase Orders in your Jira top menu and then navigate to tab Company.

Jira config

Company

Approvals

Departments

Employees

API & Integrations

Company name*

My company

Address

Logo file (png)

Choose file

No file chosen

Default discount name

Discount

PDF Template

<html xmlns:th="http://www.thymeleaf.org">
<head>
<style>
body {
font-size: 10px;
font-family: Verdana, Geneva, Tahoma, sans-serif;
}

.text-left {
text-align: left;
}

.text-right {
text-align: right;
}
.text-center {
text-align: center;
}

.border-left {

PAJSM-21

Preview PDF

Reset template

Save

Note the large textarea in the bottom part of the screen called "PDF Template". This is where you make your template modifications and later on test it using

Preview PDF button.

Just make the changes in the PDF Template as you need, provide a Jira issue key that keeps a purchase request (the status doesn't matter) and click on Preview PDF.

The system will generate a purchase order PDF file and opens it in your browser.

If you really screw it up, then you can always click on "Reset template" link and it will revert the PDF Template to the default.

NB! If you simply want to cancel your modifications to the template and return to the previous version that you were using then just refresh your browser.

NB! Note, that your changes to the template will not have effect on the way PDF is generated before you hit the button SAVE.

The following table shows all available properties of a Raley purchase order that you can reference in your template:

Purchase Order template variables

Property	Description
<code>\${logo}</code>	path to your company logo as added on Company tab
<code>\${number}</code>	Purchase order number
<code>\${date}</code>	The date when this PDF was generated in format <code>yyyy-MM-dd</code>
<code>\$(order)</code>	Purchase order object
<code>\$(order.jiraIssueKey)</code>	Issue key of the purchase order
<code>\$(order.netAmount)</code>	order net amount as <code>java.math.BigDecimal</code>
<code>\$(order.taxAmount)</code>	order tax amount as <code>java.math.BigDecimal</code>
<code>\$(order.grossAmount)</code>	order gross amount as <code>java.math.BigDecimal</code>
<code>\$(order.supplier)</code>	Purchase order supplier object
<code>\$(order.supplier.PROPERTY)</code>	The following properties are available in <code>order.supplier</code> : id, name, phone, email, address, notes, paymentDetails, taxNo, contact, terms
<code>\$(order.department)</code>	Purchase order department object
<code>\$(order.department.PROPERTY)</code>	The following properties are available in <code>order.department</code> : id, name, contactPerson, phone, email, address, taxNo
<code>\$(order.purchaseOrderLine)</code>	<code>java.util.List</code> of objects. Every object is representing a separate purchase order line
<code>\$(purchaseOrderLine.unitPrice)</code>	order line unit price as <code>java.math.BigDecimal</code>
<code>\$(purchaseOrderLine.quantity)</code>	order line quantity as <code>java.math.BigDecimal</code>
<code>\$(purchaseOrderLine.total)</code>	line total as <code>java.math.BigDecimal</code>
<code>\$(purchaseOrderLine.taxRate.PROPERTY)</code>	tax rate that applies for this purchase order line. You can access these properties: <ul style="list-style-type: none">name - represents tax namevalue - tax rate value as <code>java.lang.Double</code>

<code>\${purchaseOrderLine.product.PROPERTY}</code>	product referenced in this order line. You can access these properties: <ul style="list-style-type: none"> sku - SKU identifier description - Name of the product unitPrice - price of the product unit as java.lang.Double. This is the default price taken from products registry and it may differ from the <code>\${purchaseOrderLine.unitPrice}</code> value id - internal identifier of the product
<code>\${order.discountName}</code>	Name of the discount as used in this purchase order
<code>\${order.discount}</code>	value of discount as java.math.BigDecimal
<code>\${companyAddress}</code>	Company address as specified in Company tab
<code>\${currencyCode}</code>	3-letter currency code as specified for your company
<code>\${numDecimals}</code>	How many decimals should be used when rendering amounts. By default, 2. If you need a different precision, then contact us via helpdesk
<code>\${createdByName}</code>	User's displayName who created this purchase request ticket in Jira
<code>\${approverNames}</code>	Comma-separated list of users' displayName who are approvers of this purchase order
<code>\${notes}</code>	Issue description field
<code>\${notesHTML}</code>	Rich text issue description. Please note, that you'll need to use th:utext attribute to properly render it. For example: <pre><div th:utext="'Notes ' + \${notesHTML}" style="width: 100%; border: solid 1px gray;"></div></pre>
<code>\${contactPerson}</code>	Convenience field. If user has specified a custom contact person name for this purchase order then it will contain the specified value. Otherwise, it will contain the value of Contact person from Department to which this PO belongs.
<code>\${address}</code>	Convenience field. If user has specified a custom address for this purchase order then it will contain the specified value. Otherwise, it will contain the value of Address from Department that owns this PO.

Once you're satisfied with the result, click on SAVE button below and from now on your order PDFs will be generated as you've specified in your template.

Adding a scripted-font name signature

You can add a scripted font signature into PDF generated by Raley. Below is an example of such a signature:

Purchaser	My company	Supplier	My coffee vendor
Address		Phone Number	
Created By	PO Team Member	Address	
Approver	PO Budget Approver 1, PO Legal Reviewer, PO Department Reviewer, PO Controller, PO Director Test, PO VP Test	E-Mail	
Departments	My Department	Tax Number	
Requested by	PO Team Member	Contact Person	
		Payment Details	
		Payment terms	

	Description	Unit Price (USD)	Quantity	Tax (USD)	Total (USD)
1	T1000	25,000.00	1.00	20.0%	30,000.00

Notes

Requestor's signature

Net amount USD: 25,000.00
Tax amount USD: 5,000.00
Gross amount USD: **30,000.00**

To create such a signature, you can use the following template fragment:

```

<tr>
    <td>Requested by</td>
    <td><span style="font-family: 'Brush Script MT', cursive;" th:text="${createdByName}"></span></td>
    <td colspan="2"></td>
</tr>

```

Show values from order-line custom fields

To show the values from all [custom fields](#) of your purchase order line you can use the following code fragment (line 2):

```

<td class="text-left" th:text="${orderline.product.description}"></td>
<td class="text-left" th:each="cfI,index : ${orderline.customFieldsDto}" th:text="${cfI.value}" th:
class="${index.count % 2 > 0}? 'odd'"></td>

```

Our you can show individual fields, using this technique (lines 2 and 3):

```

<td class="text-left" th:text="${orderline.product.description}"></td>
<td class="text-left" th:text="${orderline.customfield_1}"></td>
<td class="text-left" th:text="${orderline.customfield_3}"></td>

```

In the example above, we're outputting the values for **GL code** (customfield_1) and **URL link** (customfield_3)