

# *Step by Step Guide to* Customizing Billing Product PDF

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- What is Accounting Seed & Visualforce
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# Purpose of this Guide

# Purpose of this Guide

- This guide helps Accounting Seed users customize our default **PDF format** for the Billing (customer invoice)
- We use PDF formats to store configuration and default settings related to the PDF generation of a record
- This guide will look at how users can implement customizations, such as removing rows, adding columns, and changing logos
- It is expected that a user of this guide may not have a coding background

# Pre-Requisites

You will need the following to follow this guide:

1. Salesforce Org
2. Accounting Seed installed in the Org

**Avoid using your production org. Try in sandbox first**

# What is Accounting Seed & Visualforce

# What is Accounting Seed & Visualforce?

- **Accounting Seed** is a 100% native accounting application available on the Salesforce AppExchange that allows users to run Accounting on the same platform as their CRM
- This negates the need to integrate with an external Accounting software and running duplicate databases
- Accounting Seed uses **Visualforce** to generate PDFs (i.e. Billing PDF)
- The instructions on the next page are specific to Billing PDF's, but they can be applied to customizing other PDF Formats too
- Visualforce is a framework that enables the creation of beautiful interfaces

# Using Pre-Built Template

# Using Pre-Built Template

- Out-of-the-box users can make use of Default Billing formats

Billing 00000000

Edit Delete Calc Tax **Create PDF** Post Unpost Amortize Revenue Apply Credit Memo Clone w/Lines

Customer: [Alpha Communications](#) Billing Date: 2/11/2019 Accounting Period: [2019-02](#) Posting Status: Approved Total: \$310.00 Balance: \$310.00

**Billing Lines (3)** New Mass Add/Edit Rows

BILLING LINE NAME	PRODUCT	QUANTITY	UNIT PRICE
<a href="#">BL-00000</a>	Motion Sensor	1.000000	\$100.000000
<a href="#">BL-00001</a>	Rubber Padding	2.000000	\$100.000000
<a href="#">BL-00006</a>	Tax Rates	1.000000	\$10.000000

[View All](#)

**Applied Cash Receipts (0)**

**Amortized Revenue (0)** New Post

**Applied Credit Memos to Invoice (0)**

**Applied Invoices to Credit Memo (0)**

**Billing Aging History (0)**

**Customer Information**

Customer: [Alpha Communications](#) PO Number:

**Owner** [SU](#)

Type: Invoice

Total: \$310.00

Received Amount: \$0.00

Cash Application Adjustment Amount: \$0.00

Credit Memo Applied Amount: \$0.00

Balance: \$310.00

Sales Tax: \$10.00

Subtotal: \$300.00

Posting Status: Approved

PDF Email Status: Unsent

Billing Format: [Custom Billing Product](#)

Recurring Billing

Discount %

Discount Amount: \$0.00

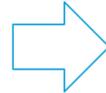
Proprietary Billing Number

# Using Our Pre-Built Template

On your right is a sample Billing:

1. Each Billing Line is a row in the table
2. Tax amount is a row

1. Each Billing Line  
is a row in the table



2. Tax amount is a row



Fort Worth  
US

**Accounting Seed**

---

**BILL TO:**  
Alpha Communications  
410 South Union Ave  
Grand Rapids, MI 49856  
USA

**SHIPPING TO:**  
Alpha Communications  
410 South Union Ave  
Grand Rapids, MI 49856  
USA

<b>Billing Number</b>	00000000
<b>Billing Date</b>	2/11/2019
<b>Billing Due Date</b>	2/11/2019
<b>Amount Due</b>	<b>\$310.00</b>

PRODUCT	PRODUCT DESCRIPTION	COMMENT	QUANTITY	UNIT PRICE	TOTAL
Motion Sensor	Motion Sensor	WaveLink wireless door chime offers a generous detection area of nearly 400 feet. Far enough to cover every window and door in your house.	1.00	\$100.00	\$100.00
Rubber Padding	Rubber Padding	Excellent shockproof performance, good resilience and flexibility, sponge sheet ideal for protecting fragile things	2.00	\$100.00	\$200.00
Tax Rates			1.00	\$10.00	\$10.00

<b>Total</b>	<b>\$310.00</b>
Amount Paid	\$0.00
<b>Amount Due</b>	<b>\$310.00</b>

Page 1 of 1

# Modifying the Pre-Built Template

# Modifying the Pre-Built Template

Things you might want to change to the default Billing Product PDF:

1. Remove the Product Description & Comment columns
2. Add a Custom Field from Billing Line object as a column
3. Change logo
4. Change the background color in 'Amount Due' Box
5. Remove Tax Rates as a line below Products
6. Show Subtotal
7. Show Sales Tax right after Subtotal
8. Show 'Credit Memo Applied' right after Subtotal

# Modifying the Pre-Built Template

In your Salesforce org click on **Developer Console** (see below)

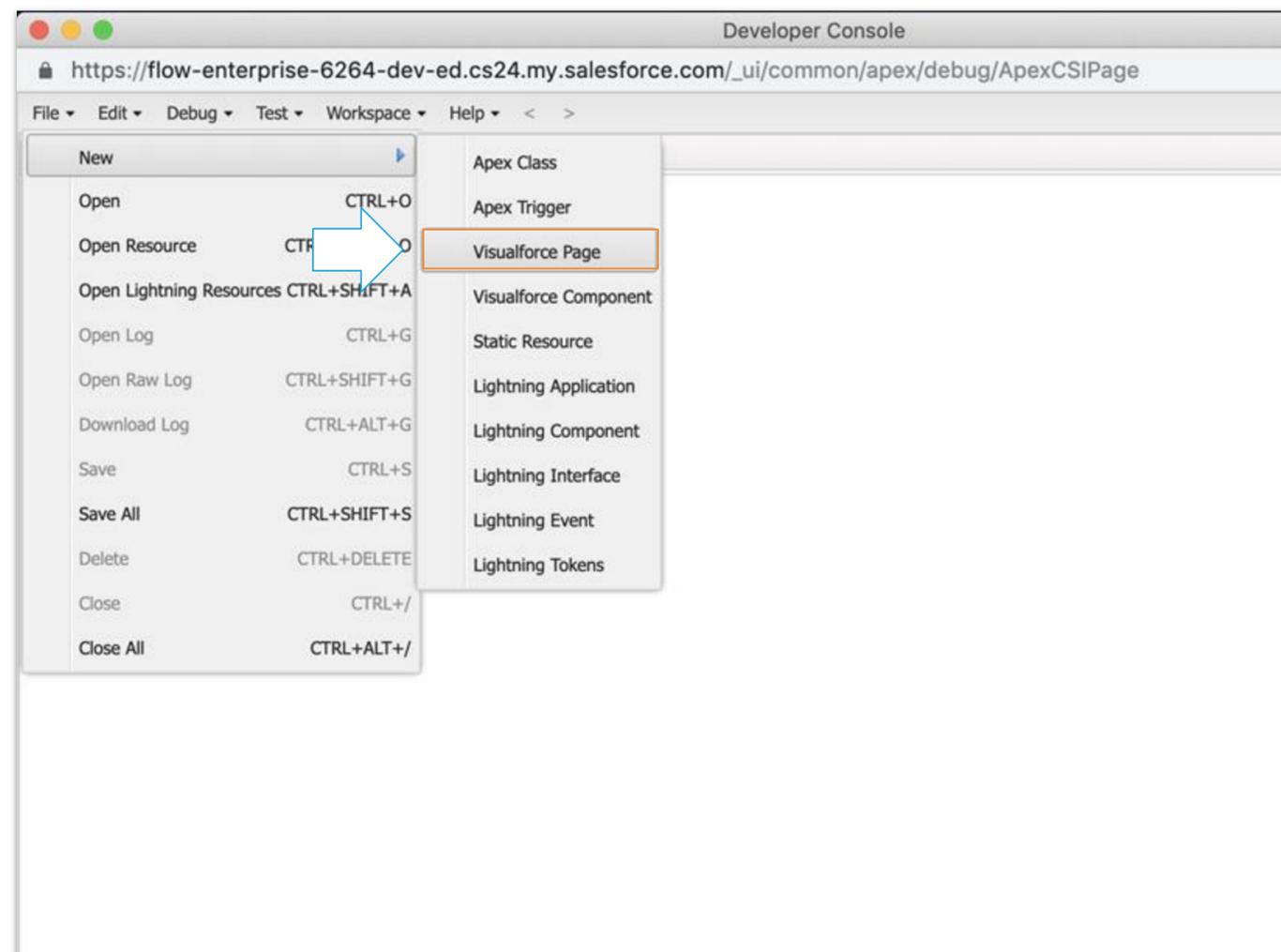
The screenshot shows the Salesforce Billing interface for a bill with ID 00000000. The top navigation bar includes 'Force.com', 'Home', 'Children', 'Masters', 'Accounting Settings', and 'Recently Viewed | Billings'. A search bar is present with the text 'Search Billings and more...'. A dropdown menu is open, showing options: 'Setup', 'Service Setup', 'Developer Console' (highlighted with an orange border and a blue arrow), 'Edit Page', and 'Edit Object'. The main content area is divided into several sections:

- Customer Information:** Customer: Alpha Communications, Billing Date: 2/11/2019, Accounting Period: 2019-02, Posting Status: Approved, Total: \$310.00, Balance: \$310.00.
- Details:** Billing Number: 00000000, Proprietary Billing Number, Posting Status: Approved, PDF Email Status: Unsent, Billing Format: Custom Billing Product, Recurring Billing, Discount %, Discount Amount: \$0.00, Subtotal: \$300.00. Owner: SU, Type: Invoice, Total: \$310.00, Received Amount: \$0.00, Cash Application Adjustment Amount: \$0.00, Credit Memo Applied Amount: \$0.00, Balance: \$310.00, Sales Tax: \$10.00.
- Billing Lines (3):**

BILLING LINE NAME	PRODUCT	QUANTITY	UNIT PRICE
<a href="#">BL-00000</a>	Motion Sensor	1.000000	\$100.000000
<a href="#">BL-00001</a>	Rubber Padding	2.000000	\$100.000000
<a href="#">BL-00006</a>	Tax Rates	1.000000	\$10.000000
- Applied Cash Receipts (0)**
- Amortized Revenue (0)** (New, Post)
- Applied Credit Memos to Invoice (0)**
- Applied Invoices to Credit Memo (0)**

# Modifying the Pre-Built Template

1. Click File - New - Visual Page
2. Name the file anything, for example:  
*BillingProductPDFCustom*



# Modifying the Pre-Built Template

1. Open the sample Visualforce page at the bottom of this page as a starting point:  
<https://support.accountingseed.com/hc/en-us/articles/217193698-Create-a-Custom-PDF-Format>
2. Copy the contents of that file

## Sample Visualforce Pages

We have included text files containing Visualforce Markup for examples of our PDFs.

We updated these with our new modern templates with the Echinacea release, Summer 2018. For previous release versions, please click on the attachments at the bottom of this article.

 [BillingOutstandingStmnt.pdf](#)

80 KB · Download

 [BillingActivityStmntModern.pdf](#)

80 KB · Download

 [BillingServiceModern.pdf](#)

90 KB · Download

 [PurchaseOrderModern.pdf](#)

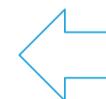
90 KB · Download

 [Sample Visualforce Page for Shipment \(Packing Slip\) PDF.pdf](#)

100 KB · Download

 [BillingProductModern.pdf](#)

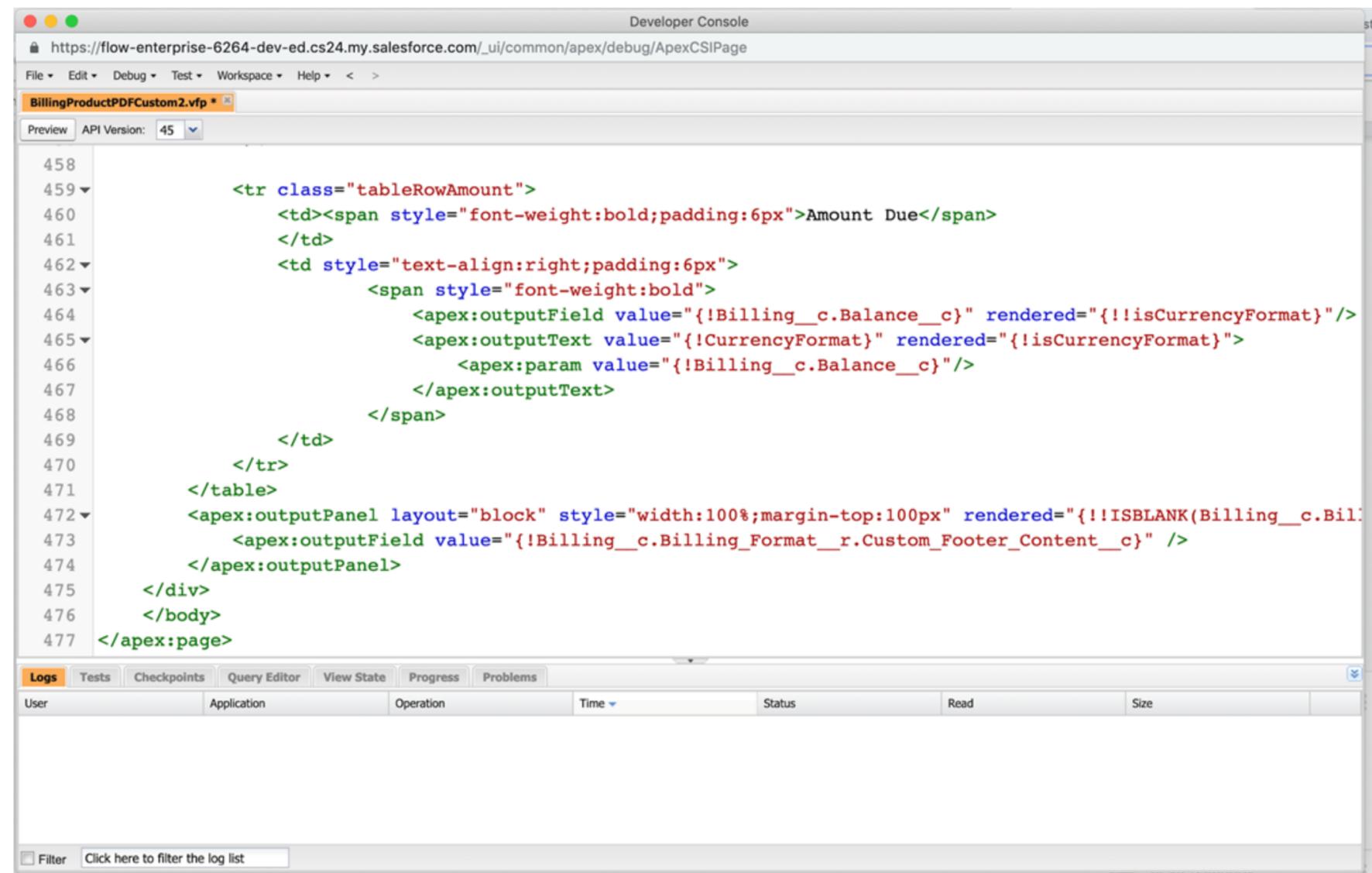
90 KB · Download



*Open this file*

# Modifying the Pre-Built Template

Paste the contents of the file you copied into the new Visualforce page



The screenshot shows a Salesforce Developer Console window with the following code:

```
458
459 <tr class="tableRowAmount">
460 <td><span style="font-weight:bold;padding:6px">Amount Due</span>
461 </td>
462 <td style="text-align:right;padding:6px">
463 <span style="font-weight:bold">
464 <apex:outputField value="{!Billing__c.Balance__c}" rendered="{!!isCurrencyFormat}" />
465 <apex:outputText value="{!CurrencyFormat}" rendered="{!!isCurrencyFormat}">
466 <apex:param value="{!Billing__c.Balance__c}" />
467 </apex:outputText>
468 </span>
469 </td>
470 </tr>
471 </table>
472 <apex:outputPanel layout="block" style="width:100%;margin-top:100px" rendered="{!!ISBLANK(Billing__c.Bil:
473 <apex:outputField value="{!Billing__c.Billing_Format__r.Custom_Footer_Content__c}" />
474 </apex:outputPanel>
475 </div>
476 </body>
477 </apex:page>
```

The interface includes a menu bar (File, Edit, Debug, Test, Workspace, Help), a toolbar (Preview, API Version: 45), and a bottom panel with tabs for Logs, Tests, Checkpoints, Query Editor, View State, Progress, and Problems. The Logs tab is active, showing a table with columns: User, Application, Operation, Time, Status, Read, and Size.

## 1) Remove the *Product Description* and *Comment* columns

```
Developer Console
https://na85.salesforce.com/_ui/common/apex/debug/ApexCSIPage?action=selectExtent&extent=apexpage
BillingProductPDFCustom.vfp
API Version: 45
339 </table>
340 <apex:outputPanel layout="block" style="width:100%;margin-top:30px;margin-bottc
341 <apex:outputText value="{!AcctSeed__Billing__c.AcctSeed__Billing__Comment__c
342 </apex:outputPanel>
343 <table style="width:100%;border-collapse:collapse;">
344 <colgroup span="9"></colgroup>
345 <thead class="rich-table-thead">
346 <tr>
347 <th class="tableHeader" style="width:90px">
348 <apex:outputText value="PRODUCT" />
349 </th>
350 <th class="tableHeader" style="width:150px">
351 <apex:outputText value="PRODUCT DESCRIPTION" />
352 </th>
353 <th class="tableHeader" style="width:120px">
354 <apex:outputText value="COMMENT" />
355 </th>
356 <th class="tableHeader columnHeader" style="width:80px">
357 <apex:outputText value="QUANTITY" />
358 </th>
359 <th class="tableHeader columnHeader" style="width:80px">
360 <apex:outputText value="UNIT PRICE" />
361 </th>
362 <th class="tableHeader columnHeader" style="width:80px">
363 <apex:outputText value="TOTAL" />
364 </th>
365 </tr>
366 </thead>
367 </table>
```

1. Delete lines 350-352 to remove **Product Description** header
2. Delete lines 353-355 to remove **Comment** header

The exact lines might be slightly different on your VF page as we might have updated our VF

# 1) Remove the *Product Description* and *Comment* columns

```
Developer Console
https://na85.salesforce.com/_ui/common/apex/debug/ApexCSIPage?action=selectExtent&extent=apexpage
BillingProductPDFCustom.vfp
API Version: 45
363 <apex:repeat value="{!billLines}" var="item">
364 <tr>
365 <td class="tableRow" style="width:90px">
366 <div class="overflowHidden">
367 <apex:outputField value="{!item.AcctSeed__Product__r.Name}" />
368 </div>
369 </td>
370 <td class="tableRow" style="width:150px;">
371 <div class="overflowHidden">
372 <apex:outputField value="{!item.AcctSeed__Product__r.Description}" />
373 </div>
374 </td>
375 <td class="tableRow" style="width:120px">
376 <div class="overflowHidden">
377 <apex:outputField value="{!item.AcctSeed__Comment__c}" />
378 </div>
379 </td>
380 <td class="tableRow alignRight" style="width:80px">
381 <div class="overflowHidden">
382 <apex:outputField value="{!item.AcctSeed__Hours_Units__c}" rendered="{!!
383 <apex:outputText value="{!NumericFormat}" rendered="{!isNumericFormat}">
384 <apex:param value="{!item.AcctSeed__Hours_Units__c}" />
385 </apex:outputText>
386 </div>
387 </td>
388 <td class="tableRow alignRight" style="width:80px;white-space:nowrap;">
389 <div class="overflowHidden">
390 <apex:outputField value="{!item.AcctSeed__Rate__c}" rendered="{!!isCurre
```

1. Delete lines 370-374 to remove values in **Product Description** column
2. Delete lines 375-379 to remove values in **Comment** column

# 1) Remove the *Product Description* and *Comment* columns

- Lets see how our changes look
- Notice the 2 columns are gone

dev  
US

**Accounting Seed** 

---

**BILL TO:**  
BGE  
9821 Blue Dart Place  
Columbia, MD 21045  
USA

**SHIP TO:**  
BGE  
9821 Blue Dart Place  
Columbia, MD 21045  
USA

Billing Number	00000000
Billing Date	11/30/2018
Billing Due Date	11/30/2018
<b>Amount Due</b>	<b>\$400.00</b>

---

PRODUCT	QUANTITY	UNIT PRICE	TOTAL
GenWatt Diesel 1000kW	1.00	\$100.00	\$100.00
GenWatt Propane 500kW	2.00	\$150.00	\$300.00
<b>Total</b>			<b>\$400.00</b>
Amount Paid			\$ .00
<b>Amount Due</b>			<b>\$400.00</b>

## 2) Add a Custom Field from Billing Line as a column

1. Create a custom text field (let's name it 'Field X') on Billing Line object
2. Add the below markup to the Visualforce page in "thead class" section:

```
333 </table>
334 <apex:outputPanel layout="block" style="width:100%;margin-top:30px;margin-bottom:30px" rendered="{!!ISBL...
335 <apex:outputText value="{!Billing__c.Billing_Comment__c}" />
336 </apex:outputPanel>
337 <table style="width:100%;border-collapse:collapse;">
338 <colgroup span="9"></colgroup>
339 <thead class="rich-table-thead">
340 <tr>
341 <th class="tableHeader" style="width:90px">
342 <apex:outputText value="PRODUCT" />
343 </th>
344 <th class="tableHeader" style="width:90px">
345 <apex:outputText value="FIELD X" />
346 </th>
347 <th class="tableHeader columnHeader" style="width:80px">
348 <apex:outputText value="QUANTITY" />
349 </th>
350 <th class="tableHeader columnHeader" style="width:80px">
351 <apex:outputText value="UNIT PRICE" />
352 </th>
353 <th class="tableHeader columnHeader" style="width:80px">
354 <apex:outputText value="TOTAL" />
355 </th>
356 </tr>
```

1. Make sure you are adding to the **thead** section
2. This markup adds a Column name with our Custom Field's name (Field X)

The exact lines do not need to match. Just make sure you add it after the **PRODUCT**

## 2) Add a Custom Field from Billing Line as a column

```
359 <table style="width:100%;border-collapse:collapse;">
360 <apex:repeat value="{!billLines}" var="item">
361 <tr>
362 <td class="tableRow" style="width:90px">
363 <div class="overflowHidden">
364 <apex:outputField value="{!item.Product__r.Name}" />
365 </div>
366 </td>
367 <td class="tableRow alignRight" style="width:90px">
368 <div class="overflowHidden">
369 <apex:outputField value="{!item.Field_x__c}" />
370 </div>
371 </td>
372 <td class="tableRow alignRight" style="width:80px">
373 <div class="overflowHidden">
374 <apex:outputField value="{!item.Hours_Units__c}" rendered="true">
375 <apex:outputText value="{!NumericFormat}" rendered="{!isNumeric}" />
376 <apex:param value="{!item.Hours_Units__c}" />
377 </apex:outputText>
378 </div>
```

1. Make sure you are adding to the `tableRow` section

2. Insert this markup to show the Custom field as a row

Make sure you add it after the **PRODUCT** so that it corresponds to the column header

## 2) Add a Custom Field from Billing Line as a column

- Populate that field on Billing Lines
- Lets see how our changes look.
- The field X column is added:

The screenshot displays the Accounting Seed interface. At the top left is the logo "Accounting Seed" with a green leaf icon. In the top right corner, the text "dev US" is visible. Below the logo, there are two sections: "BILL TO:" and "SHIP TO:". The "BILL TO:" section lists the address: "BGE, 9821 Blue Dart Place, Columbia, MD 21045, USA". The "SHIP TO:" section lists the same address. To the right of these sections is a table of billing information:

Billing Number	00000000
Billing Date	11/30/2018
Billing Due Date	11/30/2018
<b>Amount Due</b>	<b>\$400.00</b>

A blue arrow points from the "FIELD X" column header in the product table below to the text "The new custom field and its values are displaying".

PRODUCT	FIELD X	QUANTITY	UNIT PRICE	TOTAL
GenWatt Diesel 1000kW	from Billing Line	1.00	\$100.00	\$100.00
GenWatt Propane 500kW	from Billing Line 2	2.00	\$150.00	\$300.00
			<b>Total</b>	<b>\$400.00</b>
			Amount Paid	\$ .00
			<b>Amount Due</b>	<b>\$400.00</b>

### 3) Change logo

1. On your computer, open the Logo file and make it to the size you want it to appear on your Billing.
2. Click on the **PDF format** Tab, open the PDF format you want to change.
3. Click 'Edit'.
4. Click the image button on the 'Image' section to upload the logo.
5. Click 'Save'.

1. PDF Format's Name to use on Billing

3. After you upload the image it shows up here

The screenshot shows the 'PDF Format Edit' interface for 'Default Billing Product Custom'. The interface is divided into two main sections: 'Information' and 'Image'. The 'Information' section contains fields for 'PDF Format Name' (Default Billing Product C), 'Type' (Billing), 'Visualforce PDF Page' (BillingProductPDFCusto), 'Sort Field', 'Default Email Template' (Billing\_Email\_Template), 'ReplyTo Email', and 'Currency' (USD - U.S. Dollar). The 'Image' section contains a toolbar with an 'Image' icon and a preview area showing the 'teknix' logo. A red bar at the top indicates 'Required Information'.

2. Click on 'Image' icon to upload the image you have sized to appropriate size.

### 3) Change logo

#### Q: The logo is too big. What do I do?

A: To resize the Logo, go to the PDF format, where we pasted in the Logo. You would need to either 'Insert' or 'Paste' a smaller logo.

*Note - the logo file must be at most 1MB.*

#### Q: How do I resize the logo?

A: On PC you can use *Microsoft Paint* and on Mac *Preview*.



This is how the new logo shows.

		dev US		
<b>BILL TO:</b> BGE 9821 Blue Dart Place Columbia, MD 21045 USA		Billing Number 00000000 Billing Date 11/30/2018 Billing Due Date 11/30/2018 <b>Amount Due \$400.00</b>		
<b>SHIP TO:</b> BGE 9821 Blue Dart Place Columbia, MD 21045 USA				
<b>PRODUCT</b>	<b>FIELD X</b>	<b>QUANTITY</b>	<b>UNIT PRICE</b>	<b>TOTAL</b>
GenWatt Diesel 1000kW	from Billing Line	1.00	\$100.00	\$100.00
GenWatt Propane 500kW	from Billing Line 2	2.00	\$150.00	\$300.00
			<b>Total</b>	<b>\$400.00</b>
			Amount Paid	\$ .00
			<b>Amount Due</b>	<b>\$400.00</b>

#### 4) Change background color in 'Amount Due' box

dev  
US



---

**BILL TO:**  
BGE  
9821 Blue Dart Place  
Columbia, MD 21045  
USA

---

**SHIP TO:**  
BGE  
9821 Blue Dart Place  
Columbia, MD 21045  
USA

---

Billing Number	00000000
Billing Date	11/30/2018
Billing Due Date	11/30/2018
<b>Amount Due</b>	<b>\$400.00</b>

---

PRODUCT	FIELD X	QUANTITY	UNIT PRICE	TOTAL
GenWatt Diesel 1000kW	from Billing Line	1.00	\$100.00	\$100.00
GenWatt Propane 500kW	from Billing Line 2	2.00	\$150.00	\$300.00
			<b>Total</b>	<b>\$400.00</b>
			Amount Paid	\$ .00
			<b>Amount Due</b>	<b>\$400.00</b>



You want to use your corporate theme colors instead of the blue.

#### 4) Change background color in 'Amount Due' box

```
BillingProductPDFCustom.vfp
Preview API Version: 45
55 }
56 .columnHeader {
57     text-align: right;
58 }
59 .tableRow {
60     border-bottom: 1px solid #002b66;
61     padding: 6px;
62     vertical-align: text-top;
63 }
64 .topLine {
65     border-top: 1px solid #002b66;
66 }
67 .tableRowAmount {
68     background-color: #002b66;
69     color: white;
70 }
71 .tableRowAdress {
72     color: #002b66;
73 }
74 .alignRight {
75     text-align: right;
76 }
77 .overflowHidden {
78     width: 100%;
79     overflow: hidden;
80 }
81 </style>
82 </head>
83
84 <body>
85 <div class="headerFirst">
86 <table style="width: 100%">
87 <tr>
88 <td style="vertical-align: top; text-align: right;">
```

1. Enter your corporate HEX color in line 68, or under *.tableRowAmount*
2. To change the color of the text 'Amount Due' replace the word **white** with your corporate HEX color (i.e. #FBE5B0)

You can find HEX color codes from site such as this one:  
<https://www.color-hex.com/>

#### 4) Change background color in 'Amount Due' box

Fort Worth  
US

**teknix**

---

**BILL TO:**  
Alpha Communications  
410 South Union Ave  
Grand Rapids, MI 49856  
USA

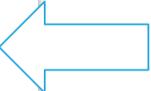
**SHIP TO:**  
Alpha Communications  
410 South Union Ave  
Grand Rapids, MI 49856  
USA

Billing Number	00000000
Billing Date	2/11/2019
Billing Due Date	2/11/2019
<b>Amount Due</b>	<b>\$310.00</b>

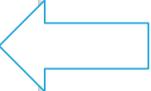
---

PRODUCT	QUANTITY	UNIT PRICE	TOTAL
Motion Sensor	1.00	\$100.00	\$100.00
Rubber Padding	2.00	\$100.00	\$200.00
Tax Rates	1.00	\$10.00	\$10.00

**Total** **\$310.00**  
Amount Paid \$0.00  
**Amount Due** **\$310.00**



Beautiful billing, right?



Notice that the colors conveniently changed here as well

## 5) Remove 'Tax Rates' as a line below Products

```
Developer Console
https://na85.salesforce.com/_ui/common/apex/debug/ApexCSIPage
BillingProductPDFCustom.vfp
API Version: 45
357         <apex:outputText value="TOTAL" />
358     </th>
359 </tr>
360 </thead>
361 </table>
362 <table style="width:100%;border-collapse:collapse;">
363     <apex:repeat value="{!billLines}" var="item">
364         <apex:outputText rendered="{!item.AcctSeed__Product__r.AcctSeed__Accounting_Type__c != 'Tax Rate'}">
365     <tr>
366         <td class="tableRow" style="width:90px">
367             <div class="overflowHidden">
368                 <apex:outputField value="{!item.AcctSeed__Product__r.Name}" />
369             </div>
370         </td>
371         <td class="tableRow alignRight" style="width:80px">
372             <div class="overflowHidden">
373                 <apex:outputField value="{!item.AcctSeed__Hours_Units__c}" rendered="{!!isNumericFormat}" />
374                 <apex:outputText value="{!NumericFormat}" rendered="{!isNumericFormat}" />
375             </div>
376         </td>
377     </tr>
378 </table>
```

1. Right after <apex:repeat...> add this markup:  
<apex:outputText rendered="{!item.AcctSeed\_\_Product\_\_r.AcctSeed\_\_Accounting\_Type\_\_c != 'Tax Rate'}">

```
394     </td>
395     <td class="tableRow alignRight" style="width:80px">
396         <div class="overflowHidden">
397             <apex:outputField value="{!item.AcctSeed__Total__c}" rendered="{!!isCurrencyFormat}" />
398             <apex:outputText value="{!CurrencyFormat}" rendered="{!!isCurrencyFormat}" />
399             <apex:param value="{!item.AcctSeed__Total__c}" />
400         </apex:outputText>
401         </div>
402     </td>
403 </tr>
404 </apex:repeat>
405 </table>
406 <br/>
```

2. In the line right before </apex:repeat> (~line 404) add this  
</apex:outputText>

## 5) Remove 'Tax Rates' as a line below Products

Fort Worth  
US



---

**BILL TO:**  
Alpha Communications  
410 South Union Ave  
Grand Rapids, MI 49856  
USA

**SHIP TO:**  
Alpha Communications  
410 South Union Ave  
Grand Rapids, MI 49856  
USA

Billing Number	00000000
Billing Date	2/11/2019
Billing Due Date	2/11/2019
<b>Amount Due</b>	<b>\$310.00</b>

---

PRODUCT	QUANTITY	UNIT PRICE	TOTAL
Motion Sensor	1.00	\$100.00	\$100.00
Rubber Padding	2.00	\$100.00	\$200.00
<b>Total</b>			<b>\$310.00</b>
Amount Paid			\$ .00
<b>Amount Due</b>			<b>\$310.00</b>

Notice the Tax Rate line is gone! Poof!

## 6) Show Subtotal

Here are the steps to accomplish this change:

1. Create a currency formula field on Billing Object called 'Subtotal' (Subtotal\_\_c)
  - a. The formula should: Subtract the Sales Tax from Total, as shown below

`AcctSeed__Total__c - AcctSeed__Sales_Tax2__c`

2. `<tr>`

```
<td style="padding:6px">Subtotal</td>
```

```
<td style="text-align:right;padding:6px">
```

```
<apex:outputField value="{!AcctSeed__Billing__c.Subtotal__c }"/>
```

```
</td>
```

```
</tr>
```

You can add this field to  
Billing Object's page  
layout

Here is how the markup would look with our changes

```
408 <table style="width:200px;border-collapse:collapse;float:right">
409
410 <tr>
411 <td style="padding:6px">Subtotal</td>
412 <td style="text-align:right;padding:6px">
413 <apex:outputField value="{!AcctSeed__Billing__c.Subtotal__c }"/>
414 </td>
415 </tr>
416 <tr>
417 <td style="padding:6px"><span style="font-weight:bold"><apex:outputText value="{!$ObjectType.AcctSeed__Billing__c.Fields.AcctSeed__
418 </td>
419 <td style="text-align:right;padding:6px">
420 <span style="font-weight:bold">
421 <apex:outputField value="{!AcctSeed__Billing__c.AcctSeed__Total__c}" rendered="{!!isCurrencyFormat}"/>
422 <apex:outputText value="{!CurrencyFormat}" rendered="{!!isCurrencyFormat}">
423 <apex:param value="{!AcctSeed__Billing__c.AcctSeed__Total__c}"/>
424 </apex:outputText>
425 </span>
426 </td>
427 </tr>
428 <tr>
429 <td style="padding:6px">Amount Paid</td>
430 <td style="text-align:right;padding:6px">
431 <apex:outputField value="{!billBalance.AcctSeed__Credit_Memo_Applied_Amount__c}" rendered="{!!isCurrencyFormat}"/>
432 <apex:outputText value="{!CurrencyFormat}" rendered="{!!isCurrencyFormat}">
433 <apex:param value="{!billBalance.AcctSeed__Credit_Memo_Applied_Amount__c}"/>
```

## 6) Show Subtotal

		Fort Worth US	
<b>BILL TO:</b>		Billing Number	00000000
Alpha Communications 410 South Union Ave Grand Rapids, MI 49856 USA		Billing Date	2/11/2019
		Billing Due Date	2/11/2019
		<b>Amount Due</b>	<b>\$310.00</b>
<b>SHIP TO:</b>			
Alpha Communications 410 South Union Ave Grand Rapids, MI 49856 USA			
<b>PRODUCT</b>	<b>QUANTITY</b>	<b>UNIT PRICE</b>	<b>TOTAL</b>
Motion Sensor	1.00	\$100.00	\$100.00
Rubber Padding	2.00	\$100.00	\$200.00
		Subtotal	\$300.00
		<b>Total</b>	<b>\$310.00</b>
		Amount Paid	\$ .00
		<b>Amount Due</b>	<b>\$310.00</b>



The Subtotal line is here!

## 7) Show 'Sales Tax' right after Subtotal

```
<tr>
  <td style="padding:6px">Subtotal</td>
  <td style="text-align:right;padding:6px">
    <apex:outputField value="{!AcctSeed__Billing__c.Subtotal__c }"/>
  </td>
</tr>
<tr>
  <td style="padding:6px">Sales Tax</td>
  <td style="text-align:right;padding:6px">
    <apex:outputField value="{!AcctSeed__Billing__c.AcctSeed__Sales_Tax2__c }"/>
  </td>
</tr>
<tr>
  <td style="padding:6px"><span style="font-weight:bold"><apex:outputText value="{!$Objec
</td>
  <td style="text-align:right;padding:6px">
    <span style="font-weight:bold">
      <apex:outputField value="{!AcctSeed__Billing__c.AcctSeed__Total__c}" render
      <apex:outputText value="{!CurrencyFormat}" rendered="{!isCurrencyFormat}">
        <apex:param value="{!AcctSeed__Billing__c.AcctSeed__Total__c}"/>
      </apex:outputText>
    </span>
  </td>
```

Add this markup right after Subtotal section:

```
<tr>
  <td style="padding:6px">Sales Tax</td>
  <td style="text-align:right;padding:6px">
    <apex:outputField
value="{!AcctSeed__Billing__c.AcctSeed__Sales_Tax2
__c }"/>
  </td>
</tr>
```

## 7) Show 'Sales Tax' right after Subtotal

Fort Worth  
US



---

**BILL TO:**  
Alpha Communications  
410 South Union Ave  
Grand Rapids, MI 49856  
USA

**SHIPPING TO:**  
Alpha Communications  
410 South Union Ave  
Grand Rapids, MI 49856  
USA

Billing Number	00000000
Billing Date	2/11/2019
Billing Due Date	2/11/2019
<b>Amount Due</b>	<b>\$310.00</b>

---

PRODUCT	QUANTITY	UNIT PRICE	TOTAL
Motion Sensor	1.00	\$100.00	\$100.00
Rubber Padding	2.00	\$100.00	\$200.00

Subtotal	\$300.00
Sales Tax	\$10.00
<b>Total</b>	<b>\$310.00</b>
Amount Paid	\$0.00
<b>Amount Due</b>	<b>\$310.00</b>



Notice the Sales Tax line is here!  
Well done!!!

## 8) Show 'Credit Memo Applied' right after Subtotal

1. Apply the change in this image

```
5 <tr>
6     <td style="padding:6px">Amount Paid</td>
7     <td style="text-align:right;padding:6px">
8         <apex:outputField value="{!billBalance.AcctSeed__Credit_Memo_Applied_Amount__c}" rendered="{!!isCurrencyFormat}" />
9         <apex:outputText value="{!CurrencyFormat}" rendered="{!!isCurrencyFormat}">
10             <apex:param value="{!billBalance.AcctSeed__Credit_Memo_Applied_Amount__c}" />
11         </apex:outputText>
12     </td>
13 </tr>
```

2. Insert the below markup right after the above 'Credit Applied Amount'

```
<tr>
  <td style="padding:6px">Amount Paid</td>
  <td style="text-align:right;padding:6px">
    <apex:outputField value="{!billBalance.AcctSeed__Received_Amount__c}"
rendered="{!!isCurrencyFormat}" />
    <apex:outputText value="{!CurrencyFormat}" rendered="{!!isCurrencyFormat}">
      <apex:param value="{!billBalance.AcctSeed__Received_Amount__c}" />
    </apex:outputText>
  </td>
</tr>
```

Here is how the markup would look with our changes

```
428 <tr>
429   <td style="padding:6px">Credit Applied Amount</td>
430   <td style="text-align:right;padding:6px">
431     <apex:outputField value="{!billBalance.AcctSeed_Credit_Memo_Applied_Amount_c}" rendered="{!!isCurrencyFormat}"/>
432     <apex:outputText value="{!CurrencyFormat}" rendered="{!!isCurrencyFormat}">
433       <apex:param value="{!billBalance.AcctSeed_Credit_Memo_Applied_Amount_c}"/>
434     </apex:outputText>
435   </td>
436 </tr>
437
438 <tr>
439   <td style="padding:6px">Amount Paid</td>
440   <td style="text-align:right;padding:6px">
441     <apex:outputField value="{!billBalance.AcctSeed_Received_Amount_c}" rendered="{!!isCurrencyFormat}"/>
442     <apex:outputText value="{!CurrencyFormat}" rendered="{!!isCurrencyFormat}">
443       <apex:param value="{!billBalance.AcctSeed_Received_Amount_c}"/>
444     </apex:outputText>
445   </td>
446 </tr>
447
448 <tr class="tableRowAmount">
449   <td><span style="font-weight:bold;padding:6px">Amount Due</span>
450 </td>
451   <td style="text-align:right;padding:6px">
452     <span style="font-weight:bold">
453       <apex:outputField value="{!AcctSeed_Billing_c.AcctSeed_Balance_c}" rendered="{!!isCurrencyFormat}"/>
454       <apex:outputText value="{!CurrencyFormat}" rendered="{!!isCurrencyFormat}">
455         <apex:param value="{!AcctSeed_Billing_c.AcctSeed_Balance_c}"/>
456       </apex:outputText>
```

← Change 1

↓ Change 2

## 8) Show 'Credit Memo Applied' right after Subtotal

		Fort Worth US	
<b>BILL TO:</b>		Billing Number	00000000
Alpha Communications 410 South Union Ave Grand Rapids, MI 49856 USA		Billing Date	2/11/2019
		Billing Due Date	2/11/2019
		<b>Amount Due</b>	<b>\$310.00</b>
<b>SHIP TO:</b>			
Alpha Communications 410 South Union Ave Grand Rapids, MI 49856 USA			
PRODUCT	QUANTITY	UNIT PRICE	TOTAL
Motion Sensor	1.00	\$100.00	\$100.00
Rubber Padding	2.00	\$100.00	\$200.00
		Subtotal	\$300.00
		Sales Tax	\$10.00
		<b>Total</b>	<b>\$310.00</b>
		Credit Applied Amount	\$0.00
		Amount Paid	\$0.00
		<b>Amount Due</b>	<b>\$310.00</b>



We have split out Credit Applied Amount & Amount Paid