

Payments Configuration

- [The Invoice Template](#)
- [Deposit Options](#)
- [Taxes](#)







The Invoice Template

Editing the template

To access the template, go to the **System Config** menu and click on **Email Templates**.

The screen will refresh with a list of possible templates to edit. In our case, we want to click on the **Edit** button for **Permit Invoice** to access the template.

Email Templates

Title		Type	Language	Subject	Notes
Appeal Submitted by User		Appeal Submitted	English	Appeal Submitted	Appeal submitted by user
Incident Report		Incident Report	English	Incident Report [INCIDENTNO]	Not used at this time.
Lost Password		Lost Password	English	Your Password	The lost my password email
Permit Invoice		Permit Invoice	English	Invoice is ready: [invoice account="name"]	Send emailed invoices to companies that have outstanding permits.
User Receipt		User Receipt	English	Payment Request Received	The receipt the user receives after a payment has been submitted.
Waitlist Selected		Selected From Waiting List	English	Your Permit Is Ready [waitlist show="fullname"]	The notification to the user that the admin has either selected them from the waitlist to receive a permit, or extended the time they have to pay for a permit before picking someone else.

The screen will refresh with the complete Template form as seen below.

Edit Email Template

[Return to Template List](#)

Send emailed invoices to companies that have outstanding permits.

Label

Permit Invoice

Type

Permit Invoice

Language

English

Français

Layout

Default Layout

Subject

Invoice is ready: [invoice account="name"]

HTML Content

This email uses special tokens that are replaced when sent. The tokens available for this email template include:

- [invoice account="number"] The account number for the company.
- [invoice account="name"] The account name for the company.
- [invoice account="fulladdress"] The full address for the company.
- [invoice account="invoice_comments"] The invoice comment value that is editable for companies only. Any line breaks will be preserved.
- [invoice show="invoiceno"] Invoice Number.
- [invoice show="duedate"] Invoice due date.
- [invoice show="billdate"] Invoice bill date.
- [invoice show="subtotal"] Subtotal of all items before tax.
- [invoice show="taxtotal"] Total amount of tax.
- [invoice show="amounttotal"] The total sum amount for all outstanding permits for this invoice.
- [invoice show="counttotal"] The total number of permits for the selected sales window.
- [invoice show="details"] The list of permits, cost and who has the permit.

File Edit Insert View Format Table Tools

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Link Image Code Help

92 Bridge Street
Carleton Place, Ontario



Invoice

Bill To: [invoice account="fulladdress"]
Account Number: [invoice account="number"]

Invoice No.: [invoice show="invoiceno"]
Date: [invoice show="billdate"]
Due Date: [invoice show="duedate"]

[invoice show="details"]

Subtotal	[\$[invoice show="subtotal"]]
Taxes	[\$[invoice show="taxtotal"]]
Total	[\$[invoice show="amounttotal"]]

Balance Due \$[invoice show="amounttotal"]

This is a test of the text block at the bottom of the page:
[invoice account="invoice_comments"]

Powered by TinyMCE

table » tbody » tr » td » p

Words: 86

Text Content

Save Email Template

The form contains 4 areas:

At the top, **Meta Data** for this specific template.

On the left, a list of possible **Short Codes** that can be used on this template form.

On the right, the actual **Template**.

At the bottom, a **Text Content field** (This field can be configured for a plain text version of the

Meta Data

Label - Enter a name for this Template.

Type - This field auto fills.

Language - Choose the language of the template.

Layout - Choose default layout.

Subject - This text will appear as the Email Subject. Note that the use of short code is permitted in this field. In this case, we are calling up the account name for the company being invoiced.

Short Code List

The template allows the use of special tokens, or short codes, to pull information from the database to appear on the invoice when sent.

These include:

[invoice account="number"] The account number for the company.

[invoice account="name"] The account name for the company.

[invoice account="fulladdress"] The full address for the company.

[invoice account="invoice_comments"] The invoice comment value that is editable for companies only. Any line breaks will be preserved.

[invoice show="invoiceno"] Invoice Number.

[invoice show="duedate"] Invoice due date.

[invoice show="billdate"] Invoice bill date.

[invoice show="subtotal"] Subtotal of all items before tax.

[invoice show="taxtotal"] Total amount of tax.

[invoice show="amounttotal"] The total sum amount for all outstanding permits for this invoice.

[invoice show="counttotal"] The total number of permits for the selected sales window.

[invoice show="details"] The list of permits, cost and who has the permit.

HTML Content

This email uses special tokens that are replaced when sent. The tokens available for this email template include:

[invoice account="number"] The account number for the company.

[invoice account="name"] The account name for the company.

[invoice account="fulladdress"] The full address for the company.

[invoice account="invoice_comments"] The invoice comment value that is editable for companies only. Any line breaks will be preserved.

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[invoice show="details"] The list of permits, cost and who has the permit.

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92 Bridge Street
Carleton Place, Ontario



TOMAHAWK UNIVERSITY
Home of the OPS-COM demo
Tomahawk University Parking

Invoice

Bill To:	[invoice account="fulladdress"] Account Number: [invoice account="number"]	Invoice No.:	[invoice show="invoiceno"]
		Date:	[invoice show="billdate"]
		Due Date:	[invoice show="duedate"]

[invoice show="details"]

Subtotal	\$[invoice show="subtotal"]
Taxes	\$[invoice show="taxtotal"]
Total	\$[invoice show="amounttotal"]

Balance Due
\$[invoice show="amounttotal"]

This is a test of the text block at the bottom of the page:

[invoice account="invoice_comments"]

These tokens can be placed anywhere on the template and will pull data from the system, similar to a mail merge functionality.

For example, in the **Bill To:** area, the system will retrieve the **Full Address of the Company** as well as the **Company Account Number** using these two short code tokens:

[invoice account="fulladdress"] The full address for the company.

[invoice account="number"] The account number for the company.

HTML Content

This email uses special tokens that are replaced when sent. The tokens available for this email template include:

[invoice account="number"] The account number for the company.

[invoice account="name"] The account name for the company.

[invoice account="fulladdress"] The full address for the company.

[invoice account="invoice_comments"] The invoice comment value that is editable for companies only. Any line breaks will be preserved.

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[invoice show="duedate"] Invoice due date.

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[invoice show="amounttotal"] The total sum amount for all outstanding permits for this invoice.

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[invoice show="details"] The list of permits, cost and who has the permit.

File Edit Insert View Format Table Tools

92 Bridge Street
Carleton Place, Ontario

Invoice

TOMAHAWK UNIVERSITY
Home of the OPS-COM demo
Tomahawk University Parking

Bill To: [invoice account="fulladdress"]
Account Number: [invoice account="number"]

Invoice No.: [invoice show="invoiceno"]
Date: [invoice show="billdate"]
Due Date: [invoice show="duedate"]

[invoice show="details"]

Subtotal	[\$[invoice show="subtotal"]]
Taxes	[\$[invoice show="taxtotal"]]
Total	[\$[invoice show="amounttotal"]]

Balance Due \$[invoice show="amounttotal"]

This is a test of the text block at the bottom of the page:

[invoice account="invoice_comments"]

The Template

There are a number of areas on the template that can be edited by the admin. To add branding to the template there are two areas that will be of concern.

The Company Logo Field:

This is where you would place your company logo. Using a .JPEG or .PNG file format is recommended.

HTML Content

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[invoice account="name"] The account name for the company.

[invoice account="fulladdress"] The full address for the company.

[invoice account="invoice_comments"] The invoice comment value that is editable for companies only. Any line breaks will be preserved.

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[invoice show="duedate"] Invoice due date.

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[invoice show="subtotal"] Subtotal of all items before tax.

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[invoice show="details"] The list of permits, cost and who has the permit.

File Edit Insert View Format Table Tools

92 Bridge Street
Carleton Place, Ontario

Invoice

Bill To: [invoice account="fulladdress"]
Account Number: [invoice account="number"]

Invoice No.: [invoice show="invoiceno"]
Date: [invoice show="billdate"]
Due Date: [invoice show="duedate"]

[invoice show="details"]

Subtotal	[\$[invoice show="subtotal"]]
Taxes	[\$[invoice show="taxtotal"]]
Total	[\$[invoice show="amounttotal"]]

Balance Due \$[invoice show="amounttotal"]

This is a test of the text block at the bottom of the page:

[invoice account="invoice_comments"]

Your Company Address:

Enter your company address here.

HTML Content

This email uses special tokens that are replaced when sent. The tokens available for this email template include:

[invoice account="number"] The account number for the company.

[invoice account="name"] The account name for the company.

[invoice account="fulladdress"] The full address for the company.

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[invoice show="details"] The list of permits, cost and who has the permit.

File Edit Insert View Format Table Tools

92 Bridge Street
Carleton Place, Ontario

Invoice

Bill To: [invoice account="fulladdress"]
Account Number: [invoice account="number"]

Invoice No.: [invoice show="invoiceno"]
Date: [invoice show="billdate"]
Due Date: [invoice show="duedate"]

[invoice show="details"]

Subtotal	[\$[invoice show="subtotal"]]
Taxes	[\$[invoice show="taxtotal"]]
Total	[\$[invoice show="amounttotal"]]

Balance Due \$[invoice show="amounttotal"]

This is a test of the text block at the bottom of the page:

[invoice account="invoice_comments"]

Invoice Identification:

In this section use short code to pull in the **Invoice Number, Billing Date, and Due Date.**

HTML Content

This email uses special tokens that are replaced when sent. The tokens available for this email template include:

[invoice account="number"] The account number for the company.

[invoice account="name"] The account name for the company.

[invoice account="fulladdress"] The full address for the company.

[invoice account="invoice_comments"] The invoice comment value that is editable for companies only. Any line breaks will be preserved.

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[invoice show="details"] The list of permits, cost and who has the permit.

File Edit Insert View Format Table Tools

92 Bridge Street
Carleton Place, Ontario

Invoice

TOMAHAWK UNIVERSITY
Home of the OPS-COM demo
Tomahawk University Parking

Bill To: [invoice account="fulladdress"]
Account Number: [invoice account="number"]

Invoice No.: [invoice show="invoiceno"]
Date: [invoice show="billdate"]
Due Date: [invoice show="duedate"]

[invoice show="details"]

Subtotal	[\$[invoice show="subtotal"]]
Taxes	[\$[invoice show="taxtotal"]]
Total	[\$[invoice show="amounttotal"]]

Balance Due \$[invoice show="amounttotal"]

This is a test of the text block at the bottom of the page:

[invoice account="invoice_comments"]

Invoice Details:

The short code **[invoice show="details"]** pulls in the list of permits that will appear on the Invoice. (See a sample of the Invoice below)

These include:

Parker's Name

Item type being Paid for (Permit, Access card, etc.)

Item number (Permit Number)

Sales Window

Lot Name

Quantity

Cost

HTML Content

This email uses special tokens that are replaced when sent. The tokens available for this email template include:

[invoice account="number"] The account number for the company.

[invoice account="name"] The account name for the company.

[invoice account="fulladdress"] The full address for the company.

[invoice account="invoice_comments"] The invoice comment value that is editable for companies only. Any line breaks will be preserved.

[invoice show="invoiceno"] Invoice Number.

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[invoice show="amounttotal"] The total sum amount for all outstanding permits for this invoice.


[invoice show="counttotal"] The total number of permits for the selected sales window.

[invoice show="details"] The list of permits, cost and who has the permit.

File Edit Insert View Format Table Tools

Back Forward Add Formats Bold Italic Underline Link Image Code Help

92 Bridge Street
Carleton Place, Ontario


TOMAHAWK UNIVERSITY
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Tomahawk University Parking

Invoice

Bill To:	[invoice account="fulladdress"] Account Number: [invoice account="number"]	Invoice No.:	[invoice show="invoiceno"]
		Date:	[invoice show="billdate"]
		Due Date:	[invoice show="duedate"]

[invoice show="details"]

Subtotal	\$([invoice show="subtotal"])
Taxes	\$([invoice show="taxtotal"])
Total	\$([invoice show="amounttotal"])

Balance Due \$[invoice show="amounttotal"]

This is a test of the text block at the bottom of the page:

[invoice account="invoice_comments"]

Payment Information (Billing Cost):

In this section use short code to pull in the billing information such as **Subtotal**, **Calculated Taxes**, and **Total Billing Amount**.

HTML Content

This email uses special tokens that are replaced when sent. The tokens available for this email template include:

[invoice account="number"] The account number for the company.

[invoice account="name"] The account name for the company.

[invoice account="fulladdress"] The full address for the company.

[invoice account="invoice_comments"] The invoice comment value that is editable for companies only. Any line breaks will be preserved.

[invoice show="invoiceno"] Invoice Number.

[invoice show="duedate"] Invoice due date.

[invoice show="billdate"] Invoice bill date.

[invoice show="subtotal"] Subtotal of all items before tax.

[invoice show="taxtotal"] Total amount of tax.

[invoice show="amounttotal"] The total sum amount for all outstanding permits for this invoice.

[invoice show="counttotal"] The total number of permits for the selected sales window.

[invoice show="details"] The list of permits, cost and who has the permit.

File Edit Insert View Format Table Tools

92 Bridge Street
Carleton Place, Ontario

TOMAHAWK UNIVERSITY
Home of the OPS-COM demo
Tomahawk University Parking

Invoice

Bill To: [invoice account="fulladdress"]
Account Number: [invoice account="number"]

Invoice No.: [invoice show="invoiceno"]
Date: [invoice show="billdate"]
Due Date: [invoice show="duedate"]

[invoice show="details"]

Subtotal	[\$[invoice show="subtotal"]]
Taxes	[\$[invoice show="taxtotal"]]
Total	[\$[invoice show="amounttotal"]]

Balance Due \$[invoice show="amounttotal"]

This is a test of the text block at the bottom of the page:

[invoice account="invoice_comments"]

You may also wish to add comments to the invoice. Comments can be added in the company configuration.

Company Edit [Back](#)

3 Users associated to this company. [View Users](#)

Account Number 197102

Account Name Jones Windows

☒ **Receives Invoice**

Invoice Emails joneswindows@jw.com

Invoice Comments Sample Invoice Comment

Address 123 Clearview Lane
Line 2
Line 3

City Perth

The Email with PDF attached:

Here is a sample of what the resulting email would look like. There is also a .PDF version of this invoice attached to the email.



Invoice

Bill To:

Shannon Jones
123 Clearview Lane
Perth, ON
K7H 3C8
Account Number: 197102

Invoice No.:
Date:
Due Date:

1024
10/22/2019
11/21/2019

Name	Item	Item Details	
Jason Barnes	Permit	109 Window: Test Annual	Lot: RED-STU
Julie Parsons	Permit	108 Window: Test Annual	Lot: RED-STU

Quantity	Rate	Amount	Tax
1	\$525.00	\$525.00	Tax
1	\$525.00	\$525.00	Tax

Subtotal	\$1,050.00
Taxes	\$136.50
Total	\$1,186.50

Balance Due \$1,186.50

This is a test of the text block at the bottom of the page:

This is a test of the comment feature.

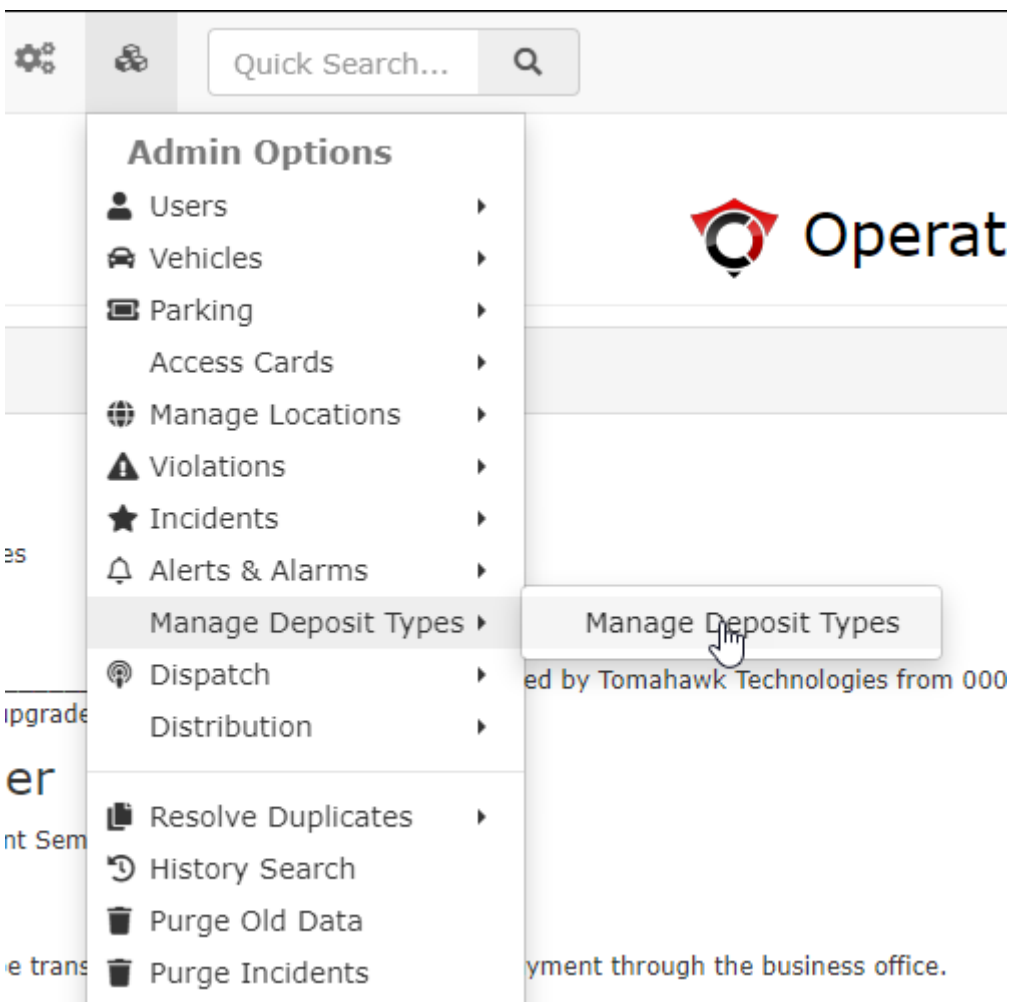
Deposit Options

Navigating to Deposits

To get to the Manage Deposits page:

- Select the **Admin Options** icon
- Select the **Manage Deposit Types** option
- Select **Manage Deposit Type** from the drop-down menu

(Currently, this menu item cannot be accessed from any pages that are still in **Beta**.)



This will take you to the **Manage Deposits** page.

Manage Deposit Types ?





☐ Toggle Archived

Add Deposit Type


Label	Assignable Text	Flags	Amount	
Lock Deposit	lock model May09	Can Edit Label	\$20.00	1 record. <div>Edit</div>
Permit Deposit			\$50.00	<div>Delete</div> <div>Edit</div>

Creating New Deposits

On the **Manage Deposits** screen, new deposit types can be added by clicking **Add Deposit Type**.



Quick Search



Manage Deposit Types ?

☐ Toggle Archived

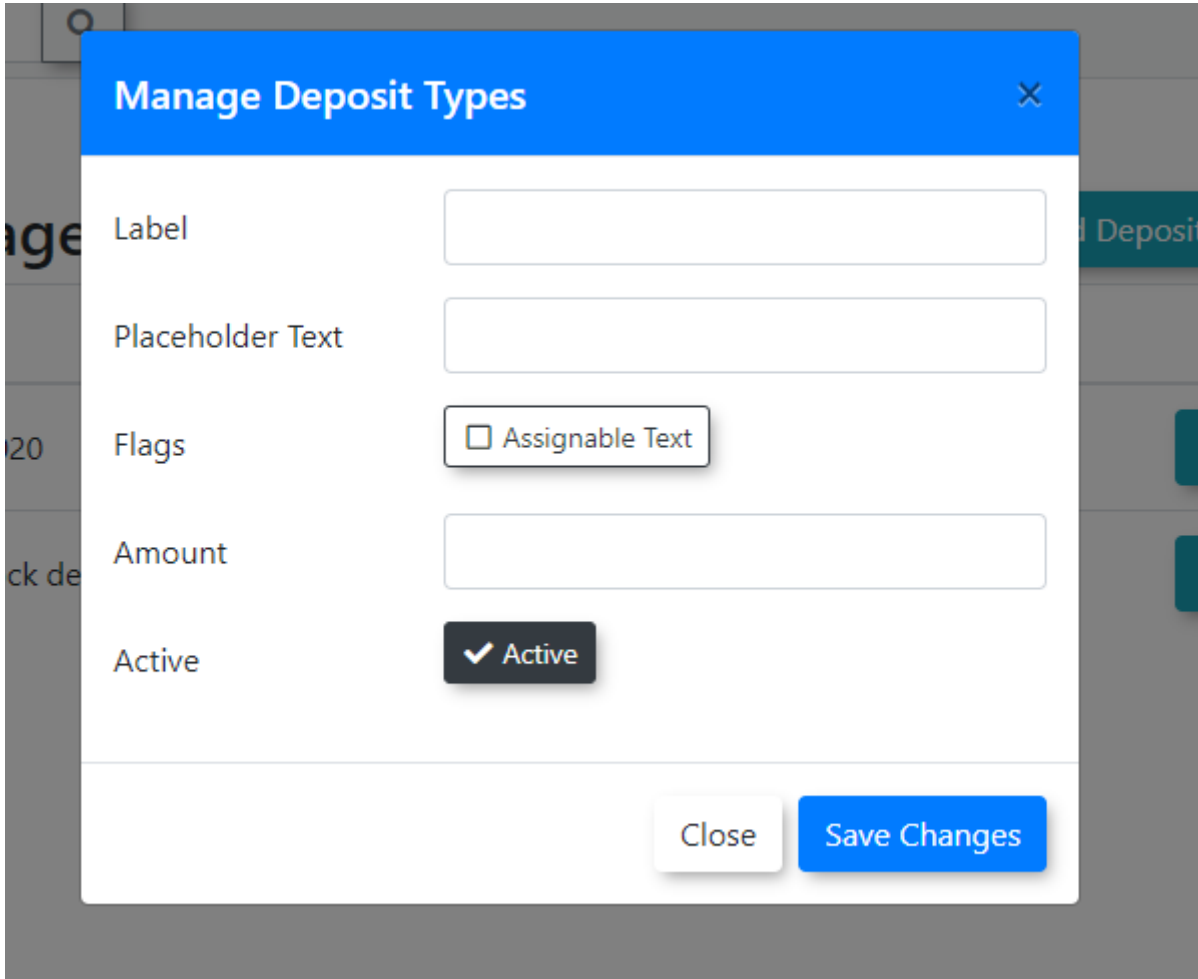
Add Deposit Type

Label	Assignable Text	Flags	Amount	
Lock Deposit	lock model May09	Can Edit Label	\$20.00	1 record. <div>Edit</div>
Permit Deposit			\$50.00	<div>Delete</div> <div>Edit</div>

Fill out the information as needed and click **Save Changes**.

Below are descriptions of the different fields, but are not all required:

- **Label** - The name that will be used to identify the deposit type.
- **Placeholder Text** - This field is optional. The prompt or sample information that will appear in the deposit information text.
- **Flags** - Toggles the ability to edit the **Assignable Text** field in the resulting active deposit record. This will appear in the user's profile. (See below)
- **Deposit Amount** - The amount the deposit will cost.

A screenshot of a 'Manage Deposit Types' dialog box. The dialog has a blue header with the title 'Manage Deposit Types' and a close button (X). Below the header, there are five fields: 'Label' (text input), 'Placeholder Text' (text input), 'Flags' (checkbox labeled 'Assignable Text'), 'Amount' (text input), and 'Active' (checkbox labeled 'Active'). At the bottom right, there are two buttons: 'Close' and 'Save Changes'.

Editing Existing Deposits

Click **Edit** to make changes to existing deposits.

Make any changes needed, then press **Save Changes** when finished.

Manage Deposit Types ?

☐ Toggle Archived

Add Deposit Type

Label	Assignable Text	Flags	Amount	
Lock Deposit	lock model May09	Can Edit Label	\$20.00	1 record. <div>Edit</div>
Permit Deposit			\$50.00	<div>Delete</div> <div>Edit</div>

See the information under **Creating New Deposits** in this article for more information on what the individual fields are used for.

Finding Deposit Usage

A list of all deposits that have been setup and those currently in use can be viewed from the **Manage Deposits** page.

A deposit can only be deleted if it is not currently being used anywhere in the system.

Once a deposit has been assigned or used in the system, the option to delete it will no longer be available and will instead be replaced by a count of its usage.

Manage Deposit Types ?







☐ Toggle Archived

Add Deposit Type

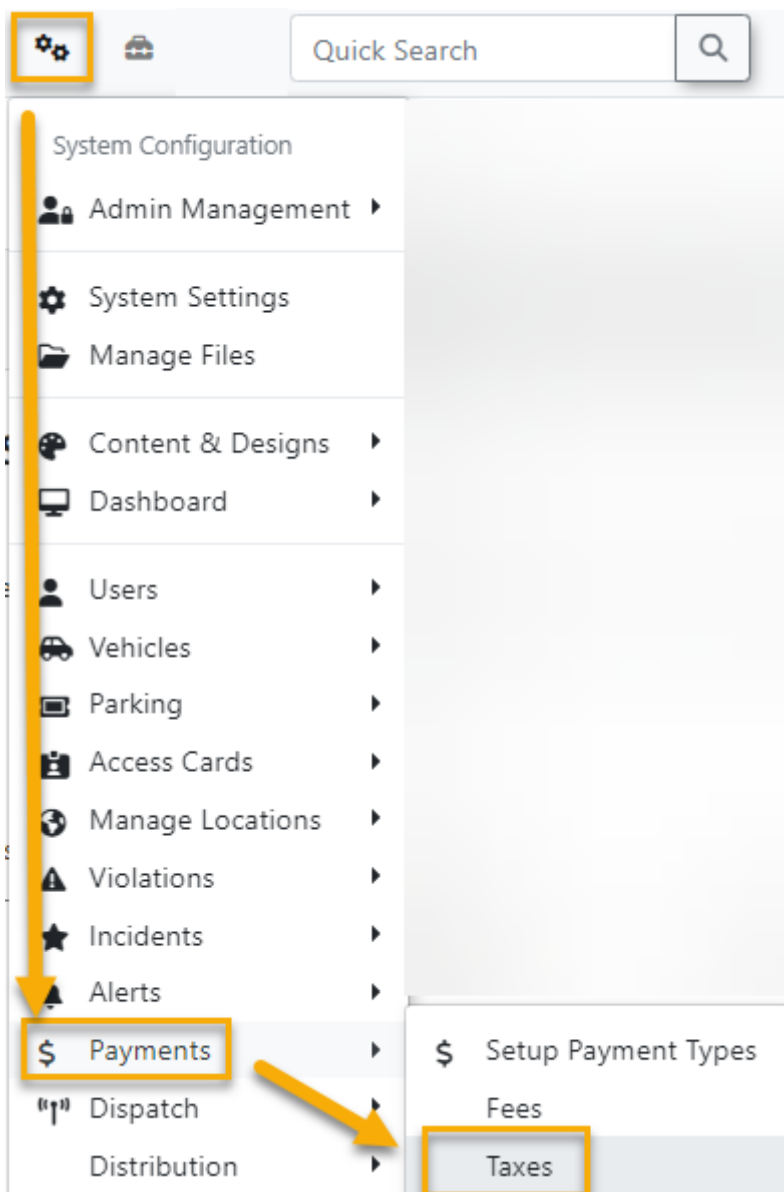
Label	Assignable Text	Flags	Amount		
Lock Deposit	lock model May09	Can Edit Label	\$20.00	1 record.	Edit
Permit Deposit			\$50.00	Delete	Edit

Taxes

This page allows administrators with appropriate roles and permissions to configure the tax percentage calculated and charged to users when making payments in OPS-COM.

Taxes				
	Name			
1	HST		Disabled	4
2	GST		Enabled	4
3	PST		Enabled	3

You can find the taxes page under the System Configuration → Payments → Taxes.



When editing a tax type, there are multiple settings:

Taxes

[Back](#)

Enabled

☐

Percentage

 %

Text	Language	Translation
Tax Label	English (en)	<input type="text" value="HST"/>
	Français (fr)	<input type="text"/>

Apply to the following items:



Access Cards



Lockers



Permits



Temp Permits

Update

- **Enable:** Check or uncheck whether or not this tax type is enabled (checked) or disabled (unchecked).
- **Percentage:** The percentage of taxes calculated
- **Tax Label & Translation:** How this tax will be displayed to users in the cart/checkout process. Multiple languages supported.
- **Apply to the following items:** Check the system modules you want tax to be applied to.