







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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Source

Help

92 Bridge Street
Carleton Place, Ontario



Invoice

Bill To:

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

Invoice No.:

Date:

Due Date:

[invoice show="invoiceno"]
[invoice show="billdate"]
[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

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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.

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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

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

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

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92 Bridge Street
Carleton Place, Ontario

Invoice

TOMAHAWK UNIVERSITY
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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.

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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

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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:

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92 Bridge Street
Carleton Place, Ontario

Invoice

TOMAHAWK UNIVERSITY
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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

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TOMAHAWK UNIVERSITY
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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.**



Invoice

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

Invoice No.: 1024
Date: 10/22/2019
Due Date: 11/21/2019

Name	Item	Item Details	Quantity	Rate	Amount	Tax
Jason Barnes	Permit	109 Window: Test Annual Lot: RED-STU	1	\$525.00	\$525.00	Tax
Julie Parsons	Permit	108 Window: Test Annual Lot: RED-STU	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.

Revision #2
Created 15 May 2024 08:40:50 by Cameron
Updated 26 July 2024 09:57:57 by Cameron