The Invoice Template

> The Invoice Template feature allows administrators to fully customize the email and PDF invoices sent to companies for outstanding permits. Its primary purpose is to ensure that billing communications accurately reflect your organizational branding while dynamically generating all necessary financial details using shortcodes. This article is intended for OperationsCommander (OPSCOM) administrators.

Setup and Configuration

Configuring the invoice template involves adjusting the meta data that dictates how the email is identified and formatted before it reaches the recipient.

Admin Side:

1. Hover over **System Config** and click **Email Templates**.
2. Click the **Edit** button next to **Permit Invoice** to access the template configuration form.
3. Enter a descriptive name for internal reference in the **Label** field.
4. Choose the appropriate language from the **Language** drop-down menu.
5. Select the default layout from the **Layout** drop-down menu.
6. Enter the text that will appear as the email subject line in the **Subject** field.

> You can successfully use shortcodes in the **Subject** field to dynamically personalize the email. For example, inserting **[invoice account="name"]** will automatically call up and display the specific account name for the company being invoiced directly in the subject line.

User Side: End-users do not interact with the setup or configuration of administrative email templates.

Using this Feature

The template form interface contains four primary areas: Meta Data at the top, a list of available Short Codes on the left, the actual visual Template on the right, and a Text Content field at the bottom (used for configuring a plain text version of the invoice).

Administrators interact with the visual template editor to place static branding and dynamic shortcodes.

Available Shortcodes

The template allows the use of special tokens, or shortcodes, to accurately pull live information from the database and populate the invoice when sent. These function similarly to a standard mail merge.

- **[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"]**: The unique Invoice Number.
- **[invoice show="duedate"]**: The invoice due date.
- **[invoice show="billdate"]**: The invoice bill date.
- **[invoice show="subtotal"]**: The subtotal of all items before *Taxes*.
- **[invoice show="taxtotal"]**: The total calculated 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 comprehensive list of permits, costs, and who holds the permit.

Customizing the Template Sections

There are several key areas on the template that should be actively edited by the admin to ensure proper branding and data delivery:

- **Company Logo Field:** Replace the placeholder by inserting your o rganization's logo.
- **Company Address:** Enter your physical organizational address so it clearly appears on the generated document.
- **Invoice Identification:** Insert shortcodes to pull in the **[invoice show="invoiceno"]**, **[invoice show="billdate"]**, and **[invoice show="duedate"]**.
- **Invoice Details:** Insert the **[invoice show="details"]** shortcode. When generated, this will automatically expand to list the Parker's Name, Item type being paid for (e.g., Permit, Access card), Item

number (Permit Number), Sales Window, Lot Name, Quantity, and Cost.

- **Payment Information:** Insert shortcodes to dynamically pull in the billing cost information, such as the **[invoice show="subtotal"]**, **[invoice show="taxtotal"]**, and **[invoice show="amounttotal"]**.

Best Practices and Considerations

- **Optimize your logo format: Using a JPEG or PNG file format is highly recommended for your company logo.** These formats ensure the highest quality rendering when the system generates the attached PDF version of the invoice.
- **Verify data placement: Always test your shortcodes by generating a sample invoice.** This ensures the system retrieves and formats the intended data (such as the company's full address and account number) exactly where you placed the tokens.
- **Leverage company comments: Add specific billing instructions or notes in the company configuration.** Using the **[invoice account="invoice_comments"]** shortcode allows you to pass these targeted messages directly onto the finalized invoice, maintaining clear communication with corporate clients.

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