Invoice Feedback Setup

Introduction

We have a feature in which invoice payees can submit invoice feedback. It will help them to get additional help related to the invoice and payments.

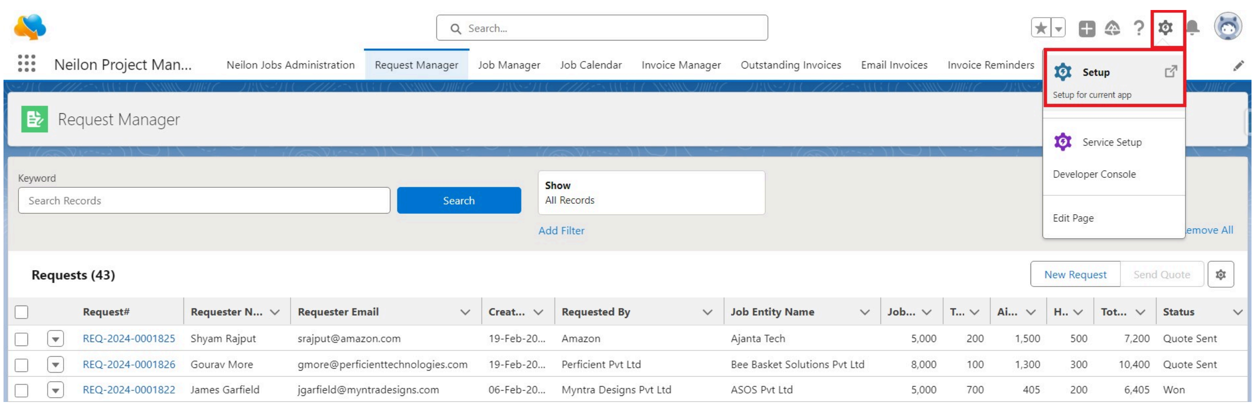
In the invoice notification email, they will get links to submit invoice feedback. By clicking on that link they can submit invoice feedback.

Here are the steps to set up the invoice feedback link.

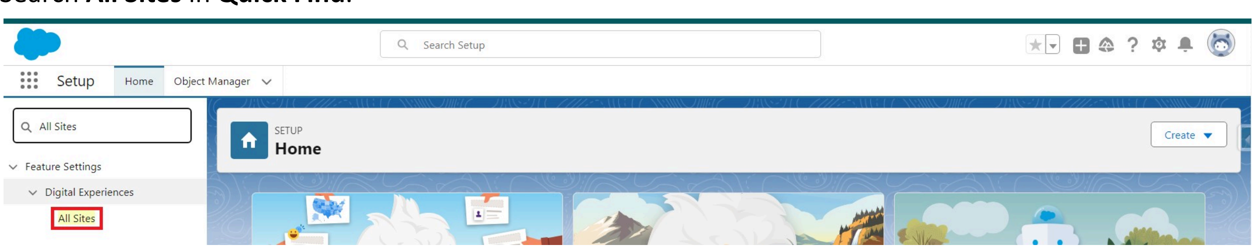
Functionality Overview

Follow the below steps to set up invoice feedback link.

1. Navigate to the **Neilon Project Management** application from the App Launcher.
2. Click on **Setup**.

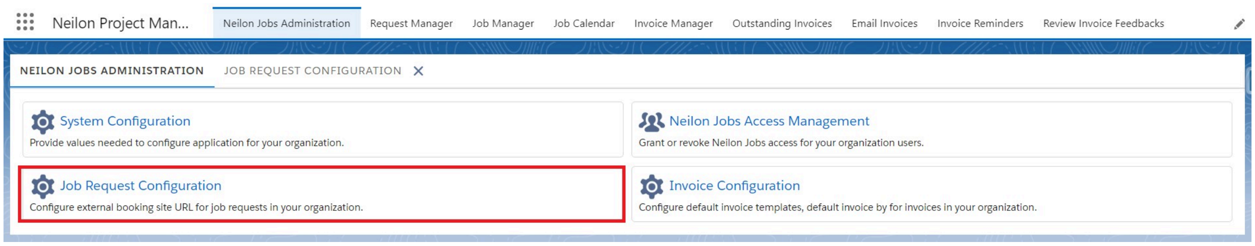


3. Search **All Sites** in **Quick Find**.

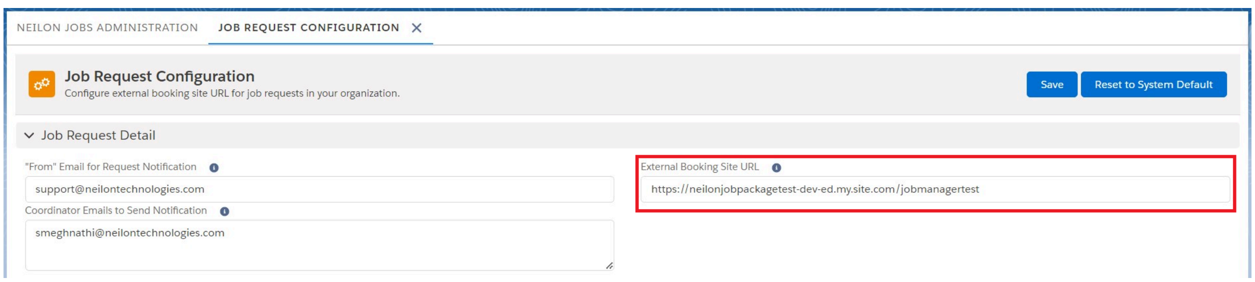


4. If there is no site configured in **All Sites**, then configure a new site by following the **Neilon Project Management Public Site Setup** guide.
5. If the site is already configured, then copy that site's URL.

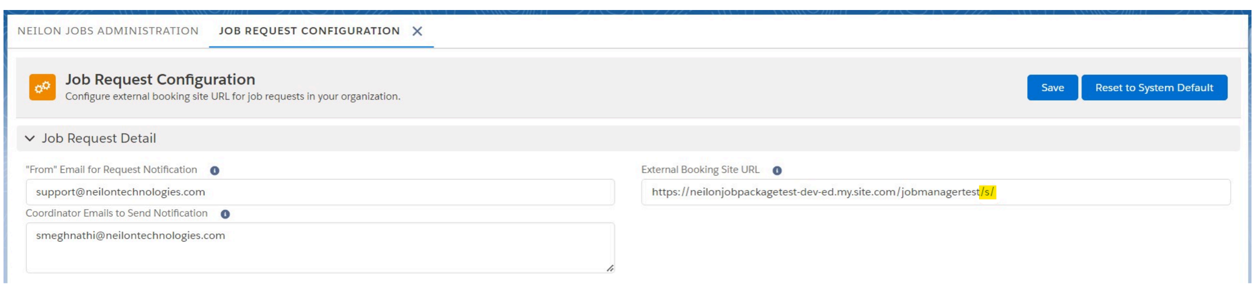
6. Navigate to the **Neilon Project Management** application from the App Launcher.
7. Go to the **Neilon Jobs Administration** tab. Click on **Job Request Configuration**.



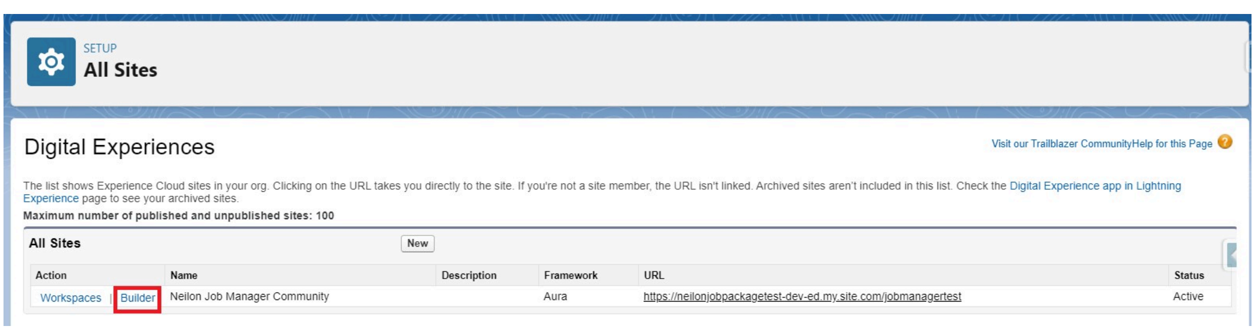
8. Paste the copied site URL in the **External Booking Site URL**.



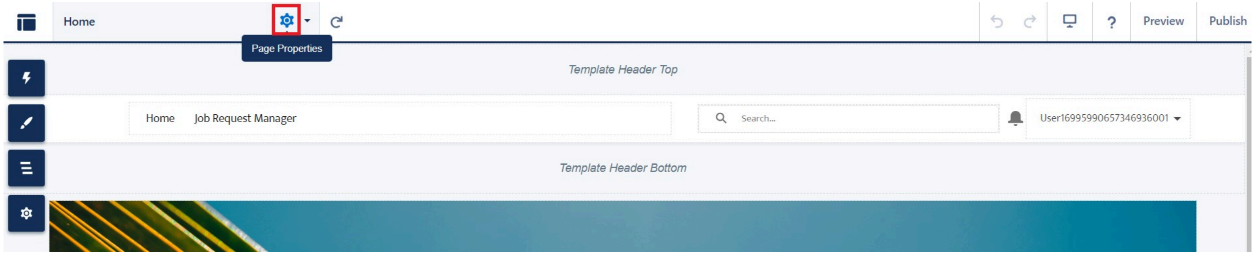
9. After pasting the site URL in the field add **/s/** at its end. Click on the **Save** button.



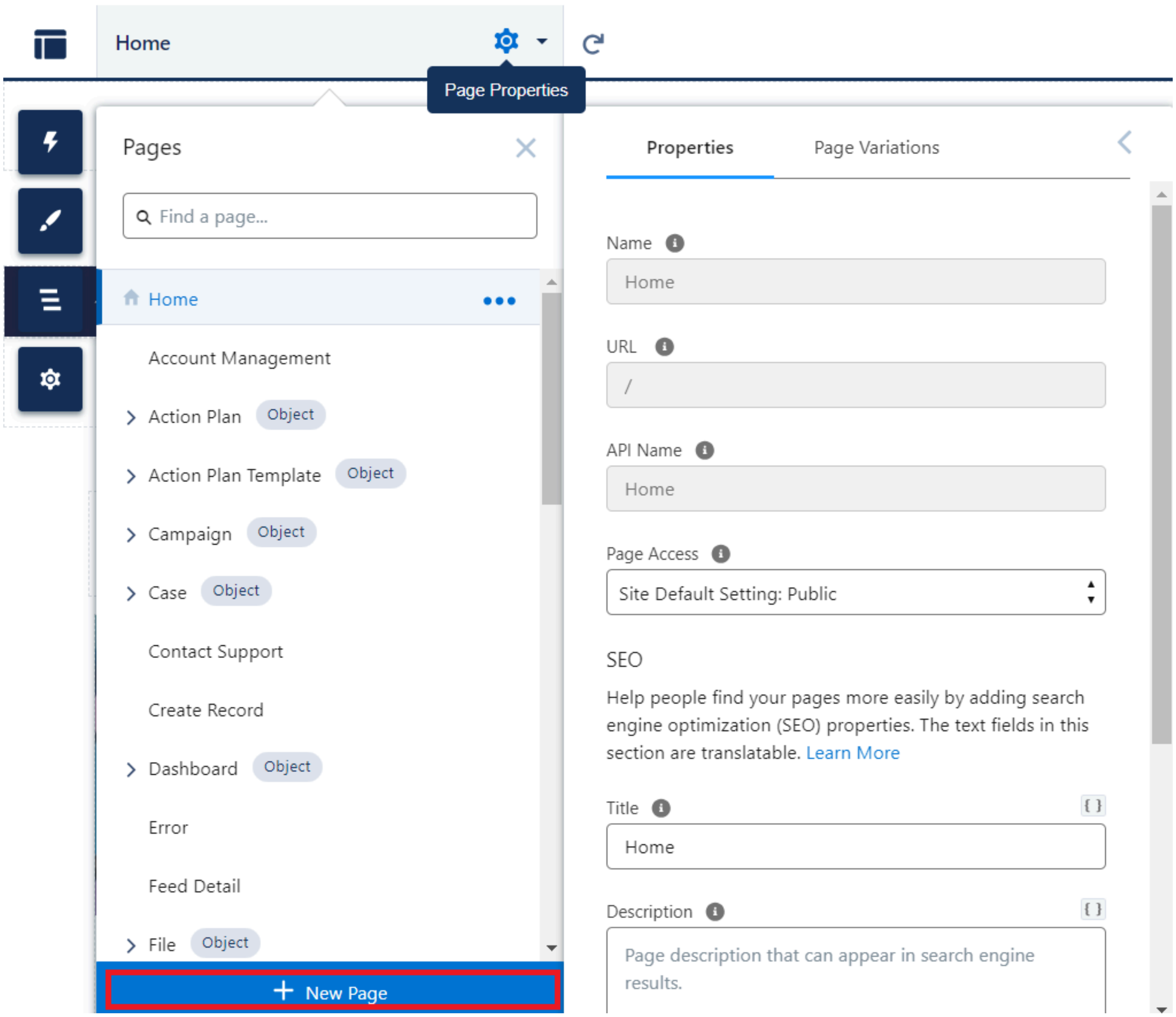
10. Go to **All Sites** again. Click on **Builder** for the site which URL we have used in the **External Booking Site URL**.



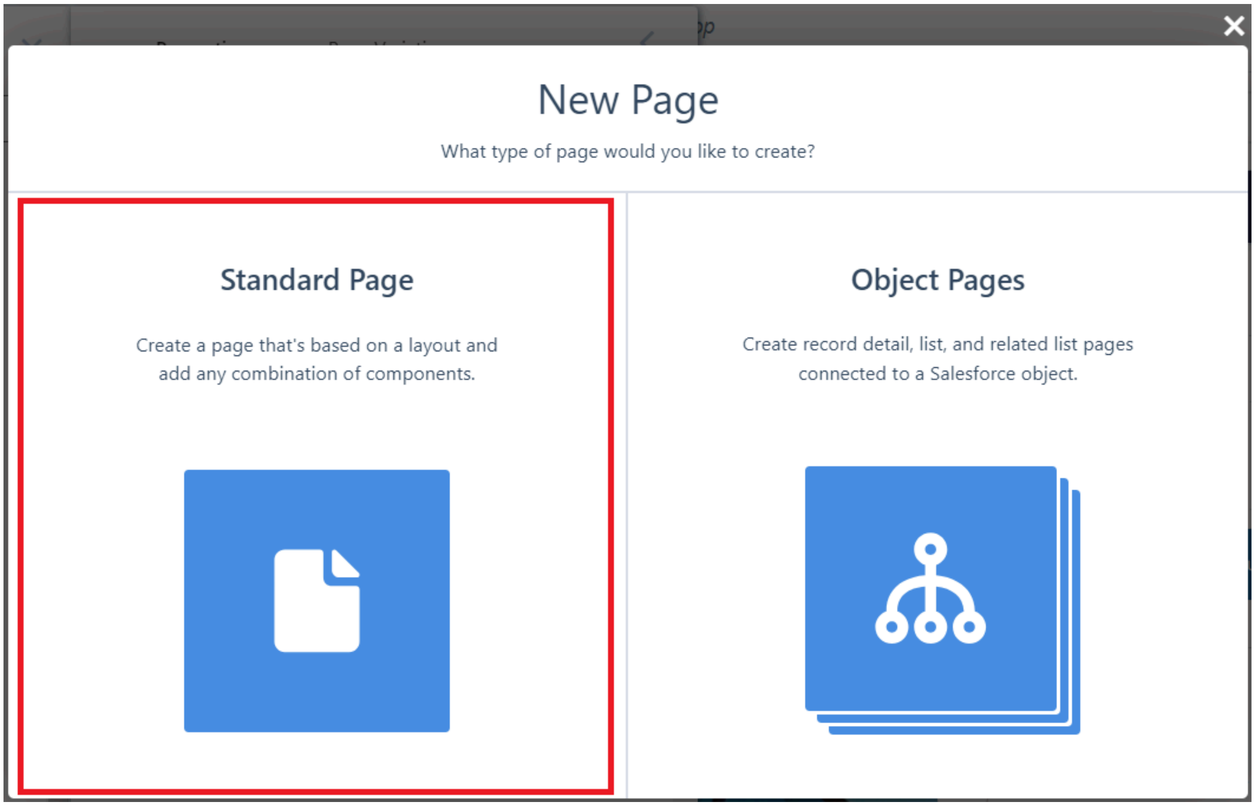
11. It will open the digital experience.
12. Click on the gear icon here to open **Page Properties**.



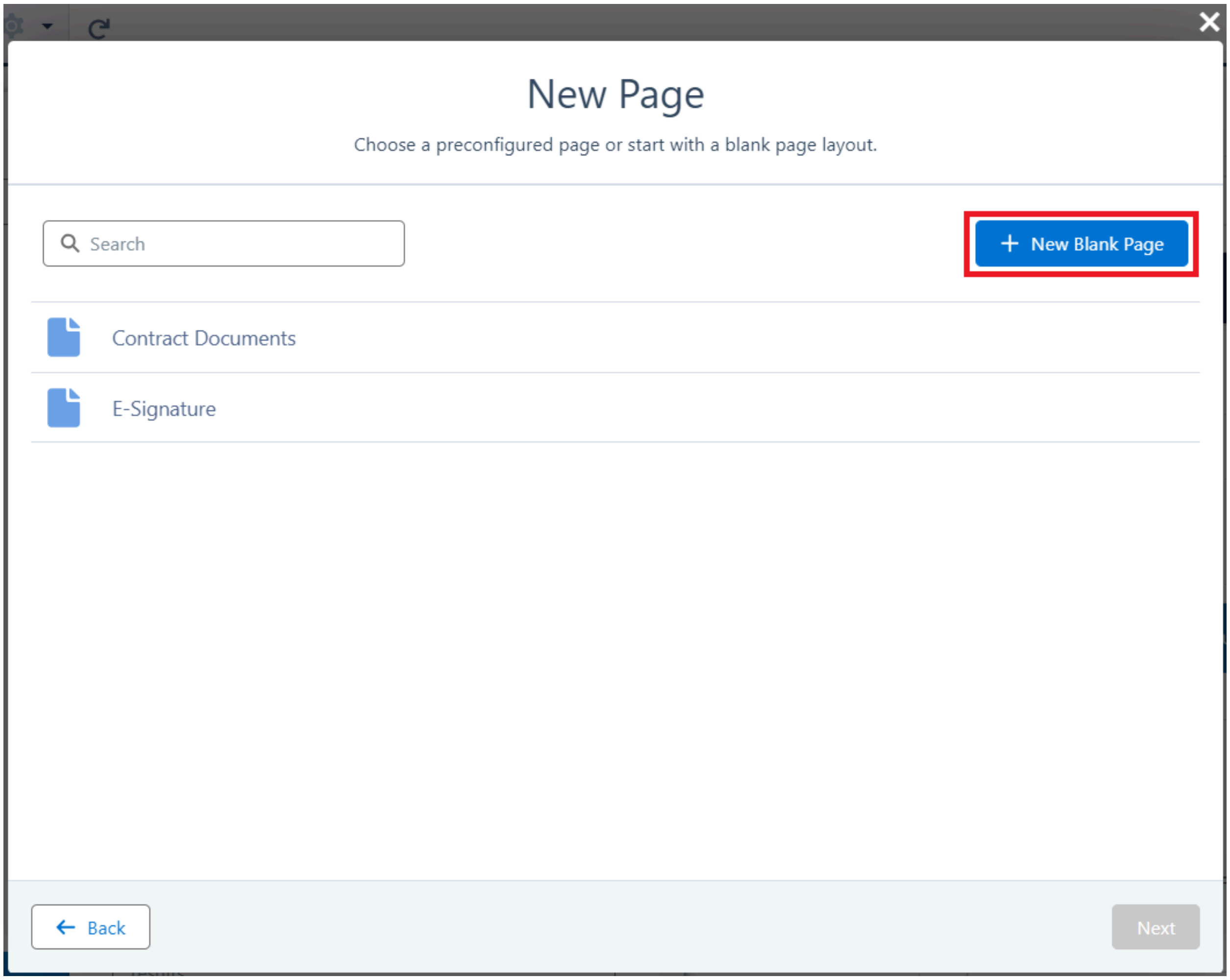
13. Click on **New Page**.



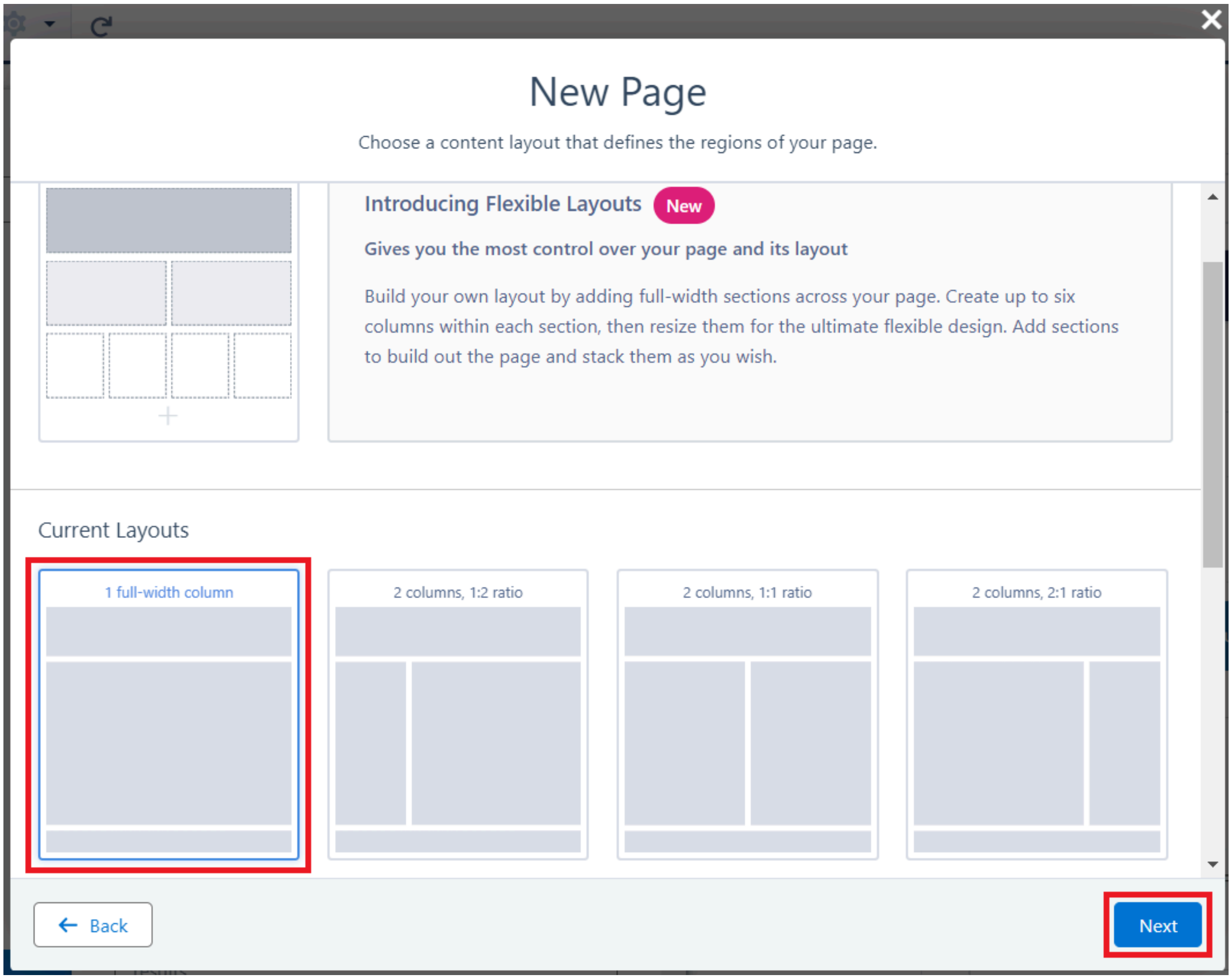
14. Select **Standard Page**.



15. Click on the **New Blank Page**.

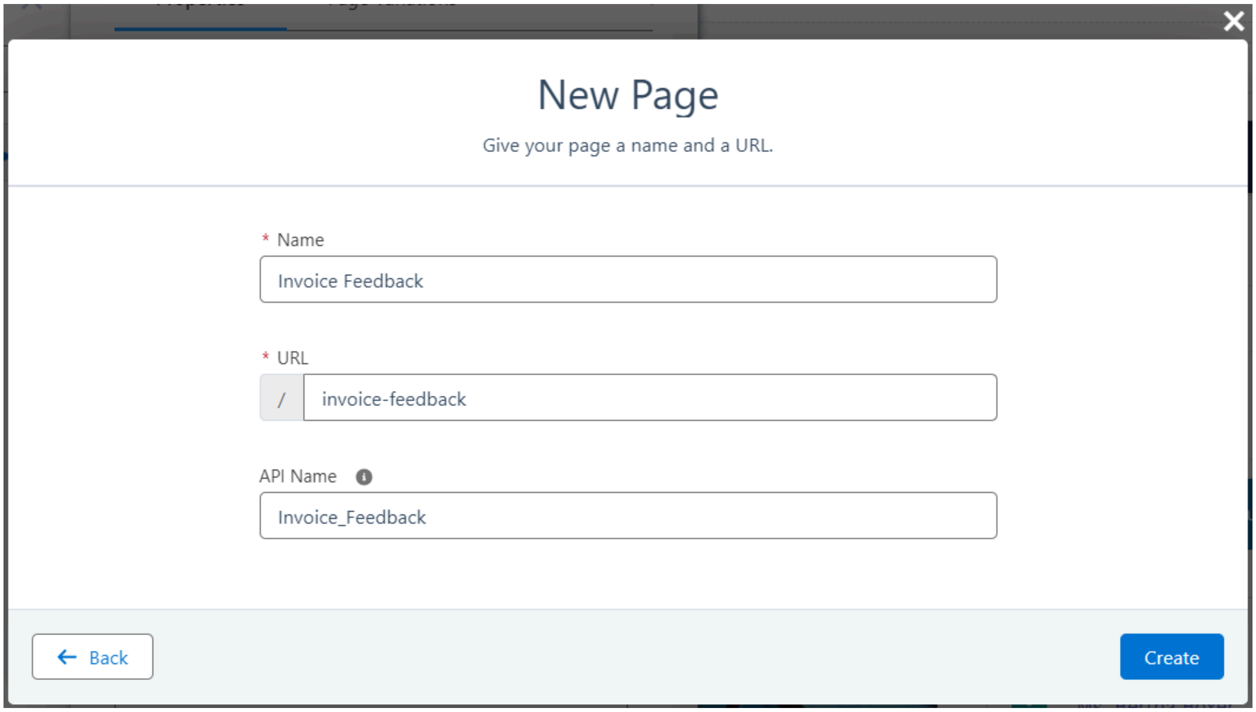


16. Select **1 full-width column** page layout and click on **Next**.



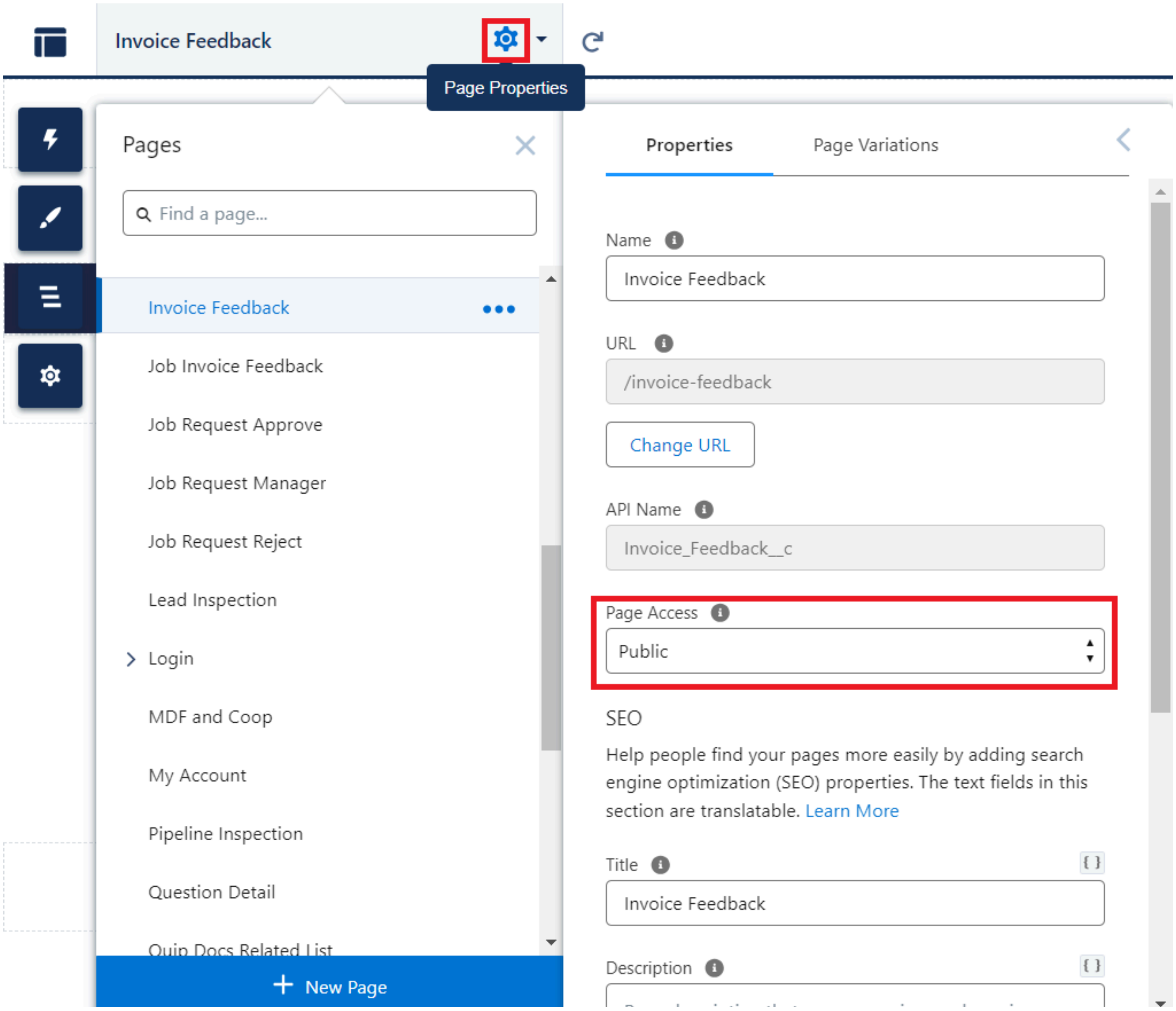
17. Configure values as per the data shown in the table.

Property	Property Value
Name	**Invoice Feedback**
URL	**invoice-feedback**
API Name	**Invoice_Feedback**

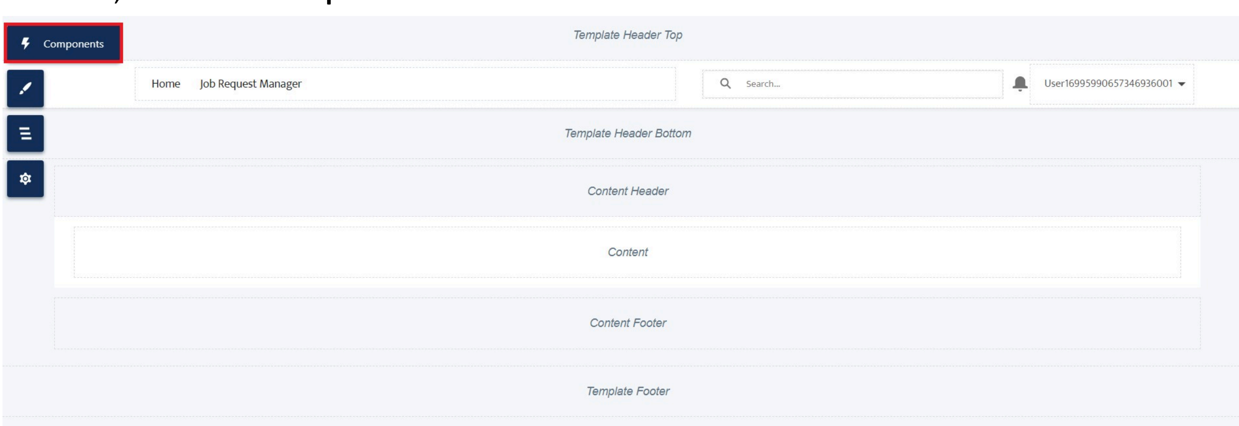


18. Click on **Create**. The page will be created.

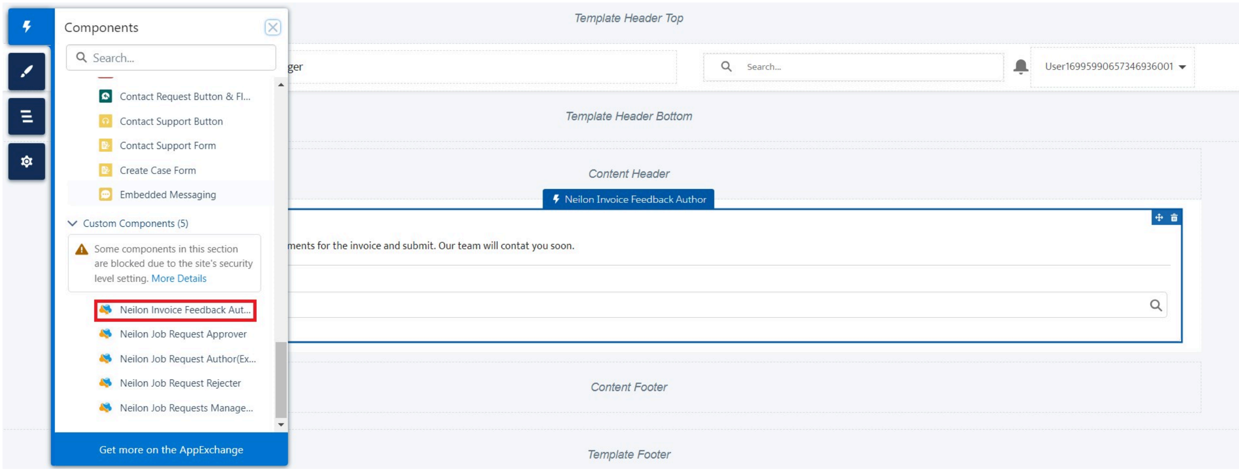
19. Click on the top left-side gear icon of the **Page Properties** and set **Page Access** as **Public**.



20. After that, click on the **Components** button.



21. Drag and drop **Neilon Invoice Feedback Author** to the **Content** section.

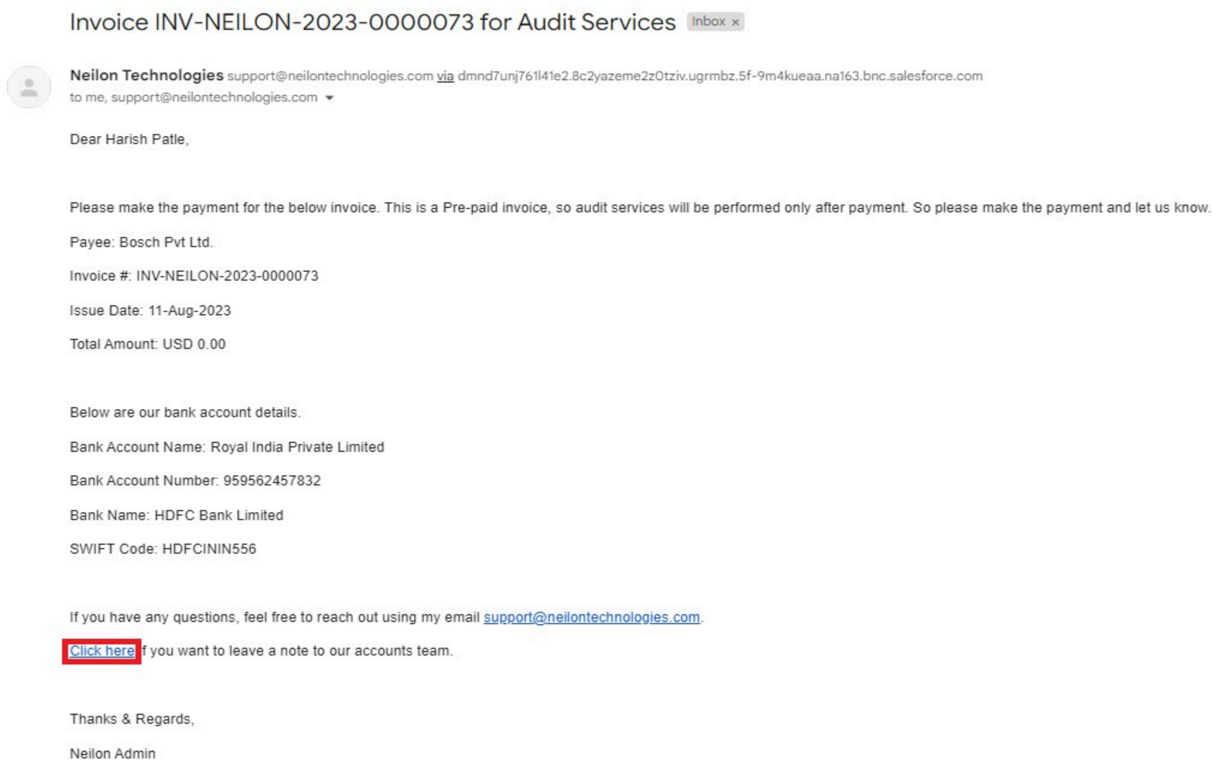


22. Click on the **Publish** button at the top-right corner to publish the page. It will show a site publish confirmation popup. Click on the **Publish** button.
23. You will get a confirmation email once the site is published successfully and live.

Submit invoice feedback steps for invoice payee

Here are the steps that need to be performed by the invoice payee to submit invoice feedback using the submit invoice feedback link from the invoice notification email.

1. In the invoice notification email, the payee can submit invoice feedback by clicking on **Click here**.



Invoice INV-NEILON-2023-0000073 for Audit Services Inbox ×

Neilon Technologies support@neilontechnologies.com via dmnd7unj761l41e2.8c2yazeme2z0tziv.ugrmbz.5f-9m4kueaa.na163.bnc.salesforce.com
to me, support@neilontechnologies.com

Dear Harish Patle,

Please make the payment for the below invoice. This is a Pre-paid invoice, so audit services will be performed only after payment. So please make the payment and let us know.

Payee: Bosch Pvt Ltd.

Invoice #: INV-NEILON-2023-0000073

Issue Date: 11-Aug-2023

Total Amount: USD 0.00

Below are our bank account details.

Bank Account Name: Royal India Private Limited

Bank Account Number: 959562457832

Bank Name: HDFC Bank Limited

SWIFT Code: HDFCININ556

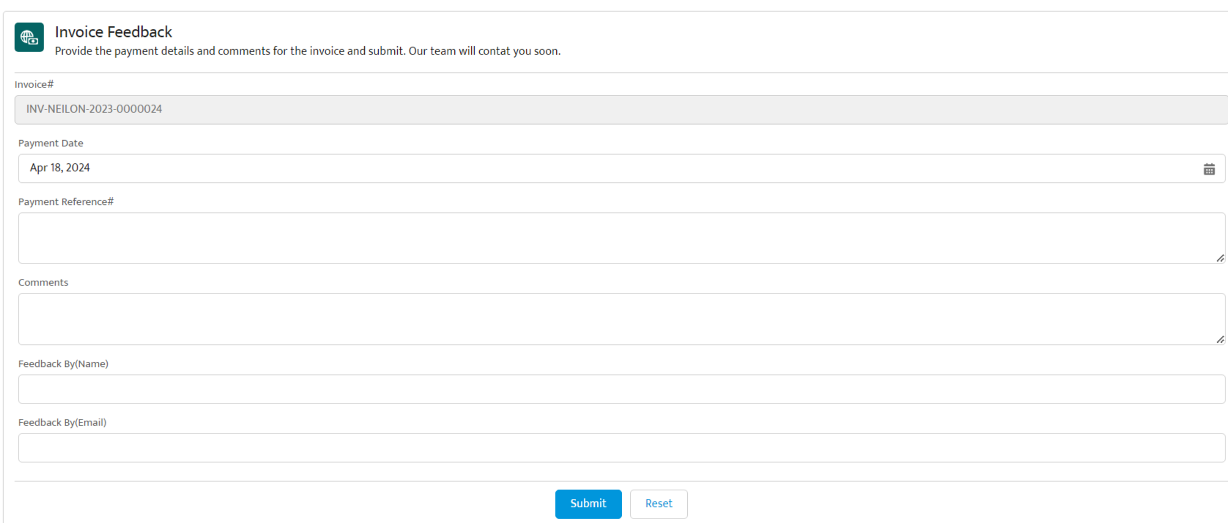
If you have any questions, feel free to reach out using my email support@neilontechnologies.com.

Click here if you want to leave a note to our accounts team.

Thanks & Regards,

Neilon Admin

2. After clicking on the **Click here** link, It will show the below details to fill in invoice feedback.



Invoice Feedback

Provide the payment details and comments for the invoice and submit. Our team will contat you soon.

Invoice#

INV-NEILON-2023-0000024

Payment Date

Apr 18, 2024

Payment Reference#

Comments

Feedback By(Name)

Feedback By(Email)

Submit Reset

3. Provide the Payment Date, Payment Reference, Comments, Name, and Email for the invoice feedback.
4. Now click on **Submit**.
5. The accounts team will receive the invoice feedback related to the invoice and payment, and do the follow-up according to the invoice feedback.