

Job Invoice Notification Template User Guide

Introduction

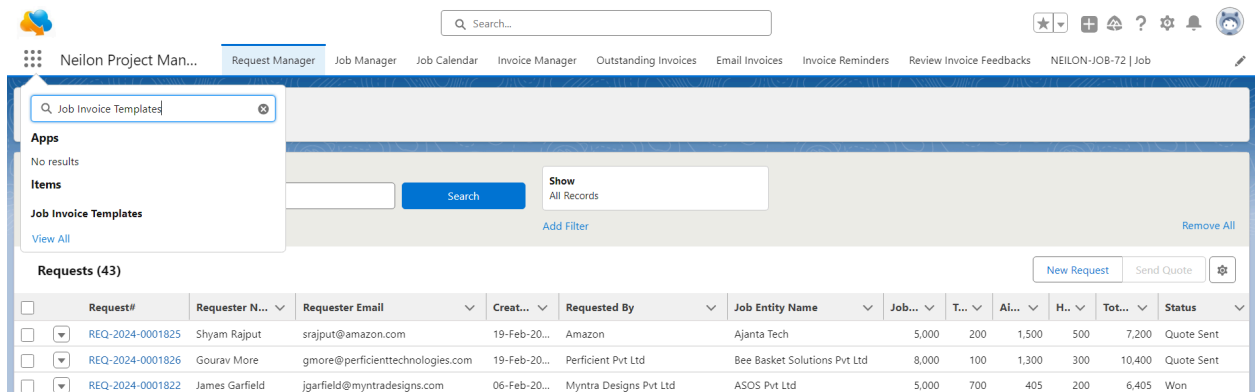
A job invoice notification template is an email template that is used to send job invoices. Default EOM and Prepaid invoice template will be created at the time of installation of our application.

Functionality Overview

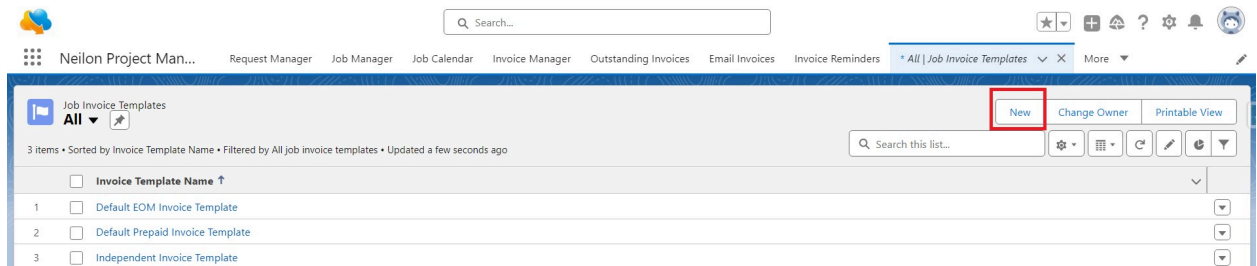
Create an Invoice Notification Template

Follow the below steps to create a job invoice notification templates

1. Go to App Launcher. Search for the **Job Invoice Templates** and click on it



2. It will show a list of all the job invoice templates available in your org
3. Click on the **New** button to create a new job invoice template



4. It will open the UI where you can set the desired values for a new job invoice template
5. Set the Invoice Template Name, Subject, and Body in the **Detail** section

New Invoice Template
Select invoice & provide test email address to send test notification

Detail

Invoice Template Name
Independent Invoice Template

Subject
Royal India Private Limited Invoice ({NEILON1__Invoice_No__c}) for Audit Services

Select Merge Field
--None--

Body

Salesforce Sans 12 B I U C

Dear ({NEILON1__Invoice_Recipient__c}).

Please make the payment for the below invoice.
Payee: ({NEILON1__Payee__c})
Invoice #: ({NEILON1__Invoice_No__c})
Issue Date: ({NEILON1__Issue_Date__c.Month})
Total Amount: ({NEILON1__Currency__c}) ({NEILON1__Total__c})

6. You can select and add the merge fields in the subject and body using the **Select Merge Field** dropdown. When you select any merge field from the dropdown it will show the **Merge Field API Name** and you can simply copy and use it in the subject and body

Subject
Royal India Private Limited Invoice ({NEILON1__Invoice_No__c}) for Audit Services

Select Merge Field
Currency

Merge Field API Name
{NEILON1__Currency__c}

Body

Salesforce Sans 12 B I U C

Dear ({NEILON1__Invoice_Recipient__c}).

Please make the payment for the below invoice.
Payee: ({NEILON1__Payee__c})
Invoice #: ({NEILON1__Invoice_No__c})
Issue Date: ({NEILON1__Issue_Date__c.Month})
Total Amount: ({NEILON1__Currency__c}) ({NEILON1__Total__c})
Notes: ({NEILON1__Additional_Notes__c})
Address: ({NEILON1__Invoiced_By__r.NEILON1__Address__c})

Below are our bank account details.
Bank Name: ({NEILON1__Invoiced_By__r.NEILON1__Bank_Name__c})
Branch: ({NEILON1__Invoiced_By__r.NEILON1__Bank_Branch__c})
IBAN: ({NEILON1__Invoiced_By__r.NEILON1__IBAN__c})
ABA: ({NEILON1__Invoiced_By__r.NEILON1__ABA_Number__c})

7. Set **Include Sender Signature?** checkbox to true if you want to add the sender's signature to the invoice notification email
8. Set **CC to Sender?** checkbox to true if you want to CC the currently logged-in user(the user sending the notification) when invoice notification sent
9. You can save or preview the invoice notification template using the **Save** or **Preview** button

Body

Salesforce Sans 12 B I U C

Bank Address: ({NEILON1__Invoiced_By__r.NEILON1__Bank_Address__c})
Branch Code: ({NEILON1__Invoiced_By__r.NEILON1__Bank_Branch__c})
IBAN: ({NEILON1__Invoiced_By__r.NEILON1__IBAN__c})
ABA: ({NEILON1__Invoiced_By__r.NEILON1__ABA_Number__c})

If you have any questions, feel free to reach out using my email ({User.Email}).
([Link Feedback](#)) if you want to leave a note to our accounts team.

Have a nice day.

Thanks & Regards,
{User.Name}

Include Sender Signature?
☐

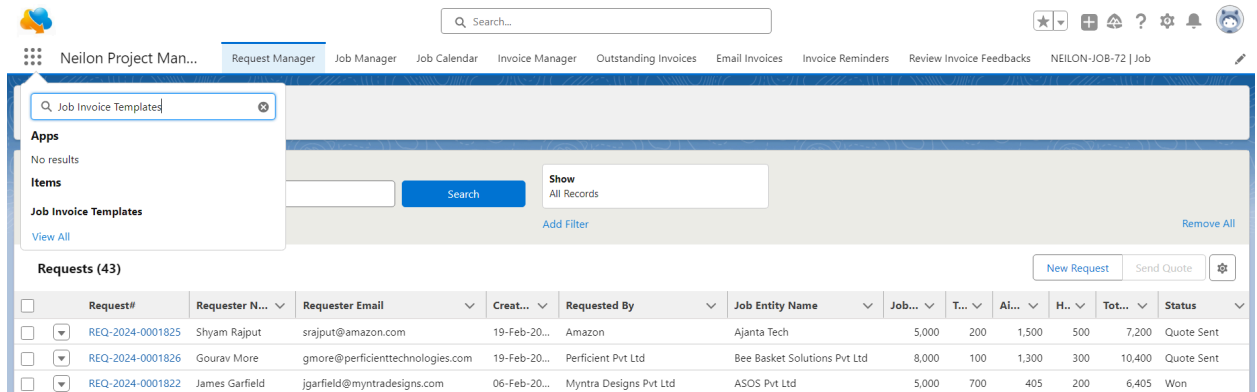
CC to Sender?
☒

Save Preview Cancel

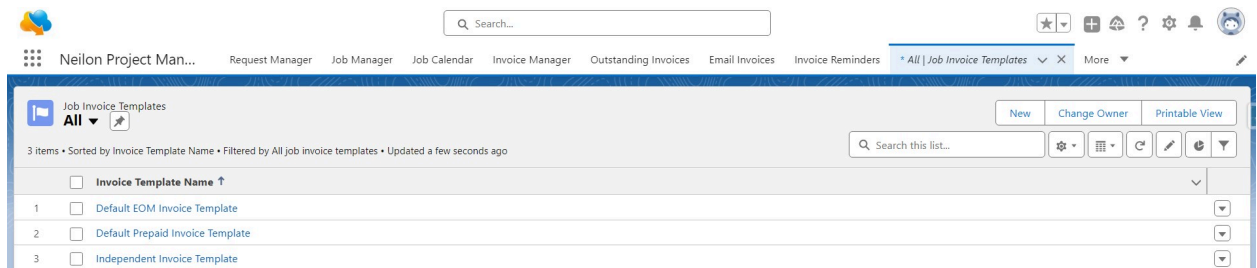
10. Follow the below steps to understand how the invoice notification template preview works

Preview Invoice Notification Template

1. Go to App Launcher.
2. Search for the **Job Invoice Templates** tab and click on it.



3. It will show a list of all the job invoice templates available in your org



4. Open the invoice notification template details by clicking on its name
5. Open **Preview** section (If this section is not available then ask your admin to add the section and preview component on this page)

Neilon Project Man... Request Manager Job Manager Job Calendar Invoice Manager Outstanding Invoices Email Invoices Invoice Reminders * Default EOM Invoice Temp... More

Job Invoice Template
Default EOM Invoice Template Edit Delete Clone

Details **Preview**

Preview Invoice Notification
Select invoice & provide test email address to send test notification

▼ Invoice for Notification

* Job Invoice
Search Job Invoices... Q

* Test Email Address
apatinge@neilontechnologies.com

▼ Invoice Recipients

Send To

No related lists to display

- Now choose an invoice for which you want to preview the template. After selecting an invoice, it will show field values using the invoice data

Details **Preview**

Preview Invoice Notification
Select invoice & provide test email address to send test notification

▼ Invoice for Notification

* Job Invoice
INV-NEILON-2024-0000124 X

* Test Email Address
apatinge@neilontechnologies.com

▼ Invoice Recipients

Send To
apatinge@neilontechnologies.com

CC To

- The current logged-in user email will be set in the **Test Email Address** field. The test email will be sent to emails you enter in the **Test Email Address** field. You can add multiple emails as well separating by a semicolon(;) (for example sales@amazon.com;support@flipkartindia.com;amitmishra@gmail.com).
- Click on the **Send** button at the bottom
- Test invoice notification for the selected invoice will be sent to those email addresses in the **Test Email Address** field