

# ePay Advantage Invoice Template Guide

Version 2

May, 2016



ePay Advantage  
Integrated Bill Pay Portal

## Overview

Within ePay Advantage (ePay), end user has the ability to view the details of their invoice from the website. Since most organizations have their own style & layout of invoice, ePay provides the ability to modify the template of the invoice details. This document is a guide for working with ePay's flexible invoice template to modify the display of the invoice on ePay. It is highly recommended that the user modifying the invoice template have some basic knowledge of HTML.

## Design Invoice Templates page

The following procedure can be used to begin work on an invoice template.

1. Log into ePay as an administrative user
2. Using the top menu, browse to 'Settings → Invoice Display → Design Invoice Templates'
3. Use the 'Load Saved Template' dropdown to select the desired template to be modified
4. If designing a new template or modifying from a system template, enter a desired name for the template in the 'Template Name' field and use the 'Save' button to save the template under the new name.
  - a. To ensure the original template is always available, the original templates that were installed with the ePay site cannot be modified and must be saved under a different name.

### Invoice Template

*Customize the invoice template to suit the business*

Load Saved Template:

Template Name:

Test Invoice Number:

Main Invoice Body | Line Item Section | Applied Payments

Source | | | | | | | |

**B** | *I* | U | ~~S~~ |  $x_2$  |  $x^2$  | *I\_x* | | | | | | | | | | |

Styles ▾ | Format ▾ | Font ▾ | Size ▾ | | | | ?

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[[[CompanyName]]] Invoice [[[InvoiceNumber]]]  
 [[[CompanyStreet]]] Date [[[CreatedOn]]]  
 [[[CompanyStreet2|br]]]  
 [[[CompanyCity]], [[[CompanyState]]] [[[CompanyZip]]]

## Testing the Template

To view an invoice based on the currently displayed template, enter an invoice number in the 'Test Invoice Number' field and click the 'Test' button. The information associated to the provided invoice

will be presented in a pop-up window using the current invoice template. The template does not need to be saved to utilize this feature.

## Working with the Template Editor

The template editor contains a number of functions that can be utilized when working with the template in design mode. For a quick description of the function, hover the mouse over the icons to view the explanation for the feature. For added flexibility with the design, users knowledgeable with HTML can click the 'Source' button (  Source ) to view & design the template using HTML code. The 'Source' button can be clicked again to toggle the source & layout views.

## Variables

The invoice template will contain many variables to be populated based on the data associated to the invoice. The variables for the template are contained within triple brackets ([[...]]) on the template. The available variables can be found in the [Variable List](#) section at the end of this document.

In some cases it may be necessary to add some validation logic for conditional data. Using the pipe character ( | ), the conditional validation logic can be applied within a variable. For example, if the city is not available for a certain address, the address line with the city, state and zip code would look odd starting with a comma character. In this case, a comma can be added after the variable name and the pipe character. When this content is provided, the comma will only appear if there is a value for the BillToCity variable. Example: `[[BillToCity | ,]]`

The letters 'br' can be added after the pipe character to insert a line break only when the data for the variable is available. An example of this feature being used is for the secondary address variable. When the address has a second line, it should be shown with a line break after the value, but if there is no secondary address, then there should not be an empty space. Example: `[[BilltoAddress2 | br]]`

## Invoice Sections

The template features three main sections that comprise the invoice content.

### *Main Invoice Body*

This section is for the primary content for the invoice such as the company information and the total amount for the invoice. Also available in this section are the variables to hold the content of the other sections.

### *Line Item Section*

This section contains the content that will be populated into the `[[LineItemSection]]` variable from the Main Invoice Body. This section holds information relating to the line items associated to the invoice.

The line items can be grouped into separate sections based on different variables. For example, if some items have a shipping address set to one location and other items are to be shipped to another location the items could be grouped into two sections based on the shipping address. The checkboxes at the bottom of the page within the section 'Select variables to divide line items into different groups' are used to determine the grouping categories. If there is a variation between the line items and the grouping variable has not been chosen, the value for the first item will take priority. For each group of items, the entire Line Item Section will be repeated. An example of the grouping is shown below where the items are separated into different groups because they are to be sent to different addresses.

<b>Nodus Tech</b> West First Street Claremont, CA 91711		<table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td style="width:50%;"><b>Invoice</b></td> <td>STDINV2348</td> </tr> <tr> <td><b>Date</b></td> <td>4/12/2017</td> </tr> </table>		<b>Invoice</b>	STDINV2348	<b>Date</b>	4/12/2017																															
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Line Item Table

Within the Line Item Section is a table where each line item is populated with its own row. Since the number of items is not absolute and can be varied across invoices, the row for the line item content is set to auto-repeat using the following comment block within the HTML for the Line Item Section. Using these tags will cause the information within the tags to repeat for each line item.

- To start the item table: <!--BeginofLineItem-->
- To end the item table: <!--EndofLineItem-->

```

        <th>EXT PRICE</th>
    </tr>
    <!--BeginOfLineItem-->
    <tr>
        <td>[[[ItemCode]]]</td>
        <td>[[[Description]]]</td>
        <td>[[[UnitOfMeasure]]]</td>
        <td style="text-align:right;padding-right: 10px;">[[[Quantity]]]</td>
        <td style="text-align:right;padding-right: 10px;">[[[UnitPrice]]]</td>
        <td style="text-align:right;padding-right: 10px;">[[[Markdown]]]</td>
        <td style="text-align:right;padding-right: 10px;">[[[ExtendedPrice]]]</td>
    </tr>
    <!--EndOfLineItem-->
</tbody>

```

## Applied Payments

This section contains the content that will be populated into the `[[[AppliedPaymentsSection]]]` variable from the Main Invoice Body. This section is for displaying the information relating to the payments that are applied to the invoice.

### Applied Payments Table

Within the Applied Payments Section is a table where each payment is populated with its own row. Since the number of payments is not absolute and can vary across invoices, the row for the payment content is set to auto-repeat using the following comment block within the HTML for the Applied Payments Section. Using these tags will cause the information within the tags to repeat for each line item.

- To start the Applied Payments Table: `<!--BeginofPayment-->`
- To end the Applied Payments Table: `<!--EndofPayment-->`

## Adding variables from Dynamics GP

It is often required to include additional data from the back office that ePay may not have available. This process can be used to include additional data to be imported from Dynamics GP to be displayed on the invoice template. Knowledge of SQL code and the table information Dynamics GP database for the location of this data is required for this procedure.

### Modify the Import File

1. Access the Application Server and browse to the 'Sync Configuration' folder for the Nodus Synchronizer associated to the ePay website. This folder is typically in the following file path:

*C:\Program Files (x86)\Common*

*Files\Nodus\Framework\ConnectionManager\Adapters\Generic Adapter\Sync Configuration*

2. Make a backup copy of the file named InvoiceHistory.Request.xml
3. Open the InvoiceHistory.Request.xml file in a text editor. This file contains the information that is gathered from the GP database before it is sent to ePay from the Nodus Synchronizer.

4. Within this file is the content for the 'ExtensionData' field which should contain the XML any extra fields. The text, 'ExtensionData', appears four times in this document for invoices from the following sections of GP:
  - a. Sale Order Processing Module (Sales Transaction Entry window )
  - b. Invoicing Module (Invoice Entry window)
  - c. Receivables Module Open (Transaction Entry window)
  - d. Receivables Module History (Transaction Entry window after Paid Transaction Removal)
5. Use the text editor's Find function to find the desired 'ExtensionData' field. (Certain data is already being imported to the Sales Order Processing Module so this can be used as a good example to show how extra data can be imported using this field.)
6. Using SQL, build a SELECT statement to gather information the additional data.
  - a. Each value in the select statement should be named using the 'AS' statement to begin with the prefix: Ext\_
    - i. The name for the value used during the SELECT statement will be the variable name used on the ePay Invoice Template.
  - b. The SELECT statement should end with the text: FOR XML PATH ('ExtData')

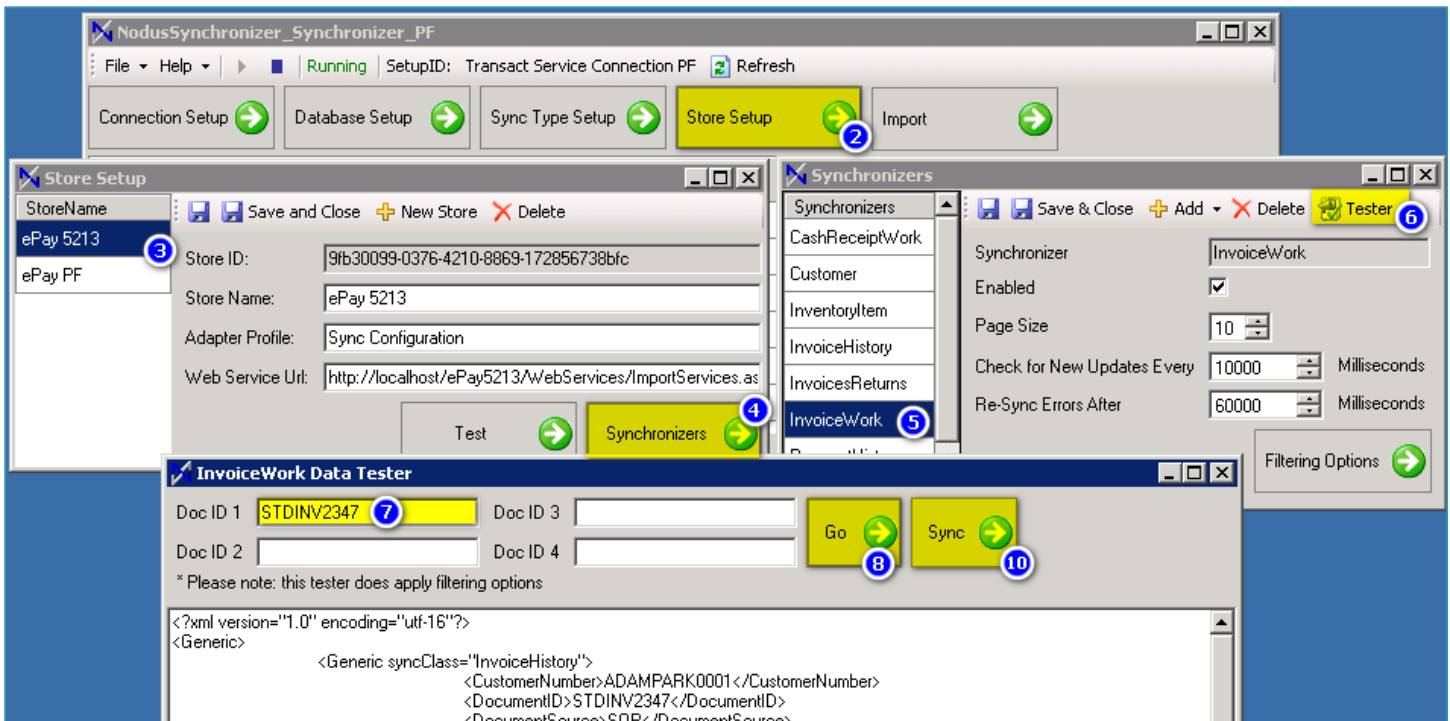
```
sopComment.USRDEF03 AS UserDef3,
sopComment.USRDEF04 AS UserDef4,
sopComment.USRDEF05 AS UserDef5,
(
  SELECT
    LTRIM(RTRIM(sopComment.USERDEF1)) as Ext_USERDEF1,
    LTRIM(RTRIM(sopComment.USERDEF2)) as Ext_USERDEF2,
    LTRIM(RTRIM(sopComment.USRDEF03)) as Ext_USRDEF03,
    (SELECT RTRIM(COMMENT1) FROM RM00101 r where r.CUSTNMBR = sopHdr.CUSTNMBR) as Ext_CustComment1
  FOR XML PATH('ExtData')
)
AS ExtensionData,
-- Multicurrency
```

7. Save the file.

### Reimport the invoice

To test that the changes to the file have been made properly, the Nodus Synchronizer Tester can be used to reimport an invoice to check for the desired changes.

1. On the ePay Application Server, open the Nodus Synchronizer application
2. Click the 'Store Setup' button to open the 'Store Setup' window
3. On the left side of the window, click the desired ePay site the invoice is to be sent to.
4. Click the 'Synchronizers' button to open the 'Synchronizers' window
5. Click the InvoiceWork class from the left menu
6. Click the 'Tester' button in the upper right corner of the window



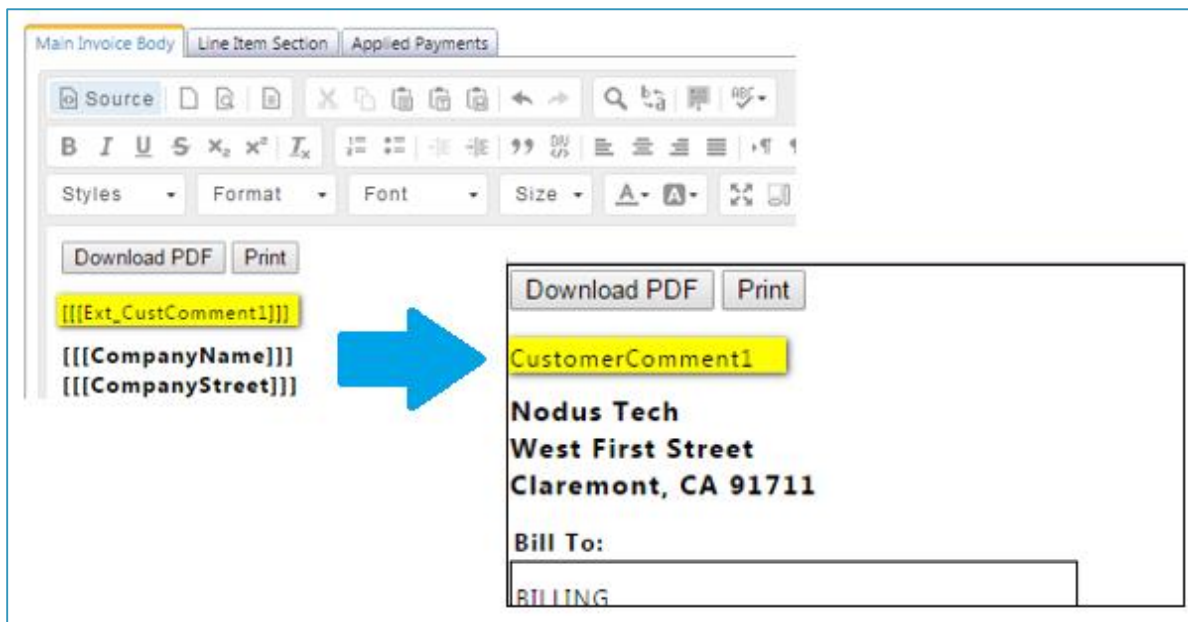
7. Enter the Invoice Number in the tester window
8. Click the 'Go' button to verify the data to be sent
  - a. If an error appears at this stage, there may be a SQL error with the data from the InvoiceHistory.Request.xml file. Please address the issue and click 'Go' again.
9. Review the XML to verify the variable has been included
  - a. Since the XML content is encoded, it may be a bit difficult to read, but the additional content should be shown within the '<ExtensionData>' tags.

```

<UserDef5>UserDef5</UserDef5>
<ExtensionData>&lt;ExtData&gt;&lt;Ext_USERDEF1&gt;UserDef1&lt;/Ext_USERDEF1&gt;&lt;Ext_USERDEF2&gt;UserDef2&lt;/Ext_USERDEF2&
&gt;&lt;Ext_USRDEF03&gt;UserDef3&lt;/Ext_USRDEF03&gt;&lt;Ext_USRDEF04&gt;UserDef4&lt;/Ext_USRDEF04&gt;&lt;Ext_USRDEF05&gt;User
Def5&lt;/Ext_USRDEF05&gt;&lt;Ext_USRDAT01&gt;1/1/1900&lt;/Ext_USRDAT01&gt;&lt;Ext_USRDAT02&gt;1/1/1900&lt;/Ext_USRDAT02&gt;
&lt;Ext_USRTAB01&gt;&lt;/Ext_USRTAB01&gt;&lt;Ext_USRTAB09&gt;&lt;/Ext_USRTAB09&gt;&lt;Ext_USRTAB03&gt;&lt;/Ext_USRTAB03&gt;&lt;
Ext_CustComment1&gt;CustomerComment1&lt;/Ext_CustComment1&gt;&lt;/ExtData&gt;</ExtensionData>
<OriginatingBalanceDue>39.95</OriginatingBalanceDue>
<OriginatingSubtotal>39.95000</OriginatingSubtotal>
    
```

10. Click the 'Sync' button to send the invoice to the website
11. A success message should appear if the document is sent successfully
12. Go to the 'Design Invoice Templates' page on ePay and add the new variable to the desired location on the template. The custom variable name must be included in the triple brackets and must match the new variable name defined in the InvoiceHistory.Request.xml file.
13. Utilize the tester on ePay to ensure the new variable is displayed as desired.





## Variable List

The following variables are available for all sections of the invoice template

- InvoiceNumber – The identifier for the invoice
- CustomerNumber – The Customer Account Number
- CustomerName – The name of the customer account
- CustomerStatementName – The name of the customer account for statements
- CustomerClass – The class the customer is in
- Salesperson – The salesperson associated to the invoice
- CreatedOn – The date the invoice was posted
- DueDate – The day the invoice is due
- PaymentTerms – The terms for the invoice payment
- PONumber – The customer purchase order number
- BillToAddressName – The identifying name for the billing address
- BillToName – The associated contact for the billing address
- BillToAddress1 – The first address line for the billing address
- BillToAddress2 – The second address line for the billing address
- BillToAddress3 – The third address line for the billing address
- BillToCity – The associated city for the billing address
- BillToState – The associated state for the billing address
- BillToZip – The associated zip code for the billing address
- BillToCountry – The associated country for the billing address
- BillToPhone1 – The associated first phone number for the billing address
- BillToPhone2 – The associated second phone number for the billing address
- BillToPhone3 – The associated third phone number for the billing address
- ShipToAddressName – The identifying name for the shipping address
- ShipToName – The associated contact for the shipping address



- ShipToAddress1 – The first address line for the shipping address
- ShipToAddress2 – The second address line for the shipping address
- ShipToAddress3 – The third address line for the shipping address
- ShipToCity – The associated city for the shipping address
- ShipToState – The associated state for the shipping address
- ShipToZip – The associated zip code for the shipping address
- ShipToCountry – The associated country for the shipping address
- ShipToPhone1 – The associated first phone number for the shipping address
- ShipToPhone2 – The associated second phone number for the shipping address
- ShipToPhone3 – The associated third phone number for the shipping address
- ShippingMethod – The associated shipping method for the invoice
- DocumentType – The type of invoice
- Comments – Additional comments associated to the invoice
- Subtotal – The sum of the line items
- Misc – Miscellaneous costs for the invoice
- Tax – Tax costs for the invoice
- Freight – Freight costs for the invoice
- Discount – Additional Discount for the invoice
- Amount – The invoice total
- BalanceDue – The remaining amount due for the invoice
- Additional variables can also be added to any section on the template

#### **The following variables are only available for the Main Invoice Body tab**

- LineItemSection – All of the content in the 'Line Item Section' tab
- AppliedPaymentsSection – All of the content in the 'Applied Payments Section' tab

#### **The following variables are only available for the Line Item tab**

- LineShippingAddressName – The identifying name for the shipping address to the line item
- LineShippingName – The contact associated to the shipping address to the line item
- LineShippingAddress1 – The first address line for the shipping address to the line item
- LineShippingAddress2 – The second address line for the shipping address to the line item
- LineShippingAddress3 – The third address line for the shipping address to the line item
- LineShippingCity – The associated city for the shipping address to the line item
- LineShippingState – The associated state for the shipping address to the line item
- LineShippingZip – The associated zip code for the shipping address to the line item
- LineShippingCountry – The associated country for the shipping address of the line item
- LineShippingPhone – The associated phone number for the shipping address to the line item
- LineShippingMethod – The associated shipping method for the invoice to the line item
- LineRequestedShipDate – The requested ship date for the item to the line item
- ItemCode – The identifier associated to the line item
- Description – The description of the line item
- UnitPrice – The price of a single unit of the item
- Quantity – The amount of units of the item

- UnitOfMeasure – The unit of measure of the quantity
- Markdown – the associated markdown for the item
- TaxAmount – The associated tax for the item
- ExtendedPrice – The total price of the line item

**The following variables are only available for the Applied Payments tab**

- PaymentNumber – The identifying number for the payment
- PaymentAmount – The amount that is applied to the invoice
- CreatedOn – The date the payment was made
- PaymentStatus – The status of the payment, either Failed, Scheduled or Processed

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