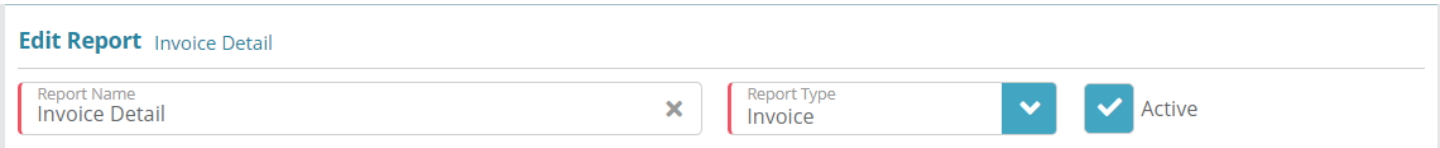
Embedding Reports in Invoice Templates

Invoicing & Credit Notes · https://learn.logisense.com/docs/680329263/

Reports set up in LogiSense Billing can be used to retrieve additional data for Invoice or Credit Note templates. That data will show up like standard invoice tokens and can be used in the exact same manner.

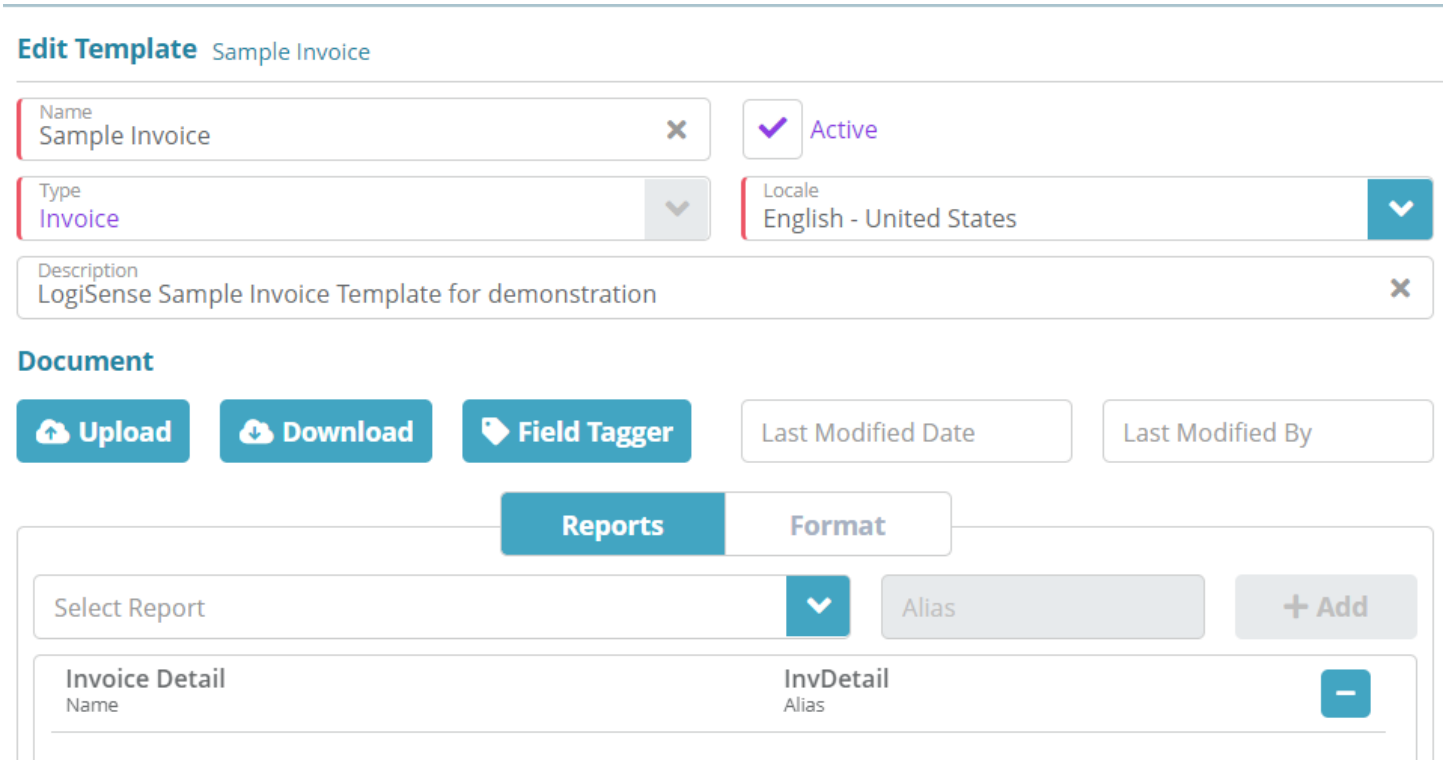
Step 1

Create a report in the Report Setup section. In the Report Type dropdown, select the type of template you want the report to be used for. Any column that is a part of the report will be available to use in the invoice.



Step 2

In the Template configuration screen, select your report in the Report section on the right. A unique alias is required to prefix the tokens that will be created.



Step 3

The columns of your report will now be available as tokens to use for mail merge in your template. They will show up in the Field Tagger right away, using the alias specified.

Invoice - Order - Shipping Contact - Contact Point Types - Work Phone - Value	invoice.order.shippingContact.contactPointTypes.work_phone.value
ReportDatasets - InvDetail - Invoice v2 - TotalCount	reportDatasets.InvDetail.invoiceV2.totalCount
ReportDatasets - InvDetail - Invoice v2 - Items - Account Id	reportDatasets.InvDetail.invoiceV2.items.accountId
ReportDatasets - InvDetail - Invoice v2 - Items - Account Name	reportDatasets.InvDetail.invoiceV2.items.accountName