

Invoices Templates

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Section overview

Invoices Templates is a convenient tool that makes the whole process of invoicing less time consuming and much more convenient and effective. It allows you to create custom invoice templates that would address your particular needs. The section is presented in the form of a table of invoices templates with the following columns (see screenshot below):

Screenshot: *Invoices Templates* section main window

Invoices Templates				
+ New PDF Template		+ New XLS Template		Rows 1 – 4 of 4 20 Page 1 of 1
ID	Name	Type	Reseller	Notes
1	default	PDF	all resellers	default invoice template
5	default extended	PDF	all resellers	
6	default with taxes details	PDF	all resellers	default invoice template with detailed taxes table
2	estonian	PDF	all resellers	estonian default template

Column Name	Description
ID	Invoice template's identification number
Name	Name of an invoice template
Type	Type of an invoice template format (.pdf/.xls)
Reseller	List of resellers corresponding invoice template was assigned to
Notes	Additional information on a template

Functional **buttons/icons**, presented in the section, are as follows:

Button/Icon	Description
+ New PDF Template	Allows to create a new invoice template in .pdf format
+ New XLS Template	Allows to create a new invoice template in .xls format
✖	Allows to delete an invoice template from the system

Creating a New Invoice Template

When creating a new template, you need to choose its type. Currently, there are **two types** – **.xls** and **.pdf**. For creating a new template, click the respective button: **New XLS Template** or **New PDF Template**.

New XLS Template creation

Screenshot: *New XLS invoice template creation form*

Invoices Templates

Name:
Reseller:
Anonymized Codes:
Locale:
Totals Calculation:
Taxes Calculation:
☐ Attach xDRs list to the invoice

Notes:

EXCEL TEMPLATE PARAMETERS


Statistics Columns:
☐ Include packages charges to invoice

Template:

OK

Close

Apply

Section	Fields Description		
General Information	General information about the invoice template		
	<ul style="list-style-type: none">Name	Unique name to differentiate invoice templates	
	<ul style="list-style-type: none">Reseller	Reseller who owns this invoice template	
	<ul style="list-style-type: none">Anonymized Codes	Code Deck, whose codes and their respective names will be hidden in the invoice	
	<ul style="list-style-type: none">Locale	Language for the text representation of totals in the invoice	
	<ul style="list-style-type: none">Totals Calculation	The order of rounding while calculating the totals: <ul style="list-style-type: none">round then sum - raw values are rounded first according to the currency settings, then summed;sum then round - raw values are summed first, then rounded.	
	<ul style="list-style-type: none">Taxes Calculation	The way taxes will be calculated: <ul style="list-style-type: none">percent from total amount - taxes are calculated as a percentage from the total amount;sum of individual taxes - taxes are calculated as a sum of respective taxes.	
	<ul style="list-style-type: none">Attach xDRs list to the invoice checkbox	If enabled, creates an xDR file for the invoicing period and attaches it to the invoice. To view advanced settings, click the  icon next to its name. <table><tr><td><ul style="list-style-type: none">xDRs List Format</td><td>List of xDR file format (.csv, .xlsx or .xls)</td></tr></table>	<ul style="list-style-type: none">xDRs List Format
<ul style="list-style-type: none">xDRs List Format	List of xDR file format (.csv , .xlsx or .xls)		

		<ul style="list-style-type: none">• Included Calls	Types of calls that will be included in invoices: <ul style="list-style-type: none">• All payable - includes calls with any duration that have non-zero costs and use packages• Non-zero payable - permits including calls with a non-zero duration that either have any cost or use packages.
		<ul style="list-style-type: none">• Select Columns	List of columns which can be presented in the attached xDR file
	<ul style="list-style-type: none">• Notes	Additional information concerning the invoice template	
Excel Template Parameters	Settings of an invoice template		
	<ul style="list-style-type: none">• Statistics Columns	List of statistics columns. If selected, the invoice will include summary statistics with selected columns	
	<ul style="list-style-type: none">• Include packages charges to invoice checkbox	If enabled, the invoice will include the data on ordered packages into a current invoice for the selected period	
	<ul style="list-style-type: none">• Template	Defined displaying format of xDRs list in a template	

✓ Tip

When you select a **Non-zero payable** parameter in the **Attached xDRs list to the invoice** advanced settings, then:

1) created **outgoing** Invoice for Client **will have attached xDRs file with:**

- incoming/outgoing non-free calls that should be paid by the Client
- outgoing free calls with non-zero duration
- outgoing free calls by package volume limits with non-zero duration

2) created **incoming** Invoice for Client **will have attached xDRs file with:**

- incoming/outgoing non-free calls that should be paid to the Client
- incoming free calls with non-zero duration
- incoming free calls by package volume limits with non-zero duration (it's applicable in case of usage of termination limits)

⚠ Attention

- xDRs table of the created invoice displays calls according to the settings of **Attach xDRs list to the invoices** settings.
- Stats table of the created Invoice shows calls included in the xDRs table.

New PDF Template creation

Screenshot: New PDF invoice template creation form

Method of Calculating and Rounding Values



Tip

To help you avoid rounding issues with **float numbers** and **missing cents**, check out our [Best practice example](#) or read about round half to even algorithm, applied in the system, [here](#).