Transitioning Customers to Different Invoice Templates

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Overview

This article provides general guidance and advice to service providers on:

- preparing a new invoice template using best practise methods
- upgrading or changing an invoice template using best practise methods.
- how to approach migrating customers to use the new template while eliminating unwanted disruption to business.

Preparing New Invoice Templates With Existing Live Templates In Play

Invoice templates comprise two user-configurable objects:

1. Invoice Layout (links to an invoice design)
2. Invoice Design (contains settings and is linked to a type of layout)

Editing Existing Layouts and Designs

There may be times when it is considered appropriate and preferable to change a template that is already in use. While it takes less effort to achieve, it also adds risks that are typical of making wholesale systems changes to live objects in a live system.

An invoice can be generated any time, so any changes being made at same time adds risk the generated invoice will be generated with partial or incomplete changes.

It is best practise to prepare a new invoice template rather than edit one that is already in use. This means creating a second *invoice layout* (Layout2) and a new *invoice design* (Design2) and linking them together to make up a complete new invoice template.

Emersion strongly recommends that any time an invoice template is to be changed, create a new template (an *invoice layout* linked to an *invoice design*) and get that ready first rather than changing your existing template objects.

This will prevent invoices being generated on templates that are not ready to be released.

Assumptions

This article assumes that best practise is followed and the following conditions are met.

1. A new *invoice design* has been created.
2. A new *invoice layout* has been created.
3. The new *invoice layout* + new *invoice design* are linked.
4. The new design and layout are configured and ready to be release.

Step-by-step instructions on how to create and configure the *invoice design* and *invoice layout* objects can be found on the Invoice Templates home page.

Want to know how to previewing a new invoice template before releasing it to all customers? See this article

Override Rules

When the system needs to build an invoice, it follows the rules below to know which invoice template to use for a specific customer.

It follows an inheritance rule set.

Step		Where is this configured	Field
1	Look for customer-level override. If found, use it.	**Customer > Details**	Account Invoice Template (pick list)

2	Look for Account Profile override. If found, use it.	Account Profiles are edited under **Admin > Settings > Account Profiles**	Account Invoice Template (pick list)
3	Use default invoice template	**My Invoice Template > Invoice Layout**	Default flag (radio button)

Knowing these rules is essential to understanding how best to transition your customers from one invoice template to another.

Transitioning Future (New) Customers

To transition all new customers created in the future to the new template, make the new layout (Layout2) the default layout.

Done under **My Invoice Template > Invoice Layout**

The **Default** flag tells the system the invoice layout to assign to a customer's account, unless a customer-level override is applied the time.

Changing this flag from one invoice layout to the other

- will change the template assigned to new customers by default
- will not retrospectively change the template for existing customers

Transitioning Existing Customers

To transition existing customers to the new templates, one of two overrides need to be used.

Applying an override is an instant change. Re-rendering any invoice for the customer will re-render it in the new template.

Apply a Customer-Level Override

Customer-level override is configured under **Customer > Details**

Best suited to service providers:

- with a small number of customer accounts (up to 10).
- there is no need for a bulk update

> At the time of wiring there is no way to bulk update customer accounts with a new invoice template override setting.

Apply an Account Profile Override

Account Profiles are edited under **Admin > Settings > Account Profiles**

An invoice template can also be linked to the Account Profile and acts as the middle node in a hierarchy.

Best suited to service providers:

- with large numbers of customer accounts who are likely to find that manually applying customer-level override overly onerous.
- updating in bulk is needed.

Test Results

Once the changes have been applied, go to a customer account that has a new template applied.

Go to **Customer > Invoices**

Re-render any invoice and view the PDF to see the results.

> When testing any invoice template changes, Emersion recommends avoiding re-rendering the most recent invoice (if possible), or any that have an amount still owing. Choosing an older invoice is better as it is less likely the customer will ask for another copy.

Related Pages

- Transitioning Customers to Different Invoice Templates
- Map a Package Plan to an Account Profile
- Set Netsuite Push Settings for an Account Profile
- Accounts and Contacts
- Account Profiles
- Account Profile Fundamentals
- Account Profile Interactions With Xero
- Change an Account Profile for an Account
- Contact Form Identification Fields
- Edit or Delete an Account Profile
- Update a Report Map
- Delete a Report Map
- Create a Report Map
- Design Settings vs Invoice Layout Variants
- Custom Message