



1 Adding Invoice Comments

Go to Accounting → Sales → Customer Invoices →

Create

Click on the new tab Comments (please refer to the below image)

The image shows a screenshot of a software interface for creating a customer invoice. On the left side, there are two sections: 'Customer' with a light blue highlighted input field, and 'Payment Terms' with a white input field. At the bottom, there are three tabs: 'Invoice Lines', 'Other Info', and 'Comments'. The 'Comments' tab is highlighted with a red rectangular box, indicating it is the active or recommended tab for adding comments.

Top Comments: the comment will appear above invoice lines

Bottom Comments: the comment will appear below invoice lines



Note:

- Text format can be changed
- Image can be inserted (i.e signature)
- Hyper-link can be inserted

Sample above invoice lines comment

Above invoice lines comment



[Click Here to Access WR Ltd Customer Portal](#)

Description

Quantity

Unit Price

Taxes

Taxes Amount

Tax Excluded Price

Invoice Conditional Comments



Invoice comments can be predefined as template and selected during the creation of customer invoices

To create invoice comment template:

Go to → Accounting → Configuration → Report Comments → [Create](#)

The screenshot shows a configuration window for creating an invoice comment template. On the left, there are three labels: 'Comment summary', 'Position', and 'Applies to'. To the right of these labels are three light blue input fields containing the text 'Project Reference', 'Before lines', and 'Invoice' respectively. Below these fields, there are two tabs: 'Content' (which is active) and 'Variable Content'. Under the 'Content' tab, there is a rich text editor toolbar with icons for undo, bold (B), italic (I), underline (U), strikethrough, font size (set to 13), text color (set to purple), bulleted list, numbered list, indent, table, link, unlink, and refresh. The main text area below the toolbar is currently empty.

Invoice Conditional Comments



i Note:

you can add variable content to the comment template, click on the Variable Content under the template. You may choose any field from the invoice model and the module will generate for you the expression for the variable.

You can copy the expression and paste it in the template text section, the field value will appear in the invoice comment once you print the invoice.

Sample variable content to display the invoice Reference/ Description value

Content	Variable Content
Field	Reference/Description (account.invoice)
Sub-model	
Sub-field	
Default Value	
Placeholder	<code>#{object.name}</code>
Expression	

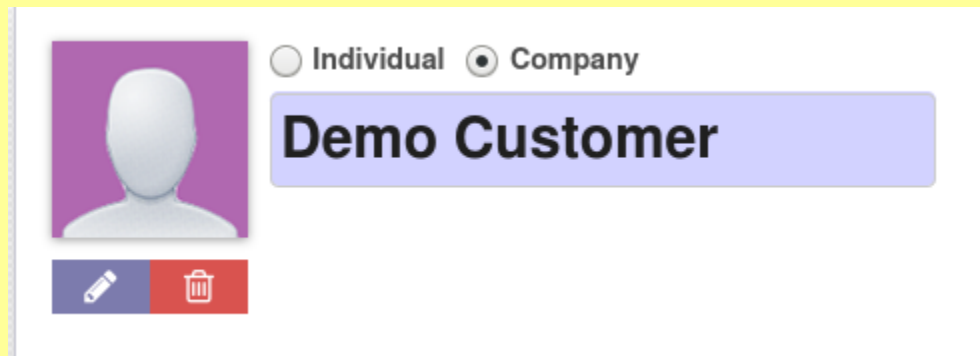


2 Invoice Conditional Comments per Business Partner

Go to → Accounting → Customers → Create or Edit Customer

i Important:

Conditioner comments is only applicable for Customer created as “**Company**”





under Sales & Purchases tab, new field is added “**Conditions template**”

A screenshot of a software interface for a 'Sale' record. The title 'Sale' is in blue. Below it are three fields: 'Is a Customer' with a checked checkbox, 'Salesperson' with an empty dropdown menu, and 'Conditions template' with a dropdown menu containing the text 'Project Reference' and a blue external link icon to its right.

You can select one of the existing template or create new one. The comment will appear automatically appear when you create new invoice for the customer, possible use case is to add a specific bank account details for invoice payment for a particular customer.