

Invoice generator

Instantly generate personalised PDF invoices for permanent placements. The invoice information is pulled into auto-populated fields within the Placement record – once set up, simply press the Generate invoice button and the PDF will be created and stored against the record and accessible as an attachment for your outgoing email from the system.

Set up your account for invoice generation

Before you can generate PDF invoices you will need to add your default account settings in the **Admin** panel under the **Company** tab.

Include your company logo

- 1 Your company logo can be added to the header of the invoice. To upload, select the **Browse** button in the Company files section.

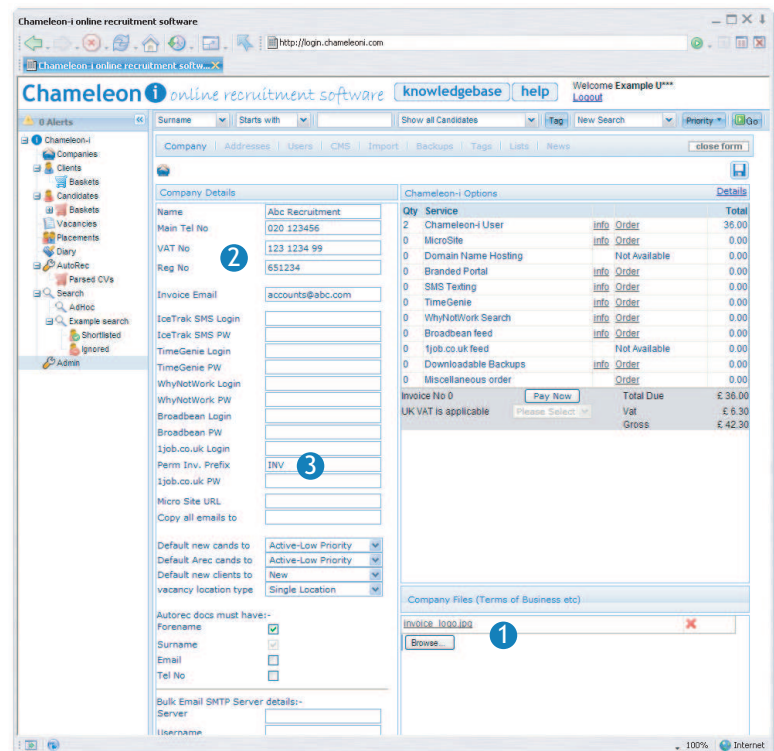
Tip: The file **must** be saved as a JPEG format and named, `invoice_logo.jpg`. We recommend the logo is no more than 700(w) x 120(h) px.

Add company details

- 2 Type your VAT number and Company registration number in the fields provided.

Prefix to the invoice number

- 3 Set the company-wide prefix of the invoice number in the field marked **Perm Inv. Prefix**.



The screenshot shows the 'Company Details' form in the Chameleon online recruitment software. The form includes fields for Name, Main Tel No, VAT No, Reg No, Invoice Email, and various login credentials. A table of 'Chameleon-i Options' is displayed on the right, showing service quantities and costs. The 'Company Files' section at the bottom right has a 'Browse' button highlighted with a red circle and the number 1.

| Qty | Service | Total |
|----------------------|----------------------|-------------------|
| 2 | Chameleon-i User | 36.00 |
| 0 | MicroSite | 0.00 |
| 0 | Domain Name Hosting | Not Available |
| 0 | Branded Portal | 0.00 |
| 0 | SMS Texting | 0.00 |
| 0 | TimeGenie | 0.00 |
| 0 | WhyNotWork Search | 0.00 |
| 0 | Broadbean feed | 0.00 |
| 0 | 1job.co.uk feed | Not Available |
| 0 | Downloadable Backups | 0.00 |
| 0 | Miscellaneous order | 0.00 |
| Invoice No 0 | | Total Due £ 36.00 |
| UK VAT is applicable | | Vat £ 6.36 |
| | | Gross £ 42.36 |

Invoice generator

Generate PDF invoices for permanent placement records.

Adding the invoice address

- 1 To create the Invoice address, first open the **Company** record, select the **Addresses** tab and the **new** button.
- 2 From the addresses pop-up window, select Invoice address from the drop down box and enter the address details. Press **save**.

Tip: Once created the Invoice contact and address information is pulled automatically into the Placement record and will be used in the PDF invoice.

Adding the permanent invoice details

- 3 Open the Placement record and edit the fields in the **Permanent invoice** section.
- 4 The **Permanent invoice** fields are auto-populated with default values that are set from the most recent placement and can be overtyped if required.

Default values of auto-populated fields:

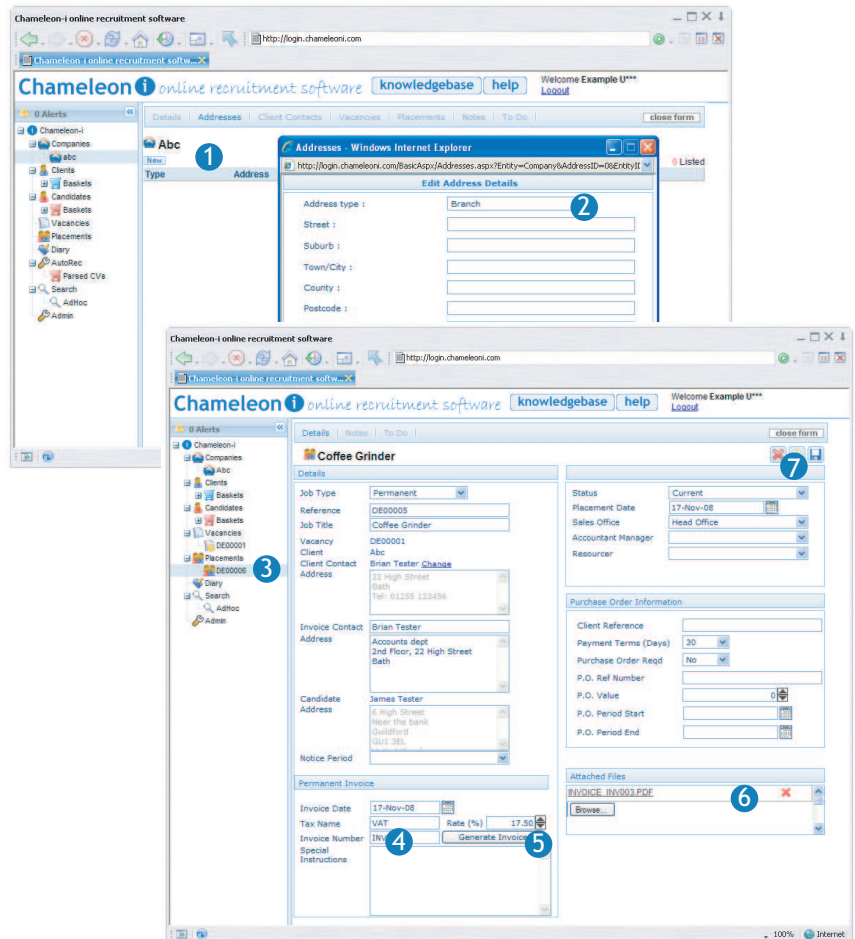
Invoice date: Today's date.

Invoice Number: The prefix set in admin and the next number in the sequence for this Company.


Tax Name & Rate: Information is pulled from the most recent placement for this company if there is no placement for Virgin, the defaults are read from the most recent placement for anyone.

Creating the invoice

- 5 Select the **Generate invoice** button.
Tip: The **Generate Invoice** button is only available for permanent placements, it is greyed out in other cases.
- 6 The system will generate a PDF invoice which will show in the attached files section.
- 7 Ensure you save the changes to the Placement record by pressing the **save** icon.



Bespoke invoice templates

-  Speak to our creative team about professionally designed invoice templates that will compliment your existing brand communication.