

# Technical Information

More technical information on some parts of advatra.

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# Export Templates (DOCX/XLSX)

You can customize the Docx Exports to your individual needs. The following information will give you a detailed overview on how to use the different functions.

# General

You can find all variables that you can use here, depending on the document type:

Travel	Document
<ul style="list-style-type: none"><li>• <a href="#">Document</a></li><li>• <a href="#">Dossier</a></li><li>• <a href="#">Customer</a></li><li>• <a href="#">TotalPrice</a></li><li>• <a href="#">Travellers</a></li><li>• <a href="#">Products</a></li></ul>	<ul style="list-style-type: none"><li>• <a href="#">Document</a></li><li>• <a href="#">Dossier</a></li><li>• <a href="#">Customer</a></li><li>• <a href="#">TotalPrice</a></li><li>• <a href="#">Positions</a></li></ul>

If you want to get a deeper technology background, have a look at the [Apache FreeMarker Library](#).

## Date formatting

For example, formatting the current date:

```
${.now?string["dd. MM. YYYY"]} //returns 01. 01. 2022
```

```
${.now?string["d. MMMM YYYY"]} //returns 1. January 2022
```

### See details about formatting

Format	Definition
<b>Month</b>	
M	Month, from 1 through 12
MM	Two digit month, from 01 through 12
MMM	Abbreviated name of the month, for example: Jan, Feb, etc.
MMMM	Full name of the month, for example: January, February, etc.
<b>Day</b>	
d	Day of the month from 1 through 31
dd	Day of the month from 01 through 31
ddd	Standard abbreviation for the day of the week, for example: Mon, Tue, etc.
dddd	Full name of the day of the week, for example: Monday, Tuesday, etc.
<b>Year</b>	

Format	Definition
y	Year from 0 to 99
yy	Year from 00 to 99
yyy	Year with minimum of 3 digits
yyyy	Year as a four digit number
<b>Hour</b>	
h	Hour using 12-hour clock from 1 - 12
hh	Hour using 12-hour clock from 01 - 12
H	Hour using 24-hour clock from 0 - 24
HH	Hour using 24-hour clock from 00 - 24
<b>Minute</b>	
m	Hour using 12-hour clock from 1 - 12
mm	Hour using 12-hour clock from 01 - 12
<b>Second</b>	
s	Second, from 0 through 59
ss	Second, from 00 through 59
<b>Other</b>	
t	First character of the AM/PM designator
tt	AM/PM designator
T	A literal to separate date and time in 8061 or other formats
z	Hours offset from UTC, with no leading zeros — Example: -5 or +530
zz	Hours offset from UTC, with leading zero — Example: -05 or +0530
zzz	Hours and minutes offset from UTC, with leading zeros — Example -0500 or +0530
g or gg	Period or era, such as A.D.
K	Zone information

# Lists

If you want to repeat something, for example, all products in an offer.

```
[ #list products as product]
    // Use "product" for one product
[/#list]
```

# Sorting

You can sort lists directly in the export, for example to display all products, sorted by the field start.

```
[ #list products?sort_by('start') as product]
    // the products get listed, sorted by "start"
[/#list]
```

# Variables

## Customer

### Usage

```
${customer.VARIABLE} // Replace VARIABLE with the appropriate field
```

Definition	Description	Example
addressAddition		<code>\${customer.addressAddition}</code>
addressFormatted	The default formatting for a customer address.	<code>\${customer.addressFormatted}</code>
city		<code>\${customer.city}</code>
country	The country of the customer	<code>\${customer.country}</code>
creationDate	Date of the creation of the customer	<code>\${customer.creationDate?string["dd.MM.YY YY"]}</code>
creator	Name of the creator of the customer	<code>\${customer.creator}</code>
email		<code>\${customer.email}</code>
firstName		<code>\${customer.firstName}</code>
lastName		<code>\${customer.lastName}</code>
name	Combination of firstName and lastName	<code>\${customer.name}</code>
number	The customer number in advatra (K1000001)	<code>\${customer.number}</code>
phone		<code>\${customer.phone}</code>
state		<code>\${customer.state}</code>
street		<code>\${customer.street}</code>
website		<code>\${customer.website}</code>
zipCode		<code>\${customer.zipCode}</code>

## Document

### Usage

```
${document.VARIABLE} // Replace VARIABLE with the appropriate field
```

Definition	Description	Example
------------	-------------	---------

travelStart	Start of the travel, <i>only on travel documents</i>	\${document.travelStart?string["dd.MM.YYYY"]}
travelEnd	End of the travel, <i>only on travel documents</i>	\${document.travelEnd?string["dd.MM.YYYY"]}
expirationDate	Date until the document is valid	\${document.expirationDate?string["dd.MM.YYYY"]}
number	The document number (D1000001.101)	\${document.number}
currency	The Currency of the document, ISO 4217	\${document.currency}
note		\${document.note}
type	Offer, Confirmation, Invoice, Deposit, Prepayment	\${document.type}
language		\${document.language}
locale	Can be used for the translation of the document	\${document.locale}
date		\${document.date?string["dd.MM.YYYY"]}
charged	Used for Deposit and Prepayment. Defines if they have been charged to an invoice.	\${document.charged}
exportDate	Date, when the document have been exported to the accounting system	\${document.exportDate?string["dd.MM.YYYY"]}
canton	Location	\${document.canton}
image		
days	List of days contained in the offer/confirmation	

# Dossier

## Usage

```
${dossier.VARIABLE} // Replace VARIABLE with the appropriate field
```

Definition	Description	Example
name		
openingDate		
status		
employee		
responsibleEmployee		
travelAgent		
number		

# Product

Usage

```
[ #list products as product]

    ${product.VARIABLE} // Replace VARIABLE with the appropriate field

[ #/list]
```

Definition	Description	Example
note		
start		
end		
title		
description		
voucherRelevant		
voucherText		
person		
images		
images3x2		
type		
travellers	<a href="#">See details here</a>	
customer	<a href="#">See details here</a>	
notes		
prices	<a href="#">See details here</a>	
guides	<a href="#">See details here</a>	
drivers	<a href="#">See details here</a>	
supplierNotes		
locationSmall	only available, when a template is linked.	
locationMedium	only available, when a template is linked.	
locationLarge	only available, when a template is linked.	
hasKickback	true, if any service has a commission	

Price

Usage



```
[ #list products as product]
```

```
[ #list product.prices as price]
```

```
[[ ${price.VARIABLE} // Replace VARIABLE with the appropriate field
```

```
[ /#list]
```

```
[ #/list]
```

Definition	Description	Example
name		
person		
quantity		
price		
type		
discount		
purchasingPrice		
creditorInvoiceReceived		
billingText		
effectivePurchasingPrice		
vat	Vat Object	
kickback		
kickbackAmount		
kickbackInvoiceCreated		
kickbackVat		
total	TotalPrice Object	

Definition	Description	Example
hotelNights		
supplier	<a href="#">See details here</a>	

# TotalPrice

## Usage

```
${totalPrice.VARIABLE} // Replace VARIABLE with the appropriate field
```

Definition	Description	Example
vats		
surcharges		
priceNetto		
priceVat		
priceBrutto		
totalPriceBrutto		
priceNettoFormatted		
totalPriceFormatted		

# Traveller

## Usage

```
[ #list travellers as traveller]

    ${traveller.VARIABLE} // Replace VARIABLE with the appropriate field

[ #/list]
```

Definition	Description	Example
firstName		
lastName		
name		
phone		
email		

Definition	Description	Example
passportNumber		
placeOfIssue		
birthday		
arrivalType		
arrivalDate		
arrivalTime		
arrivalNumber		
arrivalFlightClass		
arrivalSeat		
departureType		

# Guide

## Usage

```
[ #list guides as guide]

    ${guide.VARIABLE} // Replace VARIABLE with the appropriate field

[ #/list]
```

Definition	Description	Example
firstName		
lastName		
name		
phone		
email		

# Driver

## Usage

```
[ #list drivers as driver]
```

```
    ${driver.VARIABLE} // Replace VARIABLE with the appropriate field
```

```
[ #/list]
```

Definition	Description	Example
firstName		
lastName		
name		
phone		
email		

# Flywire Integration

You can connect advatra with Flywire. This way you can create invoices on Flywire, which then will be synced to advatra, when the client has paid.

Every payment in Flywire creates a Prepayment in advatra.

Make sure, that the Flywire **Invoice #** is always the **Dossiernumber** of advatra.  
All other invoices will be ignored.

## Requirements

To set up the Flywire integration, please contact your account manager first. You will need the following information:








- Endpoint URL from advatra
- API Keys from Flywire
- Default VAT
- Default Account financial

## Setup

To set up the Flywire integration, make sure, you have all the information from the **Requirements**.

If you have received your Endpoint URL, go to your Flywire Dashboard.

Navigate to **Settings -> Webhooks**

	Overview	
	Invoicing	▼
	Payments	▼
	Refunds	
	Contacts	▼
	Invoice reporting	▼
<hr/>		
	Settings	^
<hr/>		
General		
Company info		
Wallet		
User management		
Invoicing		
Style & localization		
Import/export		
<hr/>		
Webhooks		

Add a new Webhook with the "**Add new Webhook**"-Button on the top right.

Enter the following information:

New webhook

ENDPOINT URL

ADVATRA ENDPOINT URL

EVENTS TO SEND

Select

Invoicing

Invoice payment guaranteed

DESCRIPTION

advatra

Save changes

Cancel

### Endpoint URL

The Endpoint URL that you have received from advatra.

### Events to send

Select the "Invoice payment guaranteed"-Event

### Description

Add a description like "advatra"

## FAQ

### When will the payment be visible in advatra?

After the payment of your client is guaranteed, the Prepayment in advatra will be created within 5 minutes.

### What if I use instalments for my invoices?

Every instalment will get synced to advatra. After the payment is guaranteed, a Prepayment will be created. If you have 2 instalments, you will find 2 Prepayments in advatra.

### Is it relevant, which payment method my client uses?

No, this integration works with all payment methods Flywire offers. The duration until the payment is guaranteed depends on the payment method. For example, bank transfers can take up to 2-3 business days to process.

# Shared Calendar

In Administration -> Technical -> Global Settings you can define a "Shared Calendar Token".

Please use a save token, like a password. If this gets public, one would have access to your calendar.

If you have set up the token, you can subscribe to the calendar in your favourite calendar app, like Microsoft Outlook.

The URL of the calendar is the following:

<https://your-advatra-url.advatra.app/api/public/calendar/token/calendar.ics>



# Reports

Advatra has a powerful reporting engine based on JasperReports.

You can generate your own reports with the software Jaspersoft Studio, use a predefined report template or we can develop custom reports for you.

[You can download Jaspersoft Studio here.](#)

## Predefined reports

### Sales

#### Turnover per company type

In this report, you can select a start and end date of the travel period. In this period, all sales of all dossiers are summarized and grouped by company type. Please be aware, that if a company has assigned multiple company types, the turnover will be counted multiple times too.

[Turnover\\_per\\_company\\_type.jrxml](#)

#### Turnover per company

In this report, you can select a start and end date of the travel period. In this period, all sales of all dossiers are summarized and grouped by company.

[Turnover\\_per\\_company.jrxml](#)

#### Turnover per dossier (days before travel start)

This report helps you to get an overview of the days before travelling for each dossier. It helps you to recognize whether last-minute requests are worthwhile.

[Turnover\\_per\\_dossier.jrxml](#)

#### Turnover per dossier and status

This report provides you with an overview of all your dossiers and their current status. Additionally, it displays the total numbers for each status.

[Turnover\\_per\\_dossier\\_status.jrxml](#)

#### Turnover per employee

In this report, you can select a start and end date of the travel period. In this period, all sales of all dossiers are summarized and grouped by employee.

[Turnover\\_per\\_employee.jrxml](#)

## Turnover per travel agent

In this report, you can select a start and end date of the travel period. In this period, all sales of all dossiers are summarized and grouped by the assigned travel agent of the dossier.

[Turnover\\_per\\_travel\\_agent.jrxml](#)

## Turnover per product and location

In this report, you can select a start and end date of the travel period. In this period, all sales of all dossiers are summarized and grouped by product and the location (small, medium, large).

[Turnover\\_per\\_product\\_and\\_location.jrxml](#)

## Other

### Products without template

This report lists all products that were added as "empty product" in an offer and are not linked with the product library.

[Products\\_without\\_template.jrxml](#)

### Room nights

This report calculates the room nights per hotel in a given time period.

[Room\\_nights.jrxml](#)