

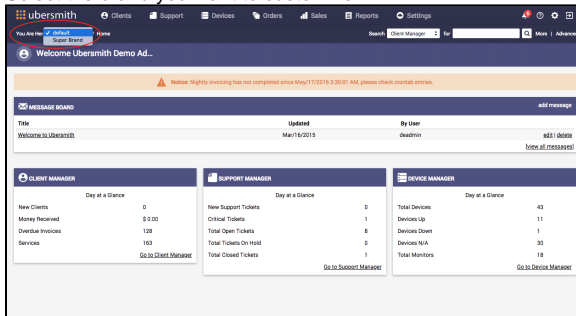
# Customizing Invoice PDF Templates

You can change the appearance of your generated PDF invoices by customizing the default invoice PDF template using HTML, variables, filters, and blocks. If you have more than one brand, you can customize the appearance of each brand's generated invoices.

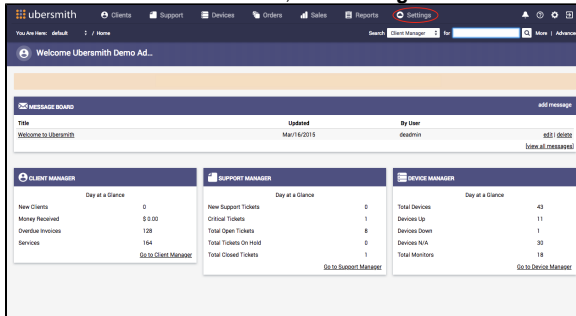
To change the appearance of your generated PDF invoices, you must first turn on the feature that enables you to customize your default invoice PDF templates. If you do customize your generated invoices appearance, it will impact performance when generating invoices.

## Access the Add Invoice PDF Template Page

1. Select the brand you want to customize.

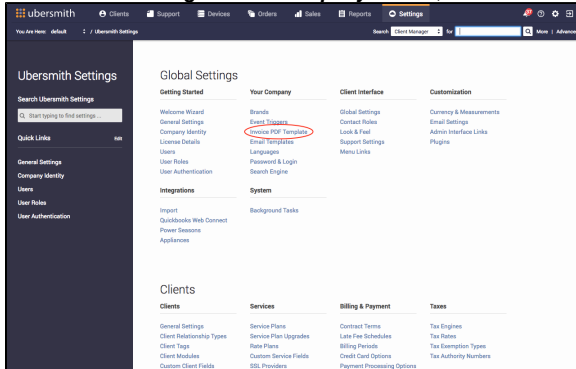


2. From the *Ubersmith Dashboard*, click **Settings**.



The *Settings* page appears.

3. In the *Global Settings - Your Company* section, click **Invoice PDF Template**.



The *Invoice PDF Template* page appears.

On this page:

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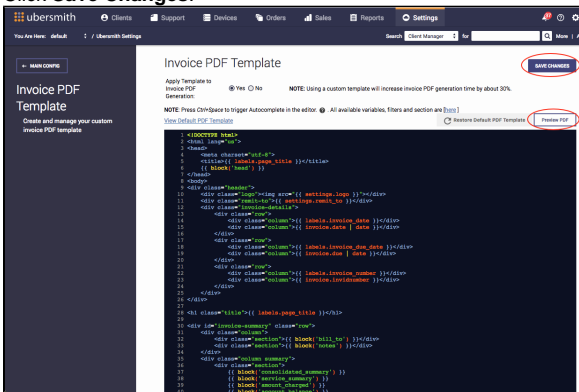
- [Access the Add Invoice PDF Template Page](#)
- [Update the Invoice PDF Template](#)
- [Editing Tips](#)

Viewing the Default PDF Template  
Enabling the Default Invoice PDF Template

- [Related Topics](#)

- The screenshot shows the 'Invoice PDF Template' editor in the Ubersmith application. The top navigation bar includes the Ubersmith logo, user profile, and various utility links like 'Clients', 'Support', 'Desktop', 'Mobile', 'Reports', and 'Settings'. Below this, a breadcrumb trail reads 'You are here: Home / > [Dashboard Settings]'. The main header area contains 'NEW CONTENT' and 'Invoice PDF Template' with a sub-header 'Create and manage your custom Invoice PDF template'. The central editor area is titled 'Invoice PDF Template' and contains a text editor with a code view. The code is a Liquid template for an invoice, featuring variables for company name, address, phone, email, and logo. It also includes a section for 'Items' with a table structure for item name, quantity, price, and total. The code is wrapped in a 'liquid' tag. To the right of the code editor, there are two buttons: 'Yes < No' and 'NOTE: Using a custom template will increase Invoice PDF generation time by about 30%.' Below the code editor, there are two buttons: 'Save Draft & Exit Template' and 'Preview Draft'.

1. Make any necessary changes to the invoice PDF template HTML code as necessary. See [Editing Tips](#) for more information.
2. Click **Preview PDF** to display the current changes.  
Any custom service modules or plugins will be included in your customized, generated invoice, but will not display in the preview.
3. Click **Save Changes**.



Once you have customized the appearance of your PDF invoices, they will display on the *Invoices* page.

The screenshot displays the Ubersmith web application interface. At the top, there is a navigation bar with the Ubersmith logo and several menu items: Clients, Support, Devices, Orders, Sales, Reports, and Settings. Below this, a secondary navigation bar includes links for 'You Are Here', 'Client Manager', and 'Client 100'. The main header area features a 'Best Insurance' badge, a search bar, and a 'Client Profile' dropdown. The 'Invoices' section is active, showing a list of 18 invoices. The table has columns for Invoice Number, Date Sent, Date Due, Amount, Amount Outstanding, Print Status, and Dispute. The first invoice, 10322-680, is highlighted, and its 'Dispute' status is 'PAID', which is circled in red. The page also includes a 'Send Invoice Now' button and a 'Send Account Statement' link.

Invoice Number	Date Sent	Date Due	Amount	Amount Outstanding	Print Status	Dispute
10322-680	Mar 14/2018	Feb 01/2018	\$ 16.20	\$ 16.20	Quoted	PAID 100% (PAID ACCOUNT STATEMENT)
10322-682	Apr 01/2018	May 01/2018	\$ 16.20	\$ 16.20	-	PAID 100% (PAID ACCOUNT STATEMENT)
10322-683	Mar 01/2018	Mar 15/2018	\$ 16.20	\$ 16.20	-	PAID 100% (PAID ACCOUNT STATEMENT)
10322-685	Apr 01/2018	Apr 15/2018	\$ 16.20	\$ 16.20	-	PAID 100% (PAID ACCOUNT STATEMENT)
10322-687	Nov 01/2018	Nov 15/2018	\$ 16.20	\$ 16.20	-	PAID 100% (PAID ACCOUNT STATEMENT)
10322-688	Sep 01/2018	Oct 01/2018	\$ 16.20	\$ 16.20	-	PAID 100% (PAID ACCOUNT STATEMENT)
10322-690	Aug 01/2018	Aug 20/2018	\$ 16.20	\$ 16.20	-	PAID 100% (PAID ACCOUNT STATEMENT)
10322-692	Jan 01/2019	Jan 01/2019	\$ 16.20	\$ 16.20	-	PAID 100% (PAID ACCOUNT STATEMENT)
10322-693	Apr 01/2019	May 01/2019	\$ 16.20	\$ 16.20	-	PAID 100% (PAID ACCOUNT STATEMENT)
10322-695	Feb 01/2019	Mar 15/2019	\$ 16.20	\$ 16.20	-	PAID 100% (PAID ACCOUNT STATEMENT)

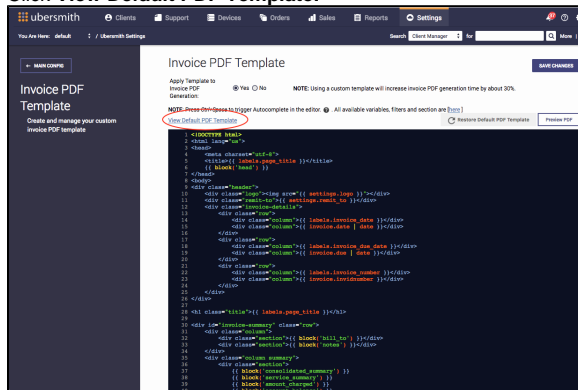
Your customizations to the HTML code should be valid, and Ubersmith will display any errors on lines that are not valid.

- An autocomplete tool is available. By pressing the **CTRL + space** keys. The autocomplete code that displays is relative to what you are currently editing. For example, if the context is HTML, a list of HTML tags displays so you can select it. If you typed `{{ system`, a list of variables, filters and blocks display.
- Variables are values related to Ubersmith's general settings, invoice, client, custom client fields and filters. You can access a complete list of variables by clicking the [here link](#). You can include a variable by typing `{{ variable_name }}` in the editor.
- Filters are functions you can apply to a variable, such as formatting the variable as a number. You can include a date filter by typing `{{ date_variable_name | date }}`
- Blocks are main sections of an invoice, such as `{{ block('service_items') }}`. You can change the order blocks display on the invoice.

## Viewing the Default PDF Template

You can copy all or parts of the default invoice PDF template or compare the default PDF template to your customized PDF template.

1. [Access the Invoice PDF Template page.](#)
2. Click **View Default PDF Template**.



The *Default Invoice PDF Template* page appears.

3. Click **Cancel** to close the window and return the *Invoice PDF Template* page.

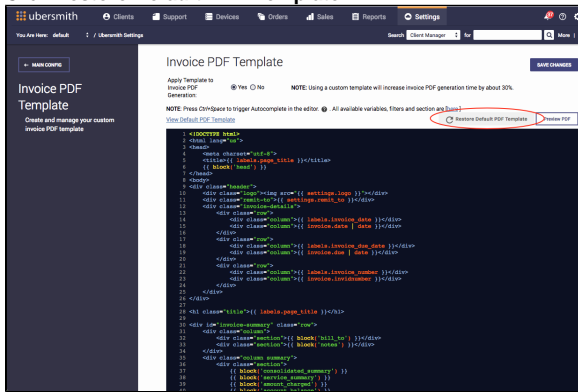


## Enabling the Default Invoice PDF Template

You can return your customized invoice PDF template back to the default invoice PDF template. If you return to the default, your customizations will be lost.

1. [Access the Invoice PDF Template page.](#)

## 2. Click **Restore Default PDF Template**.



A confirmation message appears.

## 3. Click **Yes**.

## Related Topics

[Managing Invoices](#)