

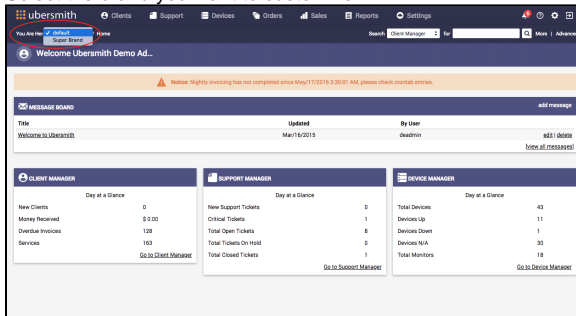
# Customizing Invoice PDF Templates

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.

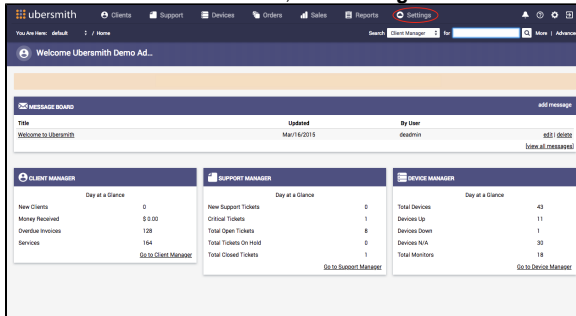
To change the appearance of your generated PDF invoices, you must first turn on the feature that enables you to customize your default invoice PDF templates. If you do customize your generated invoices appearance, it will impact performance when generating invoices.

## Access the Add Invoice PDF Template Page

1. Select the brand you want to customize.

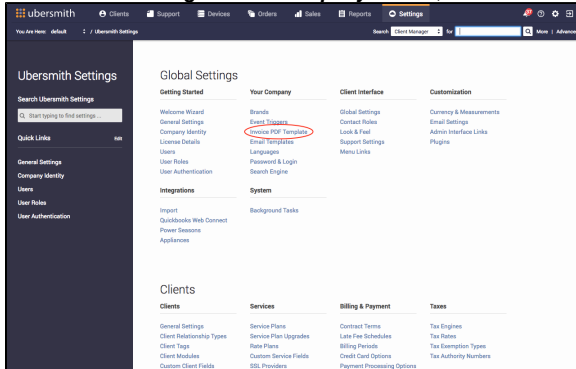


2. From the **Ubersmith Dashboard**, click **Settings**.



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:

On this page:

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

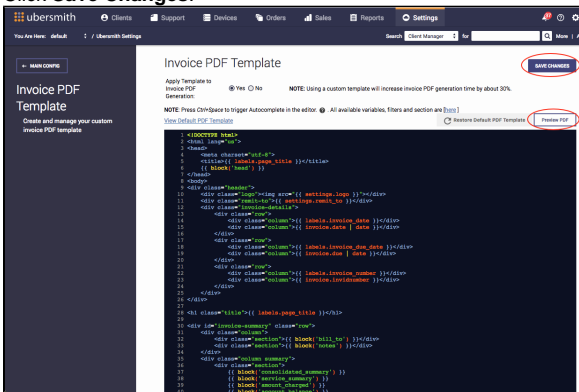
Viewing the Default PDF Template  
Enabling the Default Invoice PDF Template

- [Related Topics](#)

- The screenshot shows the 'Invoice PDF Template' editor in the Ubersmith application. The top navigation bar includes 'Ubersmith', 'Clients', 'Support', 'Debtors', 'Creditors', 'Sales', 'Reports', and 'Settings'. Below this, there are tabs for 'New Item', 'Edit Item', and 'Item Settings', with 'Item Settings' being the active tab. The main content area is titled 'Invoice PDF Template' and contains a text editor with a code preview. The code is a Liquid template for an invoice PDF. The preview on the right shows a sample invoice for 'ABC COMPANY' with a total of '100.00'. The code includes variables for company name, address, phone, email, and a list of items. The 'items' variable is a list of objects with 'name', 'quantity', 'unit\_price', and 'total' fields. The code also includes a 'total' variable and a 'tax' variable. The code is as follows:

```
1 {{ company_name }}
2 {{ company_address }}
3 {{ company_phone }}
4 {{ company_email }}
5 {{ company_website }}
6 {{ company_logo }}
7 {{ company_tax_id }}
8 {{ company_vat_id }}
9 {{ company_registration_number }}
10 {{ company_registration_date }}
11 {{ company_registration_expiry_date }}
12 {{ company_registration_expiry_date_formatted }}
13 {{ company_registration_expiry_date_formatted_2 }}
14 {{ company_registration_expiry_date_formatted_3 }}
15 {{ company_registration_expiry_date_formatted_4 }}
16 {{ company_registration_expiry_date_formatted_5 }}
17 {{ company_registration_expiry_date_formatted_6 }}
18 {{ company_registration_expiry_date_formatted_7 }}
19 {{ company_registration_expiry_date_formatted_8 }}
20 {{ company_registration_expiry_date_formatted_9 }}
21 {{ company_registration_expiry_date_formatted_10 }}
22 {{ company_registration_expiry_date_formatted_11 }}
23 {{ company_registration_expiry_date_formatted_12 }}
24 {{ company_registration_expiry_date_formatted_13 }}
25 {{ company_registration_expiry_date_formatted_14 }}
26 {{ company_registration_expiry_date_formatted_15 }}
27 {{ company_registration_expiry_date_formatted_16 }}
28 {{ company_registration_expiry_date_formatted_17 }}
29 {{ company_registration_expiry_date_formatted_18 }}
30 {{ company_registration_expiry_date_formatted_19 }}
31 {{ company_registration_expiry_date_formatted_20 }}
```

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 shows the Ubersmith web application interface. At the top is a navigation bar with the Ubersmith logo and various menu items like 'Create', 'Support', 'Devices', 'Orders', 'Sales', 'Reports', 'Settings', and 'Admin'. Below the navigation bar is a sub-header with 'You Are Here: [Home](#) / [Client Manager](#) / [Client 1001](#)'. The main header area includes a 'Best Insurance' badge, a search bar, and several filter tabs: 'Client Profile', 'Services', 'Billing / Invoicing', 'Account Mgmt.', 'Comments', 'Reports', 'Devices & Pkgs', and 'Sales'. 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, 10022-680, is highlighted, and its 'Status' is 'PAID', which is circled in red. The 'Dispute' column for this invoice shows a red 'X' icon and the text 'PAID'.

Invoice Number	Date Sent	Date Due	Amount	Amount Outstanding	Print Status	Dispute
10022-680	Mar 14/2018	Feb 01/2018	\$ 16.20	\$ 16.20	Quoted	PAID 100% (PAID)
10022-681	Apr 01/2018	May 01/2018	\$ 16.20	\$ 16.20	-	PAID 100% (PAID)
10022-682	May 01/2018	May 15/2018	\$ 16.20	\$ 16.20	-	PAID 100% (PAID)
10022-683	Jun 01/2018	Jun 01/2018	\$ 16.20	\$ 16.20	-	PAID 100% (PAID)
10022-684	Nov 01/2018	Nov 01/2018	\$ 16.20	\$ 16.20	-	PAID 100% (PAID)
10022-685	Dec 01/2018	Dec 01/2018	\$ 16.20	\$ 16.20	-	PAID 100% (PAID)
10022-686	Jan 01/2019	Jan 01/2019	\$ 16.20	\$ 16.20	-	PAID 100% (PAID)
10022-687	Feb 01/2019	Feb 01/2019	\$ 16.20	\$ 16.20	-	PAID 100% (PAID)
10022-688	Mar 01/2019	Mar 01/2019	\$ 16.20	\$ 16.20	-	PAID 100% (PAID)
10022-689	Apr 01/2019	Apr 01/2019	\$ 16.20	\$ 16.20	-	PAID 100% (PAID)
10022-690	May 01/2019	May 01/2019	\$ 16.20	\$ 16.20	-	PAID 100% (PAID)
10022-691	Jun 01/2019	Jun 01/2019	\$ 16.20	\$ 16.20	-	PAID 100% (PAID)
10022-692	Jul 01/2019	Jul 01/2019	\$ 16.20	\$ 16.20	-	PAID 100% (PAID)
10022-693	Aug 01/2019	Aug 01/2019	\$ 16.20	\$ 16.20	-	PAID 100% (PAID)
10022-694	Sep 01/2019	Sep 01/2019	\$ 16.20	\$ 16.20	-	PAID 100% (PAID)
10022-695	Oct 01/2019	Oct 01/2019	\$ 16.20	\$ 16.20	-	PAID 100% (PAID)
10022-696	Nov 01/2019	Nov 01/2019	\$ 16.20	\$ 16.20	-	PAID 100% (PAID)
10022-697	Dec 01/2019	Dec 01/2019	\$ 16.20	\$ 16.20	-	PAID 100% (PAID)

 **Important**

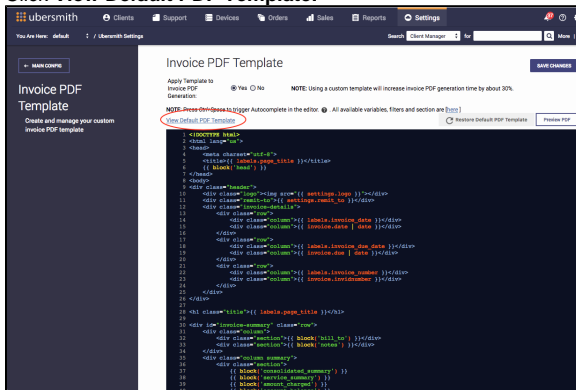
Your customizations to the HTML code should be valid, and Ubersmith will display any errors on lines that are not valid.

- 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.

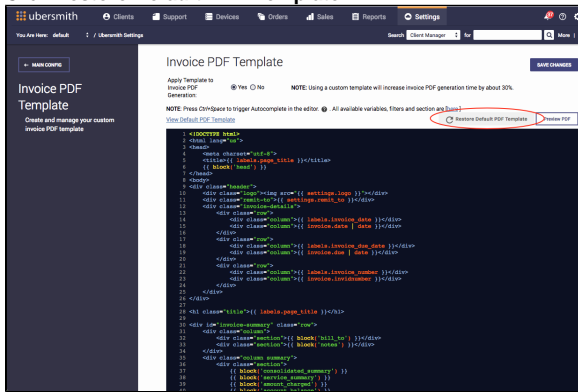


## Enabling the Default Invoice PDF Template

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](#)