

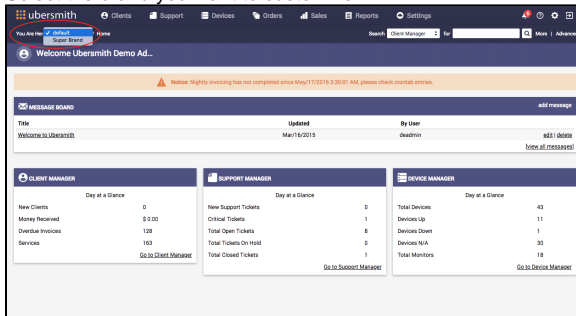
Customizing Invoice PDF Templates

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.

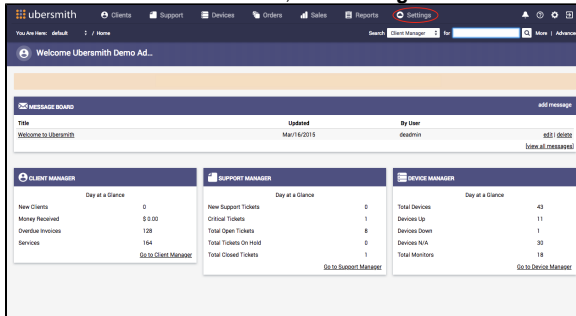
To change the appearance of your generated PDF invoices, you must first turn on the feature that enables you to customize your default invoice PDF templates. If you do customize your generated invoices appearance, it will impact performance when generating invoices.

Access the Add Invoice PDF Template Page

1. Select the brand you want to customize.

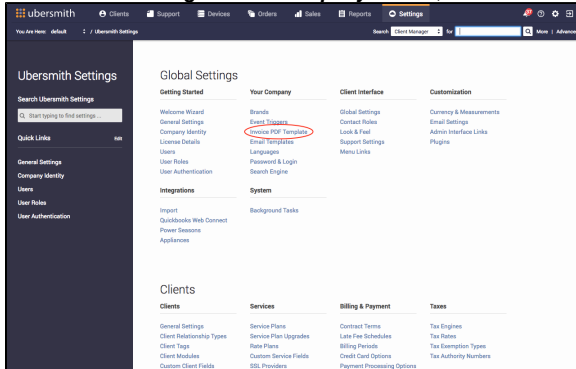


2. From the **Ubersmith Dashboard**, click **Settings**.



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:

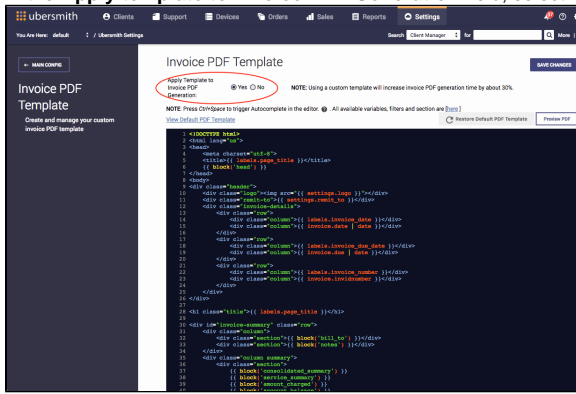
On this page:

- [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

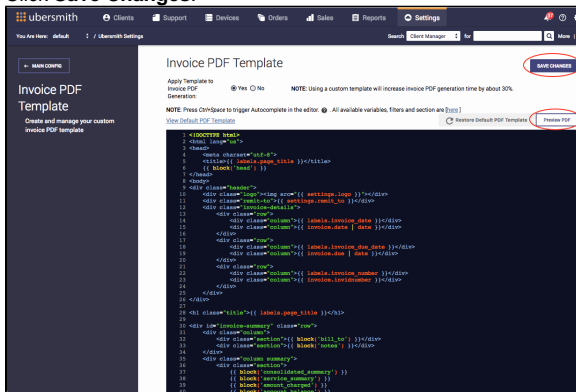
- [Related Topics](#)

4. In the **Apply template to Invoice PDF Generation** field, select **Yes**.



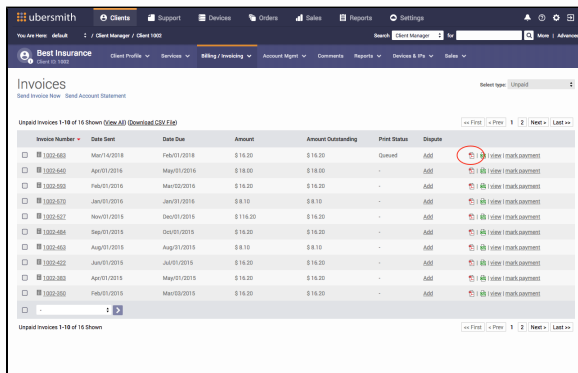
Update the Invoice PDF Template

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**.



Note

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



Editing Tips

Important

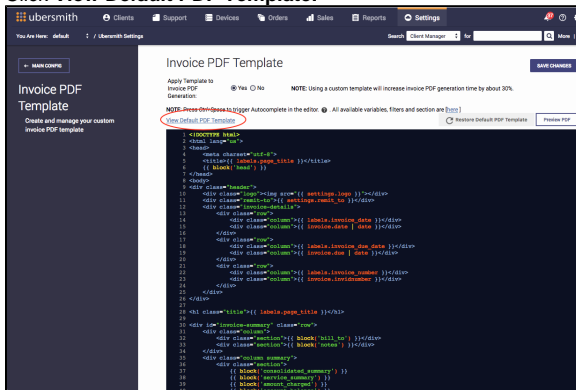
Your customizations to the HTML code should be valid, and Ubersmith will display any errors on lines that are not valid.

- 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.

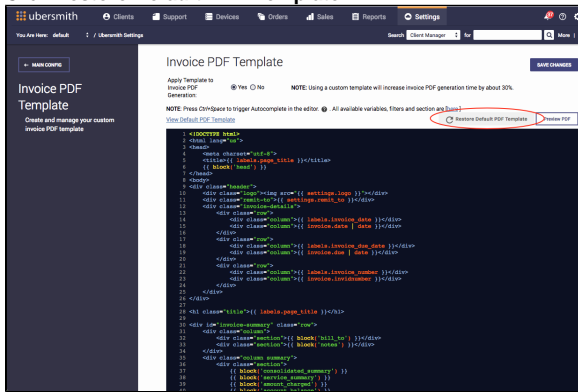


Enabling the Default Invoice PDF Template

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](#)