

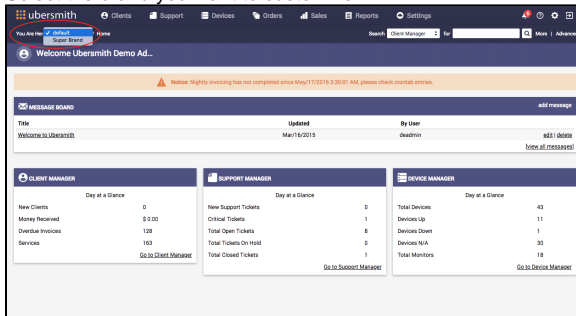
Customizing Invoice PDF Templates

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.

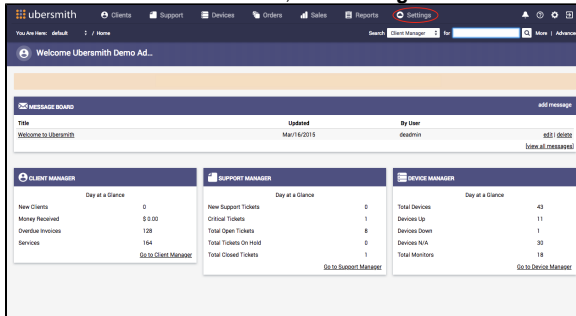
To change the appearance of your generated PDF invoices, you must first turn on the feature that enables you to customize your default invoice PDF templates. If you do customize your generated invoices appearance, it will impact performance when generating invoices.

Access the Add Invoice PDF Template Page

1. Select the brand you want to customize.

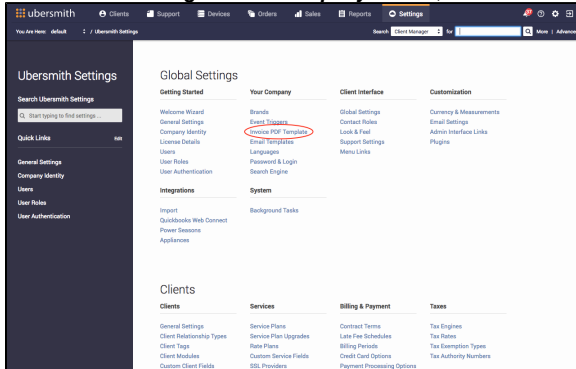


2. From the **Ubersmith Dashboard**, click **Settings**.



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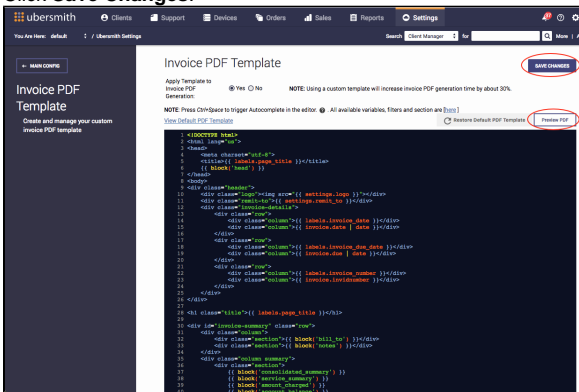
- [Access the Add Invoice PDF Template Page](#)
- [Update the Invoice PDF Template](#)
- [Editing Tips](#)

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 'Ubersmith', 'Clients', 'Support', 'Debeses', 'Orders', 'Sales', 'Reports', and 'Settings'. Below this, there are tabs for 'New Item', 'New Client', and 'New Item', along with a 'Search' bar and a 'Search Client Manager' button. The main content area is titled 'Invoice PDF Template' and contains a 'New Item' button. The template editor shows a preview of the invoice and a list of variables. The 'Variables' list includes 'Invoice Number', 'Invoice Date', 'Invoice Due Date', 'Invoice Total', 'Invoice Tax', 'Invoice Discount', 'Invoice Net Total', 'Invoice Gross Total', 'Invoice Net Total Tax', 'Invoice Gross Total Tax', 'Invoice Net Total Tax', 'Invoice Gross Total Tax', 'Invoice Net Total Tax', 'Invoice Gross Total Tax', 'Invoice Net Total Tax', 'Invoice Gross Total Tax', 'Invoice Net Total Tax', 'Invoice Gross Total Tax'. The 'Preview' button is located at the bottom right.

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 'Invoices' section of the Ubersmith dashboard. At the top, there are navigation tabs: 'Create', 'Support', 'Devices', 'Orders', 'Sales', 'Reports', and 'Settings'. Below these is a search bar and a 'Show Advanced' link. The main heading is 'Invoices' with a sub-link 'Send Invoice Now' and a 'Send Account Statement' button. A 'Status' dropdown menu is set to 'All'. The invoice list table has the following columns: 'Invoice Number', 'Date Sent', 'Date Due', 'Amount', 'Amount Outstanding', 'Print Status', and 'Dispute'. The first invoice, 10322-680, is marked as 'PAID' in the 'Dispute' column, which is circled in red. The 'Print Status' column for all invoices shows 'ASAP'. The 'Amount' and 'Amount Outstanding' columns show values of \$16.20 and \$16.20 respectively for the first invoice. The 'Date Sent' and 'Date Due' columns show 'Mar 14/2018' and 'Mar 15/2018' respectively. The 'Invoice Number' column shows '10322-680'. The 'Status' column shows 'PAID' with a green checkmark icon. The 'Print Status' column shows 'ASAP'. The 'Dispute' column shows '10322-680' with a red 'PAID' status and a green checkmark icon.

Invoice Number	Date Sent	Date Due	Amount	Amount Outstanding	Print Status	Dispute
10322-680	Mar 14/2018	Mar 15/2018	\$16.20	\$16.20	Quoted	PAID 10322-680
10322-681	Apr 01/2018	May 01/2018	\$16.20	\$16.20	-	ASAP 10322-681
10322-682	Mar 01/2018	Mar 15/2018	\$16.20	\$16.20	-	ASAP 10322-682
10322-683	Apr 01/2018	Apr 15/2018	\$16.20	\$16.20	-	ASAP 10322-683
10322-684	May 01/2018	May 15/2018	\$16.20	\$16.20	-	ASAP 10322-684
10322-685	May 01/2018	May 15/2018	\$16.20	\$16.20	-	ASAP 10322-685
10322-686	May 01/2018	May 15/2018	\$16.20	\$16.20	-	ASAP 10322-686
10322-687	May 01/2018	May 15/2018	\$16.20	\$16.20	-	ASAP 10322-687
10322-688	May 01/2018	May 15/2018	\$16.20	\$16.20	-	ASAP 10322-688
10322-689	May 01/2018	May 15/2018	\$16.20	\$16.20	-	ASAP 10322-689
10322-690	May 01/2018	May 15/2018	\$16.20	\$16.20	-	ASAP 10322-690
10322-691	May 01/2018	May 15/2018	\$16.20	\$16.20	-	ASAP 10322-691
10322-692	May 01/2018	May 15/2018	\$16.20	\$16.20	-	ASAP 10322-692
10322-693	May 01/2018	May 15/2018	\$16.20	\$16.20	-	ASAP 10322-693
10322-694	May 01/2018	May 15/2018	\$16.20	\$16.20	-	ASAP 10322-694
10322-695	May 01/2018	May 15/2018	\$16.20	\$16.20	-	ASAP 10322-695
10322-696	May 01/2018	May 15/2018	\$16.20	\$16.20	-	ASAP 10322-696
10322-697	May 01/2018	May 15/2018	\$16.20	\$16.20	-	ASAP 10322-697
10322-698	May 01/2018	May 15/2018	\$16.20	\$16.20	-	ASAP 10322-698
10322-699	May 01/2018	May 15/2018	\$16.20	\$16.20	-	ASAP 10322-699
10322-700	May 01/2018	May 15/2018	\$16.20	\$16.20	-	ASAP 10322-700

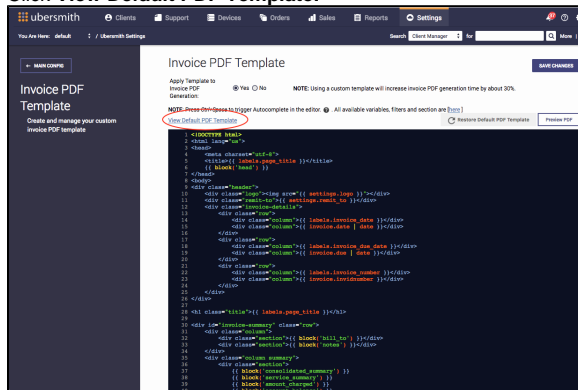
Your customizations to the HTML code should be valid, and Ubersmith will display any errors on lines that are not valid.

- 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.

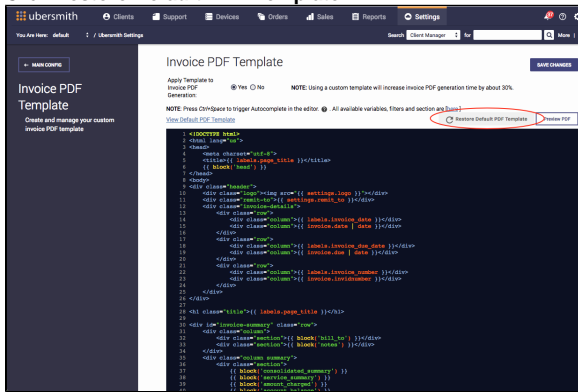


Enabling the Default Invoice PDF Template

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](#)