

How To Customize Invoice

Summary

This article provides information about how to customize invoice that is generated from MachPanel.

Applies To

MachPanel all versions

Procedure

It is very easy to customize look & feel of invoice that is generated from MachPanel. Follow the below steps to customize the invoice.

- 1) Navigate to **Home > System configuration > Billing Configuration > General Billing**
- 2) Click on Invoice Template Tab to edit invoice template.

The screenshot displays the MachPanel Billing Configuration interface. The breadcrumb navigation at the top reads: Home > System Configuration > Billing Configuration > General Billing. The 'Invoice Template' tab is highlighted with a red box. The left sidebar menu shows 'Billing Configuration' and 'General Billing' also highlighted with red boxes. The main content area shows a preview of an invoice template with a 'BILLED TO' section and an 'INVOICE' section. The 'BILLED TO' section contains variables like %clientFirstName%, %clientLastName%, %clientCompany%, %clientAddress1%, %clientAddress2%, %clientCity%, %clientState%, %clientZip%, and %clientCountry%. The 'INVOICE' section contains variables like %invoiceDateCreated%, %customerID%, %invoiceID%, %invoiceTotal%, %invoiceDueDate%, %paymentMethod%, %STATUS%, %transactionAmount%, and %TOTAL_BALANCE_DUE%. A 'Quick Formatting' panel on the right offers options like 'none', 'boldItalic', 'alert', 'style1', 'style2', 'style3', and 'style4'. At the bottom, there are buttons for 'Design mode', 'HTML text', 'Insert Company Variable', 'Insert Customer Variable', 'Insert Group Variable', 'Insert Page Break', 'Load Default Template', 'Set as default', and 'Save'.

- 3) Provide the required changes and click on Save to complete the customization.

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Note: Please use only .jpg format for images.

MachPanel Knowledgebase

<https://kb.machsol.com/Knowledgebase/50228/How-To-Customize-Invoice>