Templates

The Templates page lets you control exactly how your invoices and quotes look when delivered as PDFs. Choose a layout style, set brand colors, add a logo, write your footer and payment terms — all with a live preview that updates in real time as you make changes.

Key Features

- **Two document types**: Separate settings for Invoices and Quotes, each with its own tab — changes to one don't affect the other
- **Layout presets**: Choose between *Classic* (clean, professional, colored header) or *Minimal* (grayscale, no colored header)
- **Brand colors**: Primary and secondary color pickers — ACME Creative Agency's existing brand colors are pre-filled automatically as a starting point
- **Logo override**: Optionally supply a different logo for PDFs instead of your default company logo
- **Footer text**: Add a short message or legal line that appears at the bottom of every document
- **Payment terms**: Your standard terms (e.g. "50% deposit required to hold your date") printed on every PDF
- **Show Tax ID**: Toggle whether your Tax ID appears on documents
- **Signature block**: For quotes only — adds a signature line for client acceptance at the bottom of the PDF
- **Live preview**: The preview panel on the right updates instantly as you adjust any setting, using sample line items so you can see exactly what clients will receive

How to Use

1. Open **Templates** from the settings menu
2. Click the **Invoice** or **Quote** tab depending on which document you want to update
3. Select a **Template** layout from the dropdown — Classic or Minimal
4. Use the color pickers to set your **Primary** and **Secondary** colors
5. Optionally enter a logo URL in **Logo Override** to use a PDF-specific image
6. Fill in **Footer Text** and **Payment Terms** as needed
7. Toggle **Show Tax ID** and, for quotes, the **Signature block** checkbox
8. Watch the live preview on the right update with each change

9. Click **Save Changes** to apply your settings to all future PDFs

Tips

- Invoice and Quote templates are saved independently — you can use Classic for invoices and Minimal for quotes if you prefer
- Leaving Logo Override blank means your company's default logo is used automatically
- The preview uses sample data (a fictional "Jane Sample" invoice); real PDFs will show your actual client and billing details
- The **Save Changes** button stays grayed out until you make an edit — it activates as soon as something changes