

Custom invoice templates in Economacs 5



N.B. It is not necessary to create your own invoice template if you just want your logo on an existing template. Add your logo under Settings / General in Economacs.

Background image

Invoice templates in Economacs are based on PDF files. To create a template you first create a PDF background containing all the static information that will not change depending on the invoice shown. You can create the background in your program of choice provided it can export to PDF. The background should be in size A4 and on a single page. For each language that you want to be able to send invoices in you have to make a separate PDF file.

Invoice fields

Launch the Template Editor. Click the center button to add a PDF background. When doing so you need to specify what language the PDF background is in. Now you can add invoice fields to create a finished template. The invoice fields will be filled with information from the current invoice. For each field you select what information the field will contain. You can also select the font, text alignment and colour. The font selector is accessed using ⌘T and the colour selector using ⌘C. By selecting multiple fields you can change these properties for several fields at once.

If you've added more than one language to the template, you can flip between languages using the arrows at the bottom right. For each language, you also need to provide a few text messages used in the template. These are found in the table on the bottom left.



Tip! You can check the 'Identical across all language versions' box to have a field appear the same on all backgrounds. This is useful if most text is located in the same place.

How to use the invoice template in Economacs

Open your accounting document and select Invoicing from the Settings group in the sidebar. In the top right portion of the main view is a list of invoice templates in the document. Initially, this list contains the built-in invoice templates. Drag-and-drop an invoice template into this list to add it to your document. Select a template and press delete (⌘) to remove it. Invoice templates with the same name but different languages are grouped together.

When sending an invoice you'll find a popup menu at the bottom where you can select between the different templates in the document.

Old templates

You can no longer use invoice templates from Economacs 3.x. You will need to open these templates in Template Editor 4.x, check them for errors, and save them in the new format.