Using the HTML Editor to Customize Invoices and Statements

You can create custom invoice and statement templates and modify them using the HTML editor. You can modify the templates directly in the HTML editor, which is useful for minor changes. However, if you are making significant changes, consider copying the HTML into your preferred third-party editor, modifying it, and then copying it back into the HTML editor.

To save time and avoid errors, review the HTML guidelines for customizing invoices and statements before creating a custom template. The templates are structured differently than web pages, and some HTML elements are not allowed.

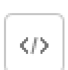
If you are not experienced with HTML and CSS, use the visual editor instead. For more information, see Using the visual editor to customize invoices and statements.

> **Tip:** Even if you aren't using the visual editor to edit your template, you can use the field selector lists to see what fields can be added. In the **Select a field type** list select either **Header** or **Detail** fields. You can then view the available fields in the **Select a field** list.

After creating a custom template, you can set it as the default template by selecting the radio button next to its name in the **Customized Templates** area on the **Invoices** or **Statements** page.

To create and modify a custom invoice or statement template:

1. On the **Templates** menu, click either **Invoices** or **Statements**.
2. Under the standard templates, click **Copy & customize**. The visual editor page opens.
3. Replace "Untitled template" with a name to identify the template.
4. Click the **View HTML** button.

5. In the **View HTML** window, do one of the following:
   - Edit the HTML directly in the window.
   - Copy the existing HTML code and paste it into a third-party editor. After modifying the code, copy and paste it back into the **View HTML** window.
   - Delete the existing HTML code, and replace it with code that you have created in a third-party editor.

   > Note: If you want to add an image to the template, you must use the visual editor. Learn more

6. When you are finished modifying the code, click **Update**.
7. ***Important!*** Scroll to the bottom of the page and click **Save** to save your changes.

You are returned to the **Invoices** or **Statements** page.

> **Tip:** To preview your template with sample data, click the **Preview** button next to its name in the **Customized Templates** area.

To add an image to a custom template:

1. On either the **Invoices** or **Statements** page, click the **Edit** link next to the custom template that you want to update.
2. Place your cursor in the area where you want to add the image, and click the **Insert new image** button.

   The **Image Browser** window opens.
3. Do one of the following, depending on whether you have already uploaded the image.
   - If the image appears in the **Image Browser** window, click it and then click **Insert**.
   - If you don't see the image you want to add, click **Add Image** and select the image. When the image appears in the window, click it and then click **Insert**.

   You are returned to the visual editor page.
4. Scroll to the bottom of the page and click **Save**.

You are returned to the **Invoices** or **Statements** page.