Previewing Changes to Invoice Templates

Go to full article

Overview

The simplest way to preview changes is to re-render an existing invoice, or generate a new one. We recommend you use a test customer account for this purpose, although any re-rendered invoice will reflect the changes.

It is easiest to have the **My Invoice Template** pages open in one browser tab and have the **Customer > Invoices** tab of a test account open in another tab. Make the required changes to your invoice template, then re-render the invoice. The changes you've made will be able to be viewed once the re-rendered invoice has been opened.

If you do not have any invoices yet, you can create an immediate invoice to preview the changes.

Invoice design settings are stored in a cache. If you make changes to an invoice design, you will need to wait **up to 5 minutes** before re-rendering an invoice before the changes take effect.

Invoice layout changes are not subject to a waiting period.

Related Pages

- Design Settings vs Invoice Layout Variants
- Custom Message
- Extended Styling Options
- Logos and Colours
- Training Session Guide: Invoice Templates and Global Invoicing Settings
- Product Invoice Mapping
- Call Itemisation
- Invoicing
- Previewing Changes to Invoice Templates
- Transitioning Customers to Different Invoice Templates
- Organisation details
- Invoice Templates
- Invoice Layout Types
- Invoice Layout Agent-Based
- Invoice Template Fundamentals