Invoice Templates — User Guide

RekordPOS · How to view, choose, and customize your invoice design · Generated 2026-06-08

1. Where to find it

Log in to your RekordPOS business panel and open the left sidebar menu. Look for **"Invoice Templates"** (it has a document/page icon). Clicking it takes you to:

Page	URL
Template gallery & assignment	`/business/invoice-templates`

> This menu item only appears if the **InvoiceEngine** module is enabled for your account. If you don't see it, contact your administrator.

2. The Template Gallery page

When you open the page you will see two sections:

A) "Current Template Assignment"

A summary card showing which design is currently active for each document type:

- **Sales** — invoices given to customers for sales
- **Purchases** — purchase invoices/orders
- **Dues / Receipts** — money-receipt documents for due collections

For each type, the card shows either the name of the template you've chosen (with paper size and type, e.g. "A4" or "Thermal 80mm"), or *"Using default (legacy) template"* if you haven't picked anything yet — in that case RekordPOS keeps using the original built-in invoice design, so nothing changes until you act.

B) "Available Templates" gallery

A grid of cards, one per available design. Each card shows:

- The template's **name** and **description**
- Badges for **type** (A4 / Thermal) and **paper size** (A4 / 80mm)
- A **"System"** badge for built-in RekordPOS designs
- An **"Active"** badge plus type badges (Sales / Purchases / Dues) showing where the template is currently in use, if anywhere

> Some templates may be marked **Restricted** — these are only available to certain businesses or roles, and won't be selectable unless your account has access.

3. How to switch your invoice design

> **Step 1 — Pick a template card**

Browse the gallery and find a design you like. The description tells you what makes it different (e.g. colour accents, layout style, etc.).

Step 2 — Click "Activate For"

On the template's card, click the **"Activate For"** button. A dropdown opens with three options:

- **Sales Invoices**
- **Purchase Invoices**
- **Due Receipts**

Click the document type you want this design to apply to. The page reloads and that template is now marked **Active** for the chosen type — every new invoice of that type will use the new design immediately.

You can mix and match — e.g. use a colourful "Modern A4" design for Sales Invoices while keeping the classic design for Purchase Invoices and Due Receipts.

Step 3 (optional) — Revert to the default design

If you want to go back to the original RekordPOS invoice for a given document type, open the **"Current Template Assignment"** card at the top, find that document type, and click **"Revert to Default"**. Confirm the prompt — your custom selection is removed and the original built-in design is used again.

4. Customizing what appears on the invoice

Every template lets you control which pieces of information are printed — without touching any code.

Step 1 — Open "Edit Field Visibility"

On any template card, click the **"Edit Field Visibility"** button. You'll see a list of every possible field on the invoice, grouped into categories such as:

- **Business** — your logo, company name, address, phone, email, VAT/tax info, branch name
- **Customer** — customer name, address, phone, email
- **Invoice** — invoice number, date, due date, terms
- **Line item** — product name, description, quantity, price, discount
- **Totals** — subtotal, discount, tax, grand total, balance due
- **Payment** — payment method, paid/due amounts
- **Tax** — VAT breakdown
- **Extras** — notes, terms & conditions, signatures

Step 2 — Toggle fields on or off

Each field has an on/off switch. Simply click a switch to show or hide that piece of information on your printed invoices.

> Fields marked with a red asterisk (*) are **mandatory** — RekordPOS requires them on every invoice (e.g. Company Name), so their switches are locked on and cannot be turned off.

Step 3 — Save

Click **"Save Changes"** at the bottom of the page. Your preferences are stored per template, so you can configure each design differently. The next invoice generated with that template will immediately reflect your choices.

5. Frequently asked questions

Will switching templates affect invoices I've already issued?

No. Past invoices remain as they were generated. The template assignment only affects newly generated/printed invoices going forward.

Can I use a different design for thermal/receipt printers?

Yes — look for templates badged **"Thermal"** / **"80mm"**; these are designed for receipt-style printers and are activated the same way as A4 designs.

I changed a field toggle but the invoice still looks the same — why?

Make sure you clicked **Save Changes** on the field-visibility page, and that you are looking at a *newly generated* invoice (older, already-rendered invoices won't change). If it still looks unchanged after a minute, refresh the page — settings can take a short moment to apply.

Why can't I select a particular template?

That template may be **Restricted** to specific businesses or staff roles. Contact your administrator if you believe you should have access.
