HTML Themes

Themes allow a high degree of customisation of the design and layout and form the base for the PDF template. As themes are created using HTML and CSS you will need to be comfortable with using this code in order to get the best result. Alternatively you can use your web designer to assist in creating themes that match your brand.

WHERE: *View > Templates > Edit and Create your own theme (link below Theme picklist)*

You can use Saasu themes to add some design elements to your Saasu templates. Your template has specific information for a document while the theme refers to the layout, colours, fonts, and other design elements that can be applied to more than one template.

Themes in Saasu allow you to add useful design features to one or more of your templates. Themes are designed to give Saasu customers with programming skills (HTML or CSS) the flexibility to help their business customers with specific PDF and email documentation needs in Saasu. Their requirements may include:

- Design elements such as colours, fonts, and images.
- Information blocks such as warranty or product information.
- Logistics information such as barcodes, delivery maps, and other devices.
- Translation to other languages.

Themes do not provide a way for customers with no programming experience to change the look and feel of their templates. If you haven't used HTML and CSS programming code before, it's probably best not to attempt this as we don't provide HTML/CSS programming support. This is due to the intensity of having to teach people programming before we can even suggest how to work with using the *Themes* feature in Saasu. Don't worry though, as we are happy to recommend a third party who can assist you with template customisation for our customers who don't have these skills or access to them.

Themes let you to control far more design elements in a document, including where your logo displays, and the colour and type of font you use. You can even embed things like maps, images, links, and buttons.

Edit Themes

1. Select *View* > *Templates* > Choose a template you want to design or edit a theme for – The Template will load in edit mode.
2. Click *Edit and create your own theme*.
3. Saasu will display some default themes that we have set up. You can open one similar to what you need and duplicate it using the *Duplicate* button.
4. Edit the CSS and HTML code for the theme.
5. You can use the *Preview* button to check your progress. The preview will display as a PDF so you can be sure the design work you are doing matches what your customers will see.

NOTE: When you edit a *Sale* or *Purchase* theme, two formats will display when you preview your changes – An *Item* style view and a *Service* style view.

Theme versions

You may need different version of a theme for different situations. You may need to customise words, like the invoice title for example. To do this duplicate the theme you want to change, make the changes, and set up the template to use the theme that you change. Some HTML knowledge is required to do this. Otherwise, it could be frustrating to get it working. Here are the steps:

1. Open the template you want to edit.
2. Click *Edit and create your own theme* below the *Theme* picklist.
3. Pick the theme you want to edit.
4. Duplicate the theme.
5. Make your changes. For example, if you just want to change the title, find the text *{InvoiceType.PrintDescription}* and replace it with the word that you want to use.
6. Click *Preview* to see your changes.
7. Click *Save* once you're happy with these.
8. Go back to the template list screen and open the template you want to change.
9. Change the theme to the new one you just created and click *Save*.

Pty Ltd Templates

⊕ Add

Name	Type
1st debts collection letter	Outstanding Invoices
Standard Outstanding Invoices	Outstanding Invoices Default
Standard	Payroll Default
No logo	Purchase
Standard exc tax	Purchase Default
Standard inc tax	Purchase
Standard	Remittance Default
Standard invoice include tax	Sale
No logo	Sale
SaasuTheme Template Test	Sale
Shipping slip	Sale
Standard invoice excluding tax	Sale Default
Standard	Receipt Default
Standard	Statement Default

Pty Ltd Edit Template

Name

SaasuTheme Template Test   ☐ Default

| Content | Email |

Theme   ○ Plain text ● HTML

Sale: SaasuThemes exc tax   ▼   **1**

Edit and create your own theme using HTML.

Logo   **2**

logo9.png   ▼   Upload | Delete

Max width is 960px without sender details or 640px if you have sender details

ICO INVOICED COMPANY

Sender details   **3**

```
<b>{FileIdentity.FullLegalName}</b><br>
{FileIdentity.Address}<br><br>
{FileIdentity.BusinessIdentifierWithLabel}
```

Supports HTML and merge fields.

Payment, notes and other information   **4**

```
<h2>Payment options</h2>
        <div class="first">
                <p><strong>PayPal:</strong><br/>
                Send payments to <em>payments@x-team.com</em></p>
        </div>

        <div>
                <p><strong>Bank Wire:</strong><br/>
                Beneficiary: <em>American Express International Inc.</em>
                Address: <em>PO Box 537, Chelsea, VIC., 3196, Australia</em><br/>
                Account Number: <em>0015002201</em><br/>
                Bank Name: <em>JPMorgan Chase</em>
        </div>
        <div class="last">
                <p>Bank Address: <em>AAP Centre Level 32, 259 George<br/>
                Street, Sydney NSW 2000, Australia</em><br/>
                Bank's SWIFT Code: <em>CHASAU2X</em><br/>
                Payment Reference: <em>Flywire Pty Ltd 8624</em></p>
        </div>
```

Supports HTML and merge fields.

Footer   **5**

Max. 3 lines. Repeated on every page. Merge fields are not supported.

PDF options   **Display**
● Portrait ○ Landscape   ☐ Page number

PREVIEW

SAVE   **SAVE & CLOSE**   **CLOSE**   **DELETE**   **DUPLICATE**

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1. Indicates which theme is used for your invoice template. Clicking Edit and Create your own theme using html you can customize your PDF invoice.

2. For further theme customization you can upload your company logo or any graphics which are used in your theme to provide your PDF invoice with custom look.
Click Upload to display upload modal and upload your theme graphic assets.

3. Sender details - are your company details You can use html tags to visually style these details.

4. Payment, notes and other information - These indicate your terms and can use html tags to position and visually style your PDF invoice. The example how the information can be presented with html tags.

5. Footer information can be inserted in this field, with only 3 lines and lack of support of merge fields and html classes can be used only for limited amount of information and styling.

Logo

logo9.png ▼   Upload | Delete

Max width is 960px without sender details or 640px if you have sender details

ICO INVOICED
COMPANY

Sender details

<b>{FileIdentity.FullLegalName}</
{FileIdentity.Address}

{FileIdentity.BusinessIdentifierWith

Supports HTML and merge fields.

Payment, notes and other i

<h2>Payment options</h2>
        <div class="first">
            <p><strong>PayP
        Send payments to
    </div>

    <div>
        <p><strong>Bank
    Beneficiary:
    Address: PO
    Account Number: <
    Bank Name:
    </div>
    <div class="last">
        <p>Bank Address:
    Street, Sydney NSW 2000, Australia
    Bank's SWIFT Code: CHASAU2X
    Payment Reference: Flywire Pty Ltd 8624</p>
    </div>

Supports HTML and merge fields.

Upload an Image

Upload an Image   ✕

Select an image, max. 100KB. Valid extensions are .gif, .png, .jpg, .jpeg.

[CHOOSE FILE]   No file chosen

Description:

☐ Overwrite existing image with the same name

[UPLOAD]   [UPLOAD AND CLOSE]   [CLOSE]

Pty Ltd Edit Theme

Type

Sale	▼

Name

SaasuThemes exc tax

HTML

```
<!DOCTYPE html PUBLIC "-//W3C//DTD XHTML 1.0 Transitional//EN"
"http://www.w3.org/TR/xhtml1/DTD/xhtml1-transitional.dtd">

<html xmlns="http://www.w3.org/1999/xhtml" xml:lang="en" lang="en">

<head>
        <meta http-equiv="Content-Type" content="text/html; charset=UTF-8" />
        <title>Saasu Invoice Template: Exc Tax</title>
        <style>
            /* Begin YUIReset.css */
            /*
            Copyright (c) 2007, Yahoo! Inc. All rights reserved.
            Code licensed under the BSD License:
            http://developer.yahoo.net/yui/license.txt
            version: 2.4.0
            */
            html{color:#000;background:#FFF;}

body,div,dl,dt,dd,ul,ol,li,h1,h2,h3,h4,h5,h6,pre,code,form,fieldset,legend,input,textarea,p,blo
ckquote,th,td{margin:0;padding:0;}
            table{border-collapse:collapse;border-spacing:0;}
            fieldset,img{border:0;}
            address,caption,cite,code,dfn,th,var{font-style:normal;font-weight:normal;}
            li{list-style:none;}
            caption,th{text-align:left;}
            h1,h2,h3,h4,h5,h6{font-size:100%;font-weight:normal;}
            q:before,q:after{content:'';}
```

See supported merge fields.

PDF Options

- ⦿ A4
- ○ Letter
- ☑ Fit to page width

Open your theme (html file) in text editor and copy the html code to clipboard - ctrl+c/cmd(apple)+c. Click inside the field red framed area and select all text with ctrl+a/cmd+a, paste copied content from your theme into this field - ctrl+v/cm+v and click Save button.

Make sure you are using proper theme file, the name of the file should match the Theme title here in Saasu.

Please keep PDF options checked as in this example.

PREVIEW

SAVE	SAVE & CLOSE	CLOSE	DELETE	DUPLICATE