



Zoho Corporation

PDF Templates

What are PDF templates in Zoho FSM?

Zoho FSM provides you with a suite of default PDF templates, allowing you to present information in a clear and visually appealing manner. These templates can also be tailored for different types of services or customer segments to enhance personalization and relevance.

- ① - **Permission Required:** [PDF Templates](#)
- Check the Edition-based availability of [PDF Templates](#).

Where can I use PDF templates in Zoho FSM?

You can use the PDF templates in the following places:

- When you [download](#) or [print](#) a record from the Requests, Estimates, Work Orders, or Service Appointments modules. Additionally, when you [download](#) a service report.

Print Estimate

Template: **Standard** ▼

- System Defined Templates
 - Standard
 - Spreadsheet
 - Premium
- Custom Templates
- Acme Inc. Estimates

Service Address
 Amy Santiago
 47 W 13th St
 New York
 New York
 10011
 USA

Summary
 Home painting for the Santiago residence

Service & Part	Quantity	List Price	Tax	Line Item Amount
Exterior Wall Painting	1	\$ 50.00	Salesta x [5.0%]	\$ 52.50
Interior Wall Painting	1	\$ 50.00	Salesta x [5.0%]	\$ 52.50
Exterior Primer - 4Ltr (White)	1	\$ 75.25	Salesta x [5.0%]	\$ 79.01
Texture Roller with Handle for Wall Decor, 7-inch	1	\$ 25.00	Salesta x [5.0%]	\$ 26.25
Sub Total				\$ 200.25

Buttons: Cancel, Print

In the mobile app, after you choose the download or print option, click on the template name at the top to see the list of available templates.

Print Estimate

Standard

Zyker Estimate
E\$10

Service Address
Lucy Robins
1001 Basin Rd
Juneau
Alaska
99801
United States

Billing Address
Lucy Robins
113 5th Street Stairs
Juneau
Alaska
99801
United States

Summary
Home Refurbishment

Service & Part	Quantity	List Price	Tax	Line Item Amount
Painting - Exterior House	1	\$ 50.00	Sale tax [5.0 %]	\$ 52.50
Exterior Primer - 4Ltr (White)	1	\$ 75.25	Sale tax [5.0 %]	\$ 79.01
Texture Roller with Handle for Wall Decor, 7-inch	1	\$ 25.00	Sale tax [5.0 %]	\$ 26.25
Sub Total				\$ 150.25
Tax Amount				\$ 7.51
Discount				\$ 0.0
Adjustment				\$ 0.00
Grand Total				\$ 157.76

Choose the Template Type

Standard

Spreadsheet

Premium

- While [emailing estimates](#), you can choose the PDF template to be used for the Estimate PDF that you add as the attachment.
- While [creating](#) service reports, you can choose the PDF template you want to use. Also, before [emailing service reports](#), you can choose the PDF template to be used for the service reports PDF that you add as the attachment.

What types of system-defined PDF templates are available in Zoho FSM?

You can choose from one of the three default templates in which you want your data to be displayed: **Standard**, **Spreadsheet**, and **Premium**.

Standard



Zylker

Estimate
ES20

Service Address

Amy Santiago
47 W 13th St
New York
New York
10011
USA

Billing Address

Amy Santiago
620 Atlantic Ave
Brooklyn
New York
11217
United States

Summary

Home painting for the Santiago residence

Service & Part	Quantity	List Price	Tax	Line Item Amount
Exterior Wall Painting	1	\$ 50.00	Salesta x [5.0%]	\$ 52.50
Interior Wall Painting	1	\$ 50.00	Salesta x [5.0%]	\$ 52.50
Exterior Primer - 4Ltr (White)	1	\$ 75.25	Salesta x [5.0%]	\$ 79.01
Texture Roller with Handle for Wall Decor, 7-inch	1	\$ 25.00	Salesta x [5.0%]	\$ 26.25

Sub Total	\$ 200.25
Tax Amount	\$ 10.01
Discount	\$ 0.0
Adjustment	\$ 0.00
Grand Total	\$ 210.26

Customer Notes

Thanks,
Zylker Inc.

Terms and Conditions

This estimate is an approximation based on information and requirements provided by the customer and is not guaranteed. Actual costs and terms may change once all project elements are discussed, negotiated, and finalized. Prior to any change in costs, the client will be notified. This estimate is valid for 30 days.

Spreadsheet



Zylker

Estimate
E520

Service Address		Billing Address		
Amy Santiago 47 W 13th St New York New York 10011 USA		Amy Santiago 620 Atlantic Ave Brooklyn New York 11217 United States		

Summary
Home painting for the Santiago residence

Service & Part	Quantity	List Price	Tax	Line Item Amount
Exterior Wall Painting	1	\$ 50.00	Salestax [5.0%]	\$ 52.50
Interior Wall Painting	1	\$ 50.00	Salestax [5.0%]	\$ 52.50
Exterior Primer - 4Ltr (White)	1	\$ 75.25	Salestax [5.0%]	\$ 79.01
Texture Roller with Handle for Wall Decor, 7-inch	1	\$ 25.00	Salestax [5.0%]	\$ 26.25

Sub Total	\$ 200.25
Tax Amount	\$ 10.01
Discount	\$ 0.0
Adjustment	\$ 0.00
Grand Total	\$ 210.26

Customer Notes
Thanks,
Zylker Inc.

Terms and Conditions
This estimate is an approximation based on information and requirements provided by the customer and is not guaranteed. Actual costs and terms may change once all project elements are discussed, negotiated, and finalized. Prior to any change in costs, the client will be notified. This estimate is valid for 30 days.

Premium



Zylker

Estimate
ES20

Service Address
Amy Santiago
47 W 13th St
New York
New York
10011
USA

Billing Address
Amy Santiago
620 Atlantic Ave
Brooklyn
New York
11217
United States

Summary
Home painting for the Santiago residence

Service & Part	Quantity	List Price	Tax	Line Item Amount
Exterior Wall Painting	1	\$ 50.00	Salesta x [5.0%]	\$ 52.50
Interior Wall Painting	1	\$ 50.00	Salesta x [5.0%]	\$ 52.50
Exterior Primer - 4Ltr (White)	1	\$ 75.25	Salesta x [5.0%]	\$ 79.01
Texture Roller with Handle for Wall Decor, 7-inch	1	\$ 25.00	Salesta x [5.0%]	\$ 26.25
Sub Total				\$ 200.25
Tax Amount				\$ 10.01
Discount				\$ 0.0
Adjustment				\$ 0.00
Grand Total				\$ 210.26

Customer Notes
Thanks,
Zylker Inc.

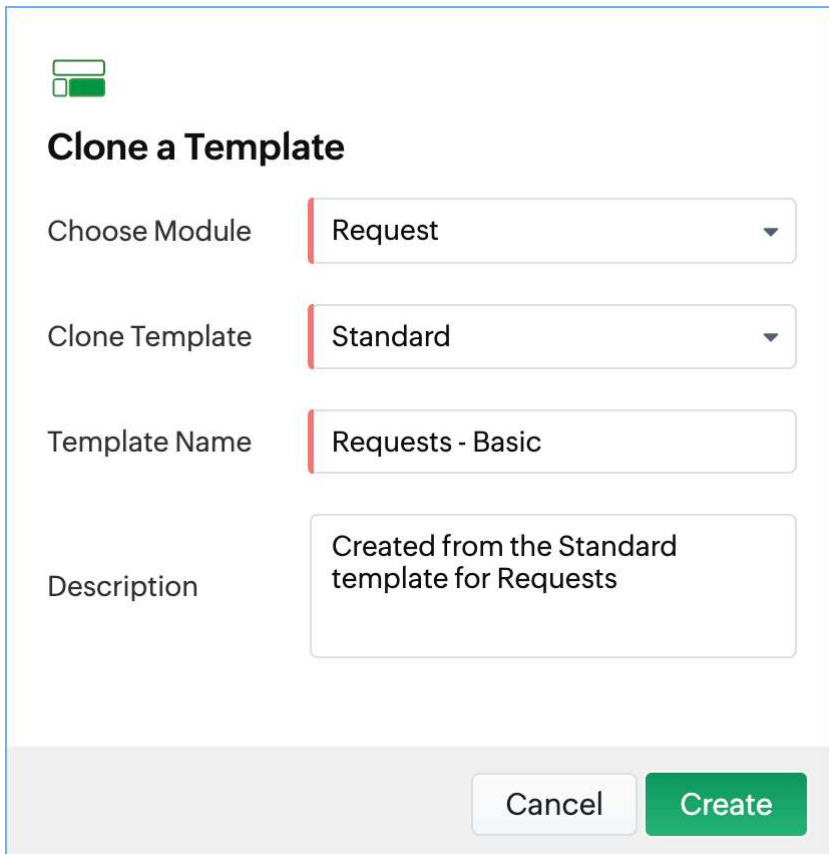
Terms and Conditions
This estimate is an approximation based on information and requirements provided by the customer and is not guaranteed. Actual costs and terms may change once all project elements are discussed, negotiated, and finalized. Prior to any change in costs, the client will be notified. This estimate is valid for 30 days.

Note: You cannot edit a system-defined PDF template. You can clone it to [create](#) a custom PDF template.

How can I create a new PDF template in Zoho FSM?

You can create a new template by cloning an existing one and then customizing it. To create a new PDF template.

1. Navigate to **Setup > Customization > PDF Templates** and click **Create Template**.
2. Enter the following details, then click **Create**:
 - a. **Choose Module:** The module for which you want to create the template.
 - b. **Clone Template:** The existing template that you want to create the template from.
 - c. **Template Name:** A name for the template
 - d. **Description:** A description for the template

A dialog box titled "Clone a Template" with a small icon of two overlapping rectangles (one green, one white) in the top left. It contains four input fields: "Choose Module" with a dropdown menu showing "Request", "Clone Template" with a dropdown menu showing "Standard", "Template Name" with a text input field containing "Requests - Basic", and "Description" with a text area containing "Created from the Standard template for Requests". At the bottom right are two buttons: "Cancel" and "Create".

Clone a Template

Choose Module

Clone Template

Template Name

Description

3. Make the [necessary changes](#) and click **Save**.

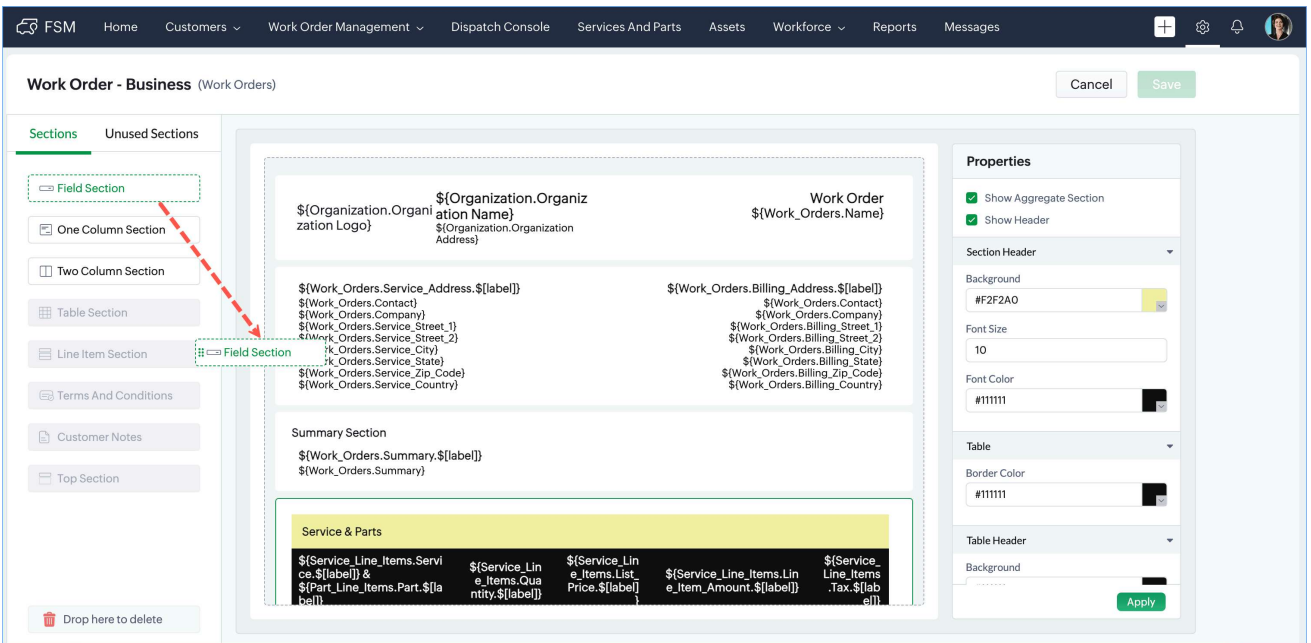
Once created, click on the template name from the *PDF templates List* page and click a record from the **Choose Actual data to preview** dropdown to see a preview of the template populated with actual record values.

How can I customize a PDF template?

You can customize the font size, font color, background color, and other style elements for headers, fields, tables, and more, depending on the section type.

To add a new section to the template:

1. Navigate to **Setup > Customization > PDF Templates**.
2. Click the PDF template you want to customize.
3. In the *PDF Template Builder* page, drag and drop the type of section you want to add.



4. Customize it as required and click **Insert**.

Refer to [this](#) section to learn how to customize the different types of sections.

5. Apply the required appearance customizations.

Refer to [this](#) section to learn about the various appearance customization options available in different sections.

6. Click **Save**.

Can I delete or rearrange sections in a PDF template?

You can edit, remove, or rearrange [🔧] the sections. You can also delete a section using the **Delete** [🗑️] icon at the bottom of the right pane. The deleted section will be moved to **Unused Sections**. From the **Unused Sections**, you can retrieve it by dragging and drop it back to the desired position.

The screenshot shows the Zoho FSM PDF Template editor. The main workspace displays a 'Service & Parts' section, which is a table with columns for Service Line Items and Part Line Items. The table contains various data fields, including Service Name, Description, Quantity, List Price, Tax, and Amount. The 'Properties' panel on the right allows customization of the selected section, including options to show aggregate sections and headers, and settings for background color, font size, font color, and table border color. The sidebar on the left lists various section types: Field Section, One Column Section, Two Column Section, Table Section, Line Item Section, Terms And Conditions, Customer Notes, and Top Section.

What types of sections can be added to a PDF template?

The PDF templates in Zoho FSM consist of one or more of the below seven types of sections:

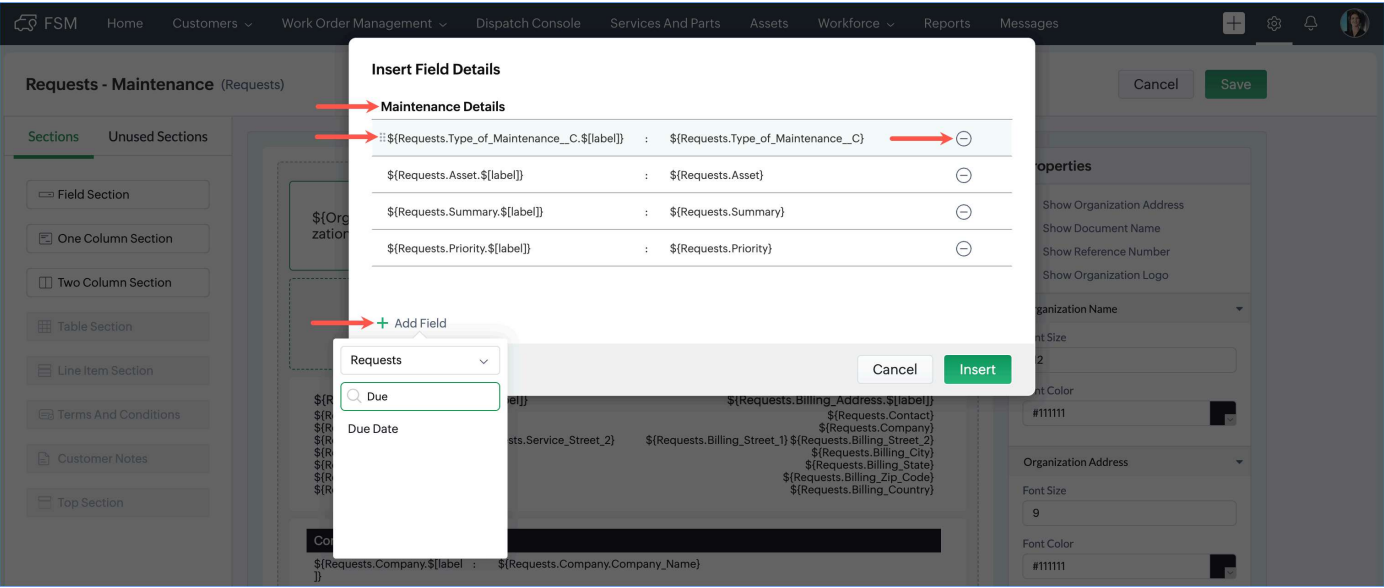
- [Field section](#)
- [Table Section](#)
- [Column Section](#)
- [Line Item Section](#)
- [Terms And Conditions](#)
- [Customer Notes](#)
- [Top Section](#)

Field Section

In this section, the data is in the format <field name> : <field value>.

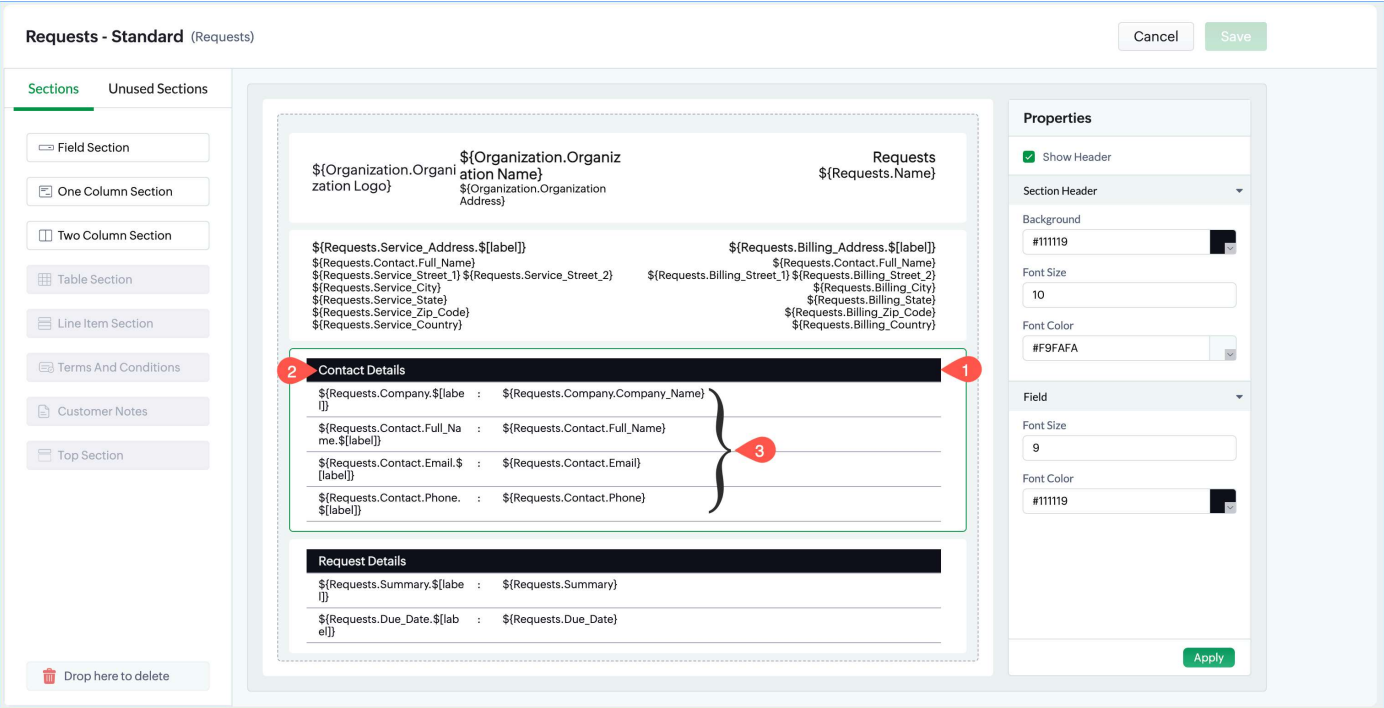
To customize a new field section:

- Enter a section header.
- Click on + Add Field and choose a field.
You can add as many fields (both default, and custom) as present in the module.
- Use to rearrange the position of an entry. Use to delete an entry.



The following appearance customization options are available for the field section:

S.N	Element	Description
1	Show Header	Select the checkbox to include the header in the section
2	Section Header - Background - Font Size - Font Color	- To apply a background color to the header - To change the font size of the header text - To apply a font color to the header text
3	Field - Font Size - Font Color	- To change the font size of the fields - To change the font color of the fields

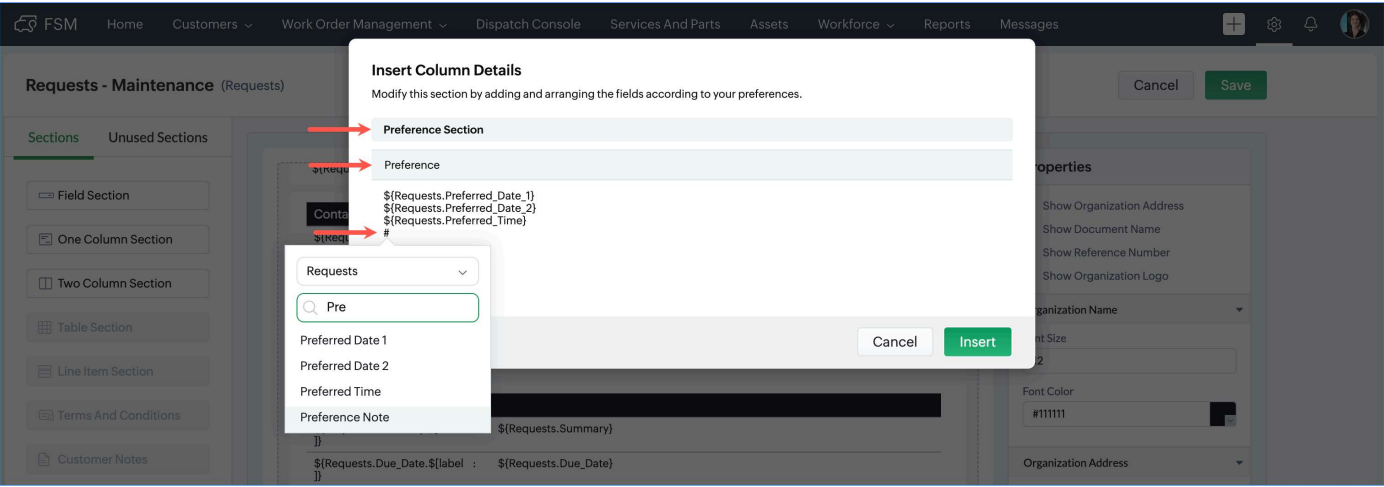


One Column Section

In this section, the data is presented in a single column.

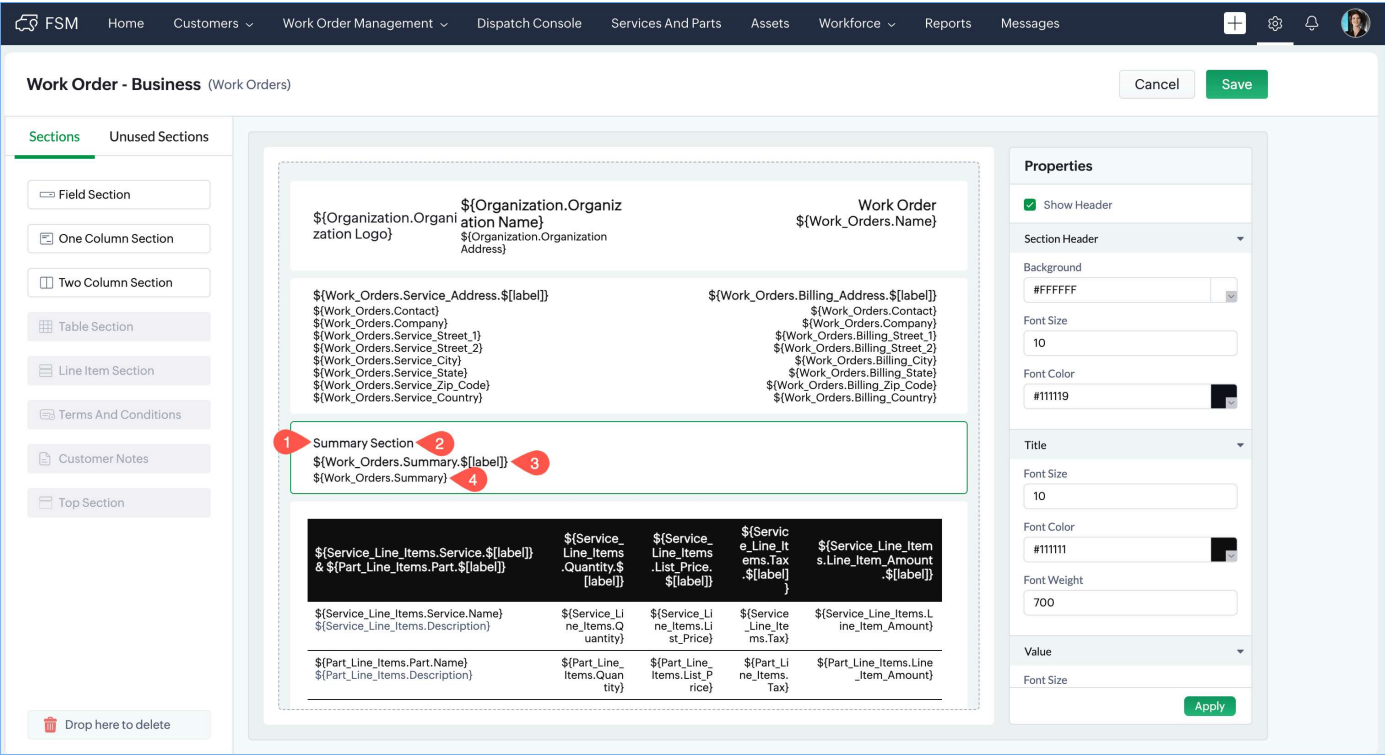
To customize a one column section:

- Enter a section header.
- Enter a title for the section
- To add a placeholder, type #. From the dropdown, select a module whose field value you want to use. Search the field you want to use and select it. The placeholders will get replaced with actual values in the service document.



The following appearance customization options are available for the one column section:

S.N	Element	Description
1	Show Header	Select the checkbox to include the header in the section
2	Section Header - Background - Font Size - Font Color	- To apply a background color to the section header - To change the font size of the header text of the section - To apply a font color to the header text of the section
3	Title - Font Size - Font Color - Font Weight	- To change the font size of the title text - To apply a font color to the title text - To change the thickness of the title text
4	Value - Font Size - Font Color	- To change the font size of the values in the columns - To apply a font color to the values in the columns

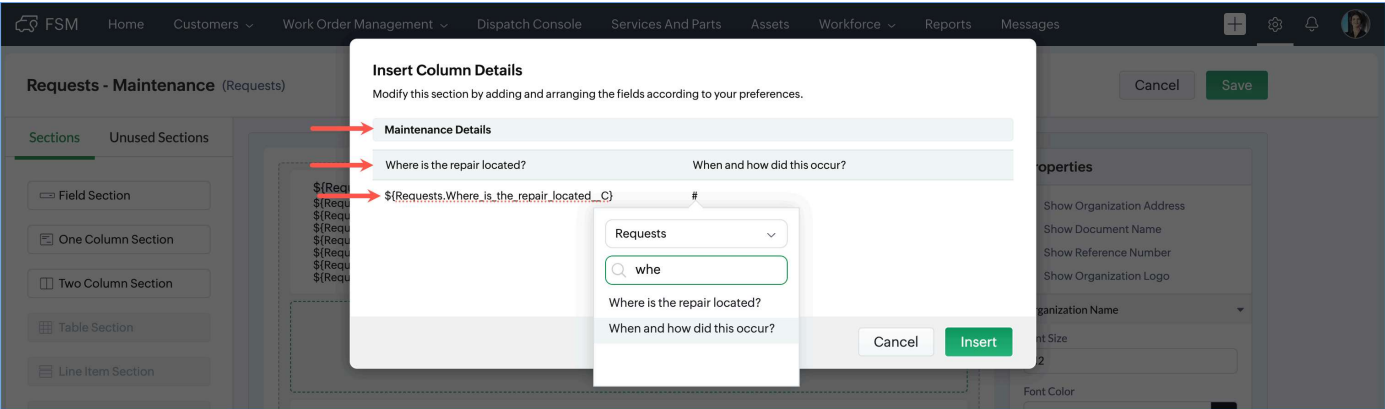


Two Column Section

In this section, the data is presented in two columns.

To customize a two column section:

- Enter a section header.
- Enter a title for the section
- To add a placeholder, type #. From the dropdown, select a module whose field value you want to use. Search the field you want to use and select it. The placeholders will get replaced with actual values in the service document.



The following appearance customization options are available for the two column section:

S.N	Element	Description
-----	---------	-------------

1	Show Header	Select the checkbox to include the header in the section
2	Section Header - Background - Font Size - Font Color	- To apply a background color to the section header - To change the font size of the header text of the section - To apply a font color to the header text of the section
3	Title - Font Size - Font Color - Font Weight	- To change the font size of the title text - To apply a font color to the title text - To change the thickness of the title text
4	Value - Font Size - Font Color	- To change the font size of the values in the columns - To apply a font color to the values in the columns

Work Order - Business (Work Orders)

Cancel
Save

Sections Unused Sections

Field Section

One Column Section

Two Column Section

Table Section

Line Item Section

Terms And Conditions

Customer Notes

Top Section

Address Section

<code>{{Organization.Organization Logo}}</code> <code>{{Organization.Organization Name}}</code> <code>{{Organization.Organization Address}}</code>	Work Order <code>{{Work_Orders.Name}}</code>
--	--

Billing Address Section

<code>{{Work_Orders.Service_Address.[label]}}</code> <code>{{Work_Orders.Contact}}</code> <code>{{Work_Orders.Company}}</code> <code>{{Work_Orders.Service_Street_1}}</code> <code>{{Work_Orders.Service_Street_2}}</code> <code>{{Work_Orders.Service_City}}</code> <code>{{Work_Orders.Service_State}}</code> <code>{{Work_Orders.Service_Zip_Code}}</code> <code>{{Work_Orders.Service_Country}}</code>	<code>{{Work_Orders.Billing_Address.[label]}}</code> <code>{{Work_Orders.Contact}}</code> <code>{{Work_Orders.Company}}</code> <code>{{Work_Orders.Billing_Street_1}}</code> <code>{{Work_Orders.Billing_Street_2}}</code> <code>{{Work_Orders.Billing_City}}</code> <code>{{Work_Orders.Billing_State}}</code> <code>{{Work_Orders.Billing_Zip_Code}}</code> <code>{{Work_Orders.Billing_Country}}</code>
--	--

Summary Section

`{{Work_Orders.Summary.[label]}}`
`{{Work_Orders.Summary}}`

<code>{{Service_Line_Items.Service.[label]}} & {{Part_Line_Items.Part.[label]}}</code>	<code>{{Service_Line_Items.Quantity.[label]}}</code>	<code>{{Service_Line_Items.List_Price.[label]}}</code>	<code>{{Service_Line_Items.Tax.[label]}}</code>	<code>{{Service_Line_Items.Line_Item_Amount.[label]}}</code>
<code>{{Service_Line_Items.Service.Name}}</code> <code>{{Service_Line_Items.Description}}</code>	<code>{{Service_Line_Items.Quantity}}</code>	<code>{{Service_Line_Items.List_Price}}</code>	<code>{{Service_Line_Items.Tax}}</code>	<code>{{Service_Line_Items.Line_Item_Amount}}</code>
<code>{{Part_Line_Items.Part.Name}}</code> <code>{{Part_Line_Items.Description}}</code>	<code>{{Part_Line_Items.Quantity}}</code>	<code>{{Part_Line_Items.List_Price}}</code>	<code>{{Part_Line_Items.Tax}}</code>	<code>{{Part_Line_Items.Line_Item_Amount}}</code>

Properties

☒ Show Header

Section Header

Background

Font Size

Font Color

Title

Font Size

Font Color

Font Weight

Value

Font Size

Apply

Table Section

In this section, the data is presented in a tabular format.

The following appearance customization options are available for the table section:

S.N	Element	Description
1	Show Header	Select the checkbox to include the header in the section
2	Section Header	- To apply a color to the border of the section header

	- Border Color - Background - Font Size - Font Color	- To apply a background color to the section header - To change the font size of the header text of the section - To apply a font color to the header text of the section
3	Table - Border Color	- To apply a color to the border of the table
4	Table Header - Background - Font Size - Font Color	- To apply a background color to the table header - To change the font size of the header text of the table - To apply a font color to the header text of the table
5	Table Body - Background - Font Size - Font Color	- To apply a background color to the table - To change the font size of the text inside the table - To apply a font color to the text inside the table

Work Orders - Spreadsheet (Work_Orders)
Cancel Save

Sections

- Field Section
- One Column Section
- Two Column Section
- Table Section
- Line Item Section
- Terms And Conditions
- Customer Notes
- Top Section

Work Order
 \${Work_Orders.Name}

Address Section \${Work_Orders.Service_Address.\$[label]} \${Work_Orders.Billing_Address.\$[label]}	
\${Work_Orders.Contact.Full_Name} \${Work_Orders.Service_Street_1} \${Work_Orders.Service_Street_2} \${Work_Orders.Billing_City} \${Work_Orders.State} \${Work_Orders.Zip_Code} \${Work_Orders.Country}	\${Work_Orders.Contact.Full_Name} \${Work_Orders.Billing_Street_1} \${Work_Orders.Billing_Street_2} \${Work_Orders.Billing_City} \${Work_Orders.Billing_State} \${Work_Orders.Billing_Zip_Code} \${Work_Orders.Billing_Country}

\${Work_Orders.Summary.\$[label]}
 \${Work_Orders.Summary}

\${Service_Line_Items.Service.\$[label]} & \${Part_Line_Items.Part.\$[label]}	\${Service_Line_Items.Quantity.\$[label]}	\${Service_Line_Items.List_Price.\$[label]}	\${Service_Line_Items.Tax.Amount.\$[label]}	\${Service_Line_Items.Line_Item_Amount.\$[label]}
\${Service_Line_Items.Service.Name} \${Service_Line_Items.Description}	\${Service_Line_Items.Quantity}	\${Service_Line_Items.List_Price}	\${Service_Line_Items.Tax}	\${Service_Line_Items.Line_Item_Amount}
\${Part_Line_Items.Part.Name} \${Part_Line_Items.Description}	\${Part_Line_Items.Quantity}	\${Part_Line_Items.List_Price}	\${Part_Line_Items.Tax}	\${Part_Line_Items.Line_Item_Amount}

\${Work_Orders.Sub_Total.\$[label]}	\${Work_Orders.Sub_Total}
\${Work_Orders.Tax_Amount.\$[label]}	\${Work_Orders.Tax_Amount}
\${Work_Orders_Adjustment.\$[label]}	\${Work_Orders_Adjustment}

Properties

☒ Show Header

Section Header

Border Color: #A6ACB9

Background: #ECF1F3

Font Size: 9

Font Color: #111119

Table

Border Color: #A6ACB9

Table Header

Background: #ECF1F3

Font Size:

Apply

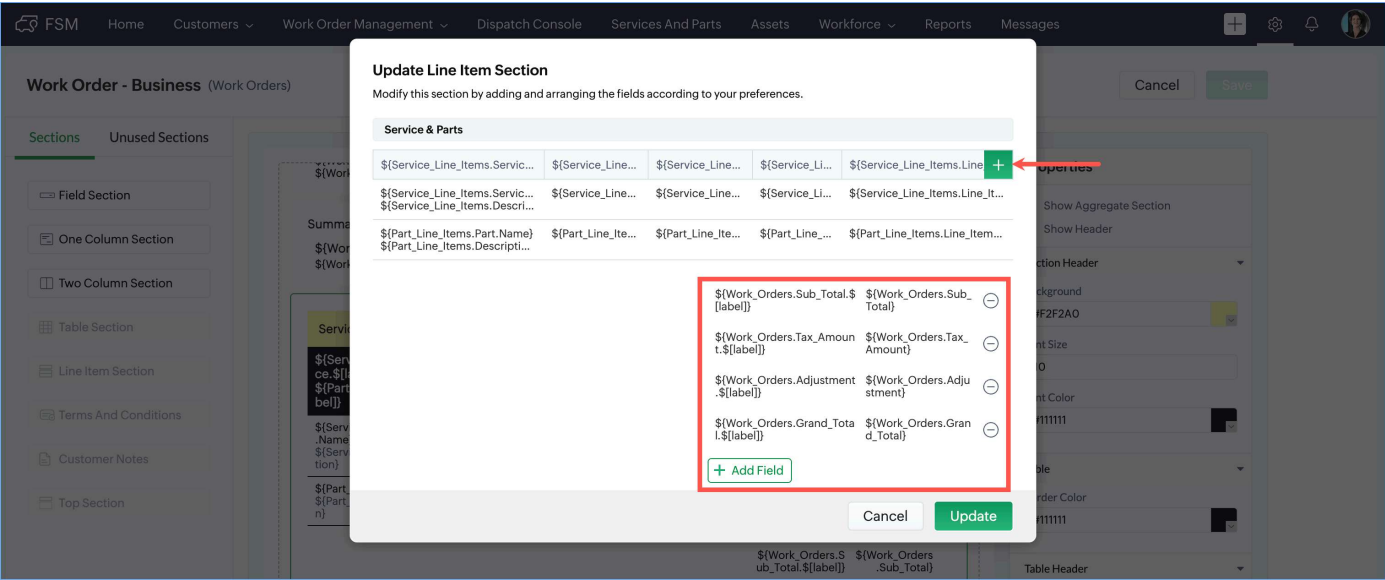
Line Item Section

This section captures the line item information in a record.

To customize a line item section:

- Click on Edit from **more options** [⋮].
- Perform the required changes and click **Update**.
 - Click  to open the **Column Selector**. Select/deselect the columns you want by checking/unchecking their checkboxes. Use  to rearrange the position of the columns. Click **Apply**.

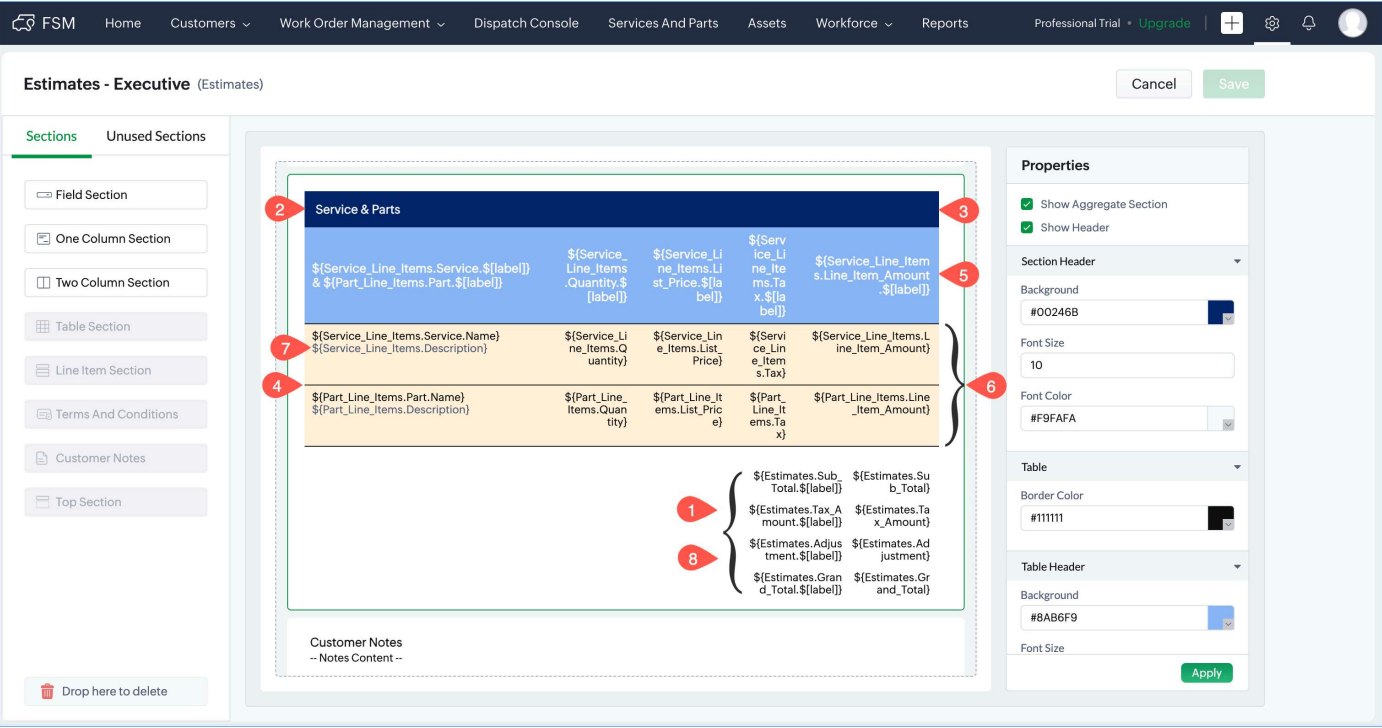
- To add an aggregate field, click **Add Field** and choose a field. Click ⊖ to remove a field.



The following appearance customization options are available for the line item section:

S.N	Element	Description
1	Show Aggregate Section	Select the checkbox to include the aggregate section. This section includes the following values: Sub Total, Tax Amount, Discount, Adjustment
2	Show Header	Select the checkbox to include the header in the section
3	Section Header - Background - Font Size - Font Color	- To apply a background color to the section header - To change the font size of the header text of the section - To apply a font color to the header text of the section
4	Table - Border Color	- To apply a color to the border of the table
5	Table Header - Background - Font Size - Font Color - Font Weight	- To apply a background color to the table header - To change the font size of the header text of the table - To apply a font color to the header text of the table - To change the thickness of the header text of the table
6	Table Body - Background - Font Size - Font Color	- To apply a background color to the table - To change the font size of the text inside the table - To apply a font color to the text inside the table
7	Sub Row - Font Size - Font Color	This is any additional information shown below a row. E.g. Description of service/part line item - To change the font size of the values in the rows

		- To apply a font color to the values in the rows
8	Aggregate Table	- To change the font size of the values in the aggregate section
	- Font Size	- To apply a font color to the values in the aggregate section
	- Font Color	



Terms And Conditions

This section captures the terms and conditions information.

The following appearance customization options are available for the terms and conditions section:

S.N	Element	Description
1	Show Header	Select the checkbox to include the header in the section
2	Section Header	- To apply a background color to the section header - To change the font size of the header text of the section - To apply a font color to the header text of the section
3	Title	- To change the font size of the title text - To apply a font color to the title text - To change the thickness of the title text
4	Value	

- Font Size - To change the font size of the text used in Terms And Conditions
- Font Color - To apply a font color to the text used in Terms And Conditions

Estimates - Standard (Estimates)
Cancel Save

Sections Unused Sections

- Field Section
- One Column Section
- Two Column Section
- Table Section
- Line Item Section
- Terms And Conditions
- Customer Notes
- Top Section

Drop here to delete

\$(Service_Line_Items.Service.\$[label]) \$(Part_Line_Items.Part.\$[label])	\$(Service_Line_Items.Quantity,\$[label])	\$(Service_Line_Items.List_Price,\$[label])	\$(Service_Line_Items.Tax,\$[label])	\$(Service_Line_Items.Line_Item_Amount,\$[label])
\$(Service_Line_Items.Service.Name) \$(Service_Line_Items.Description)	\$(Service_Line_Items.Quantity)	\$(Service_Line_Items.List_Price)	\$(Service_Line_Items.Tax)	\$(Service_Line_Items.Line_Item_Amount)
\$(Part_Line_Items.Part.Name) \$(Part_Line_Items.Description)	\$(Part_Line_Items.Quantity)	\$(Part_Line_Items.List_Price)	\$(Part_Line_Items.Tax)	\$(Part_Line_Items.Line_Item_Amount)
			\$(Estimates.Sub_Total.\$[label])	\$(Estimates.Sub_Total)
			\$(Estimates.Tax_Amount.\$[label])	\$(Estimates.Tax_Amount)
			\$(Estimates.Adjustment.\$[label])	\$(Estimates.Adjustment)
			\$(Estimates.Grand_Total.\$[label])	\$(Estimates.Grand_Total)

Customer Notes
-- Notes Content --

T&C Section T&C Section

\$(Estimates.Terms_And_Conditions.\$[label]) \$(Estimates.Terms_And_Conditions)

Properties

☒ Show Header

Section Header

Background: #FFFFFF

Font Size: 10

Font Color: #111119

Title

Font Size: 10

Font Color: #111111

Font Weight: 700

Value

Font Size:

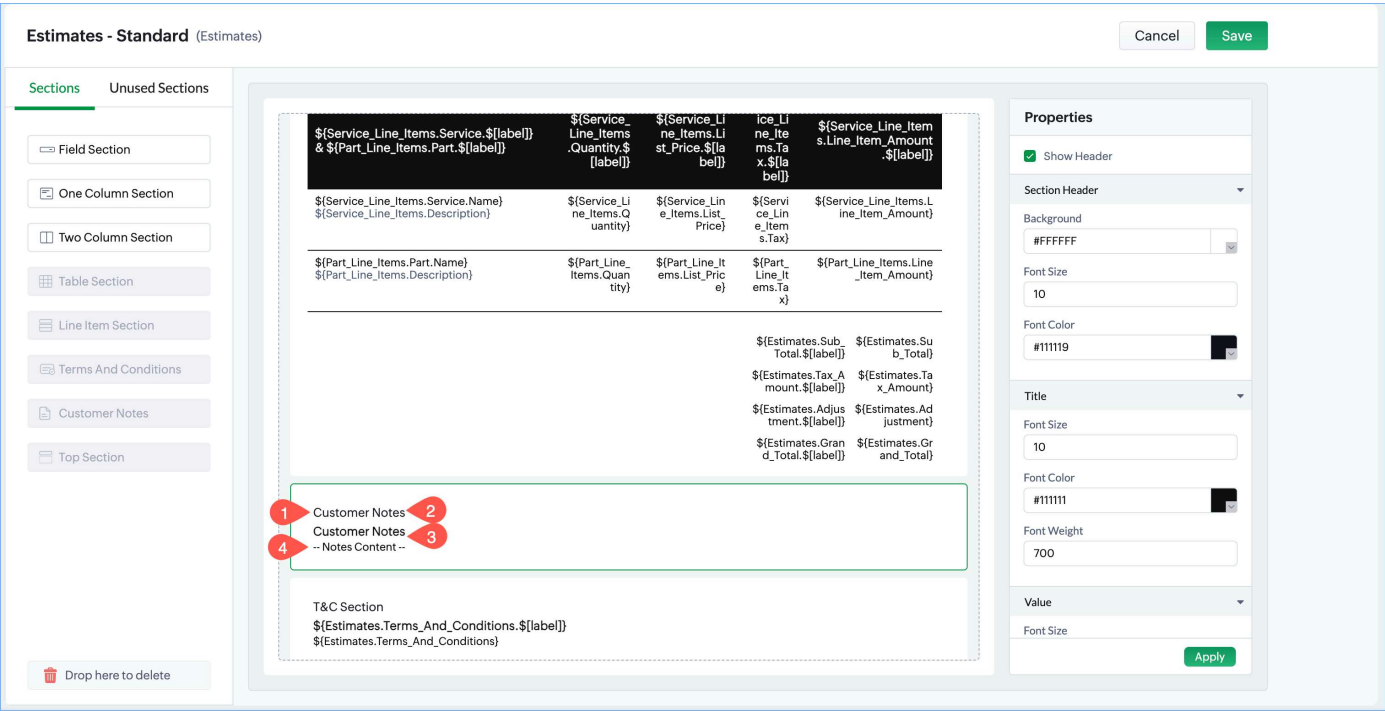
Apply

Customer Notes

This section captures the customer notes information.

The following appearance customization options are available for the customer notes section:

S.N	Element	Description
1	Show Header	Select the checkbox to include the header in the section
2	Section Header - Background - Font Size - Font Color	- To apply a background color to the section header - To change the font size of the header text of the section - To apply a font color to the header text of the section
3	Title - Font Size - Font Color - Font Weight	- To change the font size of the title text - To apply a font color to the title text - To change the thickness of the title text
4	Value - Font Size - Font Color	- To change the font size of the text used in customer notes - To apply a font color to the text used in customer notes



Top Section

This section includes the organization and record details.

The following appearance customization options are available for the top section:

S.N	Element	Description
1	Show Organization Address Organization Address - Font Size - Font Color	Select the checkbox to include the organization address in the section - To change the font size of the organization address - To apply a font color to the organization address
2	Show Document Name	Select the checkbox to include the module name in the section
3	Show Reference Number	Select the checkbox to include the record name in the section
4	Show Organization Logo	Select the checkbox to include the organization logo in the section
5	Organization Name - Font Size - Font Color	- To change the font size of the organization address - To apply a font color to the organization address

6	Document Header	This includes the document name and the reference number - Font Size - Font Color
---	-----------------	---

The screenshot displays the PDF Template Editor for 'Requests - Executive (Requests)'. The central canvas shows a template layout with various fields and sections. Red callout numbers 1 through 6 point to specific elements: 1 points to the Organization Address field, 2 points to the Requests Name field, 3 points to the Requests Name field, 4 points to the Organization Logo field, 5 points to the Organization Name field, and 6 points to the Requests Name field. The left sidebar lists section types: Field Section, One Column Section, Two Column Section, Table Section, Line Item Section, Terms And Conditions, Customer Notes, and Top Section. The right sidebar shows properties for the selected section, including checkboxes for 'Show Organization Address', 'Show Document Name', 'Show Reference Number', and 'Show Organization Logo'. Below these are input fields for 'Organization Name' (Font Size: 12, Font Color: #111111) and 'Organization Address' (Font Size: 9, Font Color: #111111). An 'Apply' button is at the bottom right of the properties panel.

Points to remember

- The range of the font size is 8 - 15.
- The range of the font weight is 500-900.

Can I manage or rename custom PDF templates?

You can edit , delete, or rename a PDF template and also see its preview. You cannot delete a PDF template that has been [set as the default template](#).

Setup

PDF Templates Email Template

Make the default templates your own by adding your branding, colors, fonts, layout elements, and other customizations. These are the templates that are used for printing, downloading records, and attaching them to emails. [Help](#)

[Create Template](#)

Name	Description	All Modules	Created By	Created Time	
Acme Inc. Estimates Default	-	Estimate	Mary Cooper	06 Jan 2025 12:08 PM	
Requests - Premium	-	Request	Mary Cooper	02 Jan 2025 04:05 PM	
Premium	Premium Template for Service Repo...	Service Report	Mary Cooper	18 Dec 2024 11:32	
Spreadsheet	Spreadsheet Template for Service R...	Service Report	Mary Cooper	18 Dec 2024 11:32	
Standard Default	Standard Template for Service Repo...	Service Report	Mary Cooper	18 Dec 2024 11:32	
Premium	Premium Template for workorders	Work Order	Mary Cooper	05 Jul 2024 11:55 AM	
Spreadsheet	Spreadsheet Template for workorders	Work Order	Mary Cooper	05 Jul 2024 11:55 AM	
Standard Default	Standard Template for workorders	Work Order	Mary Cooper	05 Jul 2024 11:55 AM	
Premium	Premium Template for Service Appo...	Service Appointment	Mary Cooper	05 Jul 2024 11:55 AM	
Spreadsheet	Spreadsheet Template for Service A...	Service Appointment	Mary Cooper	05 Jul 2024 11:55 AM	

New Updates
New templates are available for Service Reports now.

< 1 > 10 Records per page

How do I change the default PDF template for a module?

The **Standard** template of each module will be set as the default PDF template for that module. To change the default template:

1. Hover over the desired template and click on the **More Options** [:] icon.
2. Click on **Set as Default**.
3. In the confirmation message, click **Yes, Proceed**.

The default template will be applied wherever PDF templates are [used](#).

How can I resize the logo used in a PDF template?

The [company logo](#) added under **Setup > General > Organization Details** will be used in the PDF templates too.

To resize the logo used in a PDF template:

1. Navigate to **Setup > Customization > PDF Templates**.
2. Click the PDF template where you want to resize the logo.
3. In the *PDF Template Builder*, go to **Organization Logo** in the **Properties** panel on the right.

If a company logo has not been added yet, you can do so from here. Click the placeholder for the company logo and add one. Hover over the added logo to find the options to

change or remove it. These changes will reflect in **Setup > General > Organization Details** too.

4. Use the **Resize Logo** slider to resize the logo in the PDF template.

Use  to reset to the default size.

5. Click **Save**.

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