

Customisation

Logo, Job Sheet, Quote and Invoice PDFs

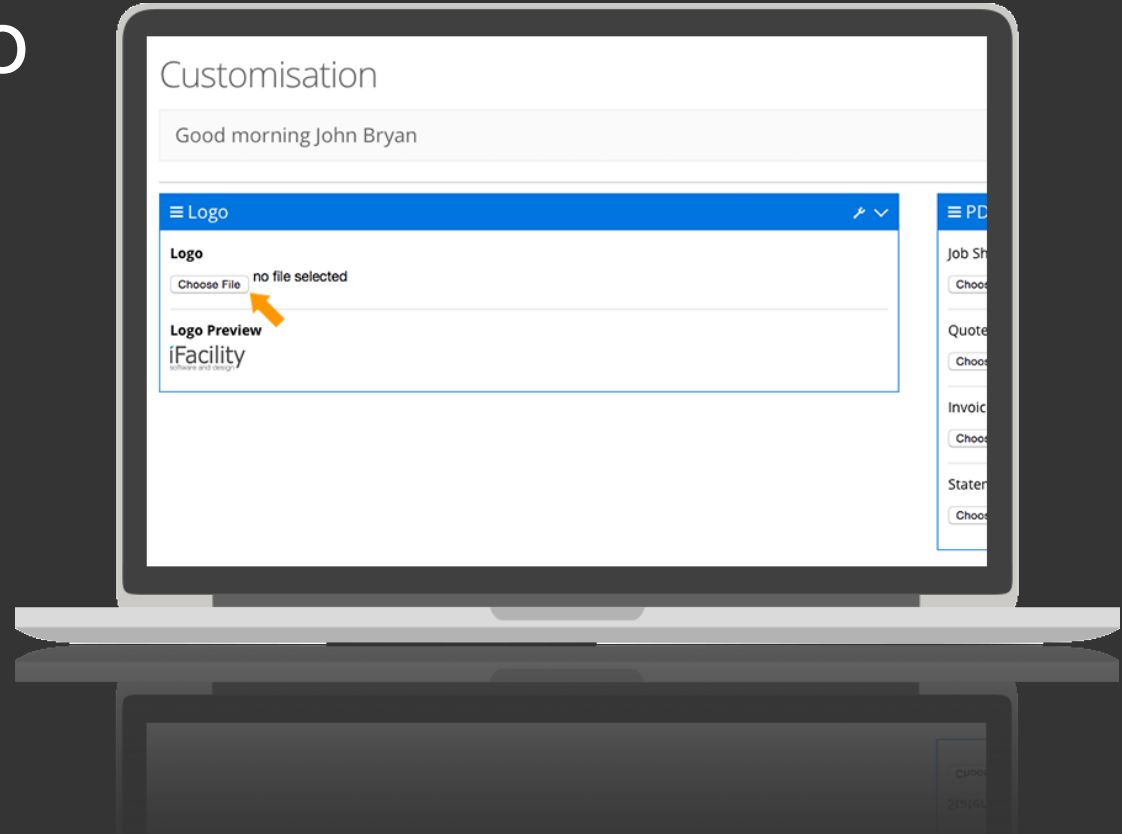
You can add your own logo to documents and redesign the standard job sheet, quote, statement and invoice template backgrounds in iManage to match those of your business.

This quick tutorial shows you how to...

- Use your own logos on all outbound emails from the iManage system
- Upload your own layouts of job sheets, quotes, invoices and statements



Adding your Logo to outbound communications



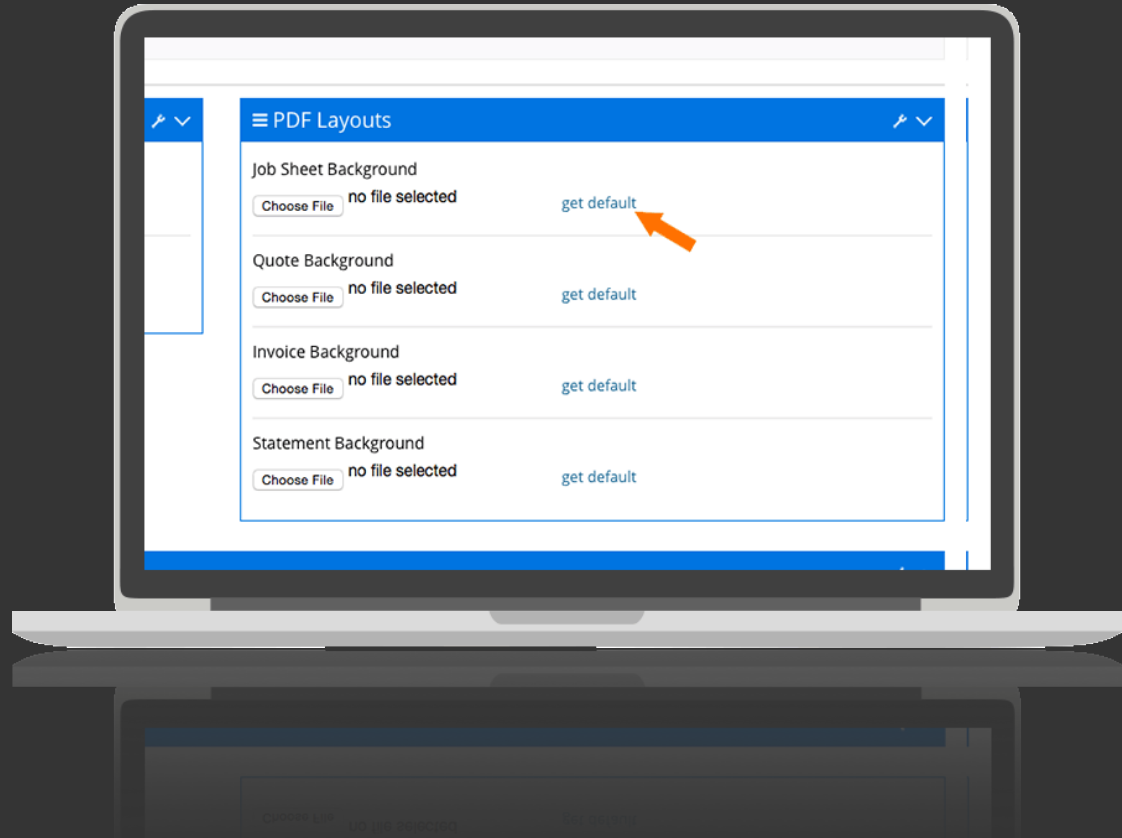
The Logo section within the **settings > customisation** menu option is used to insert your logo in to any outbound iManage emails and is also used in the online views of quotes, orders, invoices, statements etc

Use the browse button to select and upload your logo

Note: this doesn't apply the logo to any PDF document such as job sheets, invoices, quotes or statements, that follows on the next page.



Customise your PDF Job Sheets, Quotes and Invoices



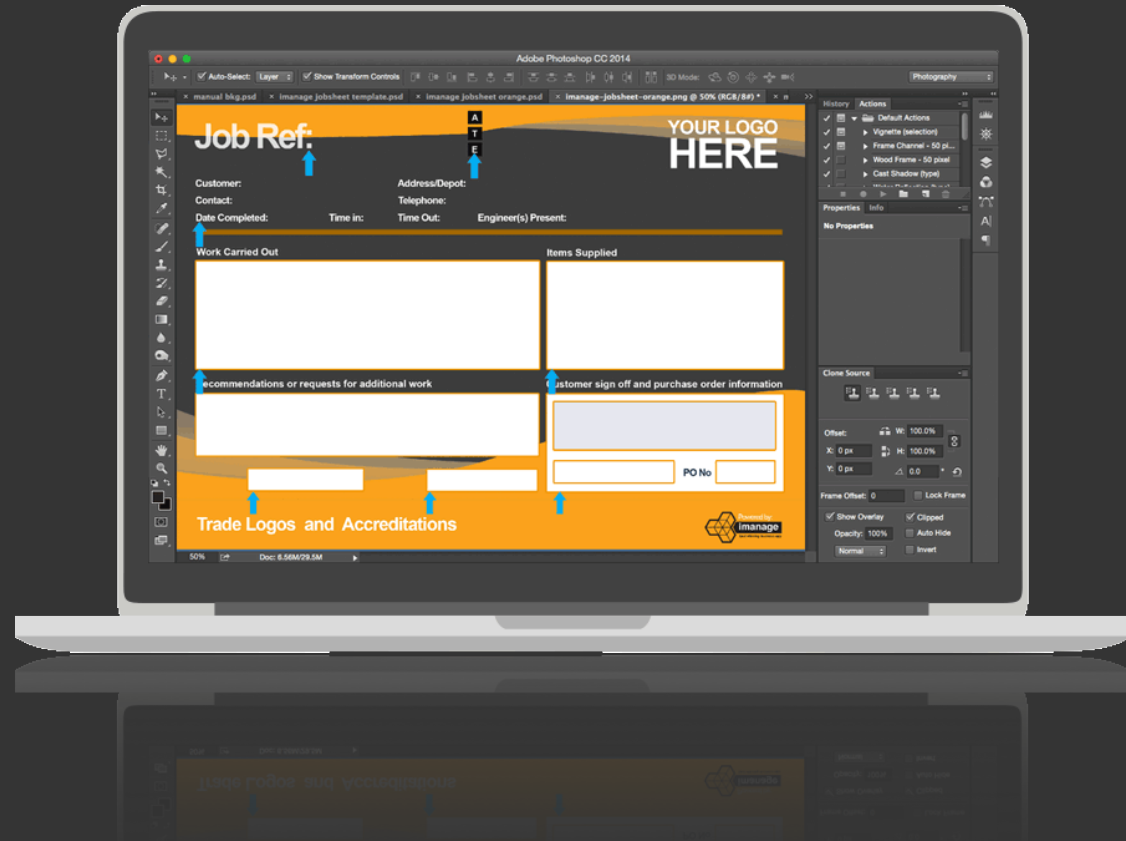
First you need to modify the default PDF layouts to include your company logo, change colours and add any additional text. Do this by downloading our default layout. Go to **Settings > Customisation > PDF Layouts**

Click on get default (this will download a photoshop .psd file)

(NB. We do offer a design and upload service to do this on your behalf if you are unable to edit Photoshop documents or wish them professionally laid out)



Editing your Job Sheet offline

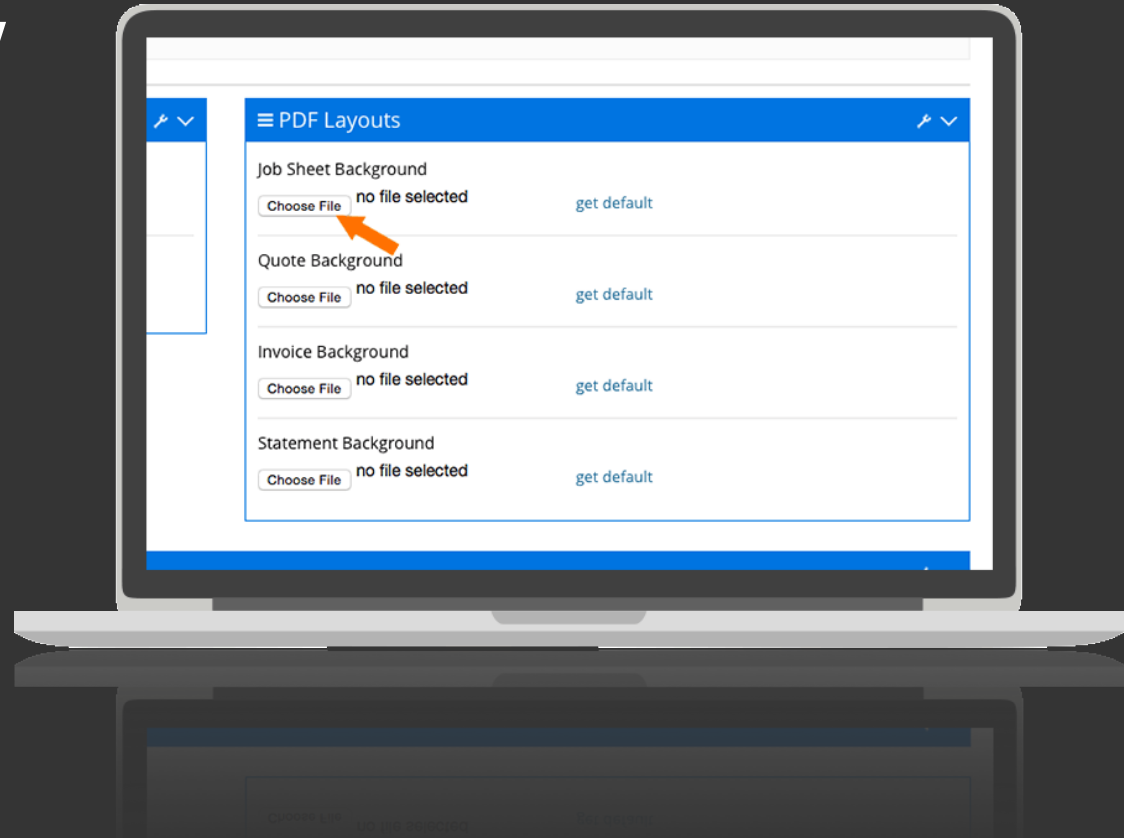


Using Photoshop or similar you can visually alter the layout to change colours, add logos and any additional text in any of the free space as you wish. Ensure to leave labels and boxes (highlighted with arrows) in exactly the same position as this is used to 'overprint' your job information.



Note: the bottom left of the job sheet is reserved for our default terms and conditions, (but this can be turned off if you'd like to use the space).

Upload your new Job Sheet



Once you are happy with your new background click the choose file button under Job Sheet Background and select your file.

Your finished image needs to be jpg, or png and no larger than 350k



Repeat process for Quotes, Invoices and Statements

QUOTE NUMBER
 DATE
 DEPARTMENT
 PROJECT/ISSUE

QUANTITY	DESCRIPTION OF ITEM OR SERVICE	UNIT PRICE	TOTAL

SUB TOTAL
 VAT
 TOTAL COST

SUB TOTAL
 VAT
 TOTAL COST

INVOICE NUMBER
 DATE
 PURCHASE ORDER
 JOB SHEET
 PROJECT TO BE RECEIVED BY

QUANTITY	DESCRIPTION OF ITEM OR SERVICE	UNIT PRICE	TOTAL

SUB TOTAL
 VAT
 TOTAL COST

SUB TOTAL
 VAT
 TOTAL COST

INVOICE NUMBER
 DATE
 PURCHASE ORDER
 JOB SHEET
 PROJECT TO BE RECEIVED BY

INVOICE	THE DATE	DUE DATE	PURCHASE ORDER	INVOICE	BALANCE

SUB TOTAL
 VAT
 TOTAL COST

SUB TOTAL
 VAT
 TOTAL COST

OUTSTANDING
 OVERDUE
 GRAND TOTAL

If you are experiencing any problems or need additional help please don't hesitate to contact us by emailing support@imanagerapp.com

