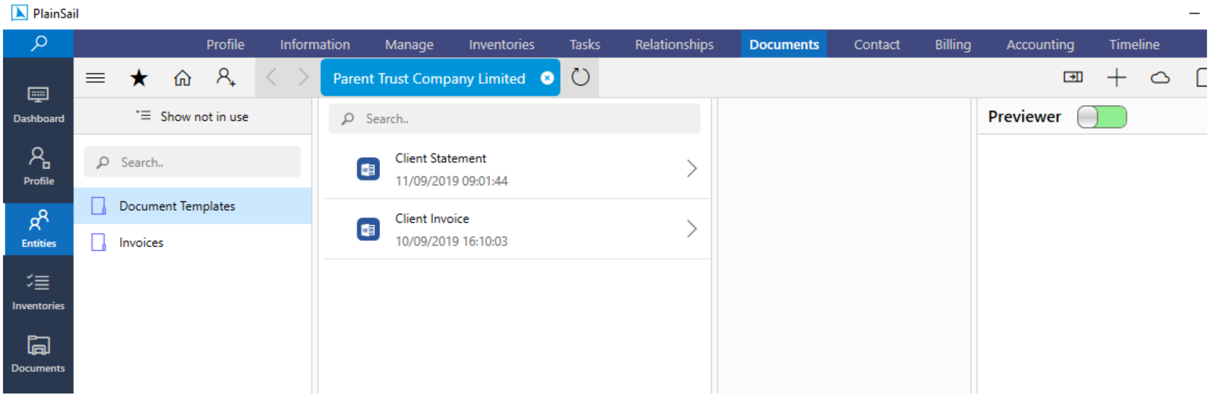
Updating the layout of your invoice

Navigate to the charging entity: Entities -> [Your Company Name] -> Documents -> Document Templates:



1. **Open the document names Client Invoice for editing**
2. **Make your changes in Microsoft Word**
3. **Take care not to accidentally delete any markers which look like this '{{ClientReference}}' these are used by PlainSail to populate the invoice.**
4. **Click 'Save' when finished and close the Word document**
5. **Check the document back into PlainSail. To do this you can click the bottom bar which will show documents you are current working on. Click the Save Icon next to 'Client Invoice' to check it back in.**