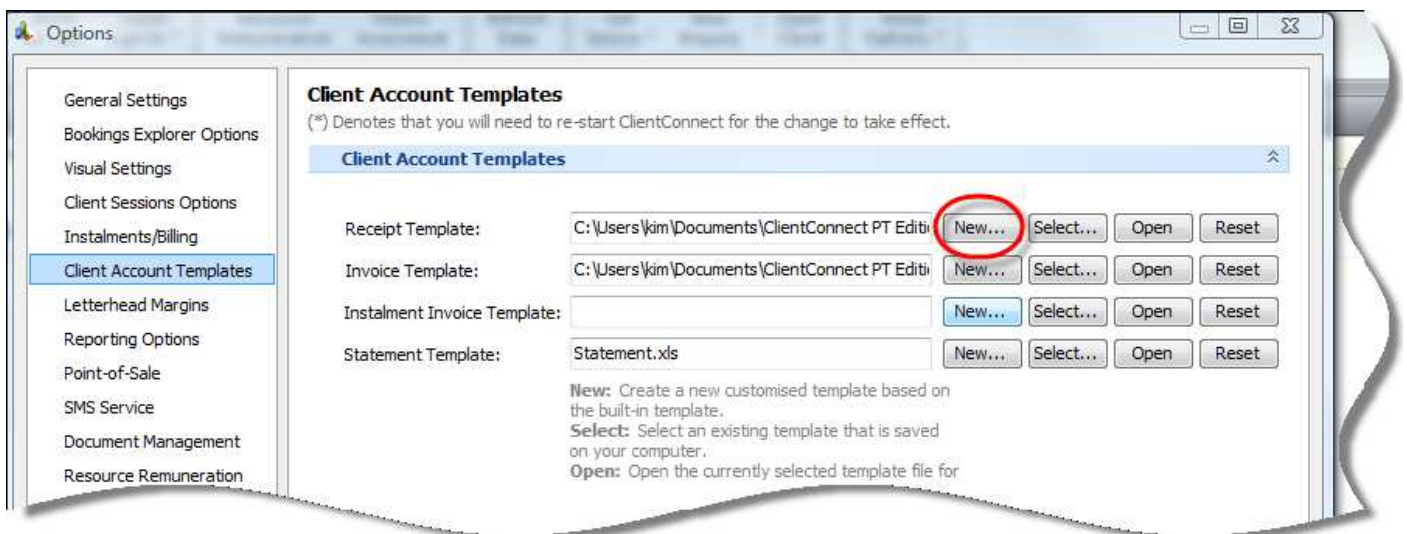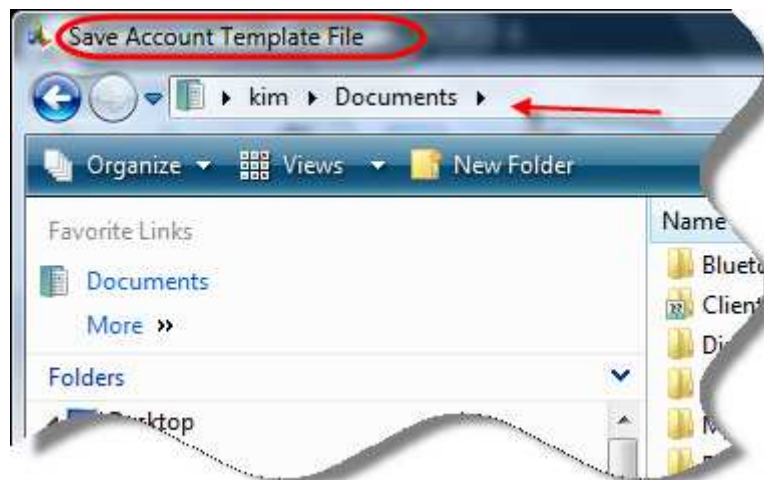# Customising Receipt/Invoice Templates

**Step 1** Go to **'Application menu' > 'Control panel' > 'ClientConnect Options' > 'Client Account Templates'**. Click on **'New'** for the template you wish to modify.


Step 2 A popup will appear for you to browse to where you would like to save the template. Select a file path, specify a file name, then save the template.

Step 3 You can then click on **'Select'** and browse to your newly created template. Then click on **'Open'**. The new template has been created in Excel.
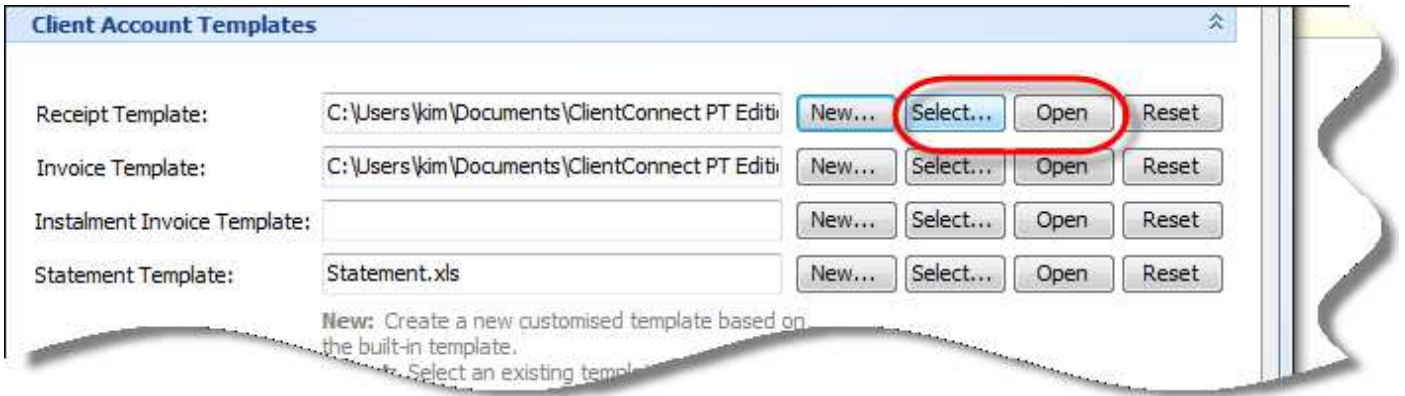

Step 4 Make any required adjustments to the template. I added a logo to my template.
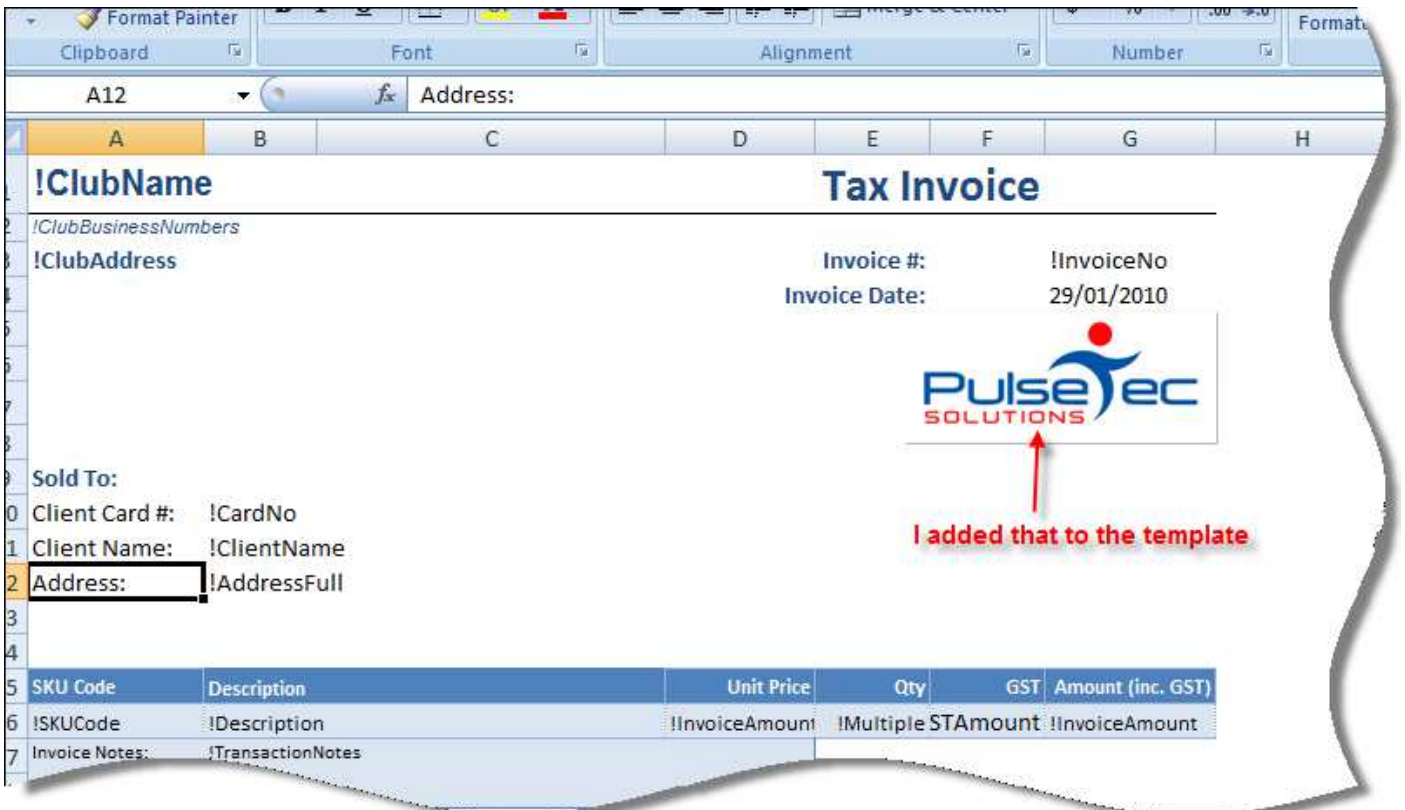
Step 5 I can add other fields to the template too. For example if I want the Health Fund and the Provider number on the receipt, I can add that in.

NB: if you want to add fields you will need to let us know which ones so we can give you the actual database field name. All database fields in the templates are the ones with an exclamation mark "!" in front of them.
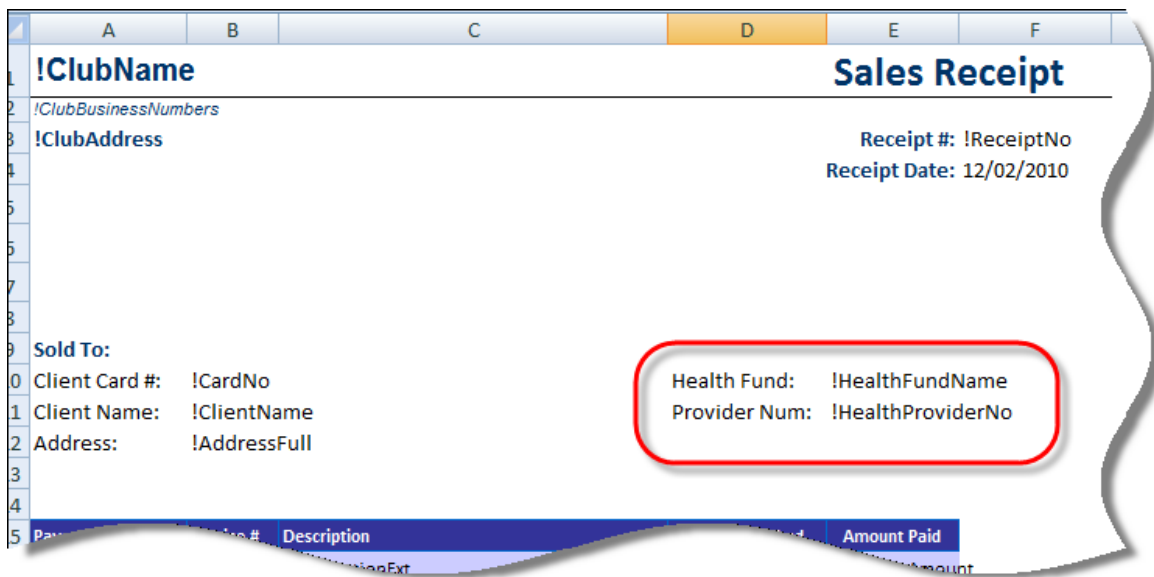
Step 6 You can also change the colours in the receipt (if you have a colour printer).
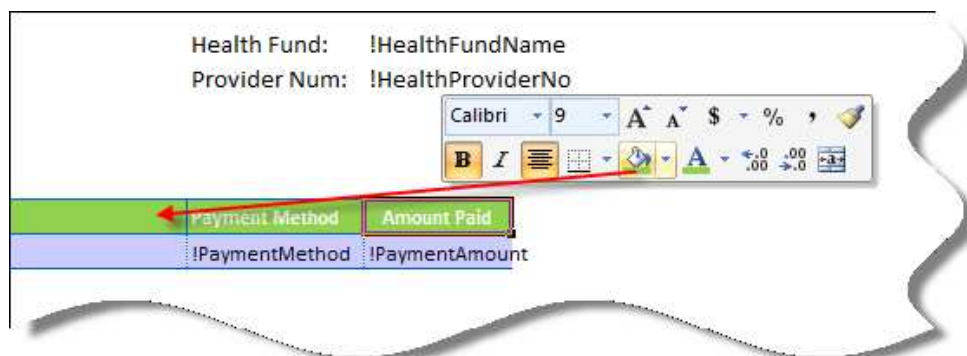
Step 7 Simply save the template when you have finished modifications.

Step 8 Test out your new look template by printing off a receipt/invoice.

Date last modified: May 2011