Print formats and letterheads

System administration

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Print formats and letterheads

Design branded invoices and other printouts, and choose which format each document uses.

Intermediate · About 25 minutes · Version 1.0 · Updated 17 November 2026

Overview

A **Print Format** controls how a document looks when printed or emailed as a PDF. Hesabu ERP has standard formats, and you can build your own with your logo, colours, bank and M-Pesa details and footer wording. A **Letter Head** adds your company header and footer.

Prerequisites

The System Manager role. A logo image, if you want one.

Steps

Create a letter head

1. Search for **Letter Head** and click **Add Letter Head**.
2. Enter a name, tick **Is Default** if it should be used automatically, and add your header (logo and company details) and optional footer.
3. Save.

Build a print format

1. Search for **Print Format Builder** and choose the **Document Type**, for example *Sales Invoice*.
2. Click **Create New**, and give the format a name.
3. Drag fields in from the left, and arrange sections and columns.
4. Click **Save**.

For full control, use **Print Format** instead, choose **Custom Format** and write the design in HTML.

Make it the default

1. Search for **Customize Form** and choose the **Document Type**.
2. Set **Default Print Format** to your format.
3. Click **Update**.

Preview

Open any submitted document, click the **printer** icon, and choose your **Print Format** from the drop-down to preview it.

Practical example

Mwangaza Hardware creates a format called `Mwangaza Invoice` with its logo, KRA PIN, and a footer reading *"Pay by Paybill 880100, account number is your invoice number"*. They set it as the default for **Sales Invoice**, so every printed and emailed invoice uses it.

Important notes

- Use images that are not too large, so the PDF stays small.
- Keep a copy of a custom format before you edit it.
- If you embed a logo that is private, it may not appear in some outputs. Use a public file for logos.

Common mistakes

- Choosing a format but forgetting to set it as the default, so staff keep printing the old one.
- Very wide tables that get cut off in the PDF.

Troubleshooting

See Printing and PDF problems.

Next steps

Read Custom fields and forms.

Related documentation

- Creating a sales invoice
- Custom fields and forms
- Printing and PDF problems