PDF Invoice / Quote Template Designer

User Guide

Odoo 18 / 19 Community & Enterprise

Misc horizontal painkillers

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Technical reference

Technical name	gb_pdf_invoice_quote_template_designer
Version	18.0.1.0.0
Odoo series	18.0 and 19.0
Category	Misc horizontal painkillers
Depends on	base, web, mail
Licence	LGPL-3
Data models	gb.doc.template, gb.doc.block, gb.doc.compiler, gb.doc.preview.wizard

1. Overview

Customising an Odoo invoice or quotation PDF usually means QWeb and a developer. This app lets you design branded document layouts from blocks - header, logo, address, lines, totals, footer - with no QWeb coding.

A template is assembled from blocks, compiled to print-ready markup, previewed against a real document, and set as the print layout for invoices or quotations.

Who is it for?

- Businesses wanting branded invoices/quotes without a developer.
- Consultants standardising document layouts for clients.
- Community users who cannot use Enterprise Studio.

2. Installation

The module installs like any standard Odoo app. You need the Administration / Settings access right to install apps.

- Enable developer mode is not required for normal use.
- Open Apps from the main menu.
- Click Update Apps List (top menu) so Odoo re-reads the addons folder.
- Remove the default Apps filter and search for "PDF Invoice/Quote Templat" (technical name **gb_pdf_invoice_quote_template_designer**).
- Click Install. The dependencies (base, web, mail) are installed automatically.

After installation a new top-level menu becomes available (see Configuration below). On a multi-company database, install once; the records are company-aware where the underlying models are.

3. Configuration

Open Doc Designer > Templates (gb.doc.template) and create a template.

Set the Branding and Margins (mm) on the Document and Style tabs.

Built on Odoo's core web report engine; the compiled layout is set as the print layout for invoice/quotation documents.

4. Step-by-step Walkthrough

The flow below uses the real menus, buttons and statuses shipped with the module. Labels are quoted exactly as they appear in the interface.

4.1 Build a template from blocks

1. Create a template and add Blocks (gb.doc.block) such as header, logo, address, line table, totals and footer.
2. Set branding, fonts and Margins (mm).

4.2 Compile it

1. Click Compile to turn the blocks into print-ready markup (gb.doc.compiler); the result is held in Compiled Markup.

4.3 Preview against a real document

1. Click Preview to open the preview wizard (gb.doc.preview.wizard) and render the layout with a real invoice or quotation.

4.4 Make it the print layout

1. Click Set as Print Layout so invoices/quotations print with your design; Reset reverts if needed.

5. Feature Reference

Every feature below is implemented in the module; the model behind each one is named in brackets so administrators can locate it.

Block-based templates

Assemble documents from reusable blocks - no QWeb (gb.doc.template, gb.doc.block).

Branding & margins

Logo, colours, fonts and per-document margins in millimetres.

Compiler

Compiles blocks to print-ready markup held in Compiled Markup (gb.doc.compiler).

Live preview

Render the layout against a real invoice/quotation before going live (gb.doc.preview.wizard).

Set as print layout

Apply the design to invoice/quotation prints with one click, with a Reset to revert.

6. Tips, Troubleshooting & FAQ

Q: Do I need to know QWeb?

A: No - layouts are built from blocks and compiled for you.

Q: Can I preview before applying?

A: Yes - the Preview wizard renders against a real document.

Q: How do I roll back a layout?

A: Use Reset to revert the print layout.

Q: Does it work without Enterprise Studio?

A: Yes - that is the point; it is a Community-friendly alternative.

Q: Which documents can I brand?

A: Invoice and quotation PDFs, by setting the compiled template as their print layout.

Q: Where is the generated markup?

A: In the template's Compiled Markup field after you click Compile.

7. Support

We are happy to help you get the most out of this app.

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Licence	LGPL-3
Supported	Odoo 18.0 and 19.0

When reporting an issue please include your Odoo version, the module version (18.0.1.0.0), the menu/screen you were on and the exact error text. This module performs all processing inside your Odoo instance unless an external connector is explicitly configured by you.