Word2PDF Invoices

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Overview

Word2PDF is a convenient Sellercloud feature that allows you to create your own invoice template on Microsoft Word and then generate invoices directly into PDF. You can choose one of Sellercloud's **Default Templates**, or you can build your own **Custom Template**.

For information on creating custom Product Labels, you can read our dedicated article for Word2PDF Labels.

Default Templates

Sellercloud offers three default templates that are compatible with **Word2PDF**, which you can customize:

- Simple design example – download the Word2PDF Simple Template.
- Plain design example – download the Word2PDF Plain Template.
- Classic design example – download the Word2PDF Template Classic.

Don't Copy/Paste the **Default Template**'s contents into a new Word file. Use Word's **Save As** function to save the **Default Template** as a **New** file with a unique name.

Do not use Microsoft Word's **Open a Copy** function to download any new templates, either from this article or from the **Invoice Type** field's **Word2PDF** template value, because your PDF invoice won't generate properly.
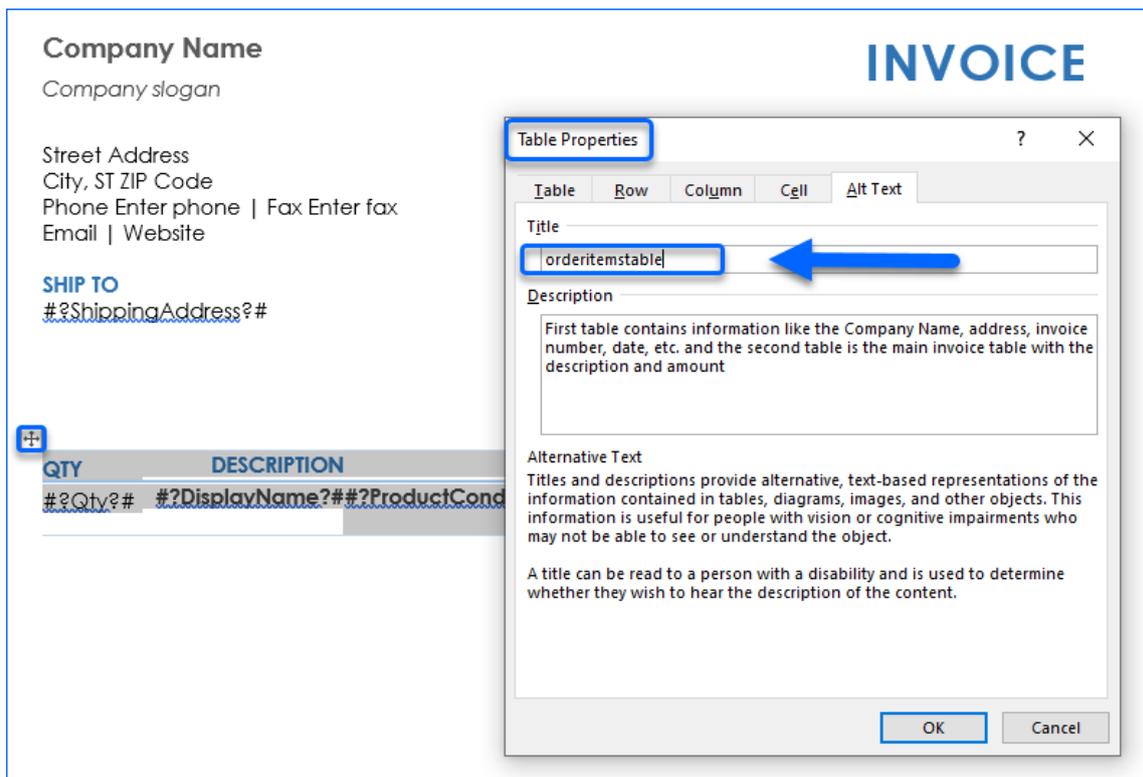
Create Custom Template

To create a **Custom Template** fit for your business needs, you **must** adhere to strict **Word2PDF** formatting rules.

Formatting Restrictions

- **Format all tables, rows, and cells only using styles.** For example, pressing the space key to create a tab indent will not produce a proper tab.
- **Headers and footers must be properly applied.** For example, placing header text at the top of the document will not work properly. Instead, use Word's Insert Header&Footer function.
- **If you want to create a custom template from an existing one (either from a default template or a custom one), do not copy/paste the template's contents into a new Word file**. This will automatically add placeholders in all the new template tables. Instead, use MS Word's **Save As** function to save the default template as a new file with a unique name.
- **Do not use drawing canvases.** Tables and images must be placed **directly i**nto the document, not inside a drawing canvas.
- **Do not manually apply shading to individual rows.** If you want alternate **shading** in the table rows, apply a table style to the table.
- **Do not add extra line breaks in tables.**

Order Items Table

- The **orderitemstable** shown below is the table for the order item's information and pricing. This table **must have only 1 row** that contains your desired placeholders. The **Word2PDF** feature will automatically insert a separate row for each of your order items.
- The **orderitemstable** must be **its own separate table** – do **not** add any additional rows to this table for placeholders like **SubTotal, Discount, Tax,** etc. Instead, put those placeholders into a **separate, multi-row table.** This is required because those are for order-level data, not item-level data.
- **orderitemstable** must be in the **Title** field of the **Table Properties' Alt Text** tab (select the table and right-click to choose Table Properties).
- Do **not** add anything besides **orderitemstable** in the Title of your table.
- You can only have one **orderitemstable** in your template.

You can enable the Advanced Client Setting **Sort Invoice Product IDs Alphabetically** to ensure the SKUs in the order items table are sorted alphabetically.

Placeholders

Sellercloud uses **Placeholders** to populate your template with correct order and item info when generating a **PDF Invoice**. Once your Word document is formatted correctly, you can insert placeholders into their appropriate locations.

The table below describes all supported placeholders. Enter these placeholders exactly as shown.

PLACEHOLDER	USAGE	REFERENCE INFORMATION
#?ID?#	Sellercloud Order ID	—
#?ProductName?#	Product Name in Sellercloud	
#?TimeOfOrder?#	Order date	—
#?PaymentDate?#	Payment date	Will not appear if an order is u
#?OrderSourceOrderId?#	Channel order number	—
#?BillingAddress?#	Sold To address	—
#?ShippingAddress?#	Ship To address	—
#?Qty?#	Order item quantity	—
#?DisplayName?#	Name of the ordered item from the channel	—
#?ProductID?#	Sellercoud SKU	—

#?ManufacturerSKU?#	Manufacturer SKU from the Product Properties page.	—
#?ProductImage?#	Product image	—
#?UPC?#	The item's UPC	—
#?ASIN?#	The item's ASIN	—
#?DescriptionDefaultImage?#	Default product image for the order item	Recommended image formats .jpeg.
#? ProductConditionInHouseName? #	Condition of the item	—
#?AdjustedSitePrice?#	Unit price of the item	Currency fields are formatted digits after the decimal.
#?ProductWholesalePrice?#	The product's wholesale price, as configured on the product details page.	—
#?LineTotal?#	Total of the line item	—
#?LineTotalWithDiscounts?#	Total of the line item, including discounts	—
#?Subtotal?#	Invoice subtotal	You can insert a $ before the
#?OrderDiscountsTotal?#	Total of discounts applied	You can insert a '-$' before th
#?TaxTotal?#	Total of taxes	You can insert a $ before the
#?ShippingTotal?#	Total of shipping charges	You can insert a $ before the
#?HandlingFee?#	Total of handling fees	You can insert a $ before the
#?GrandTotal?#	Grand total of the invoice	You can insert a $ before the
#?GiftWrapMessage?#	Gift message for the first item in the order that has a message.	Will appear outside of the ord table.
#?Instructions?#	Customer's Instructions	Will appear outside of the ord table.

#?CustomerEmail?#	The customer's contact email.	—
#?CustomerPhone?#	The customer's phone number.	—
#?ShippingMethodRequested?#	Channel shipping carrier and service	—
#?BarCodeChannelOrderNumber?#	Channel order ID barcode	—
#?BarCodeOrderID?#	Order ID barcode	—
#?UCCBarcodeLabel?#	Generates a barcode based on Package ID and Order ID	—
#?AsinBarCode?#	ASIN barcode	—
#?EanBarCode?#	EAN barcode	—
#?FnskuBarCode?#	FNSKU barcode	—
#?GtinBarCode?#	GTIN barcode	—
#?SkuBarCode?#	SKU barcode	—
#?UpcBarCode?#	UPC barcode	—
#?CC_CustomColumnName?#	Order Level Custom Columns	E.g. #?CC_*TestOrderColumnNe*
#?CCProduct_ColumnName?#	Product Level Custom Columns	E.g. #?CCProduct_*TestProductColun*
#?BrandLogo?#	Brand Logo	—
#?ShippingSourceWarehouseID?#	Ship From warehouse of the order.	—
#?LocationNotes?#	Product's location notes	—
#?Notes?#	Order Item notes. These are the notes found in the Items panel on the Order Details page.	
#?ShippingPackageTypeID?#	The Package Type found in the Product Preferences page.	
#?KitMainItemIncludes?#	Prints Kit main component name	Allows multi-line
#?KitIncludesNotMainItem?#	Prints Kit non-main component name	Allows multi-line

#?KitMainItemSKUIncludes?#	Prints Kit main component Product ID	Allows multi-line
#?KitIncludesNotMainItemSKU?#	Prints Kit non-main component Product ID	Allows multi-line
#?KitItemSumTotalQty?#	Total quantity of the components of all ordered kit products	—
#?KitItemSumQty?#	Total quantity of the components in an ordered kit	—
#?KitItemSKUWithQty?#	Prints bundle item SKU with quantity	In format **bundleItemSKU – C**
#?KitItemSKUWithQtyIncludeMain?#	Prints bundle item main component SKU with quantity	In format **bundleItemSKU – C**
#?KitItemDetails?#	Prints Kit Details	Component SKUS, Names, an kit
#?SerialNumbers?#	Serial Numbers of the ordered items	—
#?PaymentTermName?#	Customer's Payment Term name.	—
#?PaymentDueDateByUserTerm?#	Payment due date for Customer Credit Terms	—
#?PaymentDueDateByOrderTerm?#	Payment due date for OrderCredit Terms	—
#?VendorSKU?#	This placeholder looks at the product's Default Vendor to select which Vendor SKU to print.	—
#?SalesRepID?#	Prints the internal Sellercloud ID of the Sales Rep on the order.	—
#?SalesRepUserame?#	Prints the email of the Sales Rep on the order.	—

Custom width and height are supported for all barcode placeholders. To use custom values, set the format of the desired placeholder as follows: **#?UpcBarCode_2x3?#** .

An **Invoice Template** can also contain tables with text for standard company messages, such as your company's returns and exchanges policy, contact information, customer service hours, etc. These tables **do not** need placeholders since they do not pull data from Sellercloud orders.

WayToPay.me Placeholders

Word2PDF Invoice templates also support Waytopay.me links. If you include placeholders for Waytopay.me, they will only generate information on the actual PDF Invoice if the order is **Unpaid**. For Fully Charged orders, the placeholders will be hidden, and their slot on the invoice will be empty. There are three placeholders you can use:

- **#?WayToPayLink?#** – a clickable Waytopay.me link for the specific order, where the customer can make a payment.
- **#?WayToPayLinkImage?#** – a clickable Waytopay.me logo, which takes the customer to their order to make a payment.
- **#?WayToPayLinkQR?#** – scannable QR Code that takes the customer to their order in Waytopay.me, where they can make a payment.

Configure Order Invoice

After you create your invoice template, to configure **Order Invoices**:

1. Go to Company Settings.

2. Click **Toolbox** and select **Invoice Settings**.

3. Click **Edit**.

4. Select **Word 2 PDF** in the respective panels. Each panel relates to a specific invoice type: **Standard Packing Slip**, **Order Form Packing Slip**, and **Wholesale Packing Slip**.
   If you don't see the **Order Form** and **Wholesale** options, you must enable the **Enable Wholesale and Order Form Invoice Options** Client Setting.

5. Upload the **Word 2 PDF Template** file.

6. Click Save.
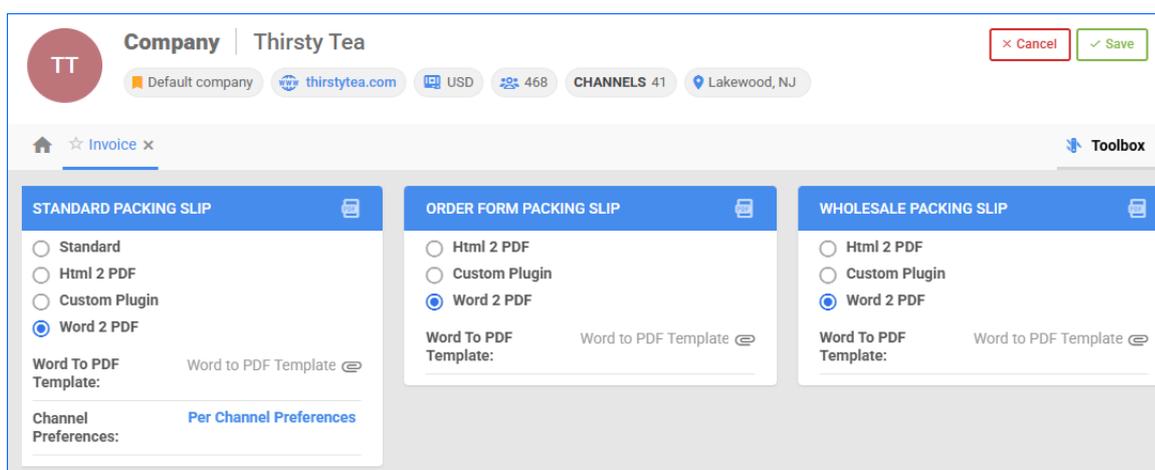
You can also set a channel-specific **Invoice Type.** Go to **Company Settings > Toolbox >** Invoice Settings **> Click Per Channel Preferences**. Once configured, your channel invoice preference will override your company's default invoice template.

Print Invoice to PDF

You can print PDF invoices in two different ways:

- Open the Order Details Page > Click the **Action** menu > Select the action **Print Invoice to PDF** > **Go**.
- Open the Manage Orders Page > Select the **Order** > Click **Action** menu > **Print Invoice to PDF** > **Go**.

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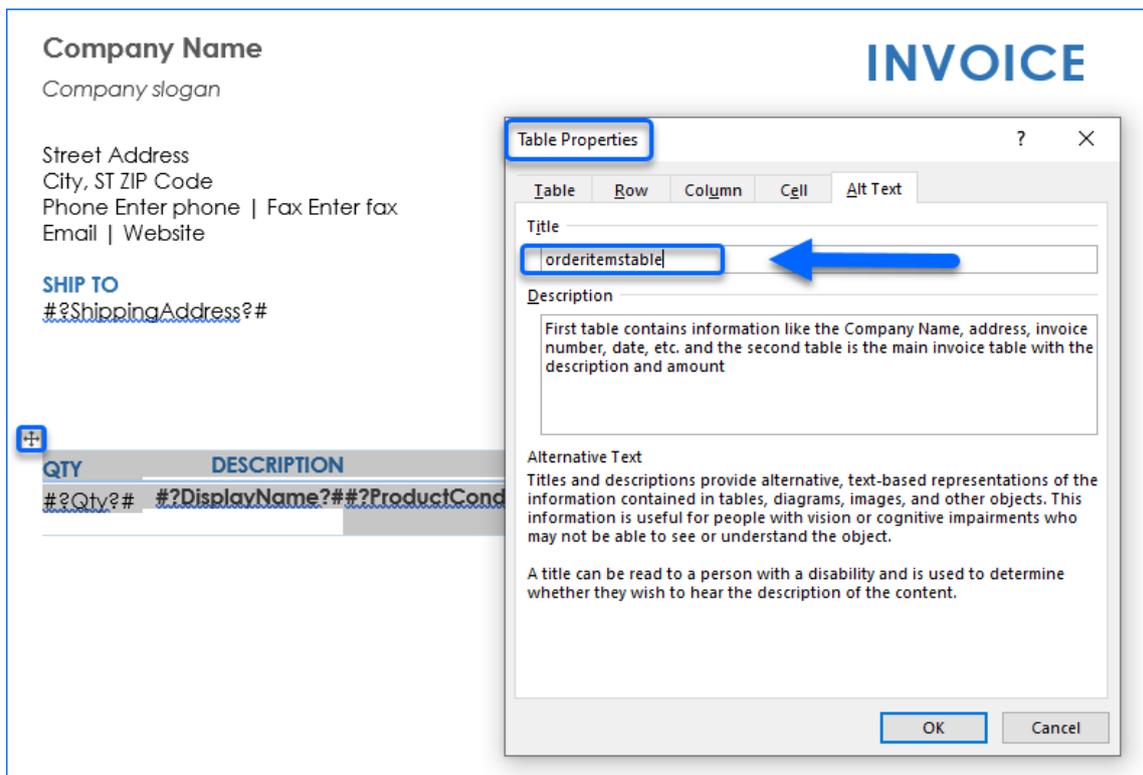
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#?PaymentDate?#	Payment date	Will not appear if an order is unpaid.
#?OrderSourceOrderId?#	Channel order number	—
#?BillingAddress?#	Sold To address	—
#?ShippingAddress?#	Ship To address	—
#?Qty?#	Order item quantity	—
#?DisplayName?#	Name of the ordered item from the channel	—
#?ProductID?#	Sellercloud SKU	—

#?ManufacturerSKU?#	Manufacturer SKU from the Product Properties page.	
#?ProductImage?#	Product image	—
#?UPC?#	UPC code	—
#?ASIN?#	The product's ASIN.	
#?DescriptionDefaultImage?#	Default product image for the order item	Recommended image formats are .png and .jpeg.
#?ProductConditionInHouseName?#	Condition of the item	—
#?AdjustedSitePrice?#	Unit price of the item	Currency fields are formatted with two digits after the decimal.
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#?BarCodeChannelOrderNumber?#	Channel order ID barcode	—
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#?EanBarCode?#	EAN barcode	—
#?FnskuBarCode?#	FNSKU barcode	—
#?GtinBarCode?#	GTIN barcode	—
#?SkuBarCode?#	SKU barcode	—
#?UpcBarCode?#	UPC barcode	—

#?CC_CustomColumnName?#	Order Level Custom Columns	E.g. #?CC_*TestOrderColumnName*?#
#?CCProduct_ColumnName?#	Product Level Custom Columns	E.g. #? CCProduct_*TestProductColumnName*? #
#?BrandLogo?#	Brand Logo	
#?LocationNotes?#	Product's location notes	
#?KitMainItemIncludes?#	Prints Kit main component name	Allows multi-line
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#?KitItemSKUWithQty?#	Prints bundle item SKU with quantity	In format **bundleItemSKU – Qty**
#?KitItemSKUWithQtyIncludeMain?#	Prints bundle item main component SKU with quantity	In format **bundleItemSKU – Qty**
#?KitItemDetails?#	Prints Kit Details	Component SKUS, Names, and Qty in the kit
#?SerialNumbers?#	Serial Numbers of the ordered items	

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An **Invoice Template** can contain tables with text for standard company messages, such as your company's returns and exchanges policy, contact information, customer service hours, etc. These tables do not need placeholders since they do not pull data from Sellercloud orders.

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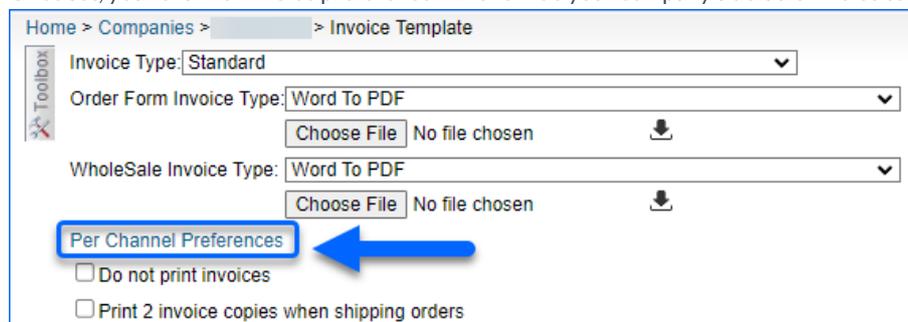
Configure Invoice Template

After you create your invoice template, you can configure **Order Invoices**:

1. Go to **Settings** > Select your **Company** > **Toolbox** > **Invoice Settings.**

2. From the **Invoice Type** dropdown, select **WORD2PDF**.

3. From the **Word to PDF Template**, click **Choose File** to upload your template > **Save**.

4. For **Order Invoices**, select your choice from the **Order Form Invoice Type** dropdown.

5. For **Wholesale Invoices**, select your choice from the **Wholesale Invoice Type** dropdown.

If you don't see the **Order Form** and **Wholesale** options, you must enable the **Enable Wholesale and Order Form Invoice Options** Client Setting.

You can also set a channel-specific **Invoice Type.** Go to your company's **Settings** > Select Invoice Settings from your **Toolbox** options > Click **Per Channel Preferences**.
Once set, your channel invoice preference will override your company's default invoice template.

To preview an invoice as a PDF file, enter an order number into the **Order Number** box > Click **Preview** > a PDF invoice will download.

Print Invoice to PDF

You can print the invoice to PDF in two different ways:

- On the Order Details Page > Click the **Action** menu > Select **Print Invoice(s) to PDF** > Click **Go**.
- On the Manage Orders Page > Select the **Order** > Click **Action** menu > Select **Print Invoice to PDF** > Click **Go**.