
Invoice Boilerplate

Simple automated LaTeX invoicing system for freelancers.

Intro

Built along the lines of cv-boilerplate and letter-boilerplate, this boilerplate contains the bare minimum to produce a professional-looking invoice with the least possible effort.

MAX MUSTERMANN • MUSTERSTRASSE 37 • 12345 MUSTERSTADT

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12345 Musterstadt
Germany

Musterstadt, November 4, 2015

INVOICE #2015-II-04

Pos.	Description	Prices in EUR
1	The first service provided	320.00
2	And another one, with a list of details <ul style="list-style-type: none">• Some more detailed explanation• of the service provided• Looking good	245.00
3	The last service provided	65.00
Subtotal:		630.00
VAT 20%:		126.00
Total:		756.00

Please transfer the due amount to the following bank account within the next 14 days:

Mustermann GmbH
Kreditinstitut: Deutsche Postbank AG
IBAN: DE18 3601 0043 9999 9999 99
BIC: PBNKDEFF

We really appreciate your business and look forward to future projects together.

Best regards,

Max Mustermann

The invoice content lives in `details.yml` and it's structured like so:

```
1 invoice-nr: 2015-11-04
2 author: Max Mustermann
3 city: Musterstadt
4 from:
5 - Musterstraße 37
6 - 12345 Musterstadt
7 to:
8 - Erika Mustermann
9 - Musterallee 1
10 - 12345 Musterstadt
11 - Germany
12 VAT: 20
13 service:
14 - description: The first service provided
15   price: 450.00
16 - description: And another one, with a list of details
17   price: 245.00
18   details:
19     - Some more detailed explanation
20     - of the service provided
21     - Looking good
22 - description: The last service provided
23   price: 245.00
```

When running `make`, Pandoc starts iterating on the YAML file, populates `template.tex` with your data, and pipes the result to XeTeX. XeTeX deals with the typesetting and compiles a PDF ready to be printed/faxed/mailed and archived (see the output).

The math gets handled internally by LaTeX through the `spreadtab` package, Excel-style (mad props to clemens on TeX SE for helping me out with this). You just need to provide a VAT rate and your prices, the boilerplate takes care of the rest.

Unless you plan to edit the template, no particular LaTeX knowledge is required to use this boilerplate. If you need your invoice in a language other than English, finding the relevant strings in `template.tex` and translating them to your language should be easy enough.

Dependencies

1. LaTeX with the following extra packages: `fontspec geometry ragged2e spreadtab fp xstring arydshln hhline titlesec enumitem xunicode xltextra hyperref polyglossia wallpaper footmisc`
2. Pandoc, the universal document converter.

I highly recommend TinyTeX as LaTeX distribution. All additional packages can be installed with

`tlmgr` as needed.

Getting started

1. Open `details.yml` with your text editor and fill it with your details, the invoice recipient's details, services/prices, and the desired settings.
2. Run `make` to compile the PDF.

Some countries require invoices to be signed. If a file named `signature.pdf` is present in the directory, the boilerplate will automatically print it after the closing note as a final touch. Follow this method to import your own signature.

Note: this template needs to be compiled with XeTeX.

Note for Windows users

Although I didn't test it, you can probably use this on Windows, too. Both Pandoc and LaTeX can be installed on Windows and you should be able to run makefiles on Windows through Cygwin. If that's too much hassle, this command should do the trick in Powershell:

```
1 pandoc details.yml -o output.pdf --template=template.tex --pdf-engine=xelatex
```

Available settings

- **VAT:** Your VAT rate.
- **currency:** Your currency code (USD, EUR...)
- **commasep:** Set to `true` to use a comma as decimal separator. This is for display purposes only—remember to always use a dot to set the prices in your YAML file.
- **lang:** Sets the main language through the `polyglossia` package. This is important for proper hyphenation and date format. Use IETF language tags format, as that is what Pandoc expects.
- **seriffont:** Used for the heading and the sender address. Hoefler Text is the default, but every font installed on your system should work out of the box thanks to XeTeX.
- **sansfont:** Used to render the recipient address, the table and the closing note. Defaults to Helvetica Neue.
- **fontsize:** Possible values here are 10pt, 11pt and 12pt.
- **geometry:** A string that sets the margins through `geometry`. Read this to learn how this package works.

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- **closingnote**: This gets printed after the table as a closing note. Use it to provide your bank details and a thank you message.
 - **letterhead**: include custom letterhead in the PDF (see below).

Custom letterhead

If you have already designed your own letterhead and want to use it with this template, including it should be easy enough. Set the **letterhead** option to **true** to activate the **wallpaper** package in the template. **wallpaper** will look for a file named **letterhead.pdf** in the project root folder and print it on the PDF before compiling the document. Change the fonts to match the ones in your letterhead, adjust the margins with **geometry** and you should be all set.

Recommended readings

- Typesetting Automation, my article about this project with in-depth instructions and some suggestions for an ideal workflow.
- Grids of Numbers Recommendations on Butterick's Practical Typography
- Multichannel Text Processing by iA
- Why Microsoft Word must Die by Charlie Stross
- Word Processors: Stupid and Inefficient by Allin Cottrell
- Proprietary Binary Data Formats: Just Say No! by Sam Steingold
- The Beauty of LaTeX by Dario Taraborelli

Resources

- TinyTeX is a lightweight, cross-platform, portable, and easy-to-maintain LaTeX distribution based on TeX Live.
- Refer to pandoc's documentation to learn more about how templates work.
- If you're not familiar with the YAML syntax, here's a good overview.
- If you want to edit the template but LaTeX scares you, these docs put together by ShareLaTeX cover most of the basics and are surprisingly kind to the beginner.
- Odds are your question already has an answer on TeX Stack Exchange. Also, pretty friendly crowd in there.
- Need to fax that invoice? Check out Phaxio and learn how to send your faxes from the command line with a simple API call.

See also

- [cv-boilerplate](#) — Easing the process of building and maintaining a CV using LaTeX
- [letter-boilerplate](#) — Typeset your important letters without leaving your text editor

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