



## TEMPLATES INDEX

Workflow Automation Delivery Framework

ENTERPRISE EDITION

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# Table of Contents

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Table of Contents

Templates Index

Ready-to-Use Business Documents

---

Available Templates

---

Converting to Word & PDF

Method 1: Pandoc (Recommended for Technical Users)

---

Method 2: Online Converters

---

Method 3: VS Code Extensions

---

Method 4: Google Docs

---

Method 5: Use HTML Templates

---

Template Customization Guide

Before Using Templates

---

Quick Customization Checklist

---

Template Categories

Sales & Proposals

---

---

Legal & Contracts

---

Billing

---

Delivery

---

Change Management

---

---

Tips for Professional Documents

---

# Templates Index

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## Ready-to-Use Business Documents

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### Available Templates

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#	TEMPLATE	PURPOSE	FORMATS
1	Scope of Work	Project definition & deliverables	MD, HTML
2	Service Agreement	Legal contract	MD, HTML
3	Retainer Agreement	Ongoing maintenance	MD, HTML
4	Invoice Templates	Billing documents	MD, HTML
5	Email Templates	Communication scripts	MD
6	Proposal Template	Sales proposals	MD, HTML
7	Project Brief	Quick project summary	MD, HTML
8	Handover Checklist	Delivery document	MD
9	Change Order	Project scope modifications	MD

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# Converting to Word & PDF

## Method 1: Pandoc (Recommended for Technical Users)

```
# Install Pandoc (macOS)
brew install pandoc

# Convert Markdown to Word
pandoc 01-scope-of-work-template.md -o scope-of-work.docx

# Convert Markdown to PDF (requires LaTeX)
pandoc 01-scope-of-work-template.md -o scope-of-work.pdf
```

## Method 2: Online Converters

### Markdown to Word:

- [Markdown to DOCX](#)
- [Dillinger](#) - Export to various formats

### Markdown to PDF:

- [Markdown to PDF](#)
- [MD2PDF](#)

## Method 3: VS Code Extensions

If you use VS Code:

1. Install “Markdown PDF” extension
2. Open the .md file
3. Right-click “Markdown PDF: Export (PDF)” or “(Word)”

## Method 4: Google Docs

1. Copy markdown content
2. Paste into Google Docs
3. Format as needed
4. Download as .docx or .pdf

## Method 5: Use HTML Templates

The `/templates-html/` folder contains styled HTML versions that:

- Look professional when printed
  - Print directly to PDF
  - Can be copied into Word
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## Template Customization Guide

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### Before Using Templates

#### 1. Replace Placeholders

- `[YOUR COMPANY]` Your company name
- `[CLIENT NAME]` Client's name
- `[DATE]` Actual date
- `[$X,XXX]` Actual amounts

#### 2. Add Your Branding

- Logo (top of document)
- Brand colors
- Contact information
- Website/social links

#### 3. Review Legal Terms

- Have attorney review contracts
- Adjust for your jurisdiction
- Add any required clauses

#### 4. Set Payment Details

- Bank information
  - Payment links
  - Accepted methods
-

# Quick Customization Checklist

Replace all [PLACEHOLDERS]  
Add your company logo  
Update contact information  
Set your payment terms  
Review and adjust pricing tiers  
Have legal review contracts  
Test all payment links  
Save branded versions

## Template Categories

### Sales & Proposals

- `01-scope-of-work-template.md` - Detailed project definition
- `06-proposal-template.md` - Client-facing proposal
- `05-email-templates.md` - Sales communication

### Legal & Contracts

- `02-contract-template.md` - Service agreement
- `03-retainer-agreement-template.md` - Ongoing support

### Billing

- `04-invoice-templates.md` - All invoice types

### Delivery

- `07-project-brief-template.md` - Quick summary
- `08-handover-document-template.md` - Delivery docs

## Change Management

- `09-change-order-template.md` - Project scope modifications
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## Tips for Professional Documents

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1. **Consistency** - Use same fonts, colors, spacing
  2. **White Space** - Don't crowd content
  3. **Hierarchy** - Clear headings and sections
  4. **Contact Info** - Always include how to reach you
  5. **Version Control** - Date and version your documents
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*See individual template files for full content.*

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