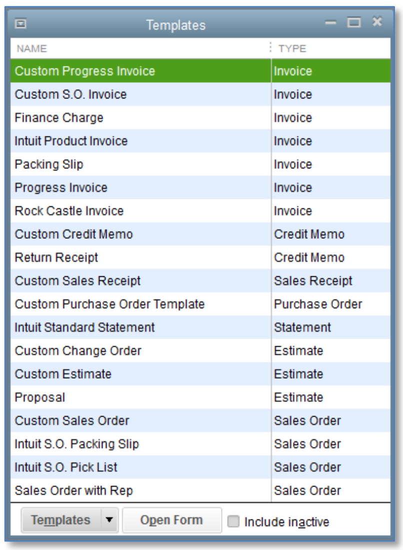
Creating New Templates

QuickBooks lets you customize an invoice form to suit the needs of your business, but there may be times when you want to design a completely different invoice form. QuickBooks lets you do that too. You can use the Layout Designer to create a new form design for your business. In the Layout Designer you can move, resize, or change the width of columns, turn on or off borders around fields, and control font type and size for each field.

To create a new invoice template:

1. From the **Lists** menu, choose **Templates**.



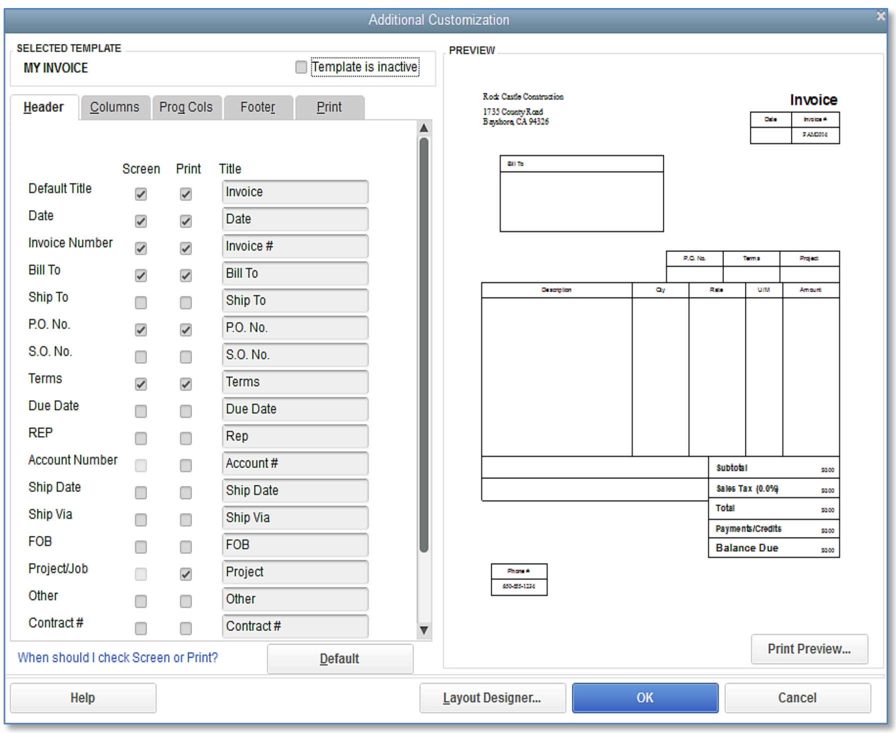
2. Click the **Templates** menu button then choose **New**.
3. Choose the type of form template you want to create.
4. Click the **Manage Templates** button to give the template a name then click **OK**.
5. Use the features in the **Basic Customization** window to customize the general look of your form.
6. Click **OK** to close the Basic Customization window.

NOTES

Customizing Fields on Forms

To customize fields on a template:

1. Click the **Additional Customization** button at the bottom of the window.



2. To have the Due Date field display both onscreen and on the printed form, click the **Screen** checkbox for **Due Date** to select it.
3. Click the **Print** checkbox for **Due Date**.
4. Clear the **Screen** and **Print** checkboxes for the **P.O. No.** field to remove the field from the form.
5. Continue customizing your form fields as needed for your business.

NOTES

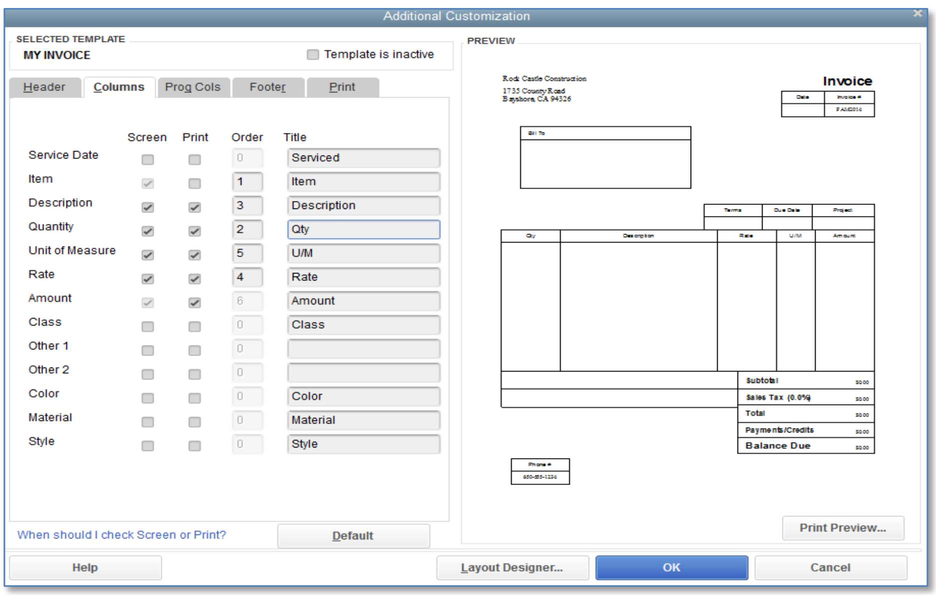
Changing Field Order on Forms

The lower half of the standard QuickBooks invoice form is where you enter details about the items or services purchased by the customer. You can change the order of these fields as they appear on your invoices.

The Order column shows you how fields display from left to right on the invoice form. Currently Item is the first column and Amount is the last column. Suppose you want the Qty field to appear after the Item field and before the Description field.

To change the order of fields on a form:

1. Click the Columns tab.
2. Double-click the Order column to select it.
3. Manually enter the number that represents the order you want the column to be displayed on your form.



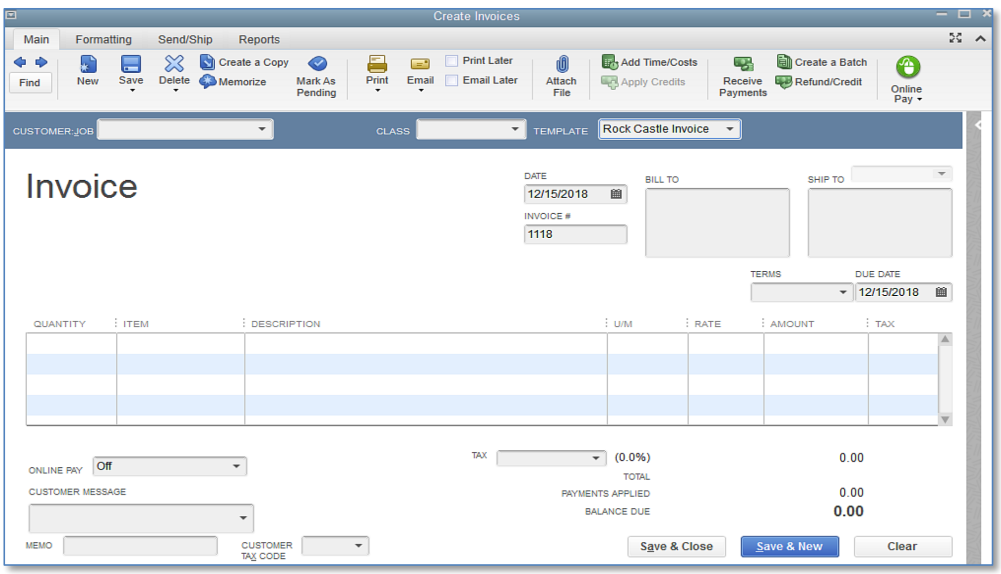
4. Continue working through the tabs to customize your form.
5. Click OK to record the changes.
6. Click OK again then close the Templates window.

Displaying your Customized Form

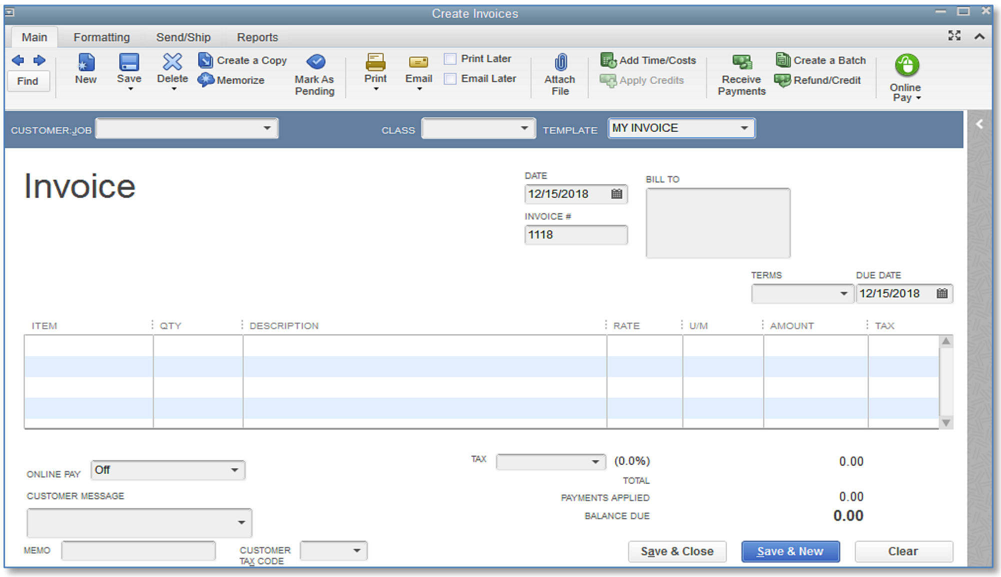
This walkthrough shows you how to view a template using the Invoice form. If you have other custom forms, you can access them by opening the form window in QuickBooks then choosing your template from the **Template** drop-down.

To display a custom invoice form:

1. From the **Customers** menu, choose **Create Invoices**.



2. In the **Template** field, choose your template from the drop-down list.



3. Click the arrow on the **Print** icon and select **Print Preview** to see what your invoice will look like printed.

4. Exit the invoice.

NOTES

Designing Custom Layouts for Forms

Here are a few examples of what you can do with a custom layout:

- Give your company name, address, and logo special treatment on the form
- For example, you could center your logo at the top of the form and put your company name and address in a special font immediately below the logo.
- Enlarge a custom field so it can display more information
- Position the customer's billing address so it coincides with the address window in the envelopes you use
- Change the borders on fields, add background colors, and add extra text fields
- Add multiple graphics to a form

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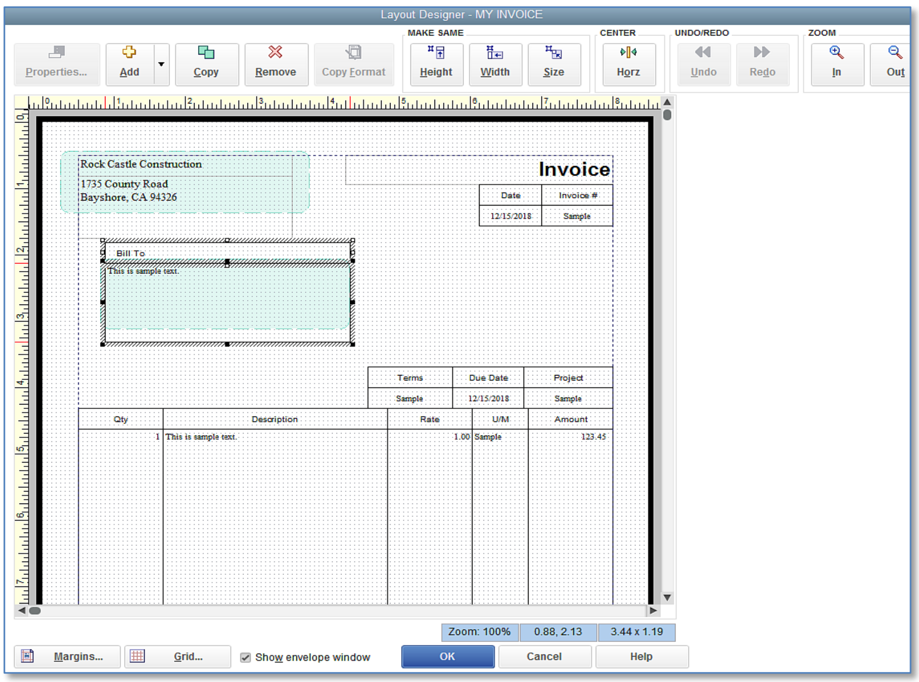
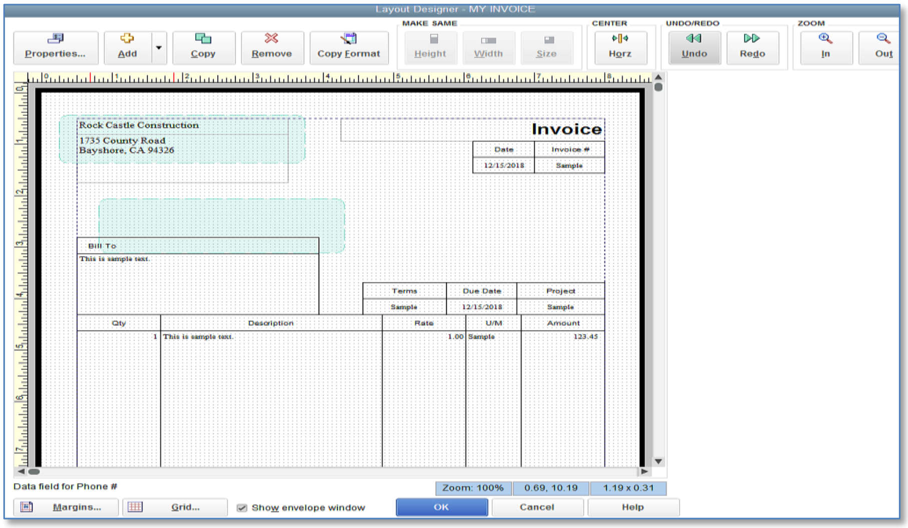
Changing the Position of Fields on Forms

To move fields on forms:

1. From the **Lists** menu, choose **Templates**.
2. Right-click on **My Invoice** then select **Edit Template**.
3. Click **Layout Designer**.



4. Click on the fields you wish to move, hold your mouse button down to drag/drop the fields.


Layout Designer - MY INVOICE
Properties...
Add
Copy
Remove
Copy Format
MAKE SAME
Height
Width
Size
CENTER
Horz
UNDO/REDO
Undo
Redo
ZOOM
In
Out
Rock Castle Construction
1735 County Road
Bayshore, CA 94326
Invoice
Date
Invoice #
12/15/2018
Sample
Bill To
This is sample text.
Terms
Due Date
Project
Sample
12/15/2018
Sample
Qty
Description
Rate
U/M
Amount
1
This is sample text.
1.00
Sample
123.45
Data field for Phone #
Zoom: 100%
0.69, 10.19
1.19 x 0.31
Margins...
Grid...
Show envelope window
OK
Cancel
Help

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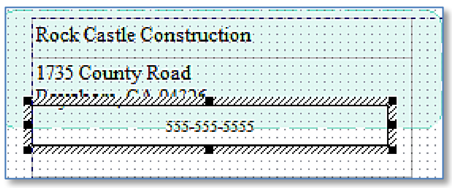
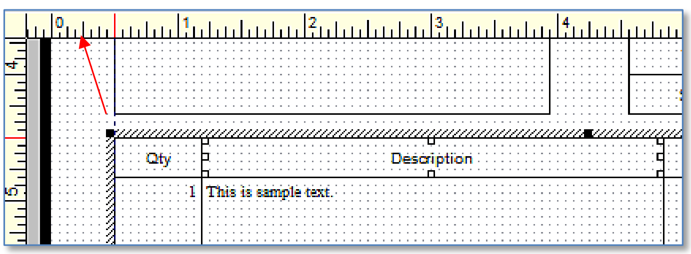
Changing Field Widths

To change the width of a field:

1. Select the field you want to resize. Click on the black boxes in the field border, hold your mouse button down and drag the black box to resize the field. Let go of your mouse button to release and resize the field.



2. Use the ruler to keep field sizes uniform and field edges in alignment.



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Changing Fonts, Borders and Colors

Using the Properties window in the Layout Designer, you can change font size and style, and text justification. You can also add, remove, or change the borders around fields.

To change fonts, borders and colors:

1. Select the field you wish to edit, right-click to select **Properties**.
2. On the **Text** tab, select the justification you wish to use.

3. Click **Font** to select your font, font size, and color. Click **OK** when you are finished.
4. Click the **Border** tab. Use these settings to create/remove/edit field borders on your form.
5. Click on the **Background** tab to give your form a colored background.
6. Click **OK** to save the changes in the Layout Designer.
7. Click **OK** to close the Additional Customization window.

NOTES

Previewing New Forms

Notice that the invoice form displayed by QuickBooks doesn't show the changes you just made in the Layout Designer. This is because changes made in the Layout Designer only affect the printed invoice and not the invoice QuickBooks displays onscreen for data entry.

To preview the invoice:

1. To see how the printed invoice form will look, click the **Print Preview** button (above the Template drop-down list).
2. When you are finished looking at the preview, click **Close**.

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