

QuickBooks 101 - Lesson 15.01

Lesson 15 — Customizing Forms and Writing QuickBooks Letters

Creating New Templates

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.

Templates	
NAME	TYPE
Custom Progress Invoice	Invoice
Custom S.O. Invoice	Invoice
Finance Charge	Invoice
Intuit Product Invoice	Invoice
Packing Slip	Invoice
Progress Invoice	Invoice
Rock Castle Invoice	Invoice
Custom Credit Memo	Credit Memo
Return Receipt	Credit Memo
Custom Sales Receipt	Sales Receipt
Custom Purchase Order Template	Purchase Order
Intuit Standard Statement	Statement
Custom Change Order	Estimate
Custom Estimate	Estimate
Proposal	Estimate
Custom Sales Order	Sales Order
Intuit S.O. Packing Slip	Sales Order
Intuit S.O. Pick List	Sales Order
Sales Order with Rep	Sales Order
Templates 🔻 Open Form 🗌 Incl	ude in <u>a</u> ctive

- 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.





Customizing Fields on Forms

Customizing Fields on Forms

To customize fields on a template:

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

					Additional C	ustomiza	tion						>
SELECTED TEMPLA	ATE			Template i	s inactive	PREVIE	N						
<u>H</u> eader <u>C</u> o	lumns F	^o ro <u>a</u> Cols	Footer	<u>P</u> rint	A	R I B	ock Castle Construction 735 County Road ajahora, CA 94326				Date	Invoice	
	Screen	Print	Title				811 To				L		
Default Title	1	~	Invoice										
Date	1	1	Date										
Invoice Numbe	er 🗸	√	Invoice #							0.00	Terms	Project	
Bill To	1	√	Bill To							-			
Ship To			Ship To			-	Descriptio	•	ay	Rate	UM	Amount	
P.O. No.	1	1	P.O. No.										
S.O. No.			S.O. No.										
Terms	1	~	Terms										
Due Date			Due Date										
REP			Rep										
Account Numb	er		Account #							Subtot	1	\$2.00	
Ship Date			Ship Date							Sales T	ax (0.0%)	\$2.00	
Ship Via			Ship Via							Total	ts/Credits	\$200	
FOB			FOB							Balan	ce Due	\$200	
Project/Job		√	Project				Phone #						
Other			Other				450-85-1224						
Contract #			Contract #		v								
When should I cf	heck Scree	n or Print	?	<u>D</u> efault							Pri	nt Preview	
Help						<u>L</u> ayout E	lesigner		ОК		С	ancel	

- 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.





Changing Field Order on Forms

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.

IY INVOICE				Template is inacti	e				
deader <u>C</u> olun	nns P	ro <u>a</u> Cols	Foo	te <u>r</u> <u>P</u> rint	Rock Castle Construction 1733 County Read Bigshore, CA 94326			Det e	Invoice Note +
	Screen	Print	Order	Title	241 To				
Service Date				Serviced					
Item	1		1	Item					
Description	1	1	3	Description			Terma	Due Date	Project
Quantity	1	1	2	Qty	ογ	Des cription	Rate	U/M	Amount
Unit of Measure	1	-	5	U/M					
Rate	1	~	4	Rate					
Amount	1	~	6	Amount					
Class				Class					
Other 1									
Other 2							Sub	total	\$0.00
Color				Color			Sale	IS TAX (0.0%)	\$0.00
Material				Material			Tot	si ments/Credits	50.00
Style				Style			Ba	lance Due	\$0.00
/hen should i chec	ck Screer	or Print	2	Default	Phone # 655-055-1126			Pri	int Preview
anon on on only in the t				Deliduit					
Help					Layout Designer	ОК			Cancel

- 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.

QuickBooks 2	015 Student	Guide
--------------	-------------	-------



Displaying your Customized Form

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.

	Create Invoices	- 🗆 ×
Main Formatting Send/Ship Reports		20 A
Image: Save Delete Image:	Print Later Image: Add Time/Costs Image: Ad	
CLASS	TEMPLATE Rock Castle Invoice	<
Invoice	DATE BILL TO SHIP TO T	
	TERMS DUE DATE ▼ 12/15/2018 @	
QUANTITY : ITEM : DESCRIPTION	UM PATE AMOUNT TAX	
		•
ONLINE PAY Off	Тах (0.0%) 0.00 тотац	
CUSTOMER MESSAGE	PRYMENTS APPLIED 0.00 BALANCE DUE 0.00	
MEMO CUSTOMER V	Save & Close Save & New Clear	



Displaying your Customized Form

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

2			Create Invoices				- 🗆 ×
Main Formatting	Send/Ship Report	5					8 *
Find New Save	Delete Memorize	Mark As Pending	Email Email Later	Attach File	Add Time/Costs Apply Credits	Receive Refund/Credit	Online Pay •
CUSTOMER: JOB	•	CL	ASS	TEMPLATE	MY INVOICE	-	<
Invoice				DATE 12/15/2018 INVOICE # 1118	BILL TO		
						TERMS DI	JE DATE
						- 1	2/15/2018 🛍
ITEM	QTY DESC	RIPTION		1.1	RATE : U/M	AMOUNT	i tax
							A
ONLINE PAY	¥		TAX	•	(0.0%) TOTAL	0.00	
CUSTOMER MESSAGE				PAYMENTS A	APPLIED	0.00	
	-			BALAN	ICE DUE	0.00	11.
MEMO		MER 🔻			Save & Close	<u>S</u> ave & New	Clear

- 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.





Designing Custom Layouts for Forms

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





Changing the Position of Fields on Forms

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.

					MAKE SA	ME		CENTER	UNDO/REDO		ZOOM	_
	÷.	-	×	0	* E		** * **	¢] 4	44	•••	€	1
roperties	Add	Copy	Remove	Copy Format	Height	Width	<u>S</u> ize	Horz	Undo	Redo	Įn	(
Roc 173 Bay	ck Castle Cons 33 County Roa yshore, CA 943 Bill To This is sample	truction 1 226				Date 12/15/201	Invoice Invoice 8 Sample	же *				
	4			6								
	Qty		Description		Terms Sample Rate	Due Date 12/15/2018 U/M	Project Sample Armount					
	Qty	This is sample text.	Description		Terms Sampté Rate	Due Date 12/15/2018 U/M 1.00 Sample	Project Sample Amount 123	(45)				
	Qty 1	This is sample out.	Description		Terns Sample Rate	Due Date 12/15/2018 // 1.00 Sample	Project Sample Amount 123	-45	¥			
	0t/ 1	Tabi is sample text.	Description		Terns Sanpte Rates	Due Date 12/15/2018 U/M 1.00 Semple Semont 100%	Project Sample Armount 123		v 9			

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



Changing the Position of Fields on Forms

Add	Copy Remove	Copy Eormat	t <u>H</u> eight	<u>W</u> idth	<u>S</u> ize	¢ <mark> </mark> ↓ H <u>o</u> rz	¶¶ <u>U</u> ndo	₽₽ Re <u>d</u> o		⊕ _ In	
<u>A</u> dd 	<u>C</u> opy <u>R</u> emove	Copy <u>F</u> ormat	t <u>H</u> eight	<u>W</u> idth	<u>S</u> ize	Horz	Undo	Redo		In	
Rock Castle Cons	1112	ultututut	<mark></mark>	ափուսեսե						-	
Bayshore, ČA 943	4 126			Date 12/15/20	Invoice Invoice Sample	÷e					
Bill To This is sample text.			Terms	Due Date	Project						
			Sample	12/15/2018	Sample						
Qty	Description		Rate	U/M	Amount						
1	This is cample text.			.00 Semple	123	45					
			1		1	•	•				
Phone #			Z	oom: 100%	0.69, 10.19	1.19 x 0.31					
	Dirt To Dist is sample sec.	oui To Dis Is sample uss. Ory Description This Is sample uss. Phone #	eni To Dis Is sample test. Gey Description 1 This is sample sect.	Brit To Dis Is sample text. Terms Terms Terms Terms Parte Terms Parte Terms Terms Ter	eni to	Oil Terrini Due Date Project Bit is sample text. Terrini Due Date Project Oly Description Task Due Date Project 1 This is sample text. 1.00 Sergits 323 1 This is sample text. 1.00 Sergits 323 Phone # Zoom: 100% 0.09, 10.19 10.90	Terms Due Date Project Bangle Loss. Terms Due Date Project Gly Description Farms Loss Date Project 1 This is sample wat. 1.00 Sample 123.42	Bit is sample tost. Terms Due Date Project 1 Tue is assigle soci. 1 Tue is assigle soci. 1 No. 0 Sample 1.00 Sample	Bit To Termin Due Date Project Dis Is sample sec. Termin Due Date Project Oly Description Tasis Sample Sample 1 Dis Is sample sec. 1.00 Sample 123.501 Sample 0 1 Dis Is sample sec. 1.00 Sample 123.43 1.00	Terret Due Deta Project Bit 15 sample test: Terret Due Deta Project Oto 1 to sample test: 1 Die Deta Project Sample test: 1 Die 1 sample test: 1 Die Deta Removel 1 Die Deta Removel 1 Die 1 sample test: 1 Die Bangle 122.45 122.45 122.45	Terms Due Date Project This is sample task. Terms Due Date Project OV Description Bingts 13/13/018 Emerget 1 This is sample task. No Norwork 122.45

Notes

Lesson 15 — Customizing Forms and Writing QuickBooks Letters

QuickBooks 2015 Student Guide

12



Changing Field Widths

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.

		1
	Rock Castle Construction	
	1735 County Road	
	Doorbrook Noble State	
	555-555-5555	2
2		
		11

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

	0	1	IJ	11			h	1	1	11		1		1	1	1	1			1		1	1	1	2		1	1	ı	1	L	1	1	1				3	ı		L		1	I	. 1	1	1				4	ı		L		1	1				1	ī]
	• •	•	•		1		• •	•	·	• •	•	•		•	• •		•	•	• •	•	•	•	•	•		• •		•	•	•	• •		•	•	•	• •		•	•	• •	• •		•	•	• •		•	•	•	•	•	•	•	•	• •		•	Т	•	• •	•	·	7
	1.1		- 1		1																1	1	1						1	1		1	1						1									1	1									н	1				1
47				٢.																																																						н					1
-				١.																																																						н	_	_	_	_	-
-		-		-1-	1	-	• •			• •					• •			-								• •										• •									• •				•		-							н					- P
-			• •	- 1	1			-																																									•	1								н					4
_				11	C I		: :			: :				2							2	2	1					2	2				1	2				2	2								2	2	1			2						н					1
_					۱ ۱	_	_	_		_	_		_		_	_			_	_					_	_	_				_					_	_			_	_	_			_	_				ι.								L		_	_	_	-1
-					- 1			-																																											-												·
-						22	2	4	11	2	2	11	11	z	12	2	2	u	2	2	4	2	2	a	2	2	u	2	2	z	u	z	4	z	4	z	u	2	2	2	u	z	u	2	2	2	2	2	2	2	2	4	Я	Ē/	2	2	2	2	\mathbb{Z}	4	2	11	2
_					24								T	τ																							U	Γ.																							ц		Л
_					- 24			10	-				- H																					۰.				-	1:	_		-																-			Н		.
-			• •	• •	24		• •	4	-	y			۰ħ	۰.				•	• •							• •							ł		21	50	τ.	Р	U	0	п				• •										• •						ч	÷.,	·
_	1.1				- 24		• •	•	•	· · ·		•	Ŀ	Ĺ.	• •	•	•	• •	• •		•	۰.	•	•		• •	•		•	•	• •		•	•	•	• •	É	È.	۰.	• •	• •		•	•	• •		•	•	•	• •	•	•	•	•	• •				•	• •	É	۰.	•
					24								Т																																																		7
۰O					- 24							-1		т	'n	İ8	1	в (83	n	ĸ	1	e	Ð	Ð	ςŧ																																					- 1
			• •	• •	24		• •			• •				-							7															• •				• •					• •										• •							÷.,	1
_	1.1				24	1					1		1	1			1			1	1							1	1				1	1				1					1				1				1	1					1				1		1
					-24																																																									÷.	1
_					24								1																																																		- 1
_					-24								- L																																																	÷.,	- 1

NOTES



Changing Fonts, Borders and Colors

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.

		Properties		×
Data field for P	hone #			
Text	Border	Bac <u>k</u> ground		
JUSTIFICATIO	ON			
HORIZO	NTAL		VERTICAL	
۲	_eft □ l <u>n</u> de Text	nt First Line of		
0 [<u>R</u> ight		Bottom	
00	C <u>e</u> nter		Center	
<u>F</u> ont	. <u>C</u> ol	or		
	ОК	Car	Help	

- 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.





Previewing New Forms

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.

