



The QuickBooks™ Client Newsletter

Helping You Grow a Profitable Business with QuickBooks™ Software

From the office of:

Accounting Connections, LLC

2624 Gladstone Terrace

Woodstock, Georgia 30189

Office (770) 516-5987 Cell (770) 846-7799

Website: www.AccountingConnections.ORG

Email: DianeOffutt@AccountingConnections.ORG

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Customize QuickBooks Forms for a More Professional Image

Want an easy, free way to make your business look more professional and polished? Customize your forms. QuickBooks has the tools.

You probably don't get as many paper forms in the U.S. Mail as you used to. But when you do, do you draw conclusions about the business that sent them based on what their forms look like?

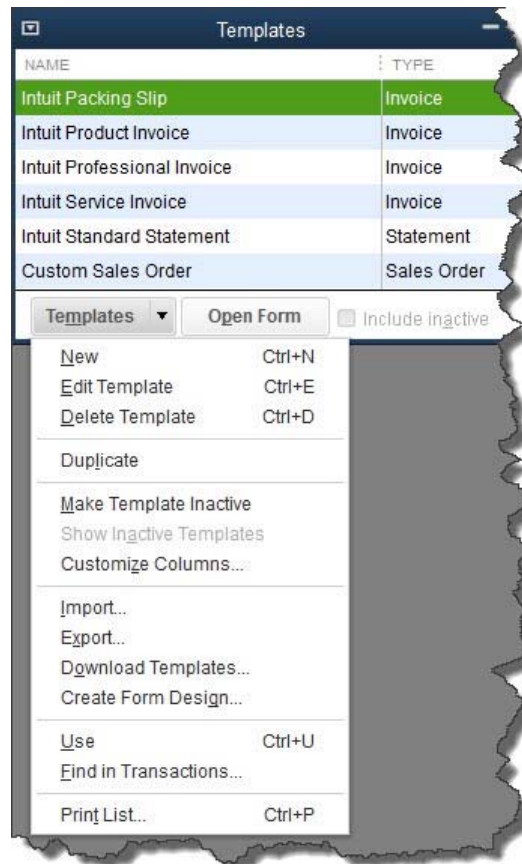
Whether or not you think you do, most people make judgements on businesses based on collateral materials. You might notice that there's no company logo, or that there are unnecessary blank fields. Maybe the print is very light or blurry, and there's no message at the bottom thanking you for your business and your payment. How you present yourself on paper *does* matter. There's a lot of competition out there, and you need to use all of the tools available to you in order to stand out. QuickBooks provides one way to do so with its simple forms customization features. Here is a sample of a *customized invoice* in QuickBooks.

Larry's Landscaping & Garden Supply		Invoice	
1045 Main Street Bayshore, CA 94326 (415) 555-4567	Due Date	Date	Invoice #
	2/13/2021	12/15/2019	132
Bill To	PAID 12/15/2019		
Computer Services by DJ 101 Bayshore Blvd. Bayshore, CA 94326	Balance Due>> \$0.00		
	<input type="checkbox"/> Please check box if address is incorrect or has changed, and indicate change(s) on reverse side.		
	Have E-Mail? Please write it here: _____		
Larry's Landscaping & Garden Supply	PLEASE DETACH AND RETURN TOP PORTION WITH YOUR PAYMENT.		
1045 Main Street Bayshore, CA 94326 (415) 555-4567	P.O. No.	Terms	Due Date
		Net 60	2/13/2021
			Project
Description	Qty	Rate	Amount
Custom Landscape Design		55.00	110.00
This is added detail on the same line			
This is a whole new line			
CA sales tax, San Tomas County		8.50%	0.00
Total			\$110.00
Payments/Credits			-\$110.00
Balance Due			\$0.00

On the Road to Business Success!

Getting Started

To see what forms are available for customization, open the **Lists** menu and select **Templates** to open this window:



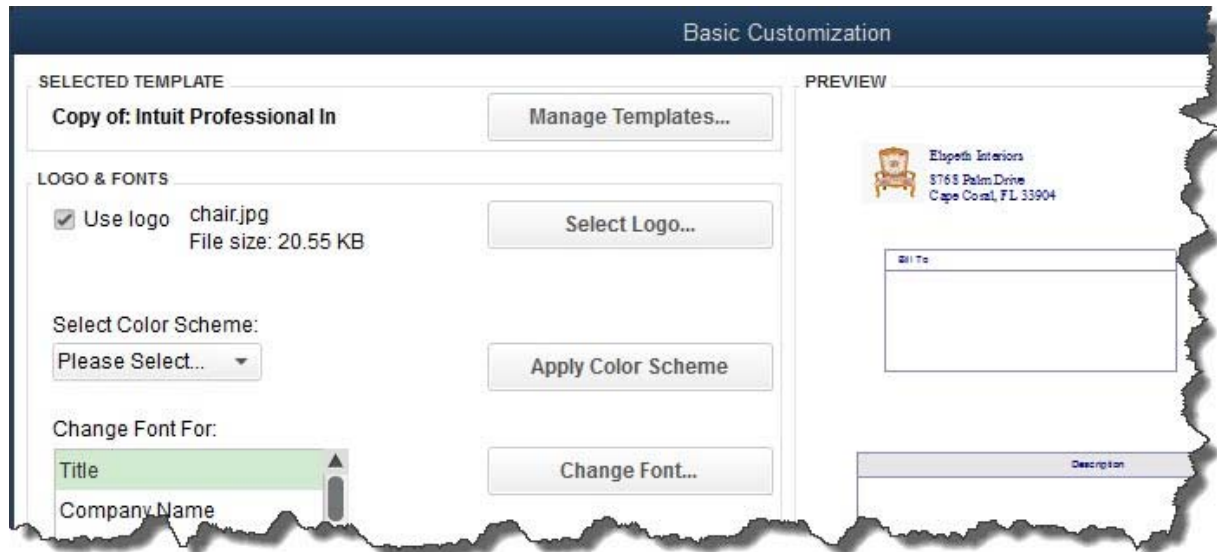
*Figure 1: QuickBooks' **Templates** window shows you what forms can be customized and provides tools for working with them.*

Before you try your hand at customizing a form, make a copy to work with first. Highlight **Intuit Product Invoice**. Click the down arrow next to **Templates** in the lower left, and select **Duplicate**. A small window will open, displaying your options. Select **Invoice** and click **OK**.

QuickBooks will then take you back to the **Templates** window, and you'll see a new entry labeled **Copy of: Intuit Product Invoice**. Right-click on it and select **Edit Template** from the menu that opens. This will open the **Basic Customization** window.

There are two parts to this screen. The editing options for the template you selected will appear on the left, and a preview of your invoice will display on the right. As you make modifications to the template, the preview will change to reflect them.

The best, most noticeable thing you can do to customize your invoice is to add a logo. Click the box in front of **Use logo**, and locate the file in the computer directory that opens. Double-click it. Your logo will appear to the left of your company name and address in the upper left corner of the preview.



*Figure 2: The **Basic Customization** window displays options for modifying your copy of the **Intuit Product Invoice** template.*

You can make numerous changes to your template in this window, like:

- Selecting a new color scheme,
- Changing fonts,
- Deciding how much of your contact information should appear, and
- Indicating whether the **Print Status Stamp (PAID, PENDING, etc.)** should appear where appropriate on your invoices.

Note: You can choose to use the same modified design on multiple types of forms. This is a little complicated; let us help you.

More Customizing Options

The changes you just made were fairly superficial. However, QuickBooks offers tools that let you go much further, modifying the actual content of the invoice itself, its columns, and its fields. To get started on this, click the **Additional Customization** button at the bottom of the screen. The window that opens displays a preview of your invoice on the right side, just like in the previous window.

Your customization options appear on the left side, divided into five different sections. You'll work primarily with three of them for your invoice:

- **Header:** This includes all of the information that appears on about the top third of the form, like **Bill To**, **Terms**, **Due Date**, and **Project/Job**.
- **Columns:** What are you billing the customer for? **Item**, **Description**, **Quantity**, **Rate**, etc.
- **Footer:** What information will you want to enter after you've completed the invoice's product or service content? You'll likely want fields like **Total**, **Balance Due**, and **Payments/Credits**, perhaps a **Message**.

	Screen	Print	Title
Default Title	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Invoice
Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Date
Invoice Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Invoice #
Bill To	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Bill To
Ship To	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ship To
P.O. No.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	P.O. No.
S.O. No.	<input type="checkbox"/>	<input type="checkbox"/>	S.O. No.
Terms	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Terms
Due Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Due Date
REP	<input type="checkbox"/>	<input type="checkbox"/>	Re

Figure 3: QuickBooks gives you tremendous control over the content in your forms.

As you can see in the above image, QuickBooks lets you choose whether specific fields and columns will appear on your invoices on screen and/or in print. You can also change field labels if you would like. And if you have overlapping fields or want to further modify the appearance of the invoice, you can use the **Layout Designer**. It's a simple tool, but it requires some design skills.

Of course, you may not be printing many invoices at all if you are set up to email them and accept payments online. But your customers, of course, will still see how carefully you have

crafted your forms, which will feed into their overall perception of you. Let this impression be a good one.

We hope you find this month's QuickBooks tips helpful. Please visit our company website <http://www.accountingconnections.org> often as it is updated constantly and offers a wealth of tax and accounting tips, along with links to better serve your business needs. Our QuickBooks Tips newsletters are archived on our website as well.

Accounting and Taxation is **our** business; having us a part of your team allows **you** to concentrate on **your** core business.



Diane Offutt, *Managing Partner at Accounting Connections, LLC*
Enrolled Agent (EA), Master of Accounting (MAcc), NTPI Fellow (National Tax Practice Institute), Certified QuickBooks™ ProAdvisor



*An **Enrolled Agent (EA)** is a federally licensed tax professional, who has taken an extensive test in taxation and must comply with continuing education in tax law to maintain their license.*

Enrolled Agents are allowed to represent clients before all administrative levels of IRS without their clients' presence (the same as a Certified Public Accountant).