

# Invoices

## Customising and Creating Invoices in QuickBooks Online

Sending a customised invoice to your customers will give your business a more polished and professional look. QuickBooks online brings you 5 invoice templates to choose from within the software. There is also in QuickBooks Labs a .docx template that you can download, work on it outside of QuickBooks Online, add as many logos as you like, change the colour in some of the fonts in the header and more then import into your QuickBooks Online file. You can have as many templates that you wish either within the software templates or the .docx templates just remember to name them differently.

In our step by step guide we show you how easy it is to customise a Sales form, here we look at customising an Invoice and walk you through to invoicing clients, setting up Recurring Invoices to be sent automatically from QuickBooks Online, where you can find your invoices once you have save or sent to client and where you can print up your delivery notes.

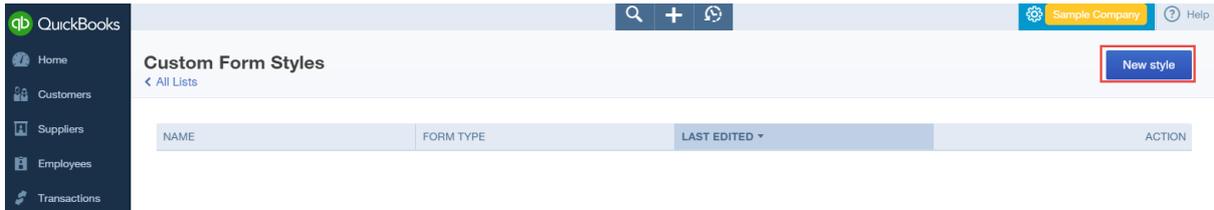
You can customise either an **Invoice, Estimate or Sales Receipt**

## How to Customise Invoices

Click on the **Gear Company Preferences** icon upper right > **Settings** > **Custom Form Styles**

The screenshot shows the QuickBooks Online dashboard for 'Prosperity Events HK' on Saturday, 24 October 2015. The 'Settings' menu is open, and 'Custom Form Styles' is highlighted with a red box. The dashboard includes a navigation sidebar on the left, a main content area with financial summaries (Income: HK\$157,940 OPEN INVOICES, HK\$3,700 OVERDUE, HK\$186,900 PAID LAST 30 DAYS; Expenses: HK\$46,250 LAST 30 DAYS), and an 'Activities' feed on the right.

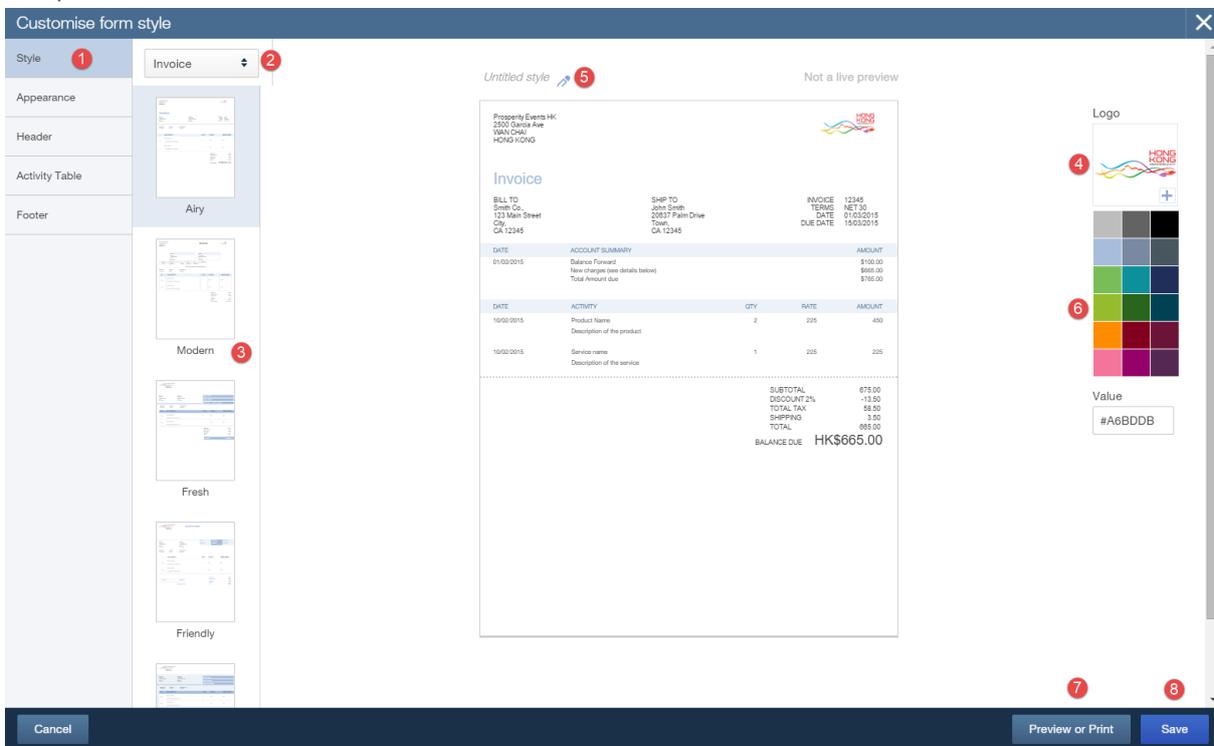
Click on **New Style** button to add a new sales form



**Customise form style** window will open. On the left follow the menu down the left hand side to customise the form

1. Style
2. Appearance
3. Header
4. Activity Table
5. Footer

## 1 Style



1. Click on **Style**
2. Choose **Invoice, Estimate Or Sales Receipt**
3. Select the form style from either **Airy, Modern, Fresh, Friendly** or **Bold** templates
4. Upload your **Logo by clicking** on the logo field
5. Click on the **Untitled style pencil icon** to name your form
6. Colour will "Intuitively" match the colour to your Logo but you can select a different colour, you have 18 to choose from
7. Click on **Preview or Print** to preview the form so far
8. Click on **Save**

## 2 Appearance

Customise form style

Style

Appearance **1**

Header

Activity Table

Footer

Logo crop, resize, align **2**

Size  Small  Medium  Large

Zoom

Logo placement **3**

Left Centre Right None

Font and line height **4**

Helvetica

Page margins **5**

Top

Left

Bottom

Right

Printing **6**

Window envelope compatible and pay slips

Use letterhead paper

Show tables **7**

Account summary

DATE	ACCOUNT SUMMARY	AMOUNT
10/02/2015	Balance Forward	\$100.00
	New charges (see details below)	\$665.00
	Total Amount due	\$765.00

1. Click on **Appearance**
2. Logo crop resize align, click on **Small, Medium** or **Large**
3. Logo Placement – click on **Left, Centre Right** or **None**
4. Font and Ling height – choose from the **Arial, Courier, Helvetica** or **Times Fonts** choose size of the font
5. Page Margins – choose the different margins to set on your form **Top Left Bottom** and **Right**
6. Printing – Choose if a **Window envelop compatible and pay slips** is required or **Use letterhead paper**
7. Show tables, choose **Account summary** or **Tax summary** is required

### 3 Header

Customise form style

Style

Appearance

Header 1

Activity Table

Footer

**Form names** 2

- Show form name
  - Invoice
  - Estimates
  - Sales Receipts
- Form number
- Use custom transaction numbers

**Company** 3

- Company name
- Address
- Email
- Website
- Phone
- Company Business ID No.

**Customer** 4

- Terms
- Due date or Expiration date
- Shipping
- Payment method
- Customer Tax Registration No.

**Custom** 5

- PO Number
- Salesperson
- Custom field 3

Cancel Preview or Print Save

1. Click on **Header**
2. **Form Names**
3. **Company** – choose what is shown on form header
4. **Customer** – what do you want the customer to see on the form
5. **Custom** fields you have a choice of up to 3 that you may want to add to the form

## 4. Activity Table

Customise form style

Style

Appearance

Header

Activity Table **1**

Footer

**Columns** **2**

COLUMNS	LABEL	WIDTH%	ORDER
<input checked="" type="checkbox"/> Service/Product	Activity	56	3
<input checked="" type="checkbox"/> Description	Date		1
<input type="checkbox"/> Date	Qty	10	4
<input checked="" type="checkbox"/> Quantity	Rate	17	5
<input checked="" type="checkbox"/> Rate	Amount	17	6
<input checked="" type="checkbox"/> Amount			

**More** **3**

Group activity by Day

Collapse activity rows

Show markup on billable expenses

Show billable time

Include employee name

Include hours and rate

Cancel Preview or Print Save

1. Click on **Activity Table**
2. **Columns** choose if the Services/Product names are to be shown, Description, Date, Quantity, Rate, Tax and Amount on the form
3. **More** add if required Billable time

## 5 Footer

Customise form style

Style

Appearance

Header

Activity Table

Footer **1**

**Message to customer** **2** Invoices and sales forms

You may remit payment to HSBC Bank  
Number 146 123456789

**Footer text** **3** Centred

Please visit us at www.intuit.hk

Cancel Preview or Print Save

1. Click on **Footer**

2. **Message to customer** add in the text field a static message for each form
3. **Footer** static message on the bottom of form

And click on **Save** bottom right corner

Our completed Invoice – using the **Bold Style Template**

**Prosperity Events HK**  
 2500 Garcia Ave  
 WAN CHAI, HONG KONG HK  
 6509444444  
 donotreply@intuit.com



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**BILL TO**  
 Hilltop Dry Goods, Inc.  
 123 Main Street  
 City, CA 12345

**INVOICE 12345**

DATE 01/03/2015

TERMS Net 30    DUE DATE 15/03/2015

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PO NUMBER	SALESPERSOPMT METHOD		
CUSTOM-1	CUSTOM-2	CHEQUE	

DATE	ACCOUNT SUMMARY	AMOUNT
01/03/2015	Balance Forward	
	New charges (details below)	661.50
	<b>Total Amount Due</b>	<b>661.50</b>

ACTIVITY	QTY	RATE	AMOUNT
<b>Product name</b>	2	225.00	450.00
Description of the product			
<b>Service name</b>	1	225.00	225.00
Description of the service			

<i>You may remit payment to HSBC Bank</i>	<b>SUBTOTAL</b>	675.00
<i>Number 146 123456789</i>	<b>DISCOUNT 2.00%</b>	-13.50
	<b>TOTAL</b>	661.50
	<b>TOTAL OF NEW CHARGES</b>	661.50

**TOTAL DUE                      HKD 661.50**

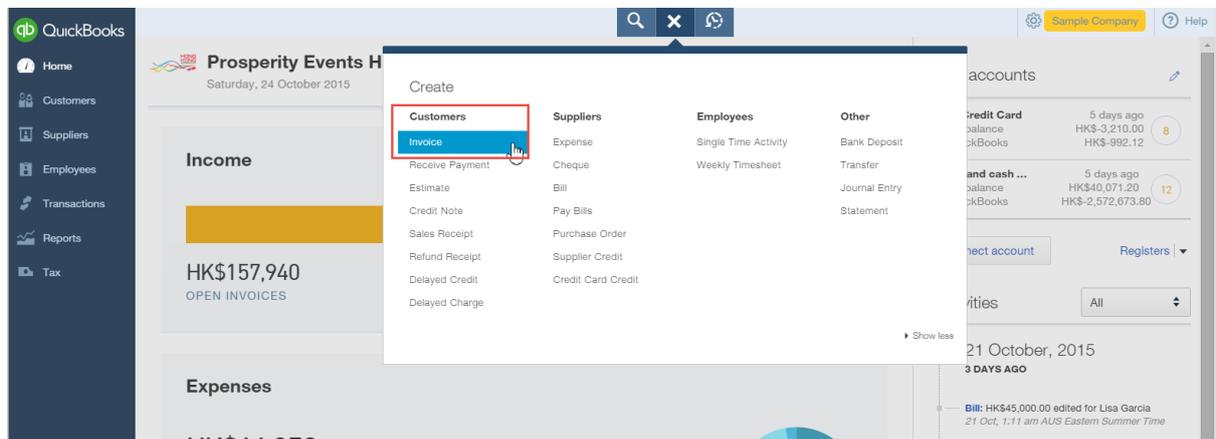
Please visit us at [www.intuit.hk](http://www.intuit.hk)

## Creating Invoices

Click on the **Global create (+ sign)** button middle of the page plus sign



Under **Customers** click on **Invoice**



Complete Invoice

Invoice no.1015

Benjamin Yeung | benjamin@yeung.com

BALANCE DUE HK\$1,950.00

Billing address: Benjamin Yeung, Yeung's Architects

Terms: Net 30 | Invoice date: 29/10/2015 | Due date: 22/11/2015

PO Number: 123456 | Salesperson: Chada

#	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT (HKD)	CLASS
1	Hours		10	120	1,200.00	
2						Subtotal: HK\$1,200.00
3	Services		5	150	750.00	
4						Subtotal: HK\$750.00
5						

Subtotal: 1950.00

Total: 1950.00

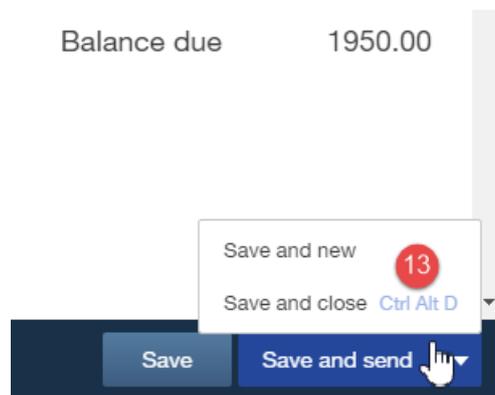
Balance due: 1950.00

Message displayed on invoice: You may remit payment to HSBC Bank Number: 146 123456789

Attachments: Maximum size: 25MB

Buttons: Cancel, Clear, Print or Preview, Make recurring, Customise, Save, Save and send

1. Choose **Customer** drop down menu
2. **Terms** can be changed or add a new one on the fly
3. **Invoice date**
4. **Due date** auto populates
5. **PO Number \*\*** note see above **Customise form > Header > 5** up to 3 fields can be chosen to appear
6. **Invoice no.** \*\*note click on **Gear icon > Company Settings > Sales** and tick on **Custom Transaction numbers**
7. Choose your **Product/Service**
8. Click on **Add Subtotal** to group different products or services
9. Overall **Subtotal** of invoice
10. Total **balance due**
11. Customise the default **Message**
12. Add **Attachments** – drag and drop, upload or choose from existing attachments
13. Bottom right hand corner **Save and close** or **Save and Send** or **Save**



Invoice is now created and emailed if **Save and Send** was chosen

## Send email

Email  
benjamin@yeung.com **1**

Subject  
Invoice 1015 from Prosperity Events HK

Body  
Dear Benjamin Yeung, **2**  
Here's your invoice! We appreciate your prompt payment.  
Thanks for your business!

**3**

Prosperity Events HK  
2520 Garden Ave  
WAN CHAI, HONG KONG HK  
8529444444  
info@prosphy@reut.com

**INVOICE**

BILL TO  
Benjamin Yeung  
Yeung's Architects

INVOICE NO. 1015  
DATE 23/10/2015  
DUE DATE 22/11/2015  
TERMS Net 30

PO NUMBER  
123456

SALES/PERSO  
N  
Chada

ACTIVITY	QTY	RATE	AMOUNT
Hours	10	120.00	1,200.00
Services	5	150.00	750.00

You may need payment to HSBC Bank  
Number 963 123456789

BALANCE DUE  
HKD 1,950.00

Cancel

**4**

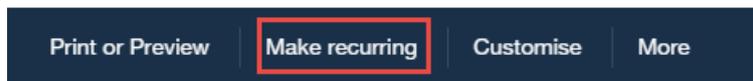
Send and close

1. **Email** from customer card, **Subject** can be edited in the Subject field
2. **Body** –edit here in this field if required
3. Copy of Invoice to be emailed
4. Click on **Send and close** – the invoice will be emailed straight away

## Recurring Invoice

If you need to send out invoices on a regular basis, QuickBooks online makes this very simple. You can create a recurring template for just about every type of transaction. Quickest way of setting this up is directly from the transaction, let's look at a recurring Invoice

Middle bottom of Invoice click on **Make recurring**



From the recurring invoice you have variables of different options to choose from

Invoice no.1015

### Recurring Invoice

Template name **1**: Benjamin Yeung    Type **2**: Scheduled    Create **3**: days in advance

Customer **4**: Benjamin Yeung    Email **5**: benjamin@yeung.com    Options **6**:  Automatically send emails

Interval **7**: Monthly    on day **8**: 15th    of every **9**: 1 month(s)    Start date **10**: 01/10/2015    End **11**: By    End date: 01/09/2016

Billing address: Benjamin Yeung, Yeung's Architects    Terms: Net 30    PO Number: 123456    Salesperson: Chada

1. Choose your **template name**
2. Type **Schedule, Reminder or Unscheduled**
3. Can be **Created** number of **days in advance** to the date set to be recurring
4. You can set this template different **customer**
5. Change the **Email** address
6. **Options** you can set the recurring invoice to be emailed out directly to customer
7. **Interval** choose from **Daily, Weekly, Monthly or Yearly**
8. Choose from a certain **day or date**
9. Set this up every **month** or maybe every 3 **months**
10. **Start date** of the 1<sup>st</sup> invoice to occur
11. **End date** choose from **None, End date or After** a number of **occurrences**
12. Bottom right **Save Template**

If you need to edit click on **Gear icon > Lists > Recurring transactions**

QuickBooks Recurring Transactions

Reminder List    New

Template Type: All    Transaction Type: All    Location: All

Filter by Name

TEMPLATE NAME	TYPE	TXN TYPE	INTERVAL	PREVIOUS DATE	NEXT DATE	CUSTOMER/SUPPLI	AMOUNT	ACTION
Quarterly Depreciation	Scheduled	Journal	Every 3 Months		05/11/2015		0.00	Edit
Mark Howard	Scheduled	Cheque Expense	Every Month	22/10/2015	21/11/2015	Mark Howard	1,250.00	Edit
Hayden Insurance Co	Scheduled	Cheque Expense	Every 3 Months		14/11/2015	Hayden Insuranc...	750.00	Edit
Benjamin Yeung monthly invoice	Scheduled	Invoice	Every Month		15/11/2015	Benjamin Yeung	1,950.00	Edit
Bank of AnyCity	Scheduled	Cheque Expense	Every Month		13/11/2015	Bank of AnyCity	471.78	Use Delete

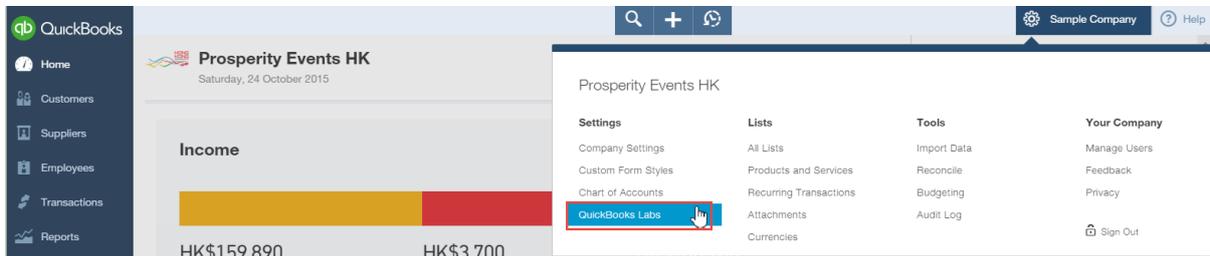
Previous 1-5 Next

1. Drop down menu choose to **Use or Delete or Edit** the recurring transaction

## QuickBooks Labs

Be the first to try some of QuickBooks Online's experimental plug-ins. Don't forget to check back to see what's new you never know what you're missing out on!

Click on the **Gear icon > Settings > QuickBooks Labs**



Let's look at **Import Style** this allows us to import into QuickBooks Online a .docx file from work that you can tailor to suit check out the demo to see how it works > switch **On**



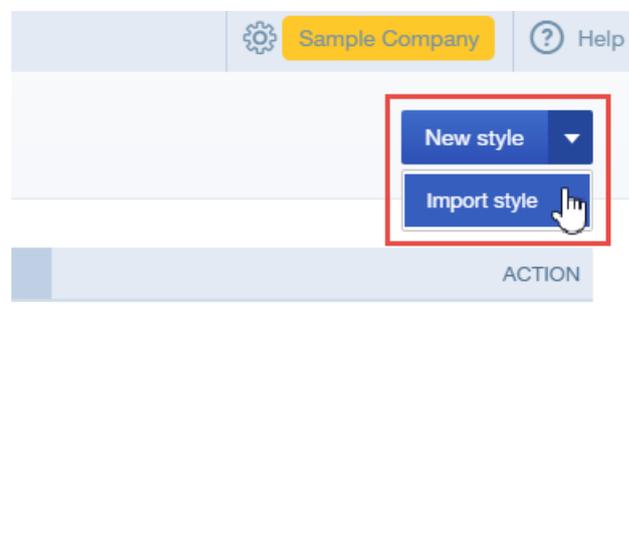
### Import Style



Now you can spice up your brand with your own invoice design. Import your .docx file from Word, tell us which fields to replace, and voila! Your brand is yours again.

[Learn more](#) | [See demo](#) | [Give feedback](#)

Once switched on under **Cogs company preference > Custom Form Styles > drop down menu at New Style** click down to **Import style**



In the **Import form style** window click on **Download a sample invoice**, this will download a zipped folder called **SampleDocument** within this folder **samplestyles** double click on this folder, you will find a **How to Import Styles** word document and 2 separate templates to choose from the

- **Invoice Airy Light** and the **Invoice Airy Pro** templates

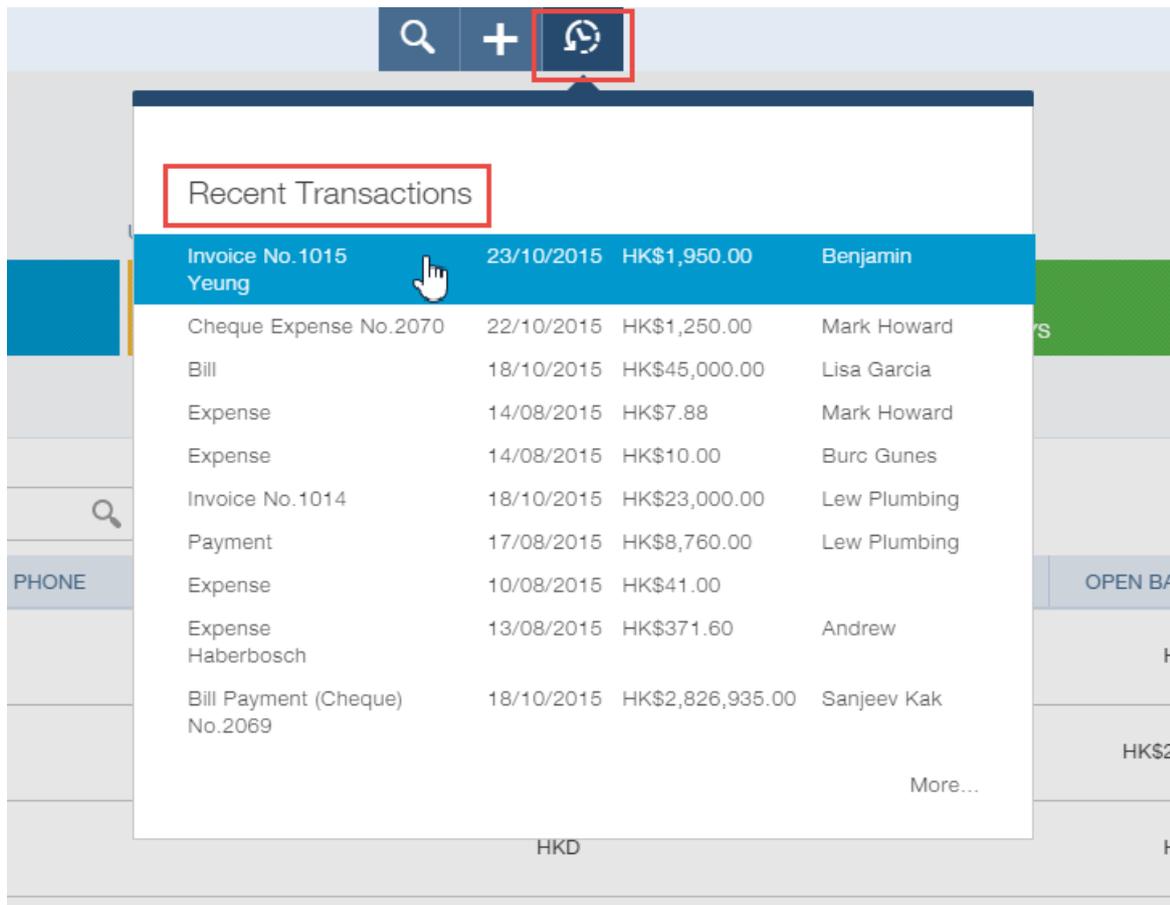
Once you have customised your template follow the instructions in the **Import form style** window to **Import your own form style**

Now you have entered your invoices where can you find them?

In the **Customers** window you can easily find your customer's Invoices in the **Find a customer or company** field

CUSTOMER	CURRENCY	OPEN BALANCE	ACTION
Abercrombie Internat Abercrombie Internation	HKD	HK\$0.00	Create invoice
Benjamin Yeung Yeung's Architects	HKD	HK\$2,750.00	Receive payment
Cathy's Consulting C Cathy's Consulting Com	HKD	HK\$0.00	Create invoice
Chadha's Consultant Chadha's Consultants	HKD	HK\$0.00	Create invoice
Charlie Whitehead Whitehead and Sons	HKD	HK\$0.00	Create invoice

**Recent Transactions** gives you the latest invoices that you have saved, allowing you to quickly go in and out of the last few transactions. Just click on any transaction from this window.



Left hand side navigation bar **Transactions > Sales** gives you an overview of you latest invoices and payments, click into any row this will take you quickly and directly to your invoice

**\*\* note the cog wheel on far right, tailor your Columns to suit your Sales register**

**Sales Transactions**

Unbilled Last 365 Days: HK\$6,188 (2 ESTIMATES)

Unpaid Last 365 Days: HK\$375 (1 UNBILLED ACTIVITY)

Overdue: HK\$3,700 (3 OVERDUE)

Paid: HK\$186,900 (3 PAID LAST 90 DAYS)

DATE	TYPE	NO.	CUSTOMER	DUE DATE	BALANCE	TOTAL	STATUS
23/10/2015	Invoice	1015	Benjamin Yeung	22/11/2015	HK\$1,950.00	HK\$1,950.00	Open
18/10/2015	Invoice	1013	Nadia Phillipchuk	17/11/2015	HK\$140,000.00	HK\$140,000.00	Open
18/10/2015	Invoice	1014	Lew Plumbing	17/11/2015	HK\$14,240.00	HK\$23,000.00	Partial
18/10/2015	Payment		Abercrombie International ...	18/10/2015	HK\$0.00	HK\$-186,900.00	Closed
17/09/2015	Invoice	1011	Abercrombie International ...	17/10/2015	HK\$0.00	HK\$150,000.00	Paid
25/08/2015	Invoice	1008	Abercrombie International ...	24/09/2015	HK\$0.00	HK\$36,900.00	Paid
25/08/2015	Billable Expense Charge		Abercrombie International ...	24/09/2015	HK\$0.00	HK\$900.00	Closed
20/08/2015	Billable Expense Charge		Abercrombie International ...	24/09/2015	HK\$0.00	HK\$15,000.00	Closed
20/08/2015	Billable Expense Charge		Abercrombie International ...	24/09/2015	HK\$0.00	HK\$0,000.00	Closed
17/08/2015	Invoice	1012	Ecker Designs	16/09/2015	HK\$2,500.00	HK\$2,500.00	Overdue
17/08/2015	Payment		Lew Plumbing	17/08/2015	HK\$0.00	HK\$-8,760.00	Closed
15/08/2015	Invoice	1010	Jordan Burgess	14/09/2015	HK\$400.00	HK\$400.00	Overdue
07/08/2015	Billable Expense Charge		Abercrombie International ...	24/09/2015	HK\$0.00	HK\$2,500.00	Closed

## Packing Slip

You may have customers that need a packing slip sent with the products and the Invoice to follow after delivery

Bottom of Invoice click on **Print or Preview** > click on **Print Packing slip**

Print later

Print or Preview

**Print packing slip**

Print or Preview    Make recurring    Customise    More

At the **Print preview** window

1. Print to add to the products being delivery
2. If you want to email click on **save** > and save this to the desktop as a .pdf and email directly from your email service

## Print preview



To print, right-click the preview and select **Print**. Or, click the **Print** icon if you see one below.

**Prosperity Events HK**  
2500 Garcia Ave  
WAN CHAI, HONG KONG HK  
6509444444  
donotreply@intuit.com

**HONG KONG**  
ASIA'S WORLD CITY

### Packing Slip

BILL TO  
Benjamin Yeung  
Yeung's Architects

INVOICE NO. 1015  
DATE 23/10/2015

PO NUMBER 123456      SALESPERSO N Chada

SERVICE	ACTIVITY	QTY
Hours		10
Services		5

Close

Print

Take the time to customise your invoices, reflect the branding of your business making your professionalism shine through.

Streamline your customer invoicing, schedule your invoices to be sent out automatically to your customers, get paid quicker.

Allow QuickBooks Online accounting software to put you in control of your finances!