Invoices

Customising and Creating Invoices in QuickBooks Online

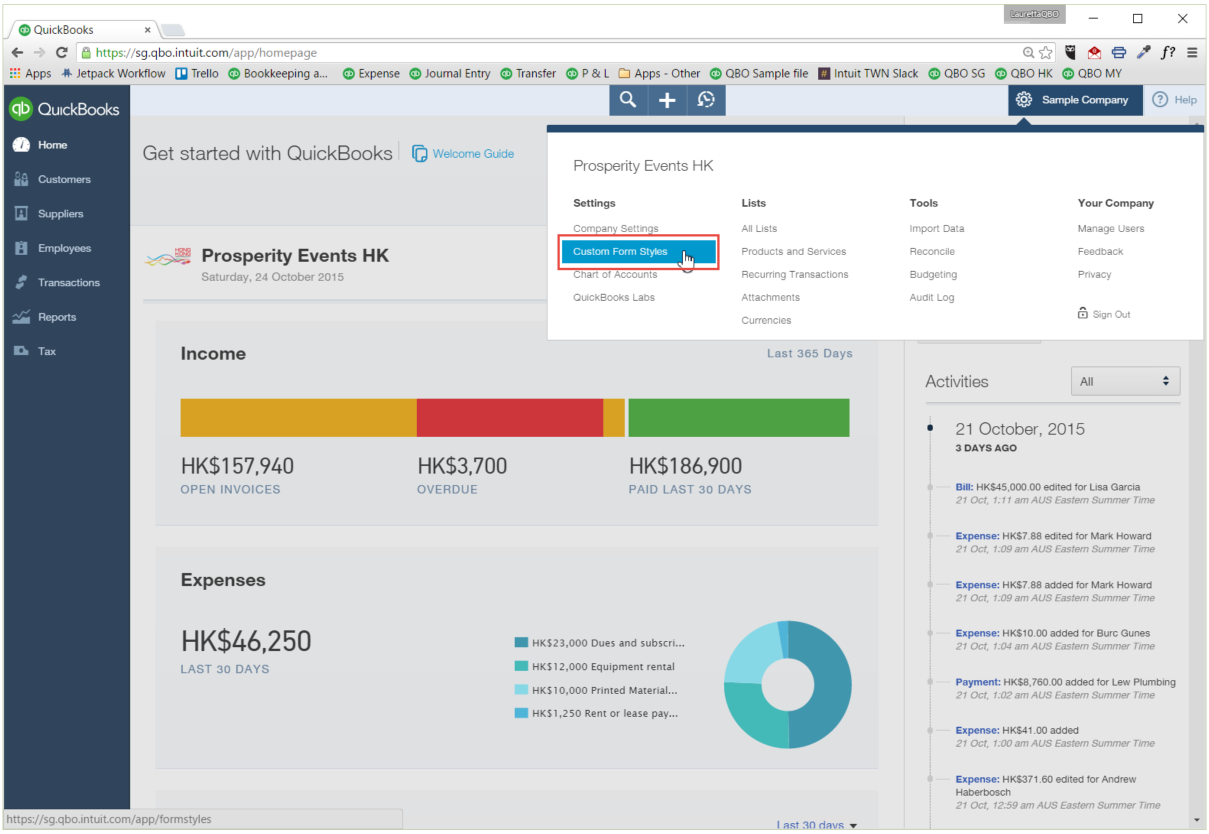
Sending a customised invoice to your customers will give your business a more polished and professional look. QuickBooks online brings you 5 invoice templates to choose from within the software. There is also in QuickBooks Labs a .docx template that you can download, work on it outside of QuickBooks 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.

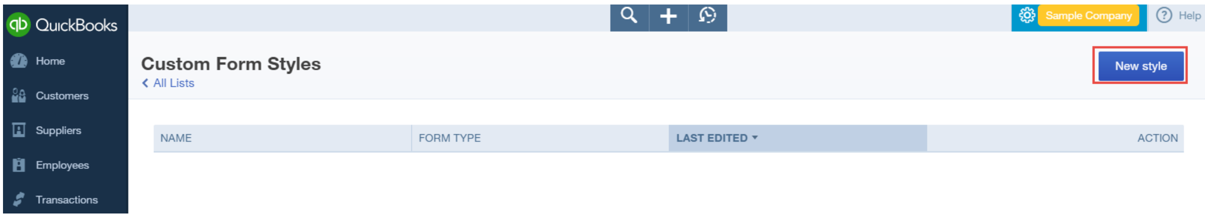
You can customise either an **Invoice, Estimate** or **Sales Receipt**

How to Customise Invoices

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



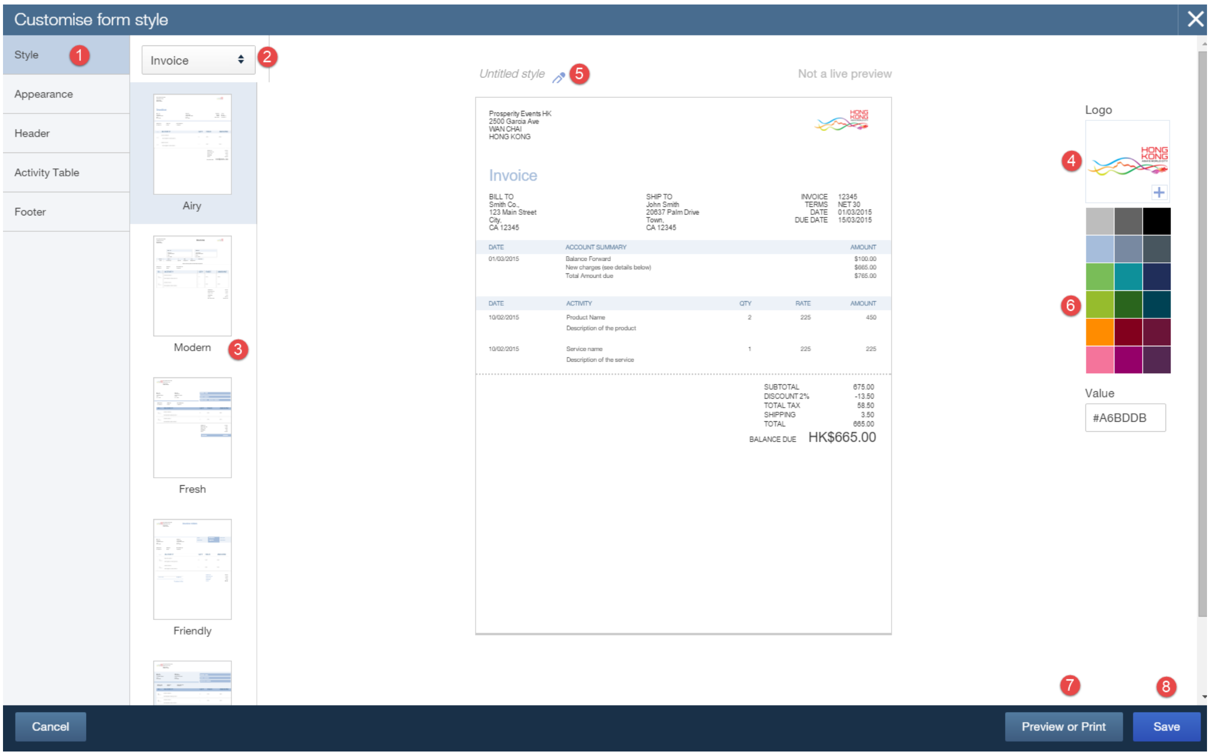
Click on **New Style** button to add a new sales form



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

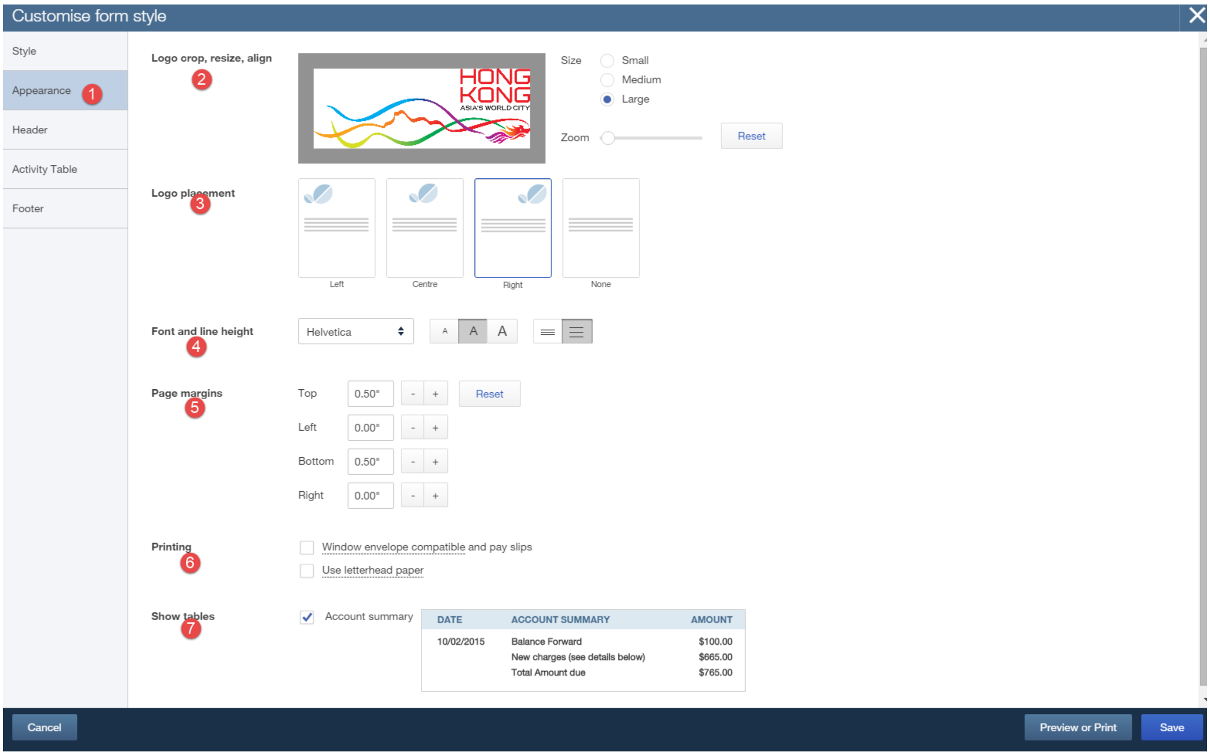
1. Style
2. Appearance
3. Header
4. Activity Table
5. Footer

1 Style



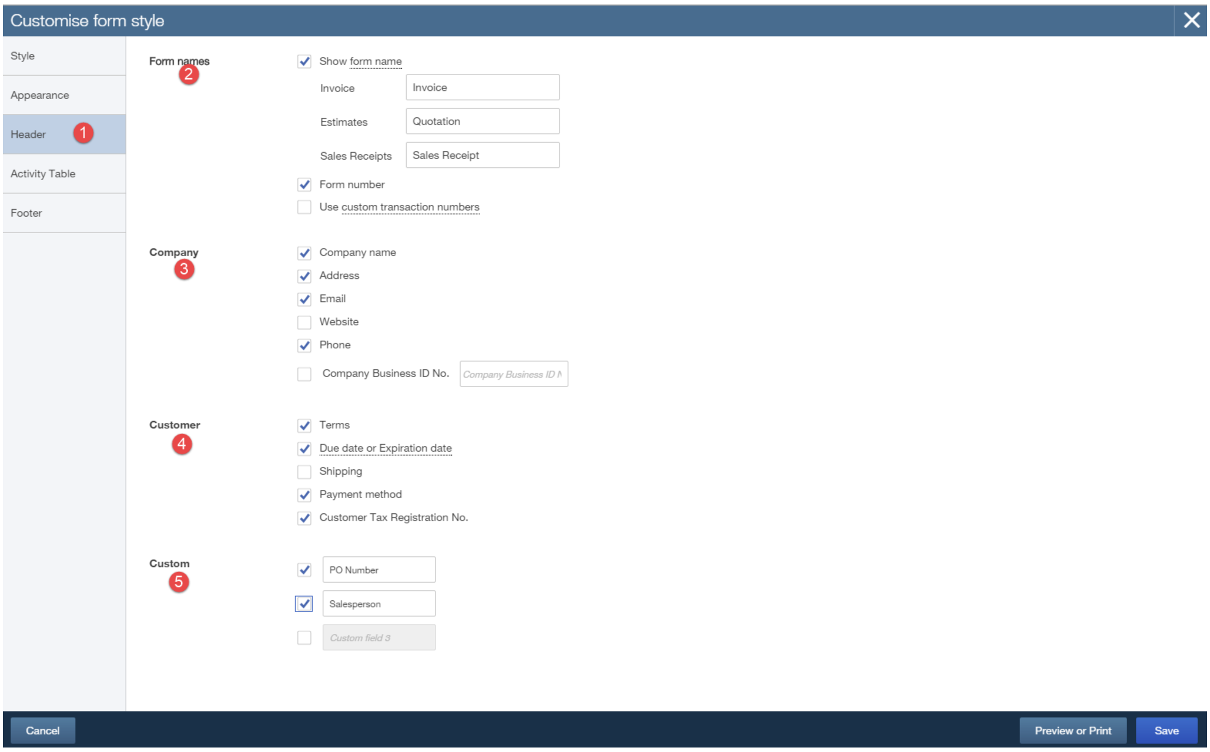
1. Click on **Style**
2. Choose **Invoice, Estimate** Or **Sales Receipt**
3. Select the form style from either **Airy, Modern, Fresh, Friendly** or **Bold** templates
4. Upload your **Logo by clicking** on the logo field
5. Click on the Untitled style **pencil icon** to name your form
6. Colour will "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



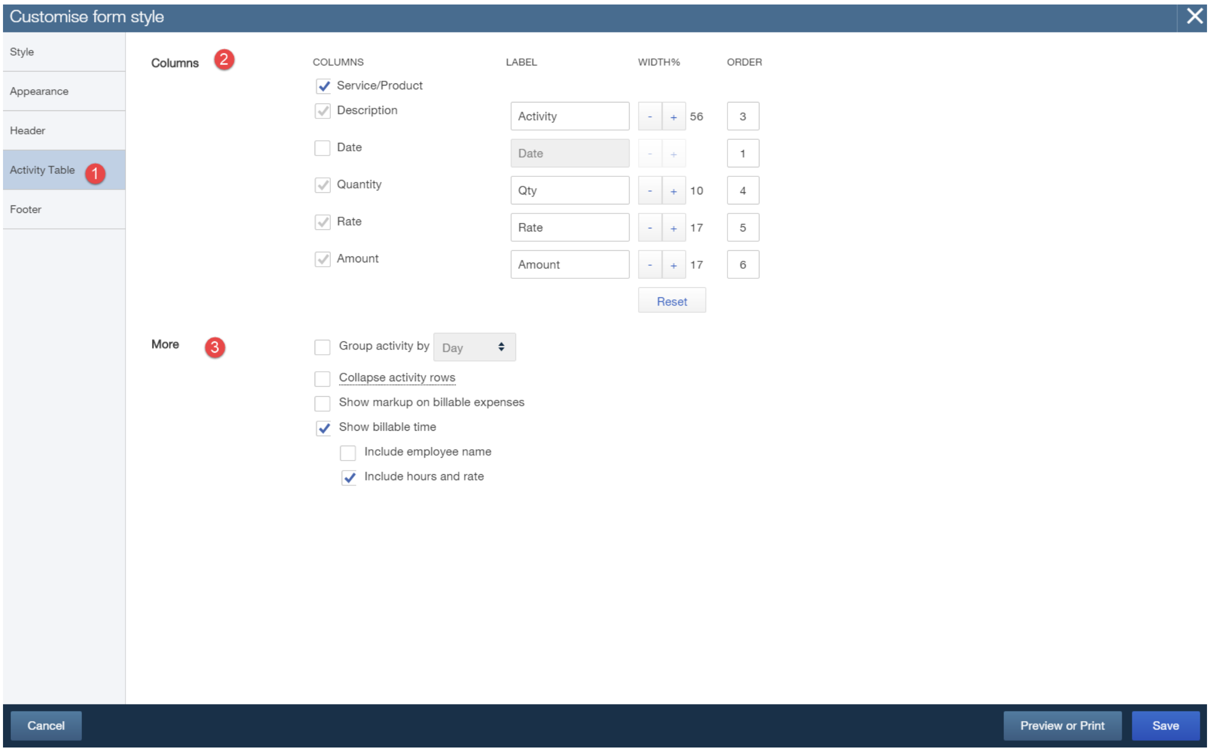
1. Click on **Appearance**
2. Logo crop resize align, click on **Small, Medium** or **Large**
3. Logo Placement – click on **Left, Centre Right** or **None**
4. Font and Ling height – choose from the **Arial, Courier, Helvetica** or **Times Fonts** choose size of the font
5. Page Margins – choose the 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



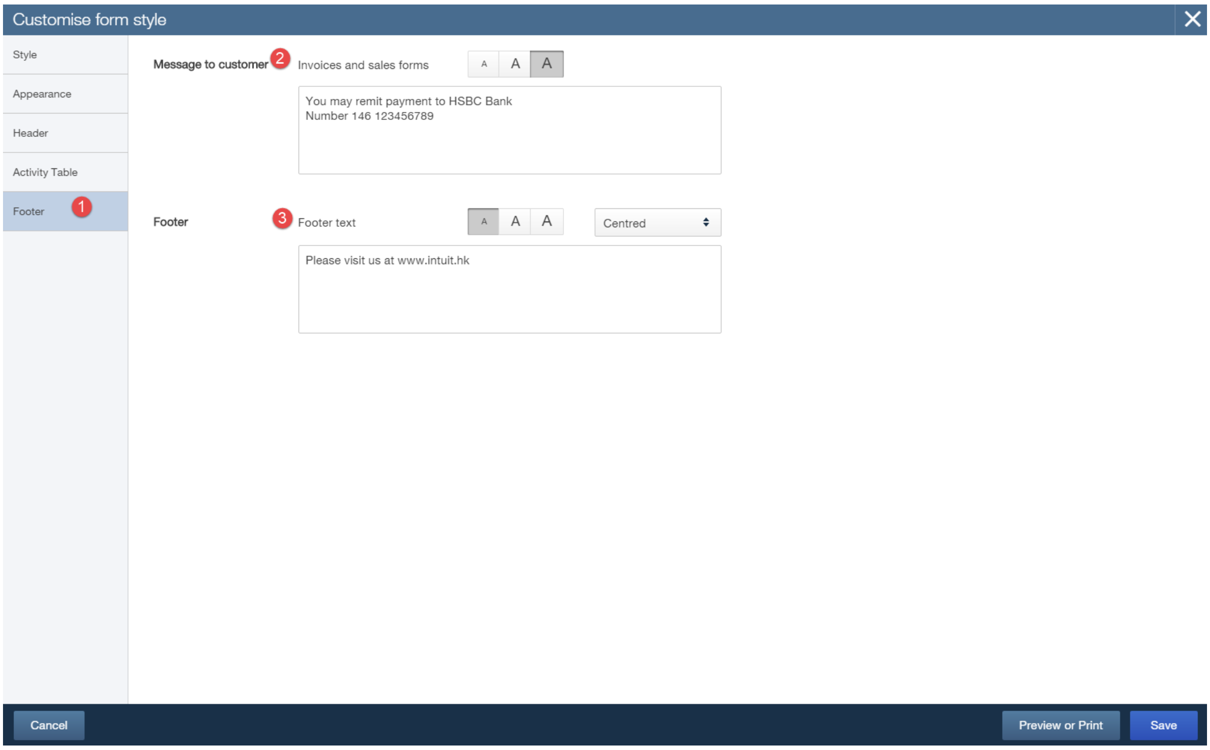
1. Click on **Header**
2. **Form Names**
3. **Company –** choose what is shown on form header
4. **Customer –** what do you want the customer to see on the form
5. **Custom** fields you have a choice of up to 3 that you may want to add to the form

4. Activity Table



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



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

HONG KONG
ASIA'S WORLD CITY

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

PO NUMBER	SALESPERSON	PMT METHOD
CUSTOM-1	CUSTOM-2	CHEQUE

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

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

You may remit payment to HSBC Bank Number 146 123456789

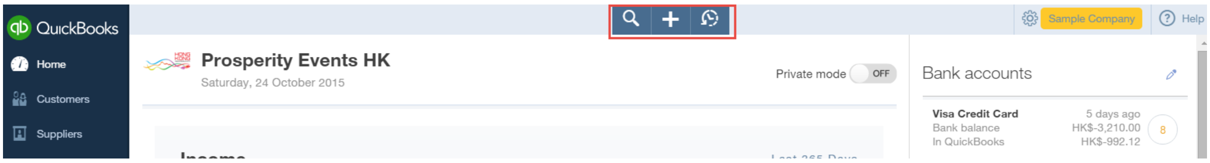
SUBTOTAL	675.00
DISCOUNT 2.00%	-13.50
TOTAL	661.50
TOTAL OF NEW CHARGES	661.50

TOTAL DUE HKD 661.50

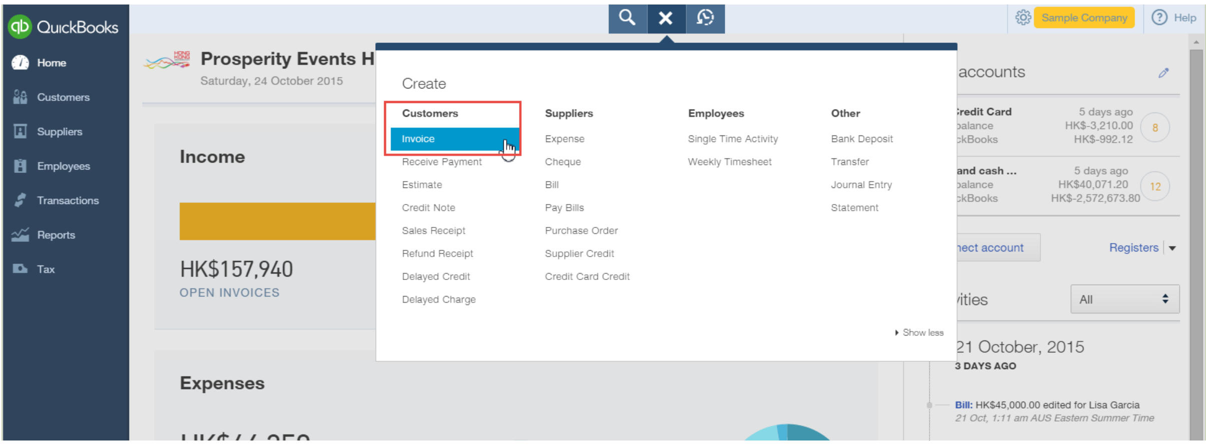
Please visit us at www.intuit.hk

Creating Invoices

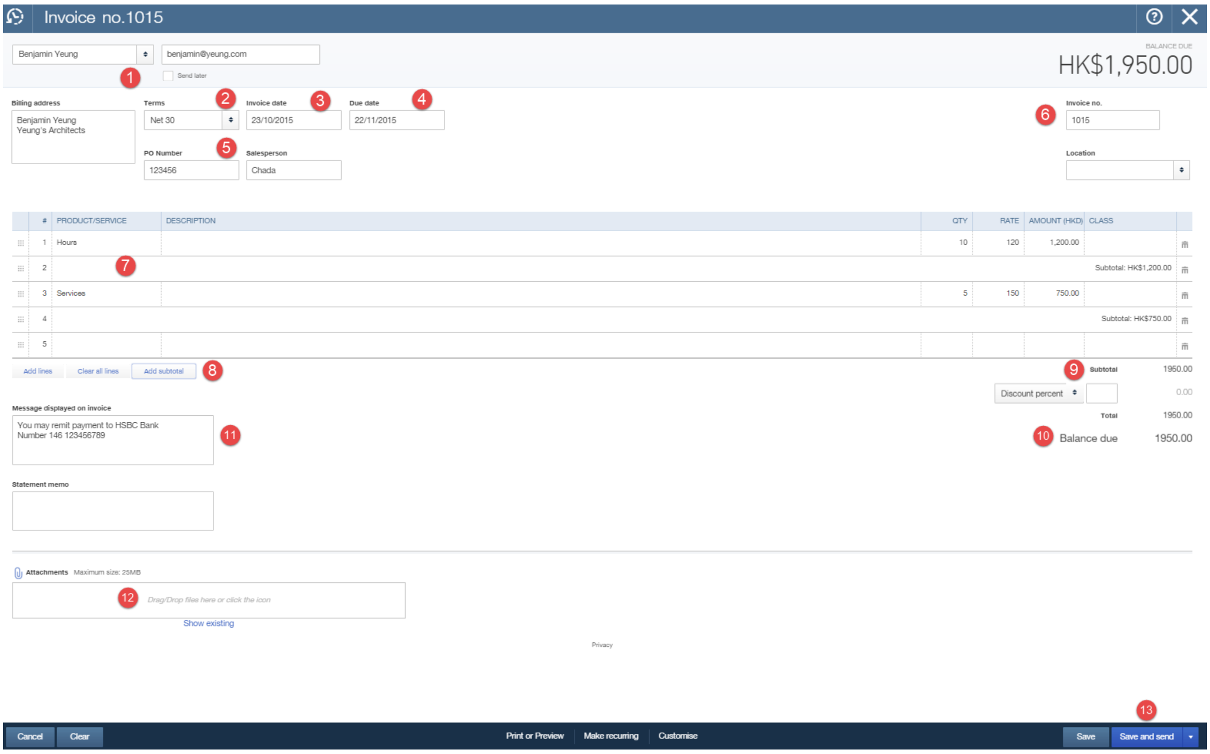
Click on the **Global create (+ sign)** button middle of the page plus sign



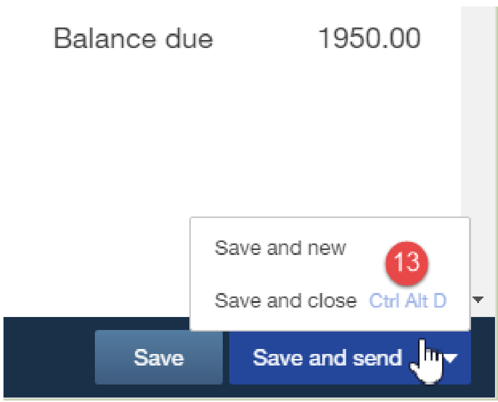
Under **Customers** click on **Invoice**



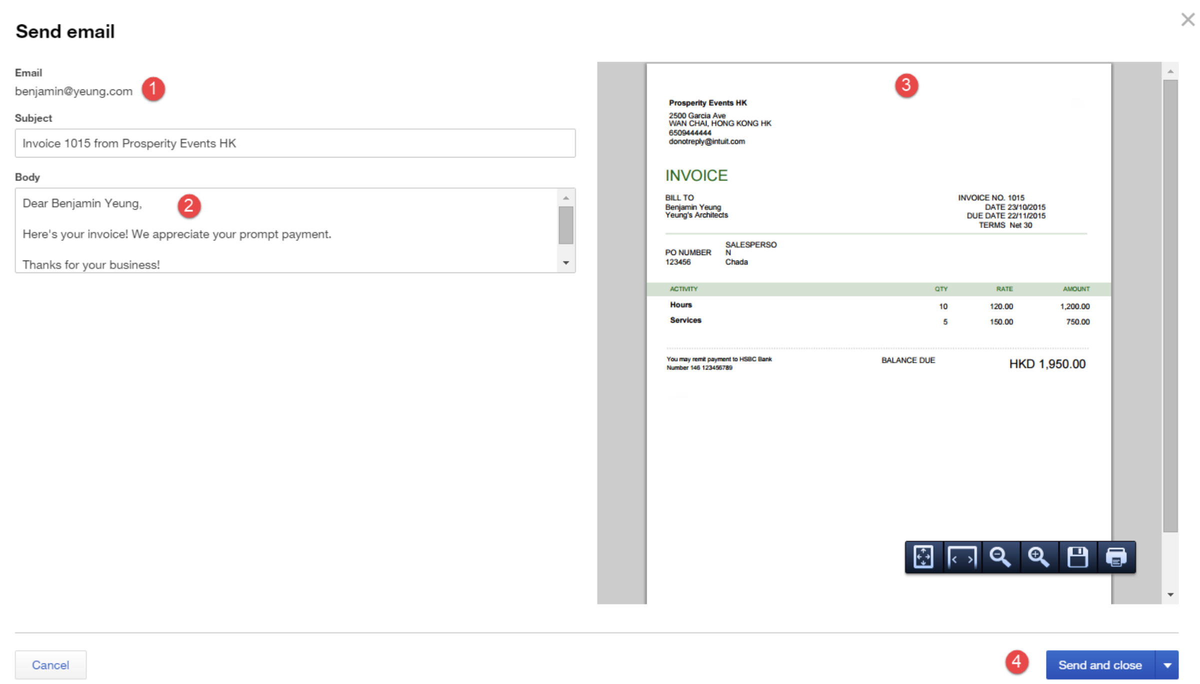
Complete Invoice



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



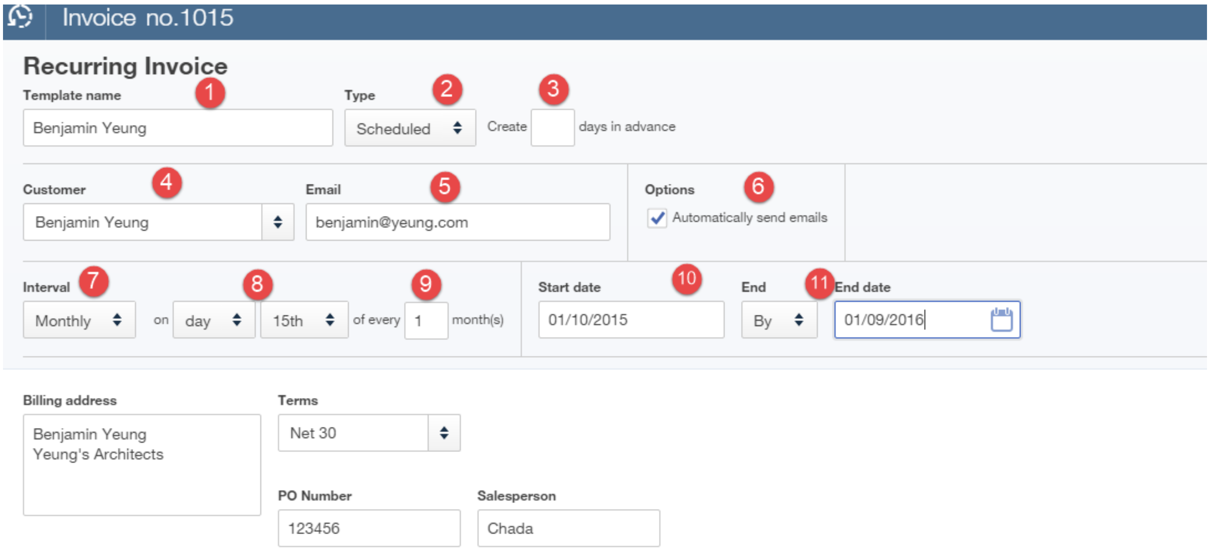
1. **Email** from customer card, **Subject** can be edited in the Subject field
2. **Body** –edit here in this field if required
3. Copy of Invoice to be emailed
4. Click on **Send and close** – the invoice will be emailed straight away

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

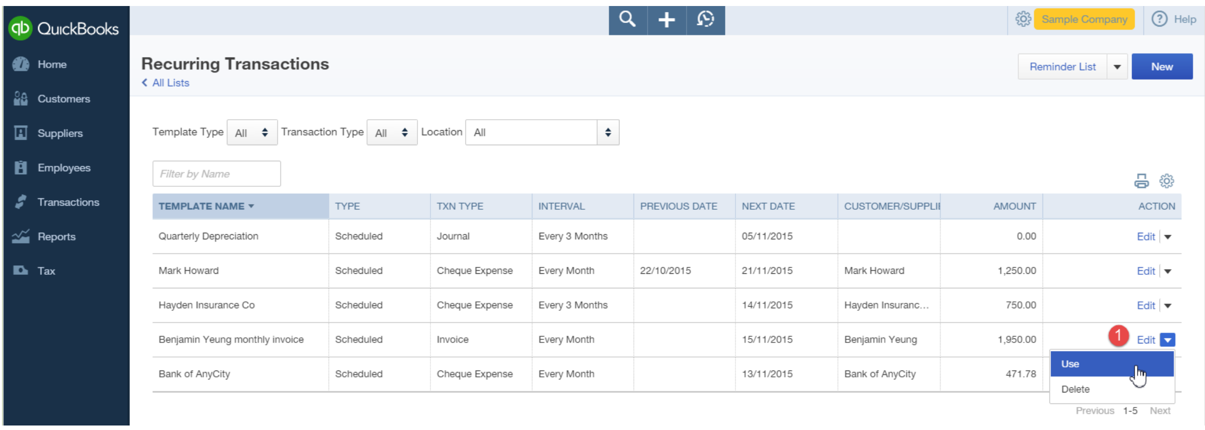
Middle bottom of Invoice click on **Make recurring**

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



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 1st 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**

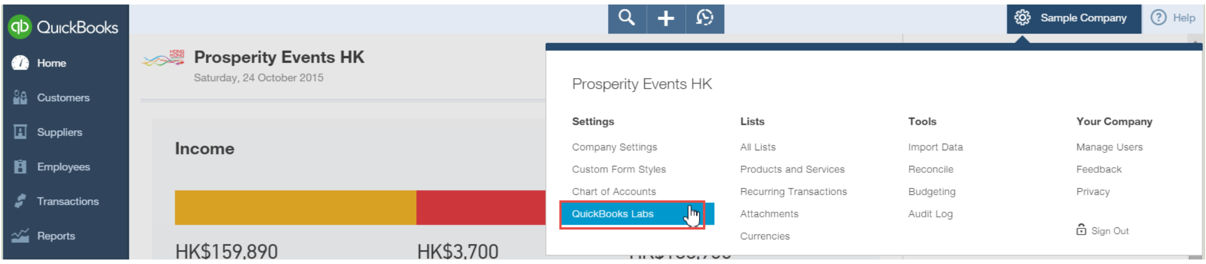


1. Drop down menu choose to **Use** or **Delete** or **Edit** the recurring transaction

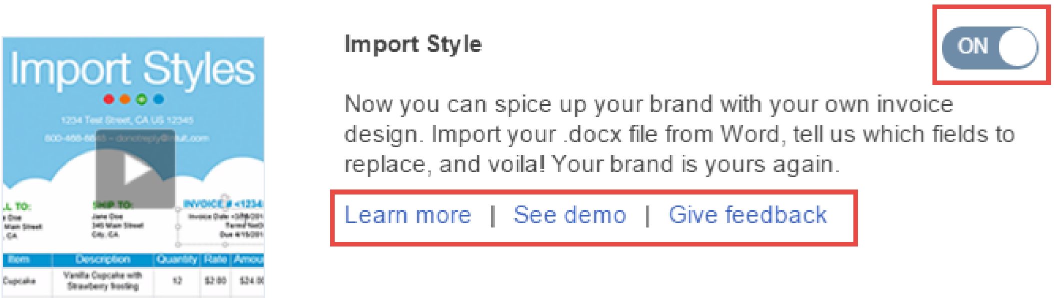
QuickBooks Labs

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!

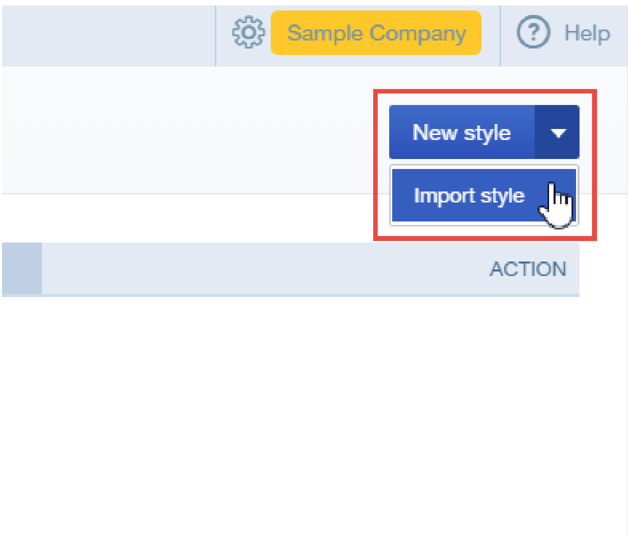
Click on the **Gear icon** > **Settings > QuickBooks Labs**



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**



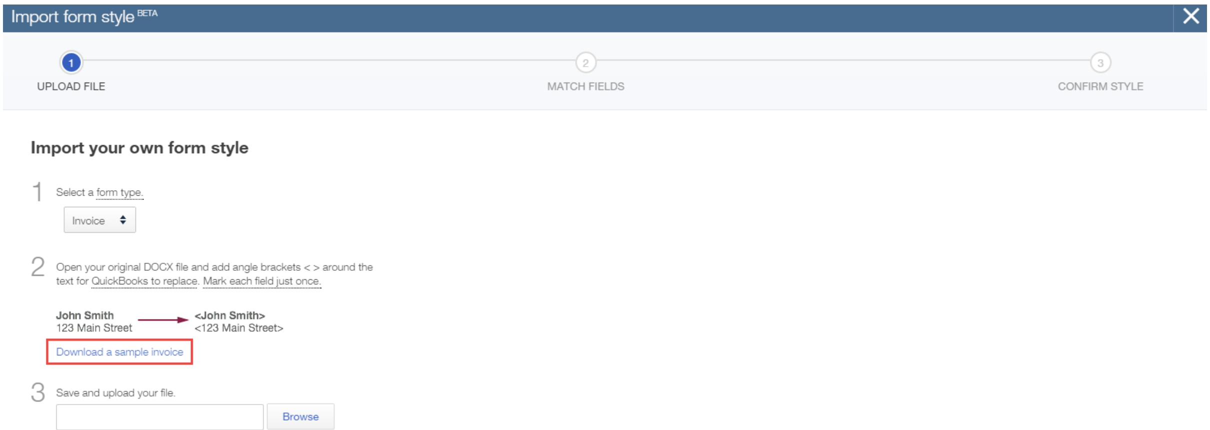
Once switched on under **Cogs company preference** > **Custom Form Styles** > drop down menu at **New Style** click down to **Import style**



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

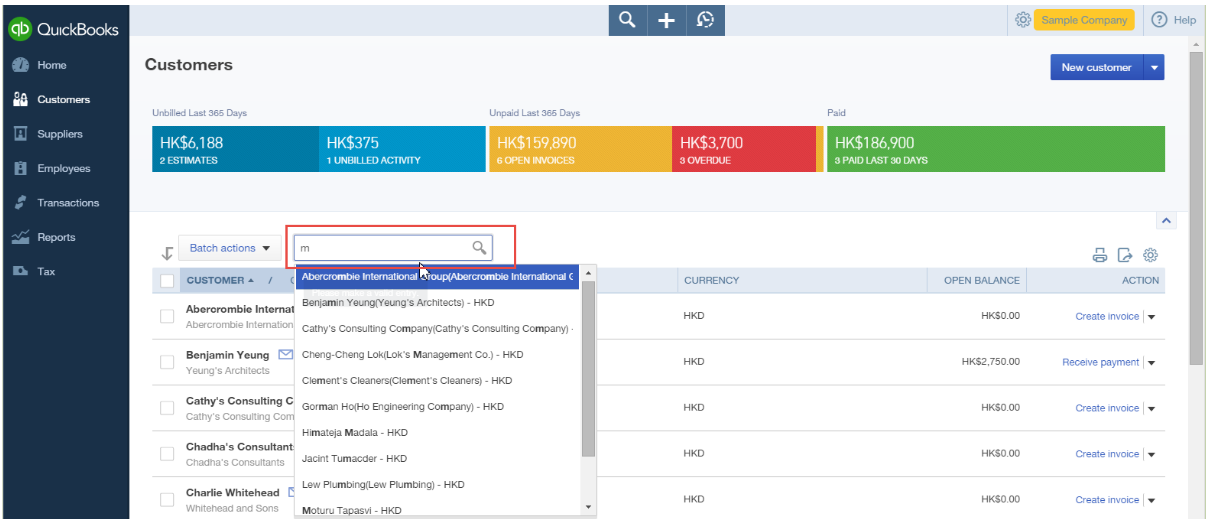
- **Invoice Airy Light** and the **Invoice Airy Pro** templates

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

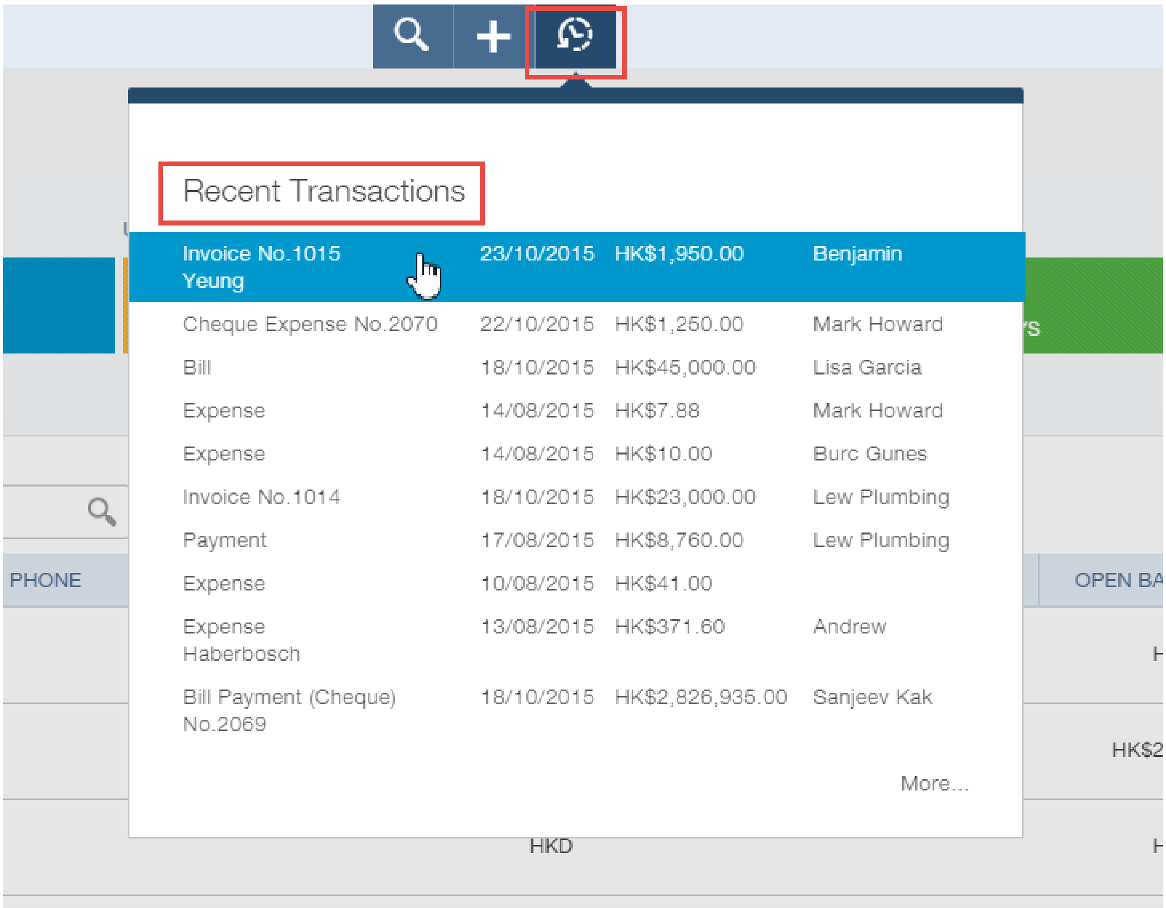


Now you have entered your invoices where can you find them?

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

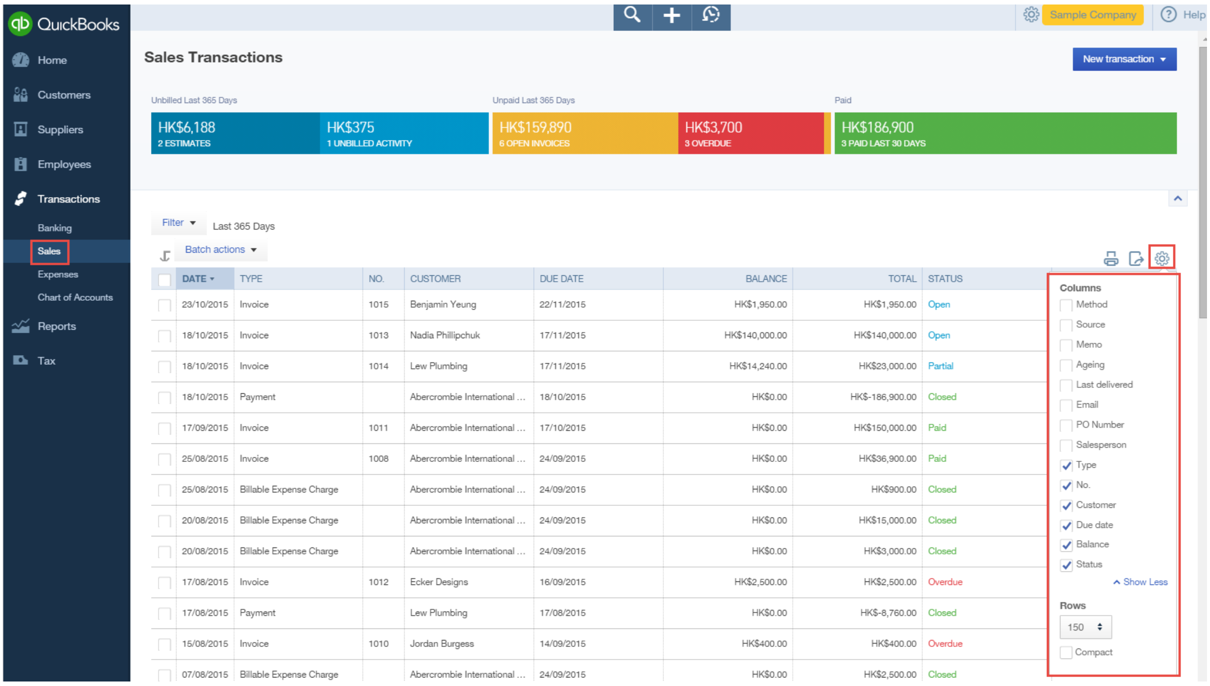


Recent Transactions gives you the latest invoices that you have saved, allowing you to quickly go in and out of the last few transactions. Just click on any transaction from this window.



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

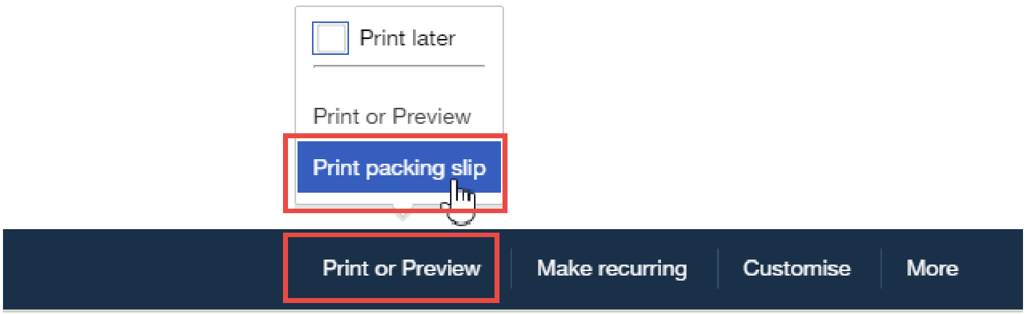
**** note** the **cog wheel** on far right, tailor your Columns to suit your Sales register



Packing Slip

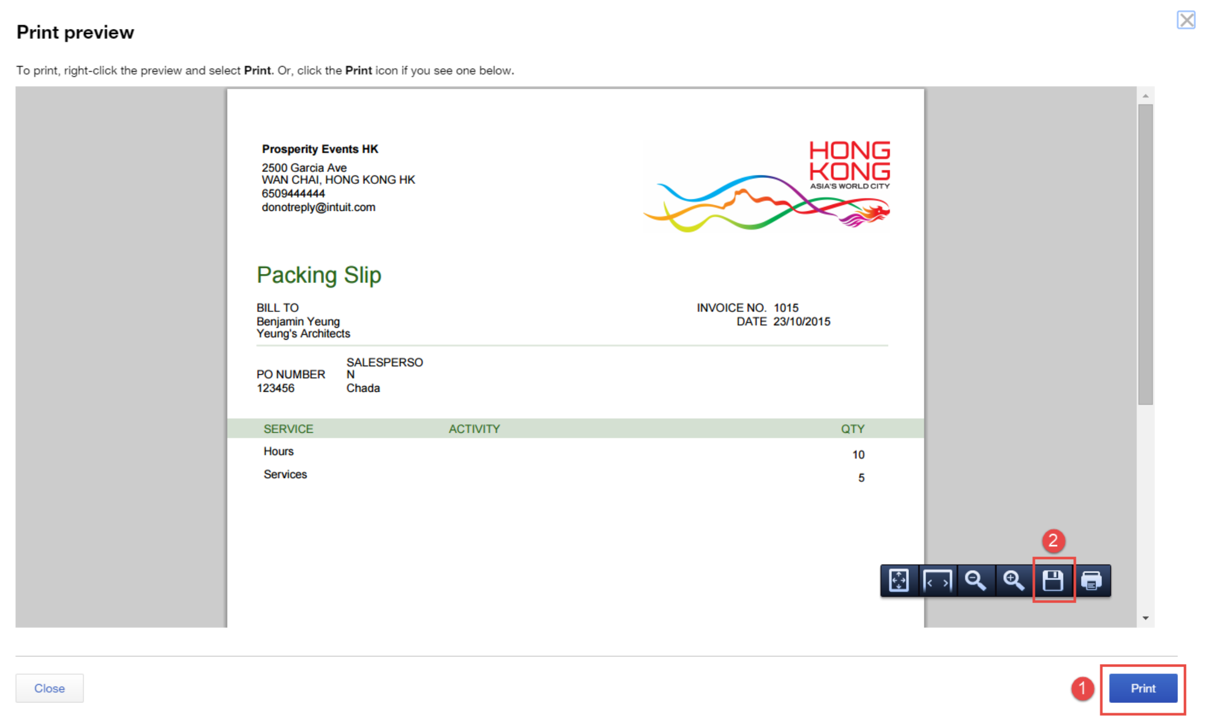
You may have customers that need a packing slip sent with the products and the Invoice to follow after delivery

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



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



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!