QUICKBOOKS DESKTOP 2017 STUDENT GUIDE

Lesson 15

Customize Forms and Write QuickBooks Letters

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Notice to Readers

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Lesson Objectives

- Learn how to modify a preset invoice form
- Design a custom invoice form
- See how to print invoices
- Learn how to prepare a collection letter for overdue customers
- Learn how to edit a prewritten letter in QuickBooks

Create New Templates

QuickBooks provides invoices and other forms to suit the needs of your business, but there may be times when you want to design a completely different invoice or other 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.

Step-by-Step: Create a New Invoice Template

1. From the Lists menu, choose **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

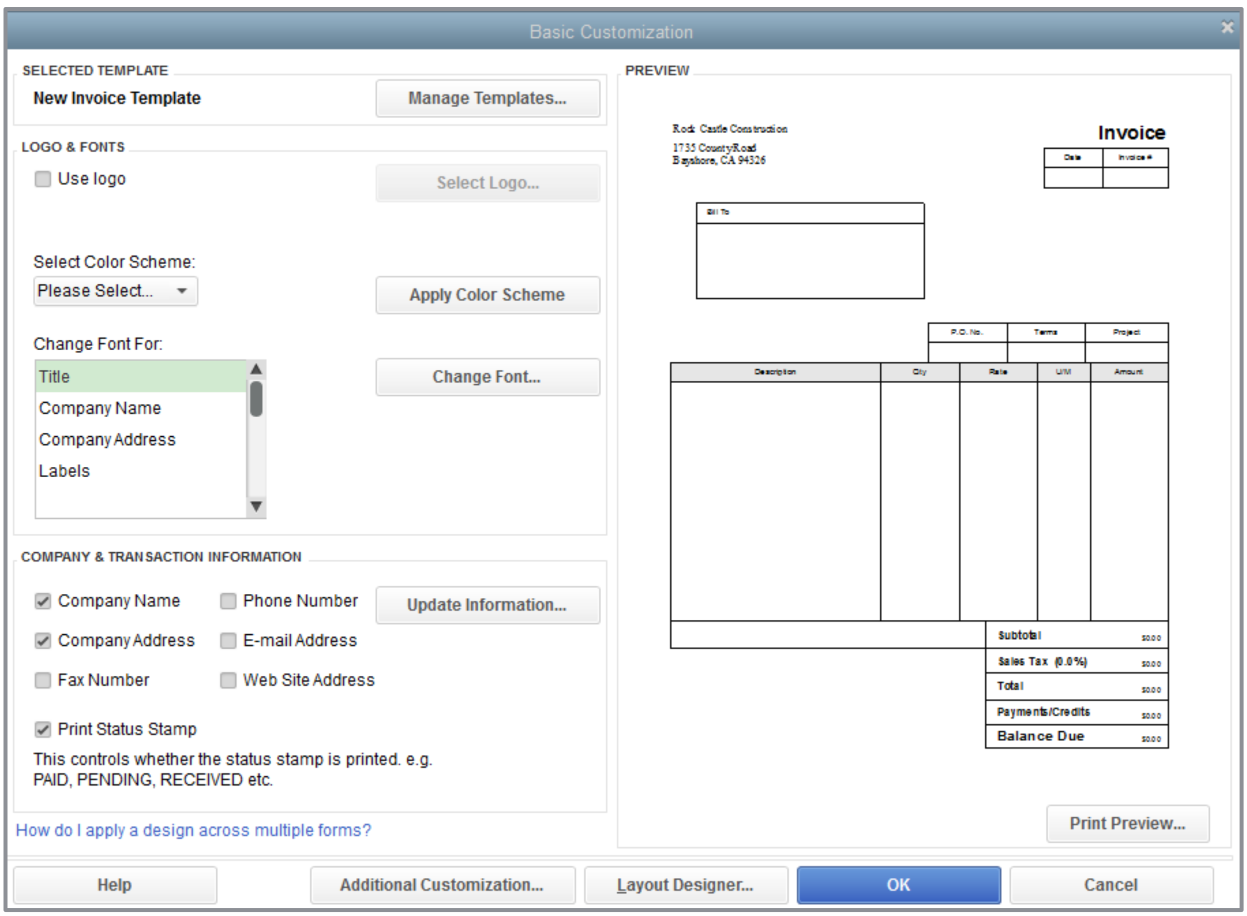
2. Click the **Templates** menu button then choose **New**.
3. Choose the template for the type of form you want to create.
4. Click the **Manage Templates** button to give the template a name then click **OK**.
5. Use the features in the Basic Customization window to customize the general look of your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

IMPORTANT: *You might want to click on an existing template. Click on the* ***Templates*** *button and select* ***Duplicate*** *to get a head-start on a new template without altering the original.*

Customize Fields on Forms

Step-by-Step: Customize Fields on a Template

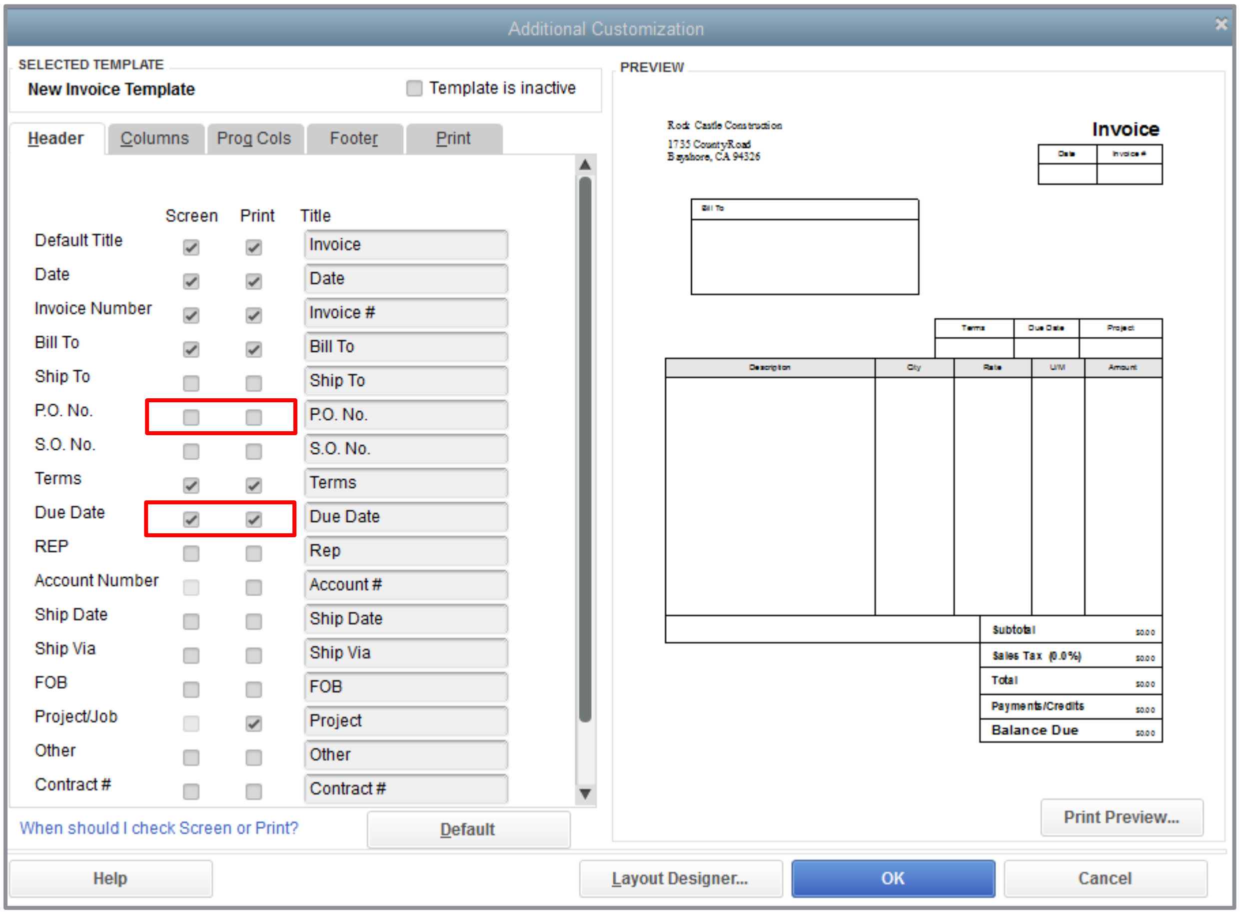
1. From the Lists menu, choose **Templates**.
2. Double-click on the template you wish to customize.
3. Click the **Additional Customization** button at the bottom of the screen.



The Header tab is displayed by default (other tabs are available to select).

4. To have the Due Date field display both onscreen and on the printed form, click the **Screen** checkbox for **Due Date** to select it.
5. Click the **Print** checkbox for Due Date.

6. Clear the **Screen** and **Print** checkboxes for the **P.O. No.** field to remove the field from the form.



7. Continue customizing your form fields as needed for your business.

8. Click **OK** to get out of Additional Customization then **OK** again to save the template changes.

Notes

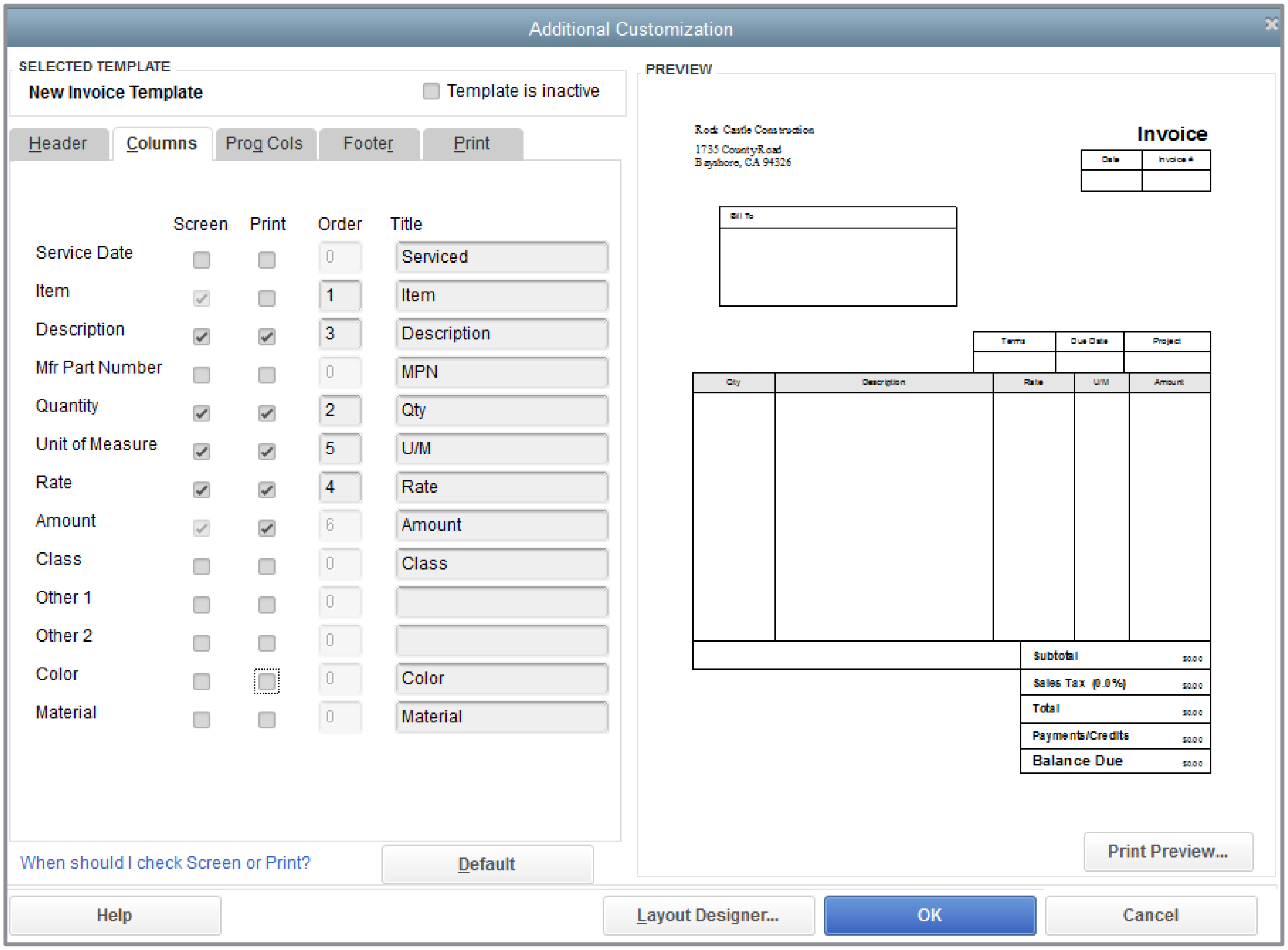
Change Field Order on Forms

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.

Step-by-Step: Change the Order of Fields on a Form

1. From the Lists menu, choose **Templates**.
2. Double-click on the template you wish to customize.
3. Click the **Additional Customization** button at the bottom of the screen.
4. Click the **Columns** tab.
5. Click the **Order** box for a particular field to select it.
6. Manually enter the number that represents the left-to-right order you want the column to be displayed on your form.



7. Continue working through the tabs to customize your form.
8. Click **OK** to record the changes.
9. Click **OK** again to save the template then close the Templates window.

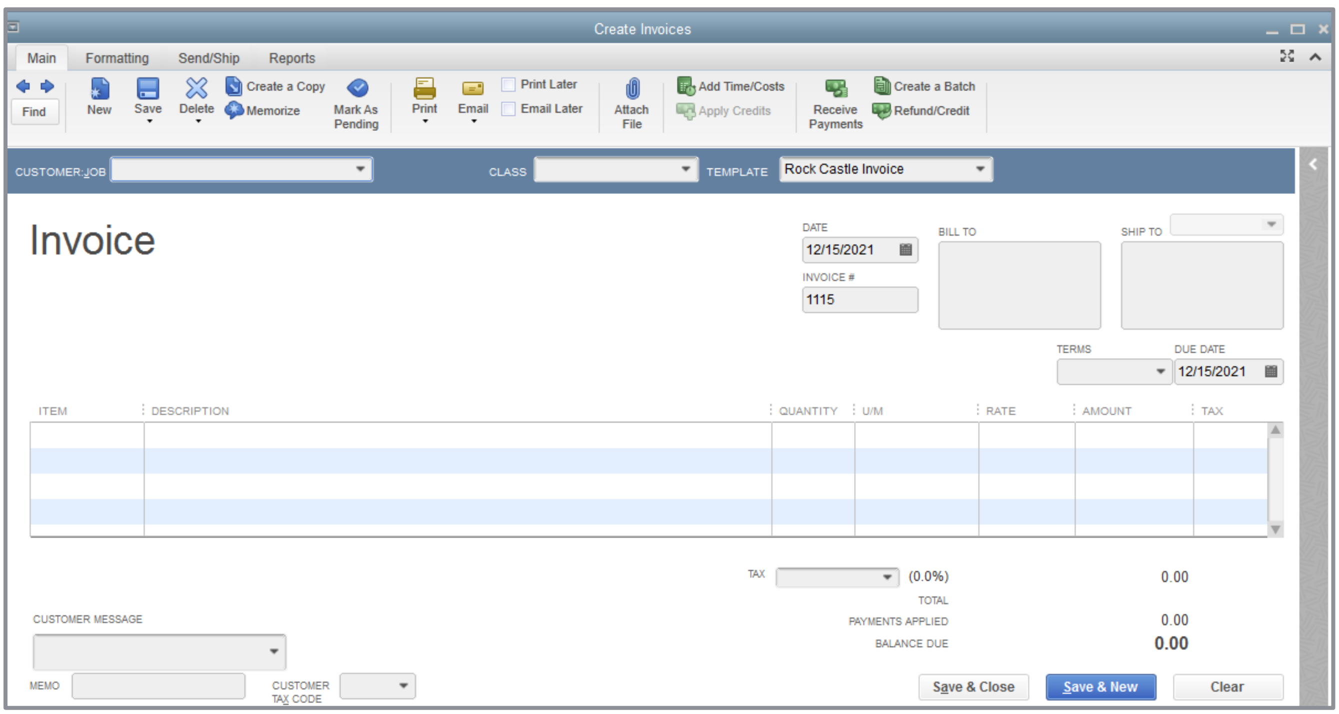
NOTES

Display your Customized Form

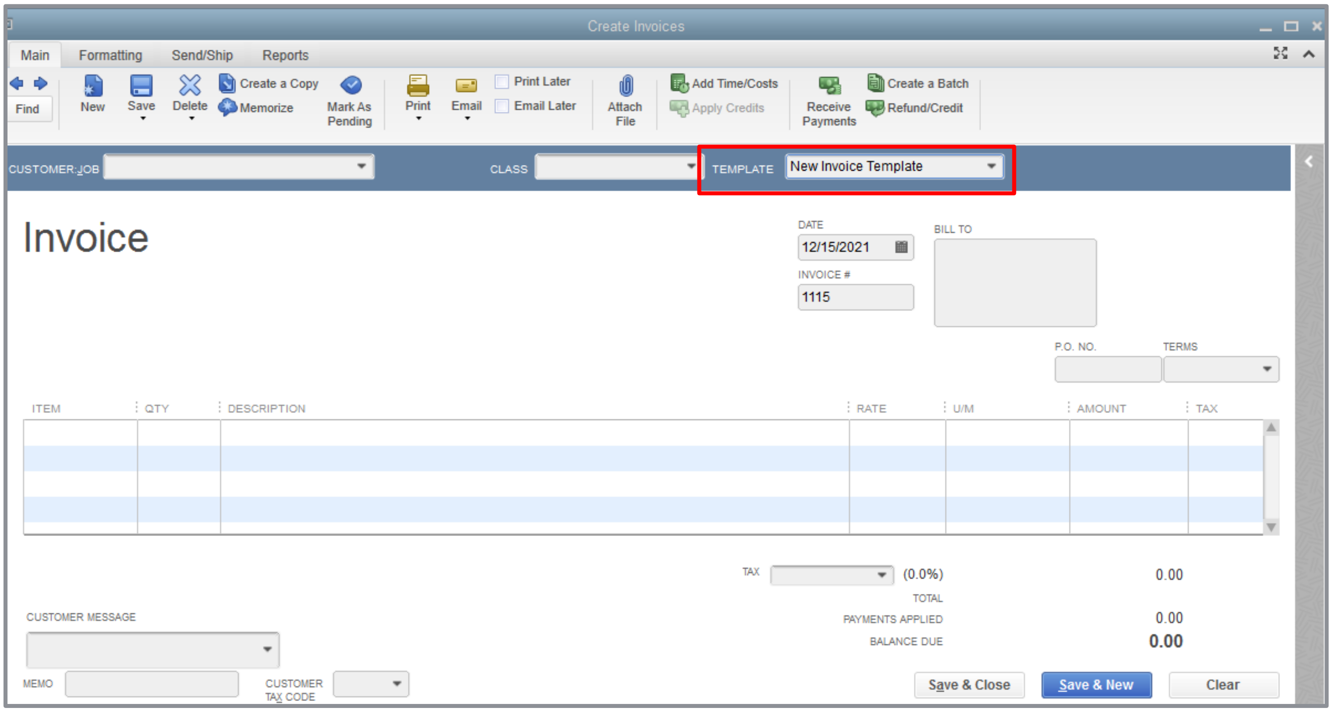
This walkthrough shows you how to view a template using the Invoice form. If you have other custom forms, you can access them by opening the form window in QuickBooks then choosing your template from the **Template** drop-down at the top of the form.

Step-by-Step: 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 **Preview** to see what your invoice will look like printed.

4. Close the Print Preview screen.

5. Exit the invoice.

IMPORTANT: *If the template you are currently using requires tweaking, you can click on the* ***Formatting*** *tab in the ribbon at the top of the form and select* ***Customize Data Layout*** *to edit the template (rather than finding the template from the Lists menu then double-clicking on it to edit it, only to go back into the Invoice form to preview it).*

NOTES

Design Custom Layouts for Forms

We have covered editing a template to change its header and some columns, but there is so much more you can do. Here are a few examples of what you can do with a custom layout:

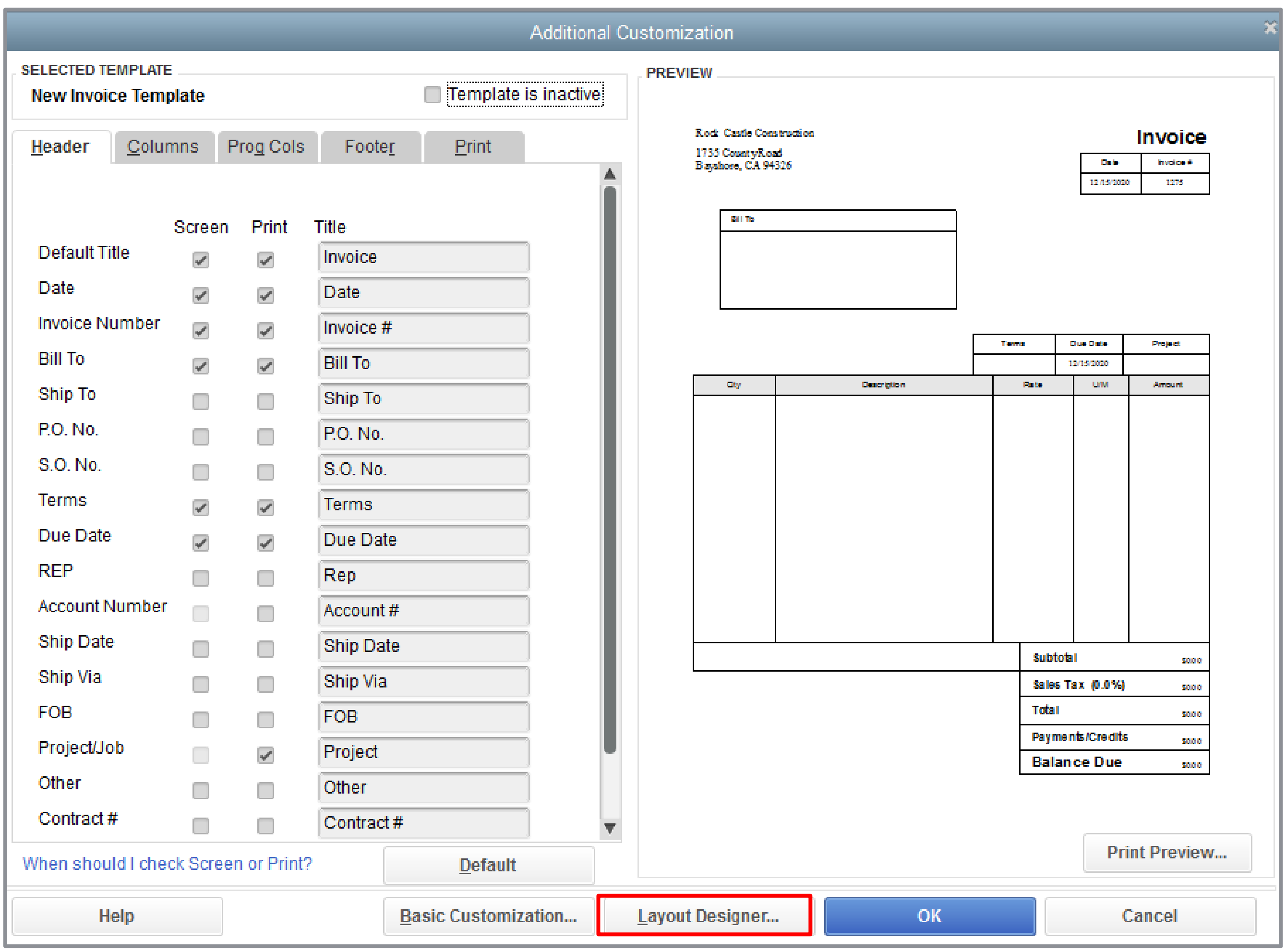
- Give your company name, address and logo special treatment on the form
- For example, you could center your logo at the top of the form and put your company name and address in a special font immediately below the logo
- Enlarge a custom field so it can display more information
- Position the customer's 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

NOTES

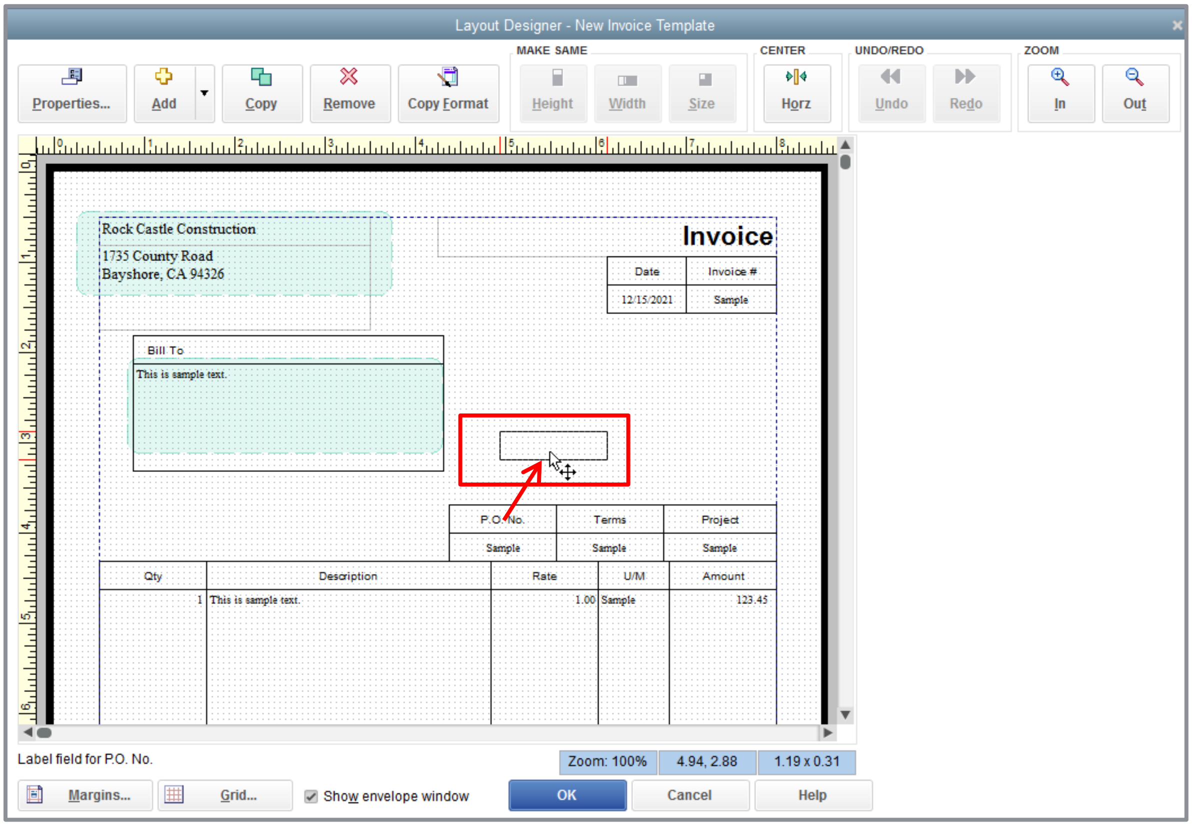
Change the Position of Fields on Forms

Step-by-Step: Move Fields on Forms

1. From the Lists menu, choose **Templates**.
2. Right-click on the template you wish to edit then select **Edit Template** (or double-click on the template you wish to edit).
3. Click **Layout Designer** at the bottom of the Basic Customization window.



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



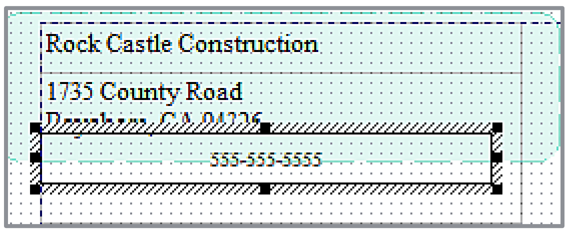
IMPORTANT: *If you wish to move multiple fields in a group, you can hold down the* ***Shift*** *key while you highlight all the fields you wish to select, then you can drag and drop them as a group into their new location.*

NOTES

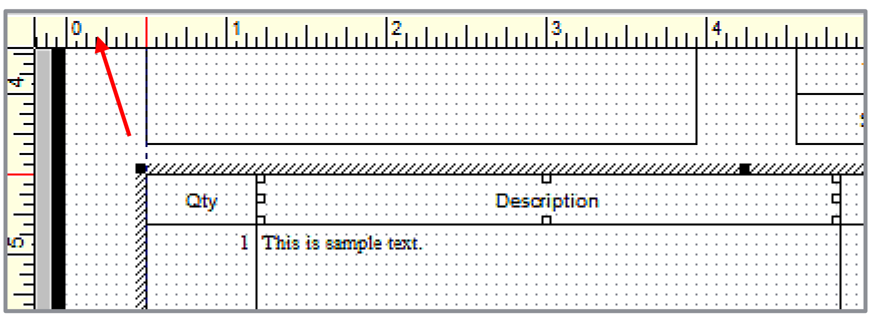
Change Field Widths

Step-by-Step: **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 the resized field.



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



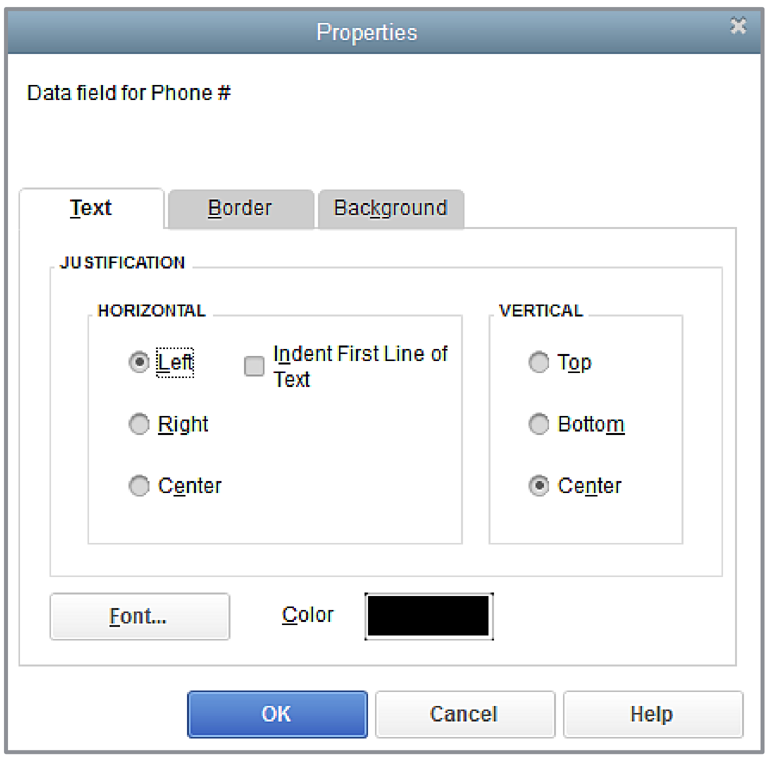
NOTES

Change 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.

Step-by-Step: Change Fonts, Borders and Colors

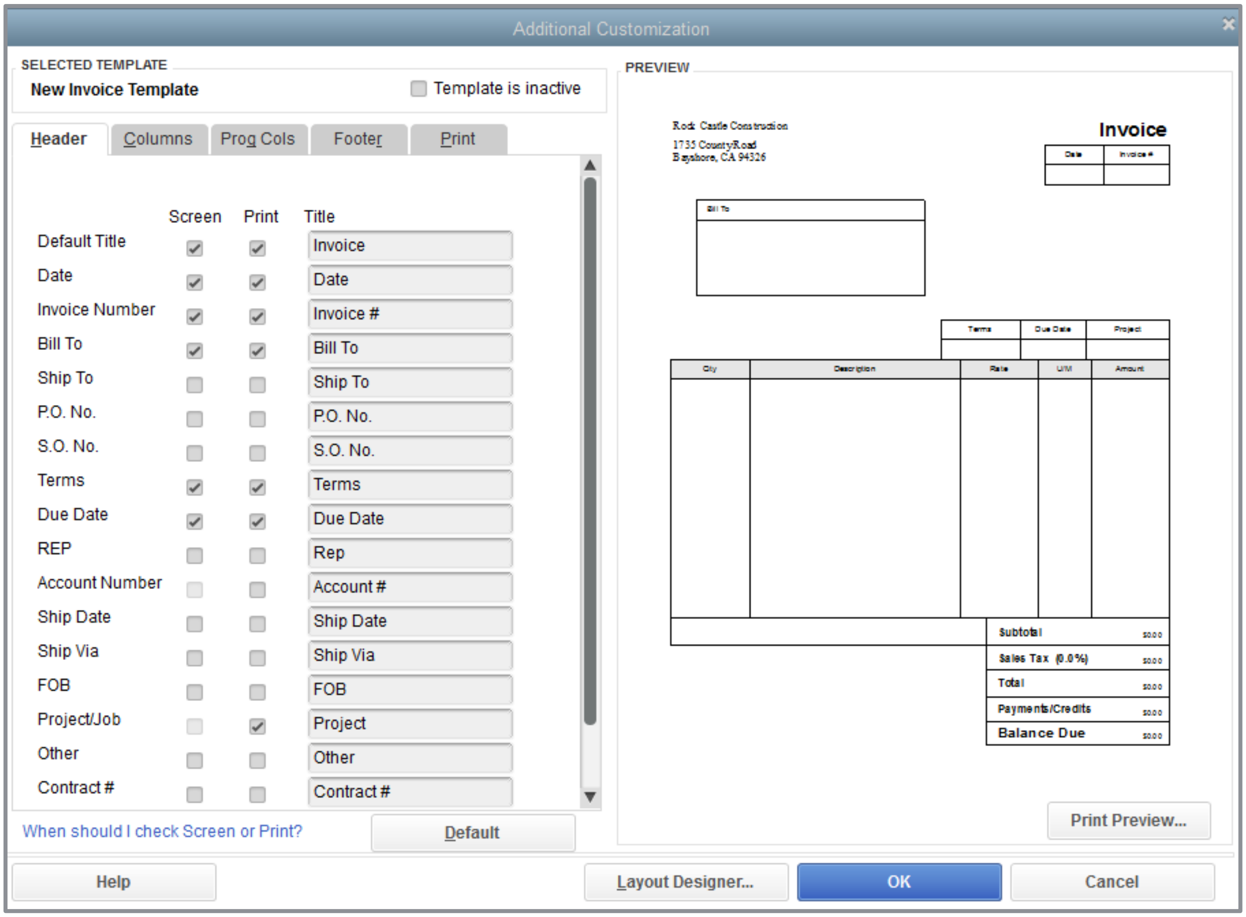
1. Select the field you wish to edit, then right-click to select **Properties**.
2. On the Text tab, select the justification you wish to use.



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 the **Background** tab to give your form a colored background.
6. Click **OK** to save the changes to that particular field's appearance.

7. Click **OK** to save the changes in the Layout Designer.

   You can see a Preview of the template in the right-hand panel of the Additional Customization window.



8. Click **OK** to close the Additional Customization window.

Notes

Preview New Forms

Notice the on-screen invoice data entry 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.

Step-by-Step: Preview the Invoice

1. To see how a printed invoice form will look, in the Main tab of the invoice, click the drop-down below the **Print** button and select **Preview**.
2. When you are finished looking at the preview, click **Close**.

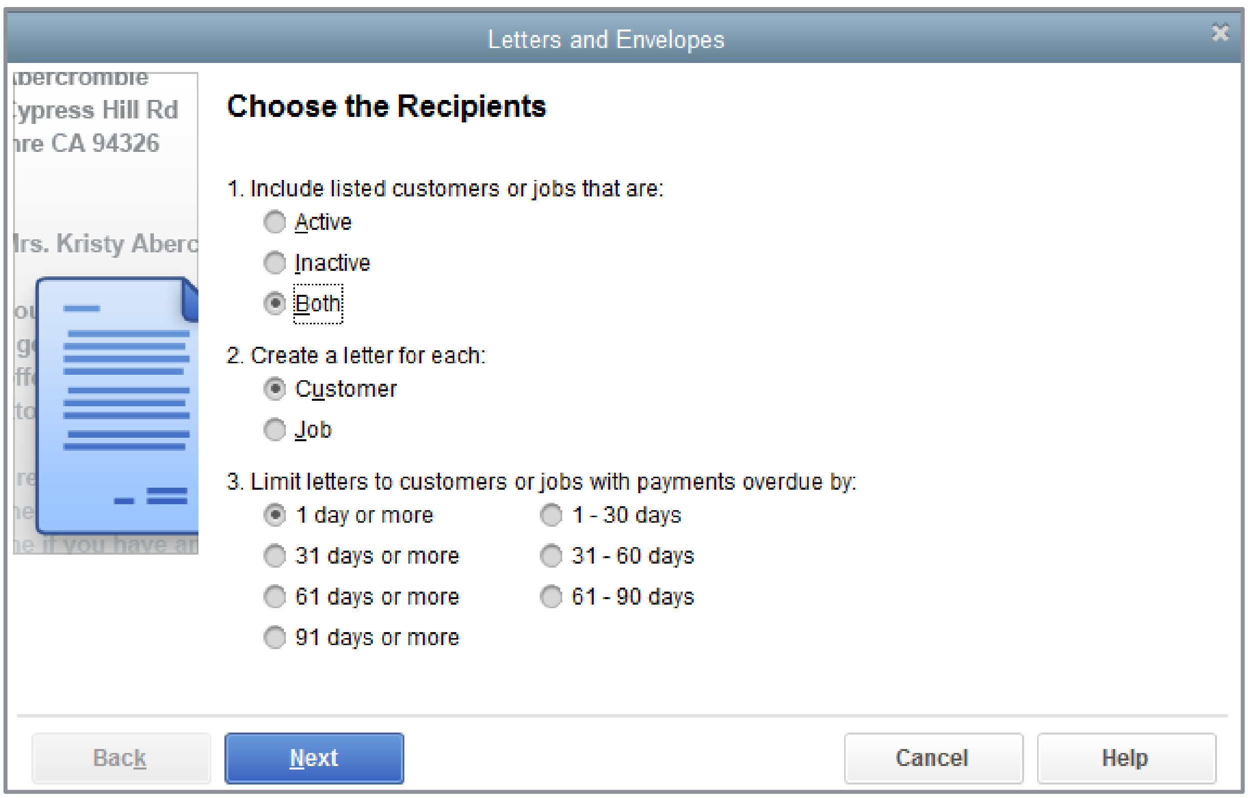
NOTES

Prepare Collection Letters

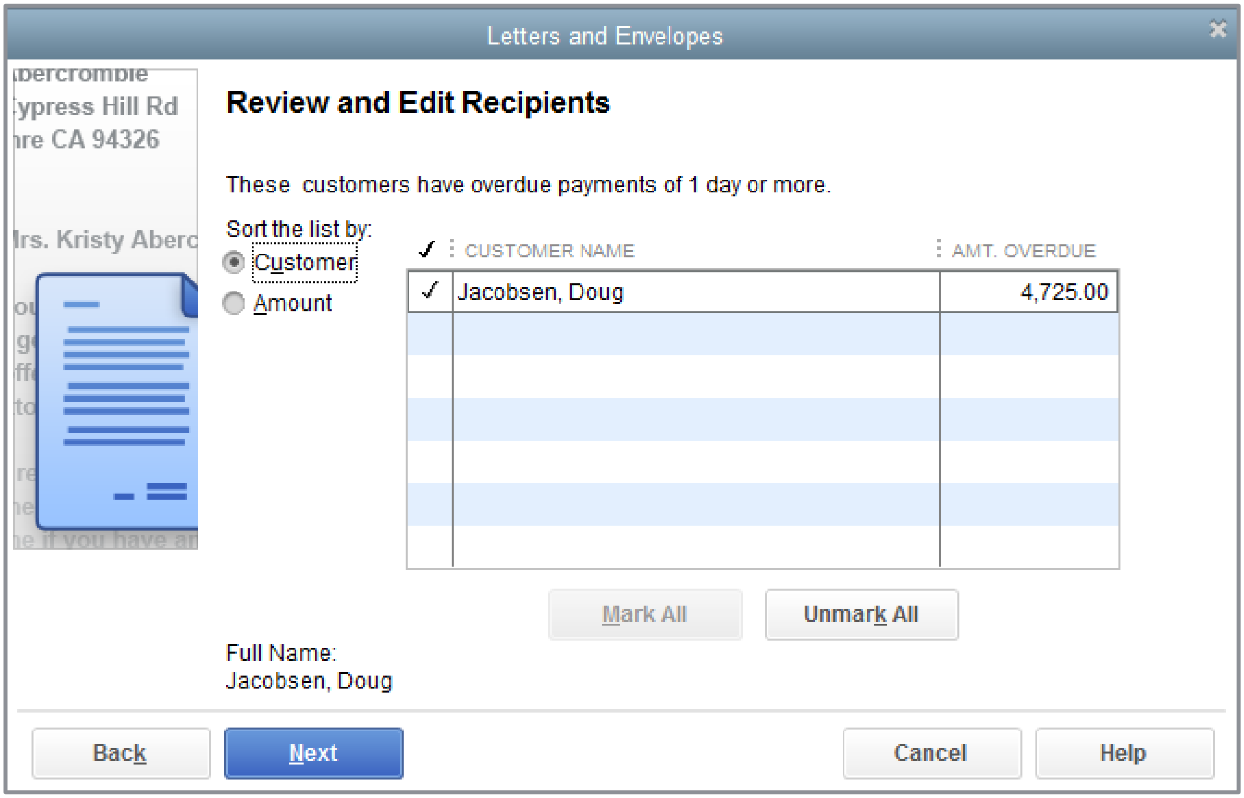
Step-by-Step: Prepare a Collection Letter

1. From the Company menu, choose **Prepare Letters with Envelopes** then choose **Collection Letters**.
2. If QuickBooks prompts you to find letters, click **Copy**. QuickBooks will copy the QuickBooks letters from your installation directory to your folder.

   QuickBooks opens the Letters and Envelopes wizard.
3. When QuickBooks prompts you to choose to whom you want to write, set your parameters accordingly.



4. Click **Next**.



5. Choose the customers for whom you would like to make letters, then click **Next**.
6. When QuickBooks prompts you to choose the letter you want to use, choose one from the list then click **Next**. (You may also choose **Create or Edit a letter template** to customize your letter even more.)
7. Enter the name and title of the person who is signing the letter.
8. Click **Next**.
9. If QuickBooks displays a message about missing information, click **OK**.
10. The letters will open in Microsoft Word®. You can print the letters from there.
11. Return to QuickBooks and click **Cancel**.

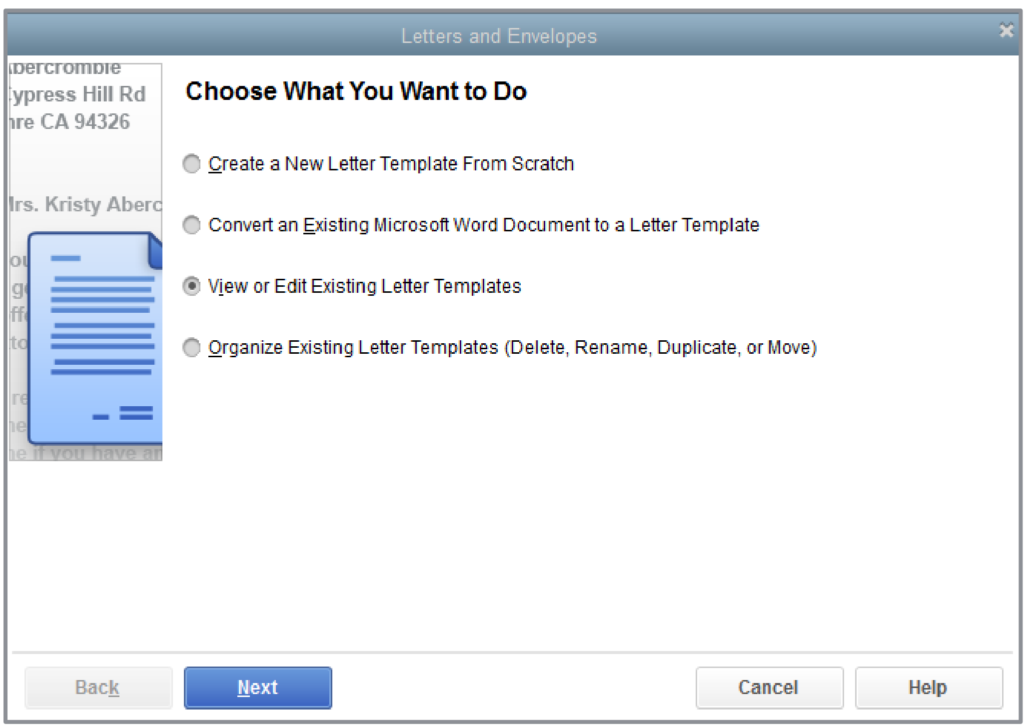
NOTES

Edit QuickBooks Letters

You can make changes to individual letters using Word, or you can make global changes by editing the QuickBooks Letter used to generate a specific letter.

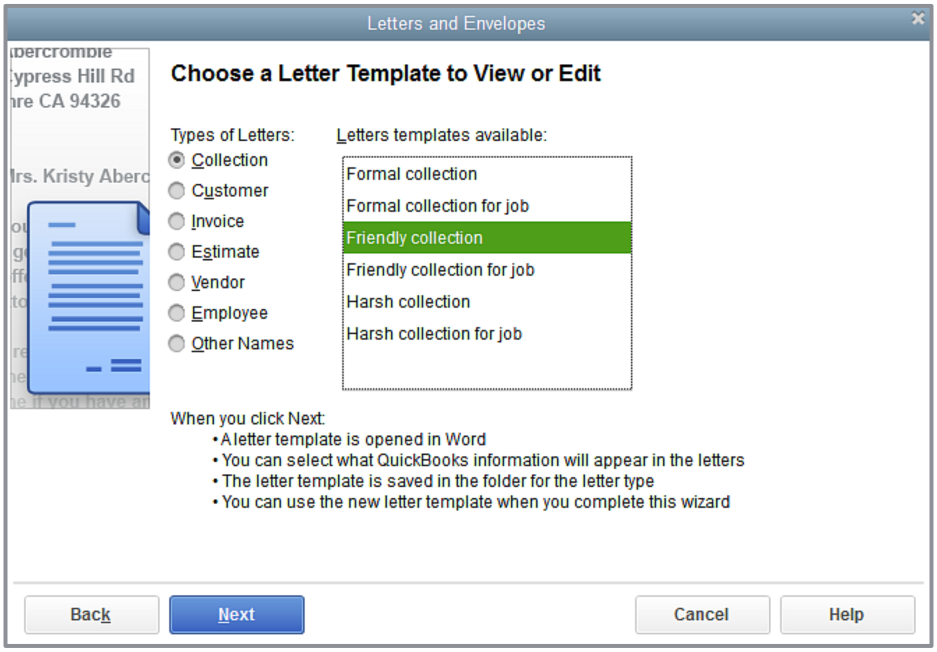
Step-by-Step: Edit a QuickBooks Letter

1. From the Company menu, choose **Prepare Letters with Envelopes** then select **Customize Letter Templates**.
2. Click **View or Edit Existing Letter Templates**.



3. Click **Next**.

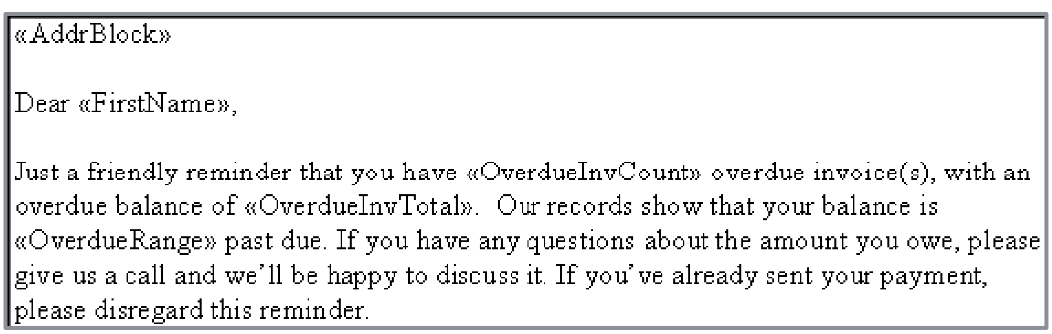
4. When QuickBooks prompts you to choose the letter template you want to view or edit, click the letter type then choose a letter from the list of available letters.



5. Click **Next**.

6. In Word, make adjustments to the text of the letter as needed.

7. From the **Insert Fields** drop-down lists on the Add-Ins tool bar in Word, you can insert links to QuickBooks data.


«AddrBlock»

Dear «FirstName»,

Just a friendly reminder that you have «OverdueInvCount» overdue invoice(s), with an overdue balance of «OverdueInvTotal». Our records show that your balance is «OverdueRange» past due. If you have any questions about the amount you owe, please give us a call and we'll be happy to discuss it. If you've already sent your payment, please disregard this reminder.

8. From the Word File menu, choose **Save As**.

9. Enter a new filename and click **Save**.

10. Close Word.

11. To see how this change affects the final letter output, close the letter file in Word, click **Use Template** in QuickBooks and go through the wizard again (all of your previous choices should still be selected). When you get to the Choose a Letter Template screen, select the name of the file you just saved then click **Next**.

12. Close Word.

13. Click **Cancel** in QuickBooks.

NOTES

Customize Forms and Write QuickBooks Letters – Review Questions

1. List three forms that can be customized in QuickBooks:
   a. ____
   b. ____
   c. ____
2. True or false: The column order on QuickBooks forms is fixed and cannot be changed.
   a. True
   b. False
3. You use the ______________ ______________ window to move and resize fields on forms.
4. True or false: You can convert an existing Word document into a QuickBooks Letter to which you can add QuickBooks data.
   a. True
   b. False

Review Activities

1. Customize a Sales Receipt form to change the default title on the header from Sales Receipt to Cash Sale.
2. Using the Layout Designer, make the columns for QTY and Rate narrower so the Description field is wider.
3. Customize the P.O. form to include the Terms field.

Answers to Review Questions

1. List three forms that can be customized in QuickBooks:
    a. ✓ *Invoice*
    b. ✓ *Sales Receipt*
    c. ✓ *Credit Memo*
    d. ✓ *Statement*
    e. ✓ *Purchase Order*
    f. ✓ *Estimate*
    g. ✓ *Sales Order (available only in Premier and higher)*
2. True or false: The column order on QuickBooks forms is fixed and cannot be changed.
    a. True
    b. ✓ *False*
3. You use the *Layout Designer* window to move and resize fields on forms.
4. True or false: You can convert an existing Word document into a QuickBooks Letter to which you can add QuickBooks data.
    a. ✓ *True*
    b. False