

## FROM THE OFFICES OF...

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The QuickBooks® Client Newsletter

# The QBC

Helping You Grow A Profitable Business with QuickBooks® Software

## Customize QuickBooks Forms for a More Professional Look

One of the many ways that QuickBooks makes your life easier is its ability to create business forms for all of the financial transactions your company produces. You simply fill in the blanks or choose data from drop-down lists, and QuickBooks generates a document you can e-mail or send. Only problem is, sometimes the preformatted default forms don't include all the fields you need. Further, they look rather, well, plain. This being October, you might want to add a Halloween-centric logo, for example. Fortunately, QuickBooks is flexible. Using simple tools, you can modify the prefab forms that are included with the program to add a logo or other graphics and indicate which fields you would like to have appear.

### Made to order

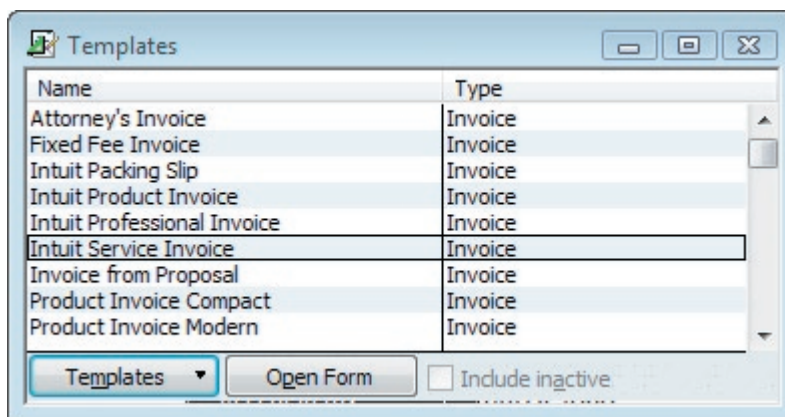
To get started, click Lists/Templates. (In Simple Start, open a new invoice and click Customize/Manage Templates.)

The window shown in **Figure 1** opens. As you can see, QuickBooks already provides multiple versions of some forms. Take a look at these before you do any modifying to see if one will meet your needs.

Select a template you want to start from, like the Intuit Service Invoice. Click the arrow in the Templates box, and a list of command options drops down. Click on Edit Template. The Basic Customization window opens, as shown in **Figure 2**.

### Customizing templates

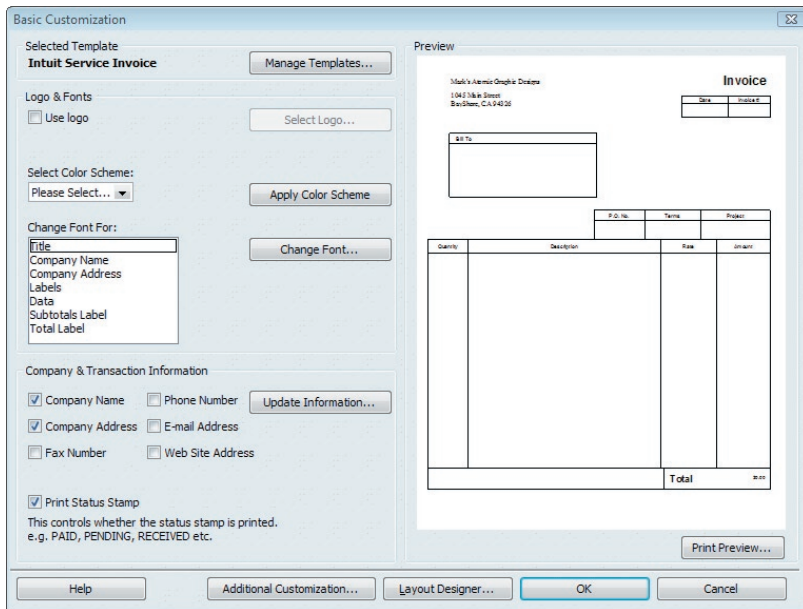
Templates are designed for use with Intuit's preprinted forms. So if you want to make additional changes, you'll have to make a copy of the form before doing so (which may or may not work with Intuit's forms). Click Manage Templates, and then click the Copy button. The program creates a modifiable copy of the template, which you can



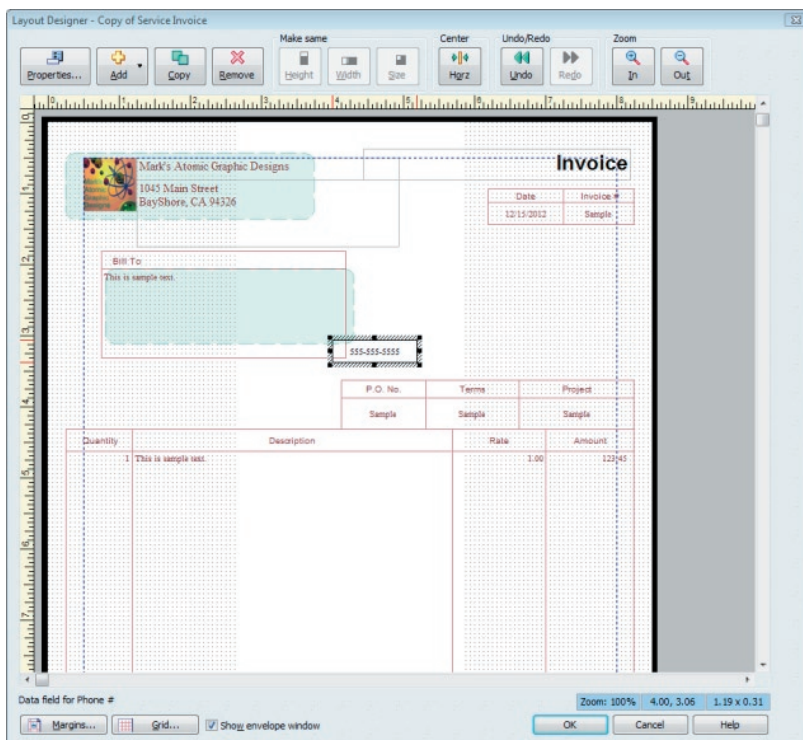
**Figure 1:** The list of QuickBooks forms templates gives you many pre-formatted options.



We believe in the value of relationships. We view every client relationship like a partnership, and truly believe that our success is a result of your success. We are committed to providing close, personal attention to our clients. We take pride in giving you the assurance that the personal assistance you receive comes from years of advanced training, technical experience and financial acumen. Our continual investment of time and resources in professional continuing education, state-of-the art computer technology and extensive business relationships is indicative of our commitment to excellence.



**Figure 2:** The Basic Customization window allows you to alter existing form designs.



**Figure 3:** The Layout Designer allows you to make more complex adjustments to your forms.

rename by replacing the text in the Template Name box. Click OK. As you make changes on the left side of the window, you'll see those modifications reflected in the graphical representation of your invoice on the right.

### Make it personal

Probably the easiest thing you can do to jazz up your invoice is to add a logo. This is simple. Click the box next to Use logo. The Select Image window opens. Browse to the image you want and select it, then click Open. The image appears with your contact information at the top of the page.

### Add interest with color

Next up is your choice of color schemes, should you want to use one. Click the arrow below Select Color Scheme. You'll see several options here. Select the one you want, and then click Apply Color Scheme. If you don't like the fonts supplied with the template, you can easily change those, too. Under the Change Font For option, select the field type you want to modify and click Change Font. Select the desired font and any effects you want in the window that opens and click OK.

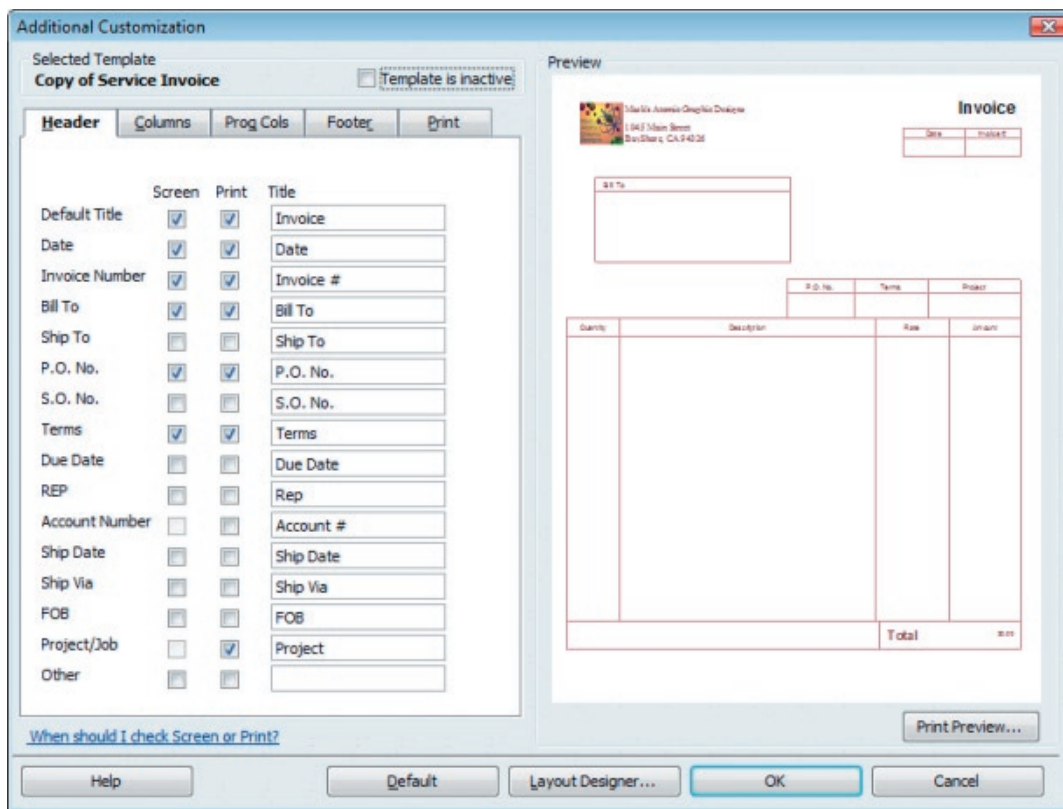
### Further customization options

Additional changes can be tricky. To add your phone number, for example, click the box next to Phone Number. You'll have to use the Layout Designer to make this modification. To do so, click the Layout Designer button. You'll see a window similar to the one in **Figure 3**. If you've never used a layout design tool, you'll have to work with this a bit. You'll need to grab the phone number and position it where it should be. Then click Properties and Font (and/or Color). Make the necessary changes and click OK.

Click the Add button to insert text boxes, data fields, and images, and Copy and Remove to use those functions. Click OK when you're happy with your changes. This will take you back out to the Basic Customization window, where you can modify your invoice further. For example, you can click the Print Status Stamp box to have QuickBooks stamp your invoices with words like "PAID." Click the Additional Customization button to make other changes, as shown in **Figure 4**. By checking and unchecking default boxes under each tab, you can continue to change the appearance of your invoice.

### Enhance your business with custom forms

You may be able to use QuickBooks invoices right out of the box. But even if you can, it's a good idea to freshen up the boilerplate forms and add your company's own personal touch to them. In these tight economic times, you should take any actions you can—small as they may be—to present a professional, personalized front to your customers. QuickBooks provides the tools to help you do just that.



**Figure 4:** The Additional Customization window gives your finer control over the format of your forms.

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