Customizing Forms and Writing QuickBooks Letters

Lesson 15

Lesson objectives

- To learn how to modify a preset invoice form
- To design a custom invoice form
- To see how to print invoices
- To learn how to prepare a collection letter for overdue customers
- To learn how to edit a prewritten letter in QuickBooks

Creating new templates

To create a new invoice template:

1. From the Lists menu, choose Templates.
2. Click the Templates menu button, and then choose New.
3. Click OK to select the invoice form.
4. Click the Manage Templates button to give the template a name.
5. In the Template Name field, type My Invoice and click OK.

Creating new templates

To create a new invoice template:

6. Look at the options in the Logo & Fonts section of the Basic Customization window.
7. In the Company & Transaction section, select the Phone Number checkbox.
8. Select the Do not display this message in the future checkbox, and then click OK.
9. Leave the Basic Customization window open. You'll use it in the next exercise.

Creating new templates

To customize fields on a template:

1. Click the Additional Customization button.
2. To have the Due Date field display both on screen and on the printed form, click the Screen checkbox for Due Date to select it.
3. Click the Print checkbox for Due Date.
4. Clear the Screen and Print checkboxes for the P.O. No. field to remove the field from the form.

Changing 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.

Changing field order on forms

To change the order of fields on a form:

1. Click the Columns tab.
2. Double-click the Order column in the Quantity row to select the number.
3. Type 2.
4. Double-click the Order column in the Description row to select it.
5. If it has not changed automatically, type 3.
6. Click the Footer tab.
7. Click the Print tab.
8. Click OK to record the changes.
9. Click OK again and close the Templates window.

Displaying your customized form

To display the custom form:

1. From the Customers menu, choose Create Invoices.
2. In the Template field, choose My Invoice from the drop-down list.
3. Leave the Create Invoices window open, you'll use it in the next exercise.

Designing custom layouts for forms

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 that it can display more information.
- Position the customer’s billing address so that 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.

Changing the position of fields on forms

To move fields on forms:

1. In the Create Invoices window, click the Customize icon.
2. Click Customize Data Layout.
3. Click Layout Designer.
4. Click the Bill To field.
5. Press and hold the Shift key.
6. Click the field directly below the Bill To field (the field containing the words “This is sample text”).
7. Release the Shift key.
8. With the cursor over the selected fields, press and hold the left mouse button.
9. Drag the selected fields down about one inch.
10. Release the mouse button.

Changing the position of fields on forms (continued)

11. Select the field containing Rock Castle’s address.
12. Move the mouse over one of the dark squares on the bottom of the field and then hold the mouse button while you drag the bottom of the field up to a point just below the address.
13. Scroll to the bottom of the screen and select the Phone # field.
14. Click Remove.
15. Select the field containing the numbers 555-555-5555.
16. Holding down the mouse button, drag the field so that it sits just below Rock Castle’s address.

Changing field widths

To change the width of a field:

1. Select the field containing the telephone number and drag the right border further to the right while holding down the mouse button.
2. In the Layout Designer window, scroll until the Qty column is visible.
3. Click the Qty column to select it.
4. Click and hold the left mouse button on the line separating the Qty and Description columns.
5. While holding down the mouse button, drag the column line to the left (to the one-inch mark on the ruler).
6. Release the mouse button.

Changing fonts, borders, and colors

To change fonts, borders, and colors:

1. With the phone number field selected, click Properties.
2. On the Text tab, select Left for horizontal justification.
3. Click Font.
4. In the Size drop-down list, select 12, and then click OK.
5. Click the Border tab.
6. Click to remove the Top, Bottom, Right, and Left checkboxes.
7. Click OK to save your changes in the Properties window.
8. Click OK to save the changes in the Layout Designer.
9. Click OK to close the Basic Customization window.

Previewing new forms

To preview the invoice:

1. To see how the printed invoice form will look, click the Print Preview button (above the Template drop-down list).
2. When you are finished looking at the preview, click Close.
3. Press Esc to close the Create Invoices window without saving.

Customize the design of all forms

1. In the Create Invoices window, click the customize icon.
2. Click Create New Design.
3. Follow the onscreen instructions in the Intuit QuickBooks Forms Customization web page to customize the design of your forms.
4. In the Apply Design window, select the QuickBooks forms that you want to use your new design.
5. Click Apply.
6. Click OK in the confirmation screen.
7. If you want, give the design a name and click Save to save it online. Then you will be able to use it to customize Intuit products like checks, or to use it again for additional forms.
8. Close the form designer window.
9. Close the Create Invoices window.

Preparing collection letters

To prepare a collection letter:

1. From the Company menu, choose Prepare Letters with Envelopes, and then choose Collection Letters.
2. If QuickBooks prompts you to find letters, click Copy.
3. When QuickBooks prompts you to choose who you want to write to, make the following selections:
   - For number 1, choose Active.
   - For number 2, choose Customer.
   - For number 3, choose 1-30 days.
4. Click Next.

Preparing collection letters

5. Leave Lew Plumbing selected and click Next.
6. When QuickBooks prompts you to choose the letter you want to use, click Friendly collection and click Next.
7. In the Name field of the next screen, type Tom Ferguson. In the Title field, type President.
8. Click Next.
9. If QuickBooks displays a message about missing information, click OK.
10. Close the Microsoft Word file without saving the letters.
11. Return to QuickBooks and click Cancel.

Editing QuickBooks Letters

To edit a QuickBooks Letter:

1. From the Company menu, choose Prepare Letters with Envelopes.
2. Select Customize Letter Templates.
3. Click View or Edit Existing Letter Templates.
4. Click Next.
5. When QuickBooks prompts you to choose the letter template you want to view or edit, click Collection, and then select Friendly collection from the list of available letters.
6. Click Next.
7. Click your mouse pointer after the period at the end of the first sentence and the press the Space bar once. (You'll insert a sentence into the paragraph.)
8. Type Our records show that your balance is past due.

Editing QuickBooks Letters

9. Click your mouse pointer after the word *is* in the sentence you just typed, and press the Space bar again.
10. From the Insert Collection Info. Fields drop-down list, select Range(days) of Overdue Invoices.
11. From the Word File menu, choose Save As.
12. Enter a new filename and click Save.
13. To see how this change affects the final letter output, close the letter file in Microsoft Word, click Use Template in QuickBooks, and go through the wizard again (all of your previous choices should still be selected).
14. When you get to the “Choose a Letter Template” screen, select the name of the file you just saved, and then click Next.
15. Close Microsoft Word.
16. Click Cancel in QuickBooks.

LESSON 15 Review questions and activities

Lesson 15: Customizing forms and writing 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 You can add fields from which of the following lists to QuickBooks Letters?

a Customers & Jobs

b Employee

c Vendor

d All of the above

5 True or false: You can convert an existing Microsoft Word document into a QuickBooks Letter to which you can add QuickBooks data.

a True

b False

Review activities

1 Customize the 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. Change the order of columns so that the QTY column and the Description column are switched.

Lesson 15: Customizing forms and writing QuickBooks Letters

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 in Premier and higher editions only)*

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 You can add fields from which of the following lists to QuickBooks Letters?

- **a** Customers & Jobs
- **b** Employee
- **c** Vendor
- **d** *All of the above*

5 True or false: You can convert an existing Microsoft Word document into a QuickBooks Letter to which you can add QuickBooks data.

- **a** *True*
- **b** False