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**QUICKBOOKS CORNER** 10-2009

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Marti A. Den Uyl

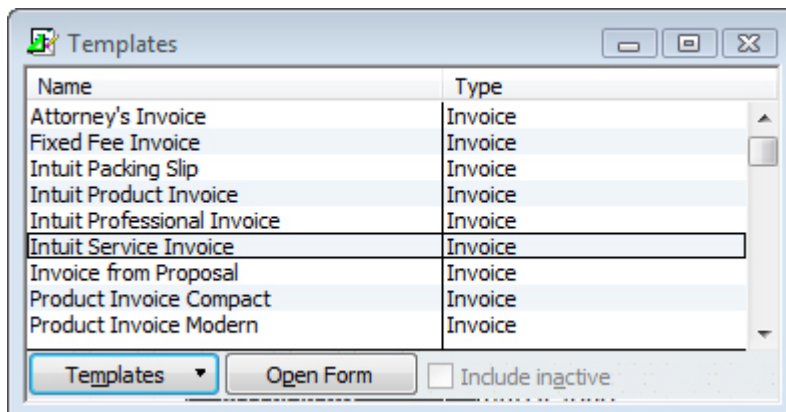
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## Customize QuickBooks Forms for a More Professional Look

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 print out and send. The only problem is that sometimes the pre-formatted default forms don't include all the fields you need. Further, they look rather, well, plain. Fortunately, QuickBooks is flexible. Using simple tools, you can modify the forms that are included with the program to add a logo or other graphics and indicate which fields you would like to have appear.

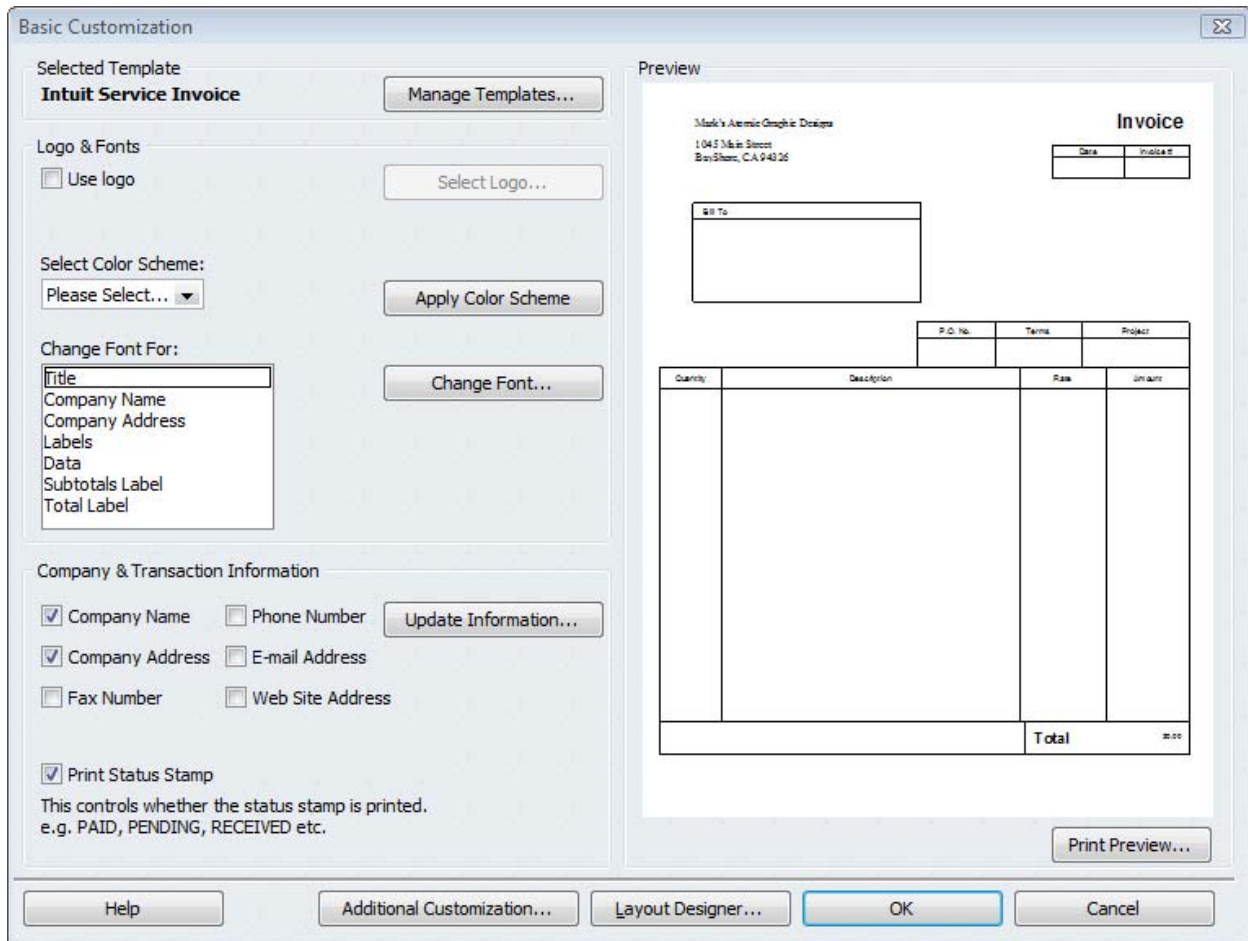
### Made to Order

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 in case one already meets your needs.



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

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" and the Basic Customization window opens, as shown in **Figure 2**.



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

## Customizing Templates

Templates are designed for use with Intuit's preprinted forms. If you want to make changes, you'll have to make a copy of the template first. Note that your new template may no longer work with Intuit's pre-printed forms. Click "Manage Templates," and then click the "Copy" button. The program creates a modifiable copy of the template, which you can 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. 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.

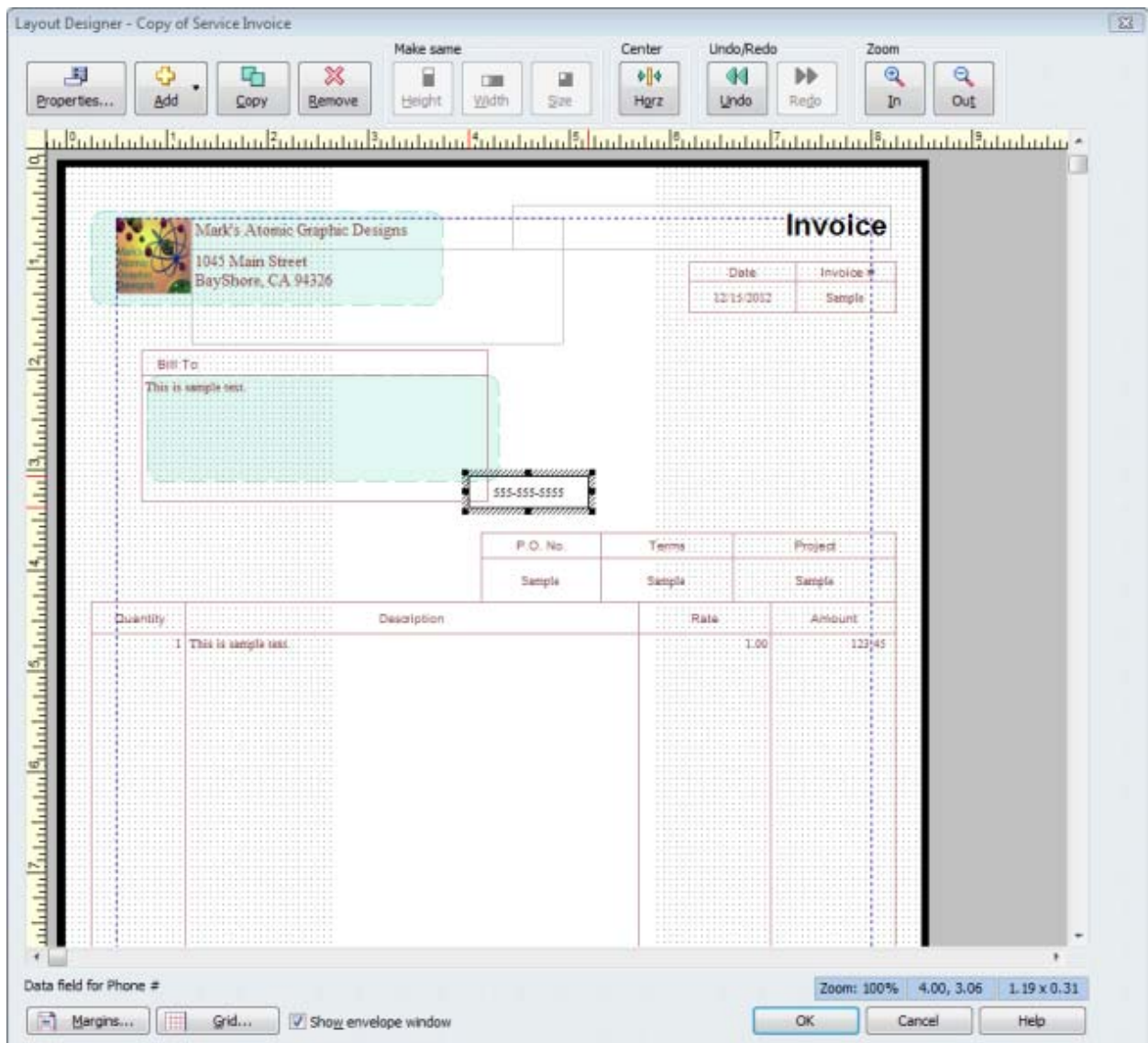
## Add Interest with Color

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.”

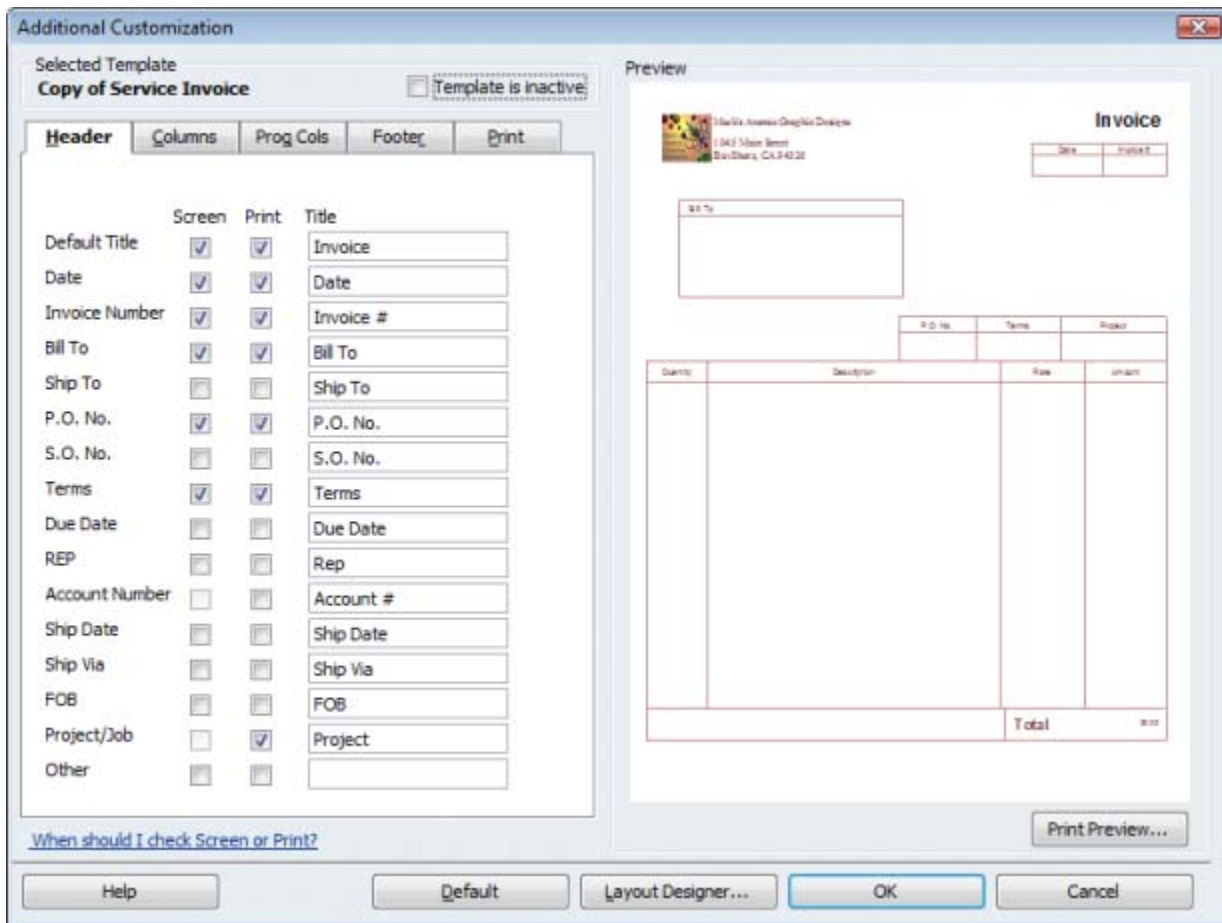
### More Customization Options

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 practice with this a bit. You’ll need to grab the phone number and position it where you want it to show up. Then click “Properties” and “Font” (and/or “Color”). Make the necessary changes and click “OK.”



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

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.



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

### 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 default forms and add your company’s own personal touch to them.

For more information on QuickBooks products, software implementation, and training, please email Certified QuickBooks ProAdvisor Marti Den Uyl at [martid@ehtc.com](mailto:martid@ehtc.com) or call 616-575-3482.

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