

QuickBooks Template Editing Instructions

For customizing invoices, statements, sales receipts, estimates and more.

Open Your Templates List

Click Lists (right after File, Edit, View in your toolbar)
Click Templates

Double-click any of the templates to view and find the one that is the best fit for your needs. DO NOT edit yet!

Duplicate the Default Template

Right-click your desired template
Click Duplicate

This adds a 'Copy of: _____' template to the list.

Re-name & Edit Your Template

Double-click your 'Copy of:' template

Click 'Manage Templates' button to change template name

Company name, etc. pulls from Company Information stored in QB (edit company info by going to Company, Company Information)

Click 'Additional Customization' button to add/remove columns, footers, etc.

I recommend adding a footer. A footer is an excellent place for your billing contact and phone number, license number, anything else that should be on all business forms.

Click 'Layout Designer' to resize your logo, stretch that footer box across the bottom of the form, move or add text boxes, change column widths, change text box borders, etc.

Click 'OK' in any and each screen to save changes - closing the window will not save changes.

Tips

In "Layout Designer" it's easier for some folks to use the arrow keys to move text boxes.

Duplicate your custom invoice for a fast way to set up another version.



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