

New Invoice Form

Chapter 3

Intuit started releasing a new **invoice** form in early January. Some of you may see the form when you first set up your company file; others will likely see it at some point during the class session. The new layout looks like this:

The screenshot shows the new invoice form interface. At the top, there is a navigation bar with 'Invoice' and a 'NEW' badge. A red box highlights a link that says 'Click to return to form used in textbook.' in the top right corner. The main form area is titled 'INVOICE' and includes a section for the company address (3835 Freepoint Blvd, Sacramento, CA 95822) and an 'Add logo' button. Below this is the 'Add customer' section with fields for 'Invoice no.' (INV-1006), 'Terms' (Select term), 'Invoice date' (01/16/2023), and 'Due date' (02/15/2023). The 'Product or service' section is a table with columns for 'Product or service', 'Unit', 'Qty', 'Rate', and 'Amount'. Below the table is a section for 'Customer payment options' with a 'Set up' button. At the bottom, there is a 'Note to customer' section and an 'Attachments' section. On the right side, there is a 'Customization panel' with options for 'Customization', 'Payment options', 'Design', and 'Automation'. The bottom of the screen has a dark bar with 'Other actions', 'Save', and 'Review and send' buttons.

If you'd prefer to use the old form (the one used in the textbook screenshots), click **Old layout** in the top right corner of the new screen. QBO should then default to the former version each time you create a new invoice.

You can, of course, use either format when completing your homework. We've included some basic information on the following pages if you want to try the new layout.

The screenshot shows the 'Invoice' form in QuickBooks Online. The top navigation bar includes 'Invoice' (with a 'NEW' badge), 'Other views' (with sub-links for 'Email view', 'PDF view', and 'Payor view'), and a 'Manage' button (gear icon). A 'Click to open customization panel' callout points to the gear icon. The main form area is titled 'INVOICE' and includes a company address (3835 Freeport Blvd, Sacramento, CA 95822) and an 'Add logo' button (Max size: 1 MB). A 'Click to revert back to old form layout' callout points to the 'Old layout' button in the top right. The form is divided into several sections: 'Customer' (with an 'Add customer' dropdown and a callout 'Select or add customer'), 'Invoice details' (with fields for 'Invoice no.', 'Terms', 'Invoice date', and 'Due date', and a callout 'Complete fields'), 'Product or service' (with a table for items and a callout 'Select or add product or service provided'), 'Customer payment options' (with logos for Apple Pay, VISA, Mastercard, Discover, Amex, and Bank of America, and a callout 'Click to record invoice payment or create duplicate invoice'), and 'Note to customer' (with a 'Thank you for your business' message). The bottom right of the form has a 'Print and download' menu with options for 'Print and download', 'Receive payment', and 'Share link'. The bottom navigation bar includes 'Other actions', 'Save', and 'Review and send' buttons.

NOTE: The customization panel will open automatically when an invoice form is first opened. (The panel is closed in the above screenshot for better visibility of the fields.) To close (or open) the panel, click **Manage** (the gear icon in the menu bar at the top of the screen).

Default form (no customization)

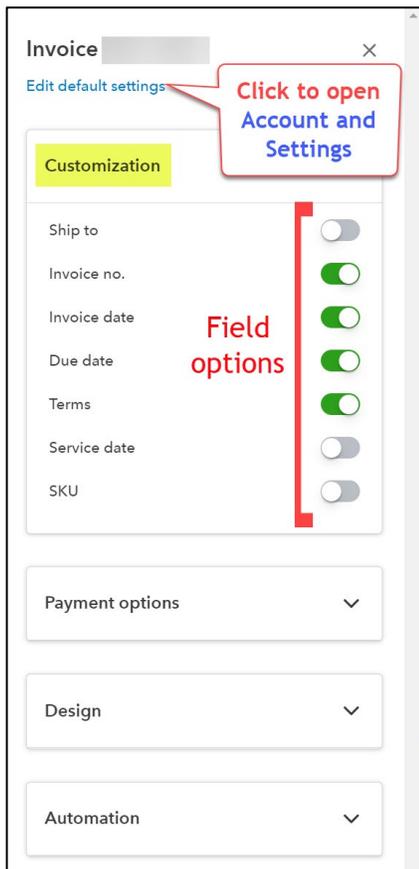
The fields included in the top section of the default form are:

- Customer name (dropdown)
 - If **+ Add new** is selected, the new customer side panel shown in Figure 3.8 will open.
- Invoice no.
- Terms (dropdown)
- Invoice date
- Due date

The fields included in the middle section of the default form are:

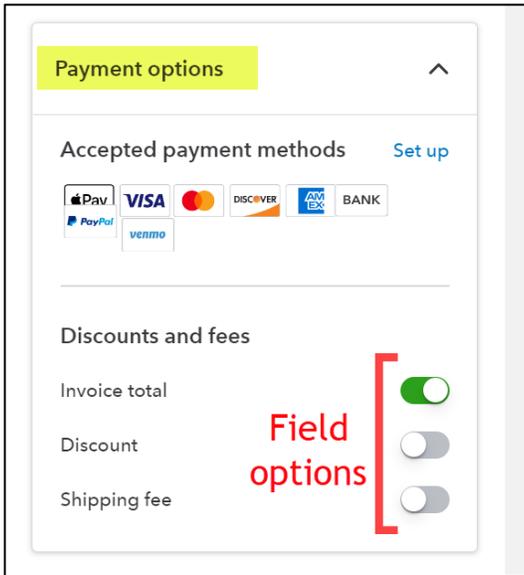
- Product or service (dropdown)
 - If **+ Add new** is selected, a condensed version of an item record will open as a side panel. Currently, only **service** and **non-inventory** items can be added.
 - The condensed version does not include many of the fields needed to account for sales and purchases properly. To avoid having to go back and edit items later, we recommend that you set up new **products** and **services** using the methods explained on pages 3-16 and 6-26 of your textbook. (Intuit may, of course, increase the fields included in the side panel in the future.)
- Unit (dropdown)
 - This is a new field that identifies the measure used in calculating charges. Options include **Unit**, **Hour**, or **Flat rate**. Currently, the choice can be saved by clicking the vertical ellipsis at the end of the row, so when that **service** or **product** is selected on a future **invoice**, the measure field will auto-fill. As of January 2023, the unit field is not included in the item record.
- Qty
- Rate (auto-fills from item record)

Customization panel (accessed by clicking **Manage**)



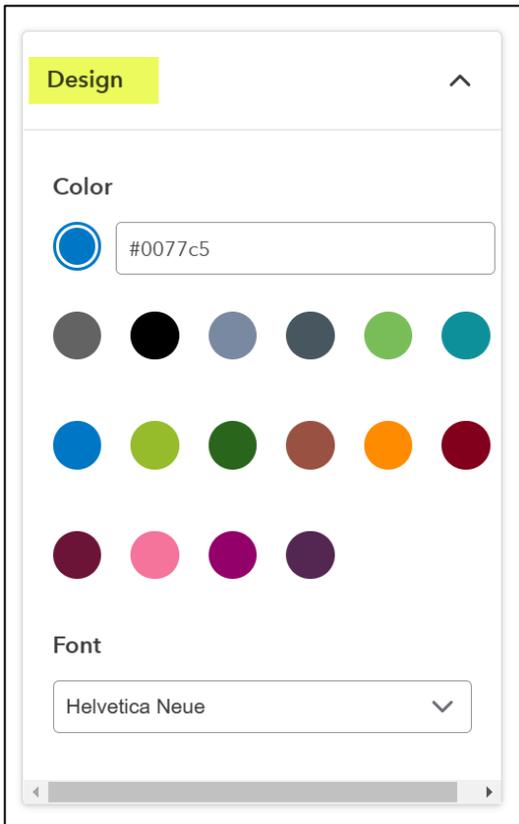
The customization side panel has four sections (**Customization**, **Payment options**, **Design**, **Automation**)

In the **Customization** section, fields can be added to or removed from the form. In your homework assignments, the **Ship to** field would need to be added when the company starts selling products (Chapter 6).



In the **Payment options** section, users can set up online payment methods. Online payments are not covered in this book.

Additional fields can also be added in the section. The **Discount** field would need to be added to the **invoice** form in Chapter 6.



Invoice fonts and colors can be customized in the **Design** section.



The **Automation** section includes a link to the setup page for recurring invoices. **Recurring transactions** are covered in Chapter 9.

Tools not included in the new **invoice** form

A few tools from the old **invoice** layout are not included in the new form (as of January 2023).

1. The  link to a list of recent **invoices**
2. The option to clear all fields
3. The option to open the **transaction journal** to see the entry underlying the transaction
4. The option to add **tags**
 - a. **Tags** are not used in your homework company. They are, however, covered in Appendix 9A.