# 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:



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.

**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)
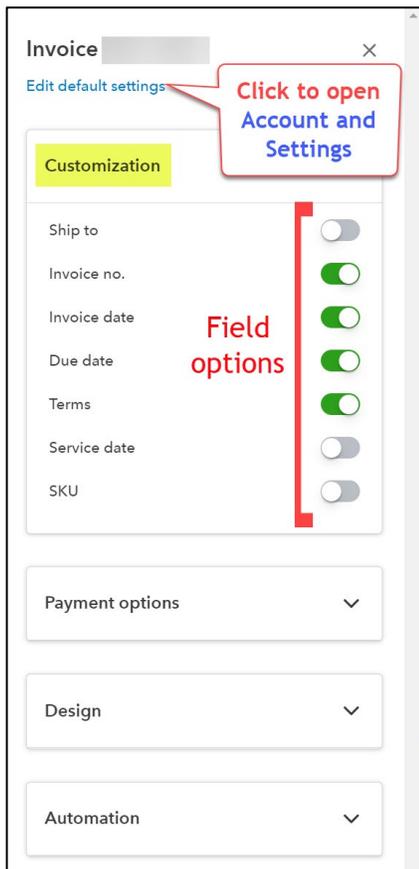


The customization side panel has four sections (**Customization**, **Payment options**, **Design**, **Automation**)

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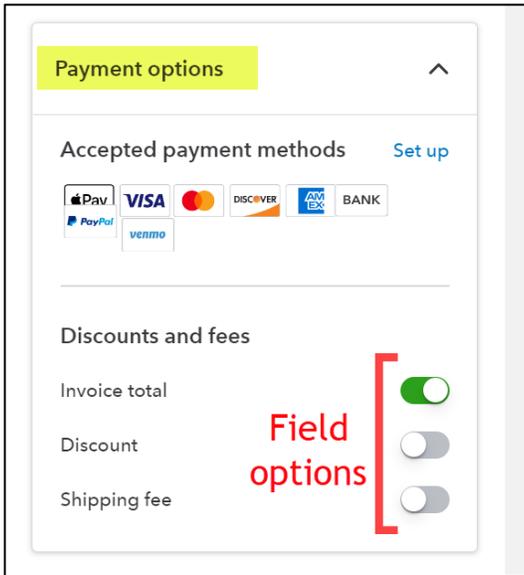
In the **Payment options** section, users can set up online payment methods.  Online payments are not covered in this book.

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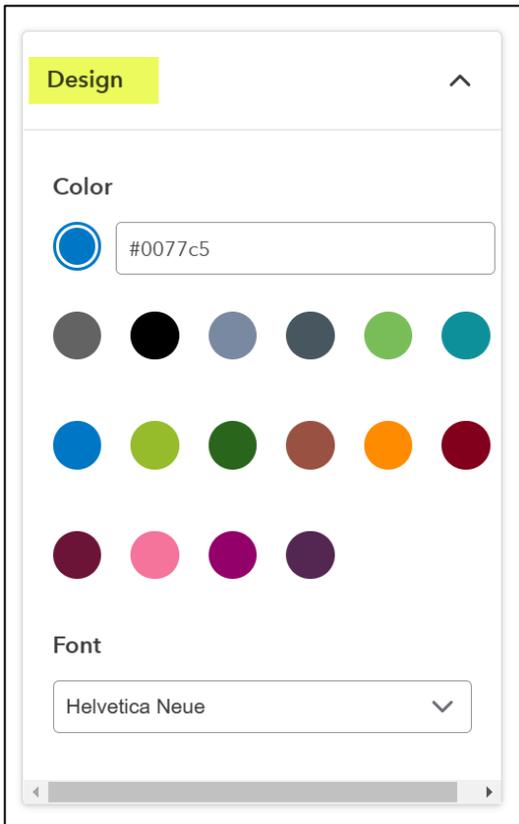


**Invoice** fonts and colors can be customized in the **Design** section.

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.