

Using Invoice templates with EasyBooks

11.04

EasyBooks versions 11.04 and greater now come with Invoice Templates. These are Microsoft Word Templates that EasyBooks uses to insert the Invoice data and can be customized to include your company details and logo.

To setup and use the templates, follow the steps below:

- e Open EasyBooks and click on Customers
- e Click on Transactions
- e Click on Select Invoice Stationary

On the "Select Invoice Stationary" screen:

- e Select "Using MS Word Template"
- e If you would like to preview your invoices before printing them, click in the box beside "Check to display invoice in MS Word before printing"
- e Click on the Select button

On the "MS Word Setup" screen:

- e Click on the Browse button at the end on the "Invoices" line
- e Navigate to the folder where your template is located
- e Click on the template and click on the Save button
- e You will be returned to the "MS Word Setup" screen, click on OK
- e You will be returned to the "Select Invoice Stationary" screen, click on OK

Your future invoices will no be printed using your MS Word template.

NOTE: IF YOU CHANGE THE TEMPLATE AT ANY STAGE, EG: ADD YOUR POSTAL DETAILS OR LOGO, YOU WILL NEED TO SAVE THE CHANGED FILE AS A TEMPLATE WITH A DIFFERENT NAME AND FOLLOW THE STEPS ABOVE TO USE THE NEW TEMPLATE FOR FUTURE INVOICES.

IF YOU ARE UNSURE HOW TO SAVE YOUR DOCUMENT AS A TEMPLATE, CONSULT YOUR MICROSOFT OFFICE HELP FILES.