

# Personalise your invoice layout – Pt.2

Tina Stewart

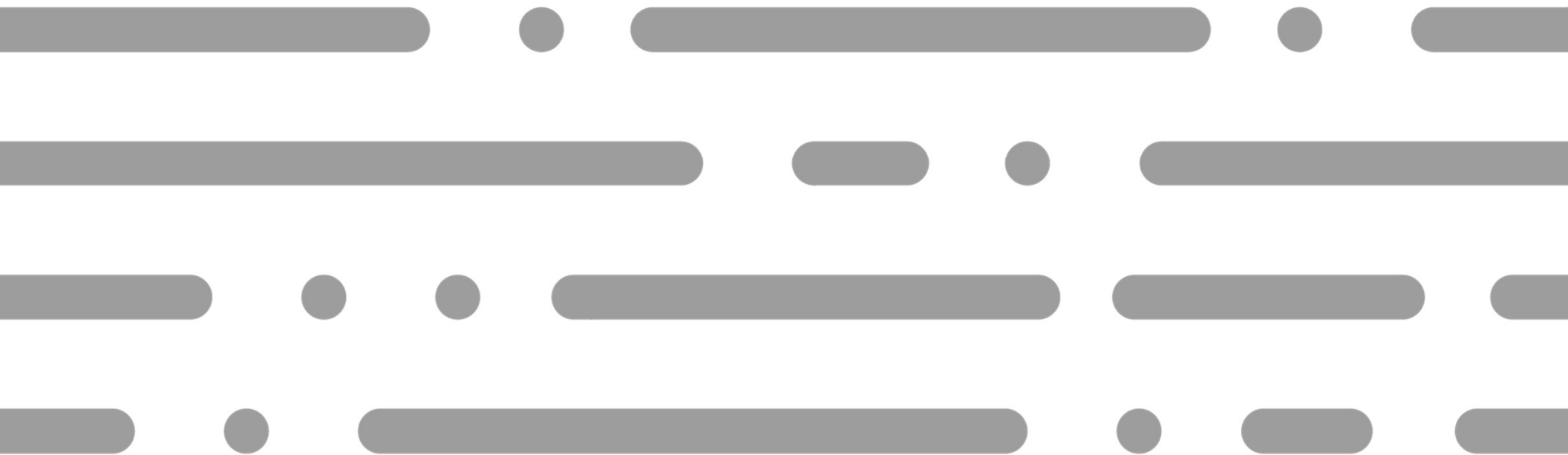
Sage



# Agenda

- **Layout Sections**
- **Which invoice data effects which sections**
  - Product Invoices
  - Service Invoices
  - Mix / Match
  - Credit Notes
  - Quotes and Proformas
  - Net Value Discounts
  - Invoice Payment Received
- **Common amendments**
- **Further support**

# Layout Sections



# Layout Sections

Want to make an amendment?

- **What** am I adding?
- **Where** am I adding it?
- **How** do I want it to look?

Quantity	Description	Unit Price	Net Amt	VAT %	VAT
2. INVOICE_NUMBER header					
INVOI		Note: THIS IS NOT A V.A.T. INVOICE			
3. ITEM_NUMBER header					
QUANTITY	DESCRIPTION	FOREIGN_UNI	((INVOICE.IN	TAX_RA	((INVOIC
4. Details					
SERVICQUANTITY	ServiceTextBold	FOREIGN_UNI	((INVOICE.IN	TAX_RA	((INVOIC
5. ITEM_NUMBER footer					
QUANTITY	DESCRIPTION	FOREIGN_UNI	((INVOICE.IN	TAX_RA	((INVOIC
6. ITEM_NUMBER footer					
COMMENT_1					
7. ITEM_NUMBER footer					
COMMENT_2					
8. INVOICE.INVOICE_NUMBER Footer					
DISCOUNT	NET_VALUE_DISCOUNT_DESC	NET_VALUE_	NET_VALUE		
9. INVOICE.INVOICE_NUMBER Footer					
NET_VALUE_DISCOUNT_COMMENT_1					
10. INVOICE.INVOICE_NUMBER Footer					
NET_VALUE_DISCOUNT_COMMENT_2					
11. INVOICE_NUMBER footer					
Amount Paid FOREIGN_		Amount Due		AMOUNT_D	

# Layout Sections

	Quantity	Description	Unit Price	Net Amt	VAT %	VAT
2. INVOICE_NUMBER header						
2	INVOI		Note: THIS IS NOT A V.A.T. INVOICE			
3. ITEM_NUMBER header						
3	QUANTITY	DESCRIPTION	FOREIGN_UNI	((INVOICE.IN	TAX_RA	((INVOIC
4. Detail						
4	QUANTITY	Service Text Bold	FOREIGN_UNI	((INVOICE.IN	TAX_RA	((INVOIC
5. ITEM_NUMBER footer						
5	QUANTITY	DESCRIPTION	FOREIGN_UNI	((INVOICE.IN	TAX_RA	((INVOIC
6. ITEM_NUMBER footer						
6	COMMENT_1					
7. ITEM_NUMBER footer						
7	COMMENT_2					
8. INVOICE.INVOICE_NUMBER Footer						
8	DISCOUNT	NET_VALUE_DISCOUNT_DESC	NET_VALUE_	NET_VALUE		
9. INVOICE.INVOICE_NUMBER Footer						
9	NET_VALUE_DISCOUNT_COMMENT_1					
10. INVOICE.INVOICE_NUMBER Footer						
10	NET_VALUE_DISCOUNT_COMMENT_2					
11. INVOICE_NUMBER footer						
11	Amount Paid FOREIGN_		Amount Due		AMOUNT_D	

Stationery & Computer Mart UK  
Sage House  
Benton Park Road  
Newcastle Upon Tyne  
NE7 7 LZ

Tel: 0191 955 3000  
Email: newbusinessadvice@sage.com  
http://www.sage.co.uk

**Sage**

INVOICE Page 1

Invoice No	86
Invoice Date	01/12/2022
Order No	
Account Ref	A1D001

A1 Design Services  
67a Station Road  
Blackpool  
Lancashire  
BP12 7HT

Quantity	Description	Unit Price	Net Amt	VAT %	VAT
10.00	Whiteboard - Drywipe (900 x 1200)	18.00	180.00	20.00	36.00
10.00	Whiteboard - Drywipe (1000 x 1500)	20.90	209.00	20.00	41.80

Deliver To :  
A1 Design Services  
67a Station Road  
Blackpool  
Lancashire  
BP12 7HT

Total Net Amount	£	389.00
Carriage Net	£	0.00
Total Tax Amount	£	77.80
Invoice Total	£	466.80

Payment Due: 31/12/2022

# Layout Sections

All middle sections on layout have a **section filter** applied. If the data in the invoice matches the filter, the section will print.

This screenshot shows the layout editor for section 4, titled 'Details'. The section contains a table with columns for SERVICE, QUANTITY, DESCRIPTION, FOREIGN, UNIT, TAX, and RA. The filter for this section is `INVOICE_ITEM.SERVICE_FLAG <> 0`.

SERVICE	QUANTITY	DESCRIPTION	FOREIGN	UNIT	TAX	RA
5. ITEM_NUMBER footer						
5	QUANTITY	DESCRIPTION	FOREIGN	UNIT	TAX	RA
6. ITEM_NUMBER footer						
6	COMMENT_1					
7. ITEM_NUMBER footer						

Properties:

- Appearance: Filter `INVOICE_ITEM.SERVICE_FLAG <> 0`
- Behaviour: Visible: True
- Layout: Height: 0.2083in

Invoice and  
Credit Note  
Sections

This screenshot shows the layout editor for section 8, titled 'Details'. The section contains a table with columns for DISCOUNT, NET\_VALUE, DISCOUNT\_DESC, NET\_VALUE, and NET\_VALUE. The filter for this section is `INVOICE_ITEM.SERVICE_FLAG = 0`.

DISCOUNT	NET_VALUE	DISCOUNT_DESC	NET_VALUE	NET_VALUE
8. INVOICE.INVOICE_NUMBER Footer				

Properties:

- Appearance: Filter `INVOICE_ITEM.SERVICE_FLAG = 0`
- Behaviour: Visible: True
- Layout: Height: 0.2132in

Coded  
Variables

# Invoice Data


# Product Invoices

Product Invoice

Clear form

Insert row (F7)

Remove row (F8)

Copy cell above (F6)

View item (F3)

Profit analysis

Pay by card

Cash sale

Memorise

Recall

Delete

Quick print

Print

Send to Excel

View Online

Details

Order

Footer

Payment

A1 Design Services

67a Station Road

Blackpool

Lancashire

BP12 7HT

Type

Invoice

Inv.No.

87

Format

Product

Order No.

Date\*

01/12/2022

Due On\*

31/12/2022

A/C\*

AID001

Item No.

Item 1 of 2

Customer Order No.

Product Code*	Description	Quantity	Price £	Net £	VAT £
BOOKS001	A4 Ledger Book - 5 Column	5.00	7.59	37.95	7.59
BOOKS002	A4 Carbon Copy Book - Triplicate				
Deduction		Description			
Net Value Discount					

Edit Item Line

Product Code

BOOKS001

Description

A4 Ledger Book - 5 Column

Comment 1

I AM A COMMENT 1 LINE

Comment 2

I AM A COMMENT 2 LINE

Order Reference

Less Deposit GBP £

0.00

Amount Due GBP £

62.58

Save

Close

### Layout sections affected: -

Comment Lines? **No - 1/5/12**  
(section **5** = product line items)

Comment Lines? **Yes - 1/5/6/7/12**  
(section **5** = product line items)

(Section **6** = Comment **1**)

(Section **7** = Comment **2**)



# Adding Product Code to item line

Tables and Variables Help Centre article

Add Data Field > click once to add field > expand table > select data field > OK

Quantity	Product Code	Description	Unit Price	Net Amt	VAT %	VAT
2. INVOICE_NUMBER header						
2	INVOI	Note: THIS IS NOT A V.A.T. INVOICE				
3. ITEM_NUMBER header						
3	QUANTITY	DESCRIPTION	FOREIGN_UNI	((INVOICE.IN	TAX_RA	((INVOIC
4. Details						
4	SERVICQUANTITY	ServiceTextBold	FOREIGN_UNI	((INVOICE.IN	TAX_RA	((INVOIC
5. ITEM_NUMBER footer						
5	QUANTITY	STOCK_CODE	DESCRIPTION	FOREIGN_UNI	((INVOICE.IN	TAX_RA
6. ITEM_NUMBER footer						
6	COMMENT_1					
7. ITEM_NUMBER footer						
7	COMMENT_2					

# Service Invoices

**Service Invoice**

Clear form | Insert row (F7) | Remove row (F8) | Copy cell above (F6) | View item (F3) | Pay by card | Cash sale | Memorise | Recall | Delete | Quick print | Print | Send to Excel | View Online

**Details**

Order  
Footer  
Payment

A1 Design Services  
67a Station Road  
  
Blackpool  
Lancashire  
BP 12 7HT

Type: Invoice  
Format: Service  
Date\*: 02/12/2022  
A/C\*: A1D001  
Inv. No.: 88  
Order No.:  
Due On\*: 01/01/2023  
Item No.: Item 1 of 1

Customer Order No.:

Details	Amount £	Net £	VAT £
Enter your service item DETAILS here	100.00	100.00	20.00

**Edit Item Line**

**Details**

Description: Enter your service item DESCRIPTION here  
Details: Enter your service item DETAILS here  
Order Reference: Order Line Reference: 0

Gross GBP £: 120.00  
Less Deposit GBP £: 0.00  
Amount Due GBP £: 120.00

Save Close

**Layout sections affected: -**

Default - **1/4/12**  
(section **4** = service line items)

# Making service Description appear

Print service item description *and* details

Double click on **Service\_Text** field in section **4** > click **Clear** > paste in content from **Invoice Layout** section of Help Centre article link above > OK

The screenshot shows a multi-section invoice form. Section 2 is the 'INVOICE' header, containing the text 'Note: THIS IS NOT A V.A.T. INVOICE'. Section 3 is the 'ITEM\_NUMBER header' with columns for 'QUANTITY', 'DESCRIPTION', 'FOREIGN\_UNI', 'TAX\_RA', and 'INVOICE'. Section 4 is the 'Details' section, where the 'Service\_Text' field is highlighted with a black box. Section 5 is the 'ITEM\_NUMBER footer' with columns for 'QUANTITY', 'DESCRIPTION', 'FOREIGN\_UNI', 'TAX\_RA', and 'INVOICE'. Section 6 is the 'COMMENT\_1' field.

2. INVOICE_NUMBER header				
2		INVOI	Note: THIS IS NOT A V.A.T. INVOICE	
3. ITEM_NUMBER header				
3	QUANTITY	DESCRIPTION	FOREIGN_UNI	((INVOICE.IN TAX_RA ((INVOIC
4. Details				
4	SERVICQUANTITY	Service_TextBold	FOREIGN_UNI	((INVOICE.IN TAX_RA ((INVOIC
5. ITEM_NUMBER footer				
5	QUANTITY	DESCRIPTION	FOREIGN_UNI	((INVOICE.IN TAX_RA ((INVOIC
6. ITEM_NUMBER footer				
6	COMMENT_1			

# Product and Service Invoices (Mix / Match)

Product Invoice

Clear form | Insert row (F7) | Remove row (F8) | Copy cell above (F6) | View item (F3) | Profit analysis | Pay by card | Cash sale | Memorise | Recall | Delete | Quick print | Print | Send to Excel | View Online

**Details**

Order  
Footer  
Payment

ABS Garages Ltd  
Unit 34  
Holystone Ind Estate  
Hebburn  
Tyne & Wear  
NE31 1VB

Type: Invoice  
Format: Product  
Inv. No.: 89  
Order No.:  
Date\*: 02/12/2022  
Due On\*: 01/01/2023  
A/C\*: ABS001  
Item No.: Item 1 of 2

Customer Order No.:

Product Code*	Description	Quantity	Price £	Net £	VAT £
PC004	PC Combo Pack 4	1.00	765.00	711.45	142.29
INST001	Installation	1.00	50.00	46.50	9.30

Deduction	Description	Net £
Net Value Discount		0.00

Total GBP £ 757.95 151.59  
Carriage GBP £ 0.00 0.00  
Gross GBP £ 909.54

Less Deposit GBP £ 0.00  
Amount Due GBP £ 909.54

Save Close

**Layout sections affected: -**

Product Line Items?  
(section **5** = product line items)

Service Line Items?  
(section **4** = service line items)

# Credit Notes

Product Credit

Clear form Insert row (F7) Remove row (F8) Copy cell above (F6) View item (F3) Profit analysis Pay by card Memorise Recall Delete Quick print Print Send to Excel View Online

Details

Order  
Footer

A1 Design Services  
67a Station Road

Blackpool  
Lancashire  
BP 12 7HT

Type Credit  
Format Product

Date\* 02/12/2022 Due On\* 02/12/2022

A/C\* A1D001 Item No. Item 1 of 1

Customer Order No.

Product Code*	Description	Quantity	Price £	Net £	VAT £
BOOKS001	A4 Ledger Book - 5 Column	2.00	7.59	15.18	3.04

Deduction	Description	Net £
Net Value Discount		0.00

Total GBP £ 15.18 3.04

Carriage GBP £ 0.00 0.00

Gross GBP £ 18.22

Amount Due GBP £ 18.22

Save Close

**Layout sections affected: -**

*Exactly the same as invoices!!*

Product Line Items?  
(section **5** = product line items)

Service Line Items?  
(section **4** = service line items)

# Quotes and Proforma

Same rules apply as either product or service invoice – **extra section visible = 2** containing text – **“Note: THIS IS NOT A V.A.T. INVOICE”**

Product Quote

Clear form Insert row (F7) Remove row (F8) Copy cell above (F6) View item (F3) Profit analysis Memorise Recall Delete Quick print Print Send to Excel View Online

Details  
Order  
Footer  
Payment

Fred Briant  
4 Oakfield Drive  
Melkton Park  
Milton Keynes  
Bucks  
MK4 3TG

Type: Quote  
Format: Product  
Inv.No.: 92  
Date\*: 02/12/2022  
Expiry: / /  
A/C\*: BRJ001  
Item No.: Item 1 of 2

Customer Order No.

Product Code*	Description	Quantity	Price £	Net £	VAT £
PC001	PC Combo Pack 1	1.00	539.00	539.00	107.80
INST001	Installation	1.00	50.00	50.00	10.00

Deduction	Description	Net £
Net Value Discount		0.00

Total GBP £ 589.00 117.80  
Carriage GBP £ 0.00 0.00  
Gross GBP £ 706.80

Less Deposit GBP £ 0.00  
Amount Due GBP £ 706.80

Save Close

Product Pro-forma

Clear form Insert row (F7) Remove row (F8) Copy cell above (F6) View item (F3) Profit analysis Pay by card Memorise Recall Delete Quick print Print Send to Excel View Online

Details  
Order  
Footer  
Payment

Bronson Inc  
18989 Royster Road  
Suite 343  
Dallas Texas 769544  
USA

Type: Pro-forma  
Format: Product  
Inv.No.: 93  
Date\*: 02/12/2022  
Due On\*: 16/01/2023  
A/C\*: BRO001  
Item No.: Item 1 of 2

Customer Order No.

Product Code*	Description	Quantity	Price £	Net £	VAT £
PC002	PC Combo Pack 2	1.00	617.50	617.50	0.00
INST001	Installation	1.00	50.00	50.00	0.00

Deduction	Description	Net £
Net Value Discount		0.00

Total GBP £ 667.50 0.00  
Carriage GBP £ 0.00 0.00  
Gross GBP £ 667.50

Less Deposit GBP £ 0.00  
Amount Due GBP £ 667.50

Save Close

# Net Value Discounts

The screenshot displays the Sage Product Invoice application. The main window has a menu bar with options like Clear form, Insert row, Remove row, Copy cell, View item, Profit analysis, Pay by card, Cash sale, Memorise, Recall, Delete, Quick print, Print, Send to Excel, and View Online. Below the menu bar is a 'Details' sidebar with links for Order, Footer, and Payment. The main area shows a form for a business invoice. The 'Business Exhibitions' section is active, showing the address '44 Keswick Way, Penrith, Cumbria, CA97 9RT'. The 'Type' is set to 'Invoice', 'Inv.No.' is '<AutoNumber>', 'Format' is 'Product', 'Date\*' is '02/12/2022', 'Due On\*' is '01/01/2023', and 'A/C\*' is 'BUS001'. A table lists items with columns for Product Code, Description, Quantity, Price £, Net £, and VAT £. The first item is 'PC005 PC Combo Pack 5' with a quantity of 1.00, price of 1080.00, net of 1080.00, and VAT of 200.00. Below the items table is a 'Deduction' table with columns for Deduction, Description, and Net £. The first row is 'Net Value Discount' with a description of 'NVD Description Details' and a net value of 80.00. A small icon is visible next to the 'Net Value Discount' entry. An 'Edit Item Line' dialog box is open, showing details for the 'Net Value Discount' entry. The dialog has a 'Details' section with fields for 'Deduction Type' (set to 'Net Value Discount'), 'Description' (set to 'NVD Description Details'), 'Comment 1' (set to 'NVD Comment 1'), and 'Comment 2' (set to 'NVD Comment 2'). It also shows 'Discount %' as 7.41 and 'Disc. GBP £' as 80.00. The dialog has 'OK' and 'Cancel' buttons. The main window has a 'Save' button and a 'Close' button at the bottom right.

Product Code*	Description	Quantity	Price £	Net £	VAT £
PC005	PC Combo Pack 5	1.00	1080.00	1080.00	200.00

Deduction	Description	Net £
Net Value Discount	NVD Description Details	80.00

**Layout sections affected: -**

*Exactly the same as invoices!!*

Net Value Discount entered?

(section **8** = NVD **Description / Values**)

(section **9** = NVD **Comment 1**)

(section **10** = NVD **Comment 2**)

# Invoice Payment Received

Product Invoice

Clear form

Insert row (F7)

Remove row (F8)

Copy cell above (F6)

View item (F3)

Profit analysis

Pay by card

Cash sale

Memorise

Recall

Delete

Quick print

Print

Send to Excel

View Online

Details

Order

Footer

Payment

County Golf Supplies  
18a Sunderland Road  
  
Gilesgate  
Durham  
DH14 3HT

Type Invoice  
Format Product  
Date\* 02/12/2022  
A/C\* CGS001  
Inv.No. <AutoNumber>  
Order No.  
Due On\* 01/01/2023  
Item No. Item 2 of 2

Customer Order No.

Product Code*	Description	Quantity	Price £	Net £	VAT £
PC001	PC Combo Pack 1	1.00	522.50	522.50	104.50
PC002	PC Combo Pack 2	1.00	617.50	617.50	123.50

Deduction	Description	Net £
Net Value Discount		0.00

Total GBP £ 1140.00  
Carriage GBP £ 0.00  
Gross GBP £ 1368.00

Less Deposit GBP £ 0.00  
Amount Due GBP £ 1368.00

Save

Close

Same rules apply as either product or service invoice –

**Extra section visible = 11** containing details of amount paid and amount due

Product Invoice

Clear form

Profit analysis

Pay by card

Memorise

Recall

Delete

Quick print

Print

View Online

Details

Order

Footer

Payment

Payment Details

Payment Ref DEPOSIT PAID  
Bank Account 1200  
Payment Amount GBP £ 368.00  
Amount Due 1000.00  
Pay Deposit by Card

Payment Type  
☐ Payment already received  
☒ Post as Payment on Account (SA)  
☐ Allocate Payment to Invoice (SR)



# Moving Invoice Payment Received

Any payment recorded in **Payments** tab of invoice displays directly underneath last line item

Quantity	Description	Unit Price	Net Amt	VAT %	VAT
1.00	PC Combo Pack 1	522.50	522.50	20.00	104.50
1.00	PC Combo Pack 2	617.50	617.50	20.00	123.50
Amount Paid 368.00		Amount Due		1,000.00	

The Properties of section 11 can be amended to display this above the invoice totals instead

Amount Paid 368.00		Amount Due		1,000.00	
<div><div><div>Deliver To :</div><div>County Golf Supplies</div><div>18a Sunderland Road</div><div>Gilesgate</div><div>Durham</div><div>DH14 3HT</div></div><div><div>Total Net Amount</div><div>£</div><div>1,140.00</div></div><div><div>Carriage Net</div><div>£</div><div>0.00</div></div><div><div>Total Tax Amount</div><div>£</div><div>228.00</div></div><div><div>Invoice Total</div><div>£</div><div>1,368.00</div></div></div>					
Payment Due: 01/01/2023					

Properties

Appearance

Filter INVOICE.FOREIGN\_AMOUNT\_PRI

Print On First False

Suppress Prior False

Behaviour

Align to Bottom True

Allow Overlap False

Page Break A False

Page Break C False

Visible True

Layout

Height 0.2500in

Select section 11 > Properties > select **Align to Bottom** > change to **True**

# Summary

Section No.	Contains....
1	<b>Invoice Header information</b> Company and Customer details, invoice number, order numbers and account reference, titles for line items
2	<b>Not a VAT Invoice text (only appears on Quotations and Proforma Invoices)</b>
3	<b>Service Line Items – <i>section switched off by default</i></b> Item quantity, service description, unit price, net and VAT values
4	<b>Service Line Items</b> Item quantity, service text, unit price, net and VAT values
5	<b>Product Line Items</b> Item quantity, description, unit price, net and VAT values
6	<b>Comment 1 for Product Line Items</b>
7	<b>Comment 2 for Product Line Items</b>
8	<b>Description and Discount Values for Net Value Discount</b>
9	<b>Comment 1 for Net Value Discount</b>
10	<b>Comment 2 for Net Value Discount</b>
11	<b>Amount Paid / Amount Due on Invoice (if Payments tab of Invoice completed)</b>
12	<b>Invoice Footer information</b> Customer delivery address, payment terms and invoice totals

## Further Support

[Tables and Variables](#)

[Print Service Item Description and Details](#)

[Reporting Support Hub](#)

[Sage Report Design Service](#)