

# Personalise your invoice layout – Pt.2

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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	Service TextBold	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	SERVICE	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

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.

102030405060708090100110120130140150160170180190200210

4. Details

4

SERVICEQUANTITY

ServiceTextBold

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

Properties

Appearance

Filter

INVOICE\_ITEM.SERVICE\_FLAG <> 0

Print On First Co

False

Suppress Printin

False

Behaviour

Visible

True

Layout

Height

0.2083in

Properties

Report Explorer

Invoice and  
Credit Note  
Sections

102030405060708090100110120130140150160170180190200210

4. Details

4

SERVICEQUANTITY

ServiceTextBold

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

Properties

Appearance

Filter

INVOICE\_ITEM.SERVICE\_FLAG = 0

Print On First Co

False

Suppress Printin

False

Behaviour

Align to Bottom

False

Allow Overlap

False

Page Break Afte

False

Page Break Only

False

Visible

True

Layout

Height

0.2132in

Properties

Report Explorer

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

BP 12 7HT

Type

Invoice

Format

Product

Date\*

01/12/2022

A/C\*

A1D001

Inv.No.

87

Order No.

Due On\*

31/12/2022

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

Details

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	Service Text Bold	FOREIGN_UNI	((INVOICE.IN	TAX_RA	((INVOIC
5. ITEM_NUMBER footer						
5	QUANTITY	STOCK_CODE	DESCRIPTION	FOREIGN_UNI	((INVOICE.IN	TAX_RA ((INVOIC
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  
BP12 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

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  
Date\*: 02/12/2022  
A/C\*: ABS001  
Inv.No.: 89  
Order No.:  
Due On\*: 01/01/2023  
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  
Carriage GBP £: 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  
BP12 7HT

Type: Credit  
Format: Product  
Date\*: 02/12/2022  
A/C\*: A1D001

Ord.No.: 90  
Order No.:  
Due On\*: 02/12/2022  
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  
Carriage GBP £ 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\*

BRI001

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

Sage

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# Net Value Discounts

**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

Business Exhibitions  
44 Keswick Way

Penrith  
Cumbria  
CA97 9RT

Type: Invoice | Inv.No.: <AutoNumber>  
Format: Product | Order No:  
Date\*: 02/12/2022 | Due On\*: 01/01/2023  
A/C\*: BUS001 | Item No.: Item 1 of 1

Customer Order No.

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

Edit Item Line

**Details**

Deduction Type: Net Value Discount

Description: NVD Description Details

Comment 1: NVD Comment 1

Comment 2: NVD Comment 2

Discount %: 7.41 | Disc. GBP £

Save Close

**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

Inv.No.

<AutoNumber>

Format

Product

Order No.

Date\*

02/12/2022

Due On\*

01/01/2023

A/C\*

CGS001

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

228.00

Carriage GBP £

0.00

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)





# 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](#)