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**

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Layout Sections

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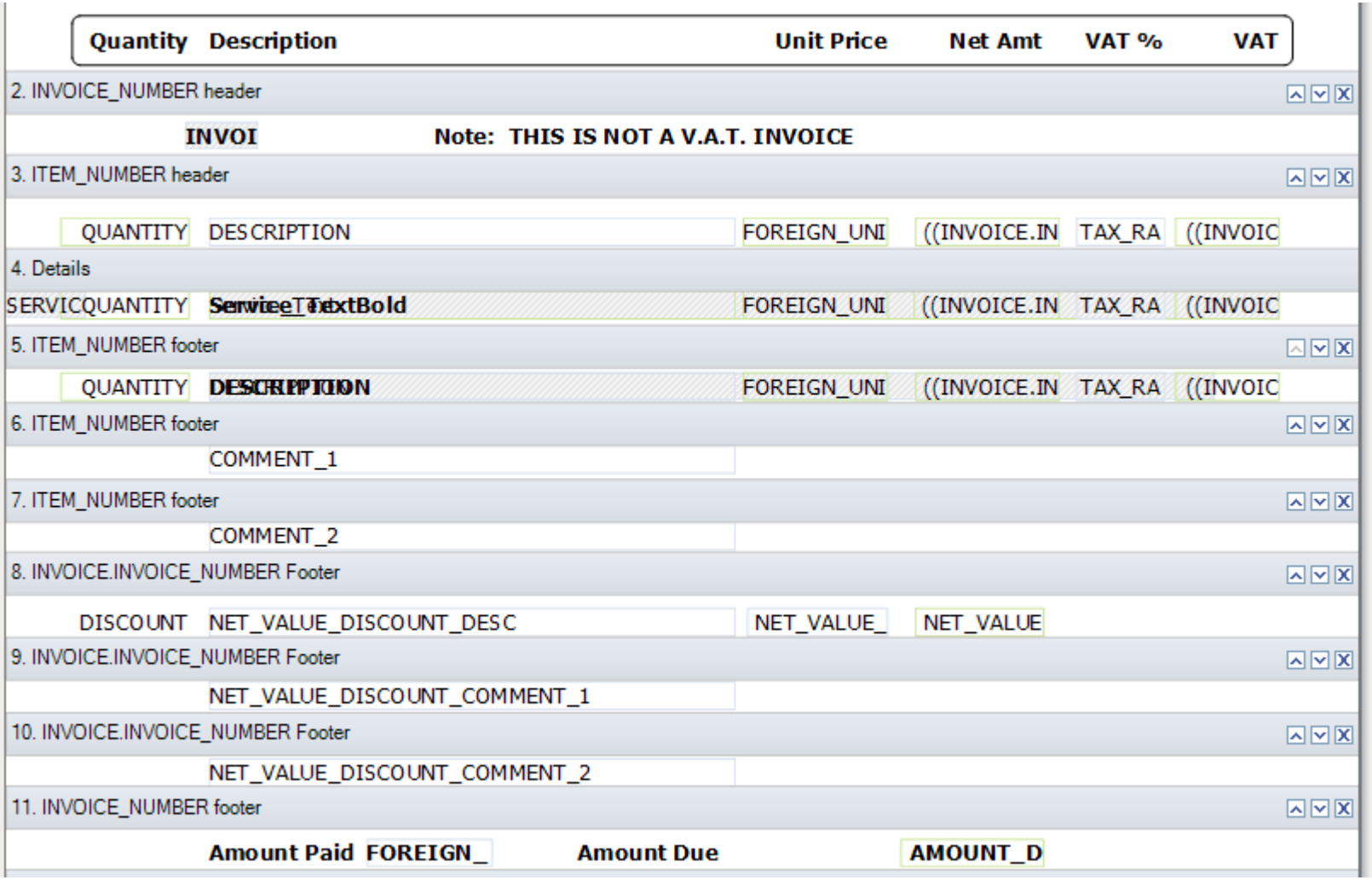
Layout Sections

Want to make an amendment?

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



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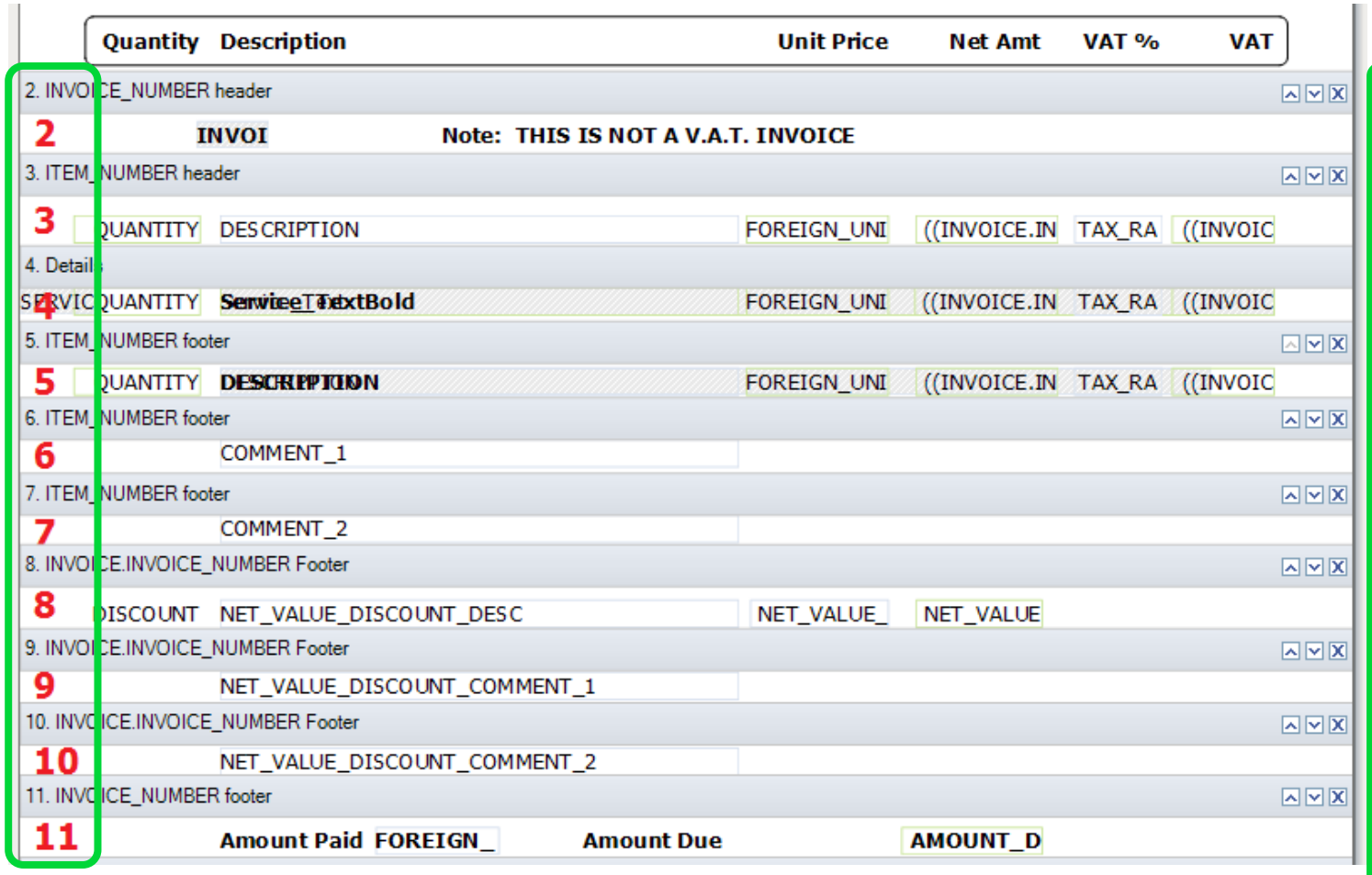
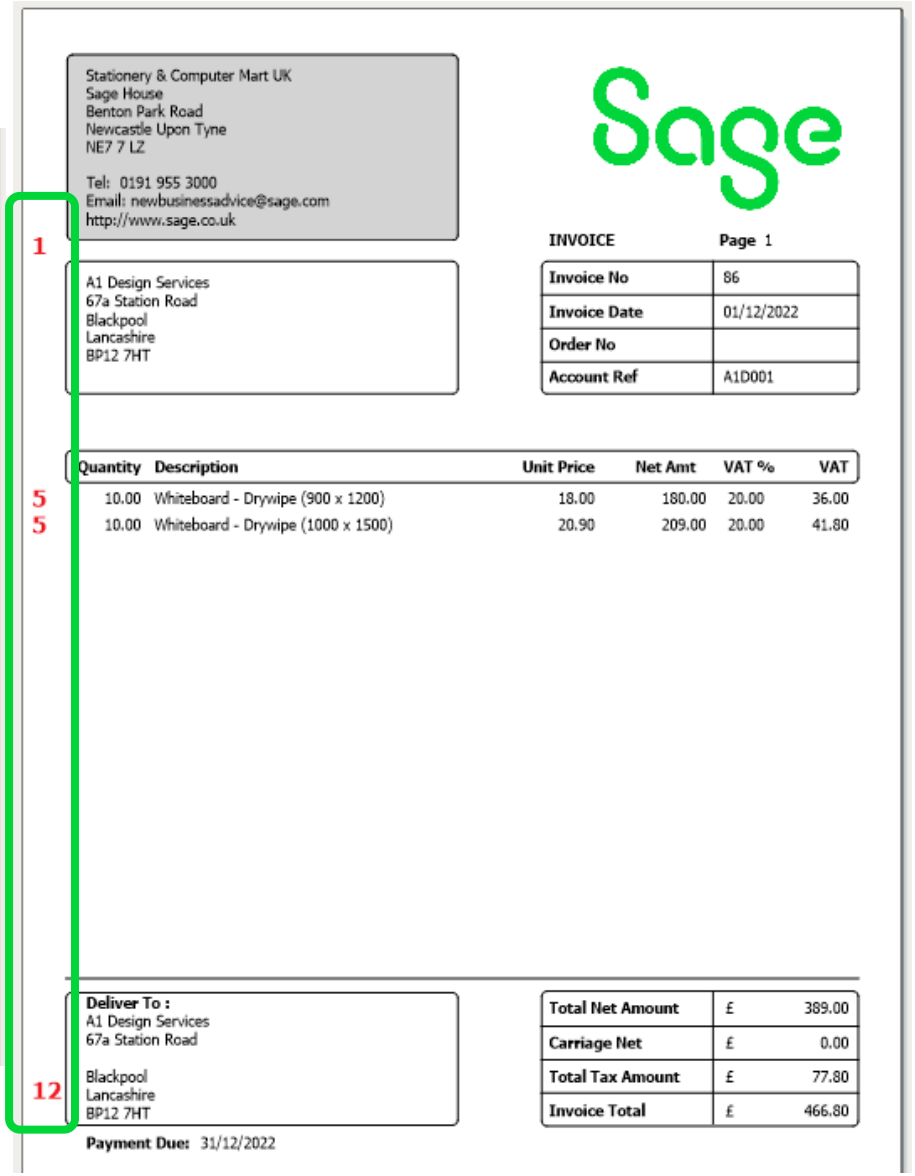
Layout Sections





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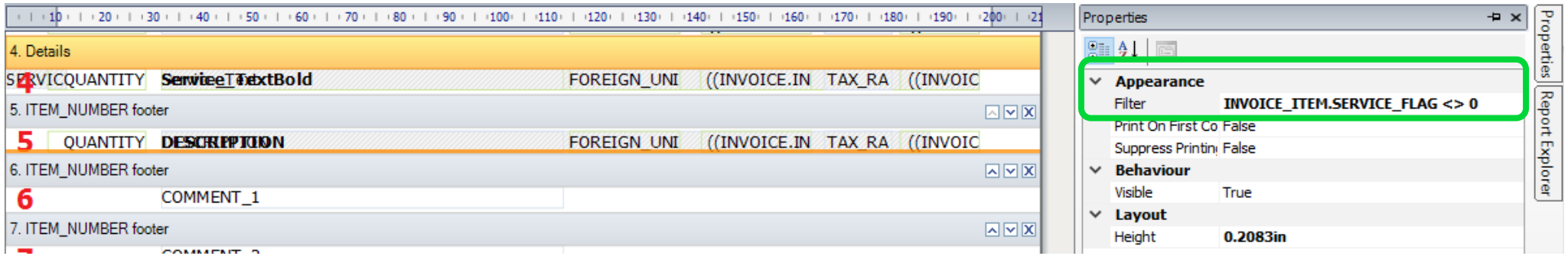
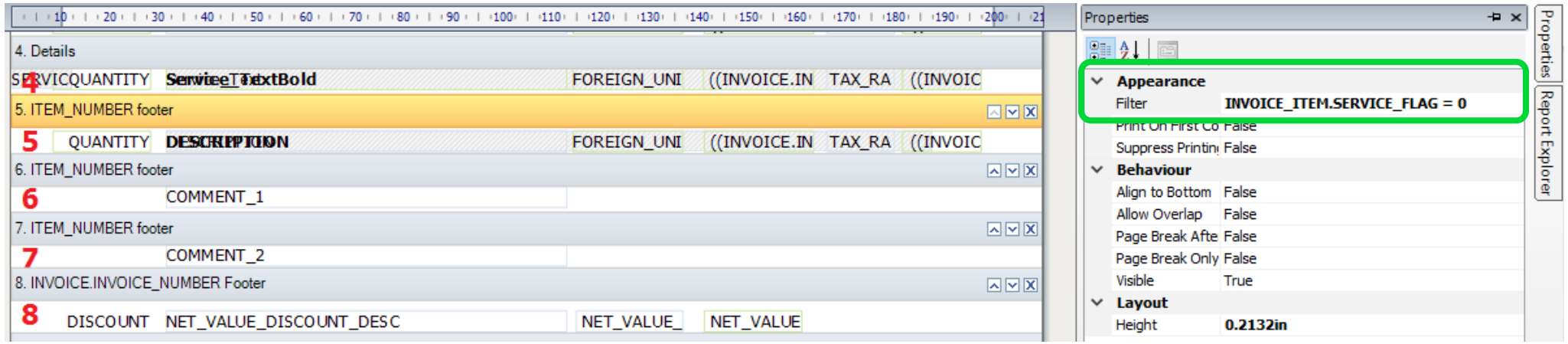
Layout Sections

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



Invoice and Credit Note Sections



Coded Variables

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Invoice Data

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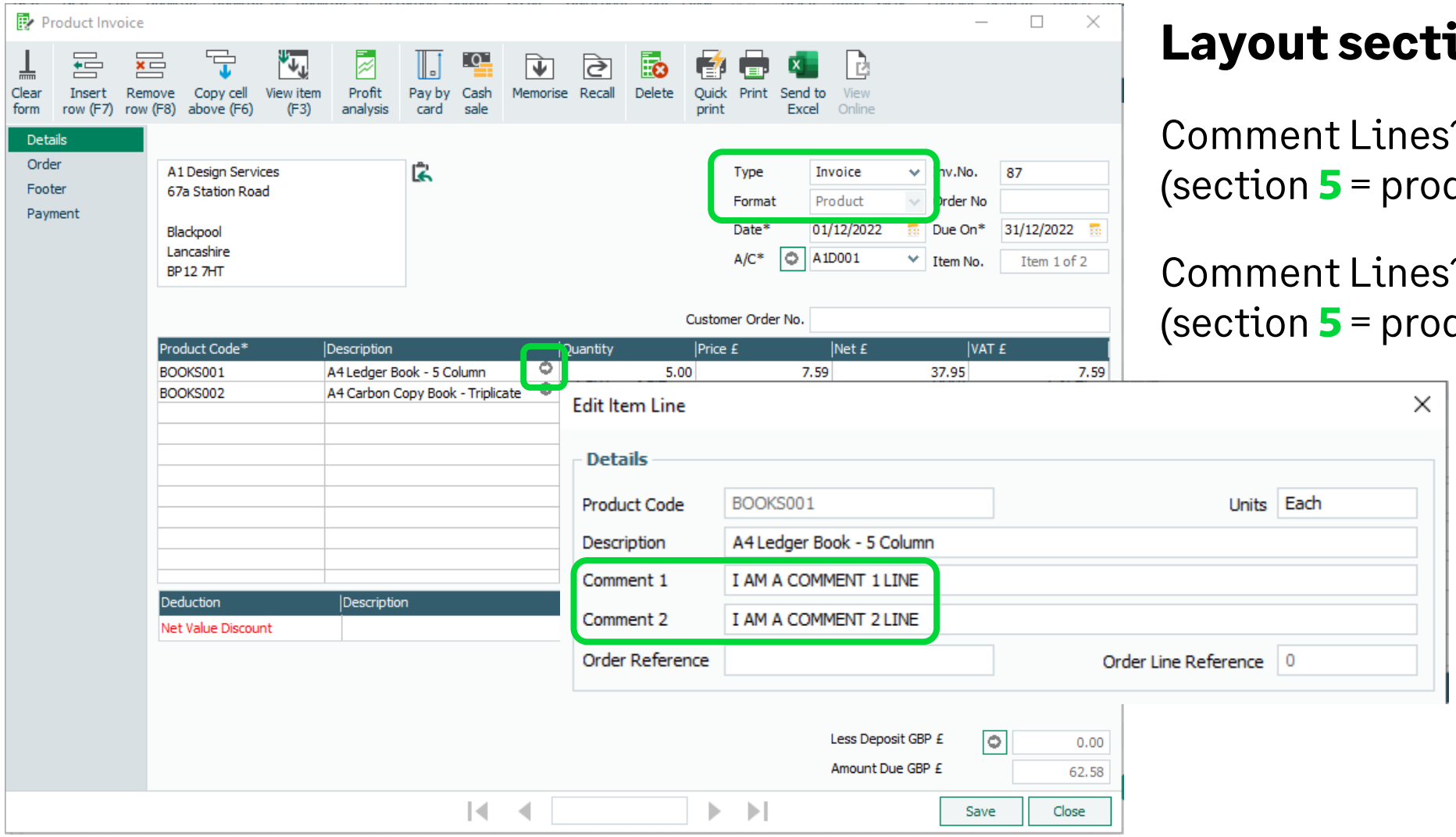
Product Invoices



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**)

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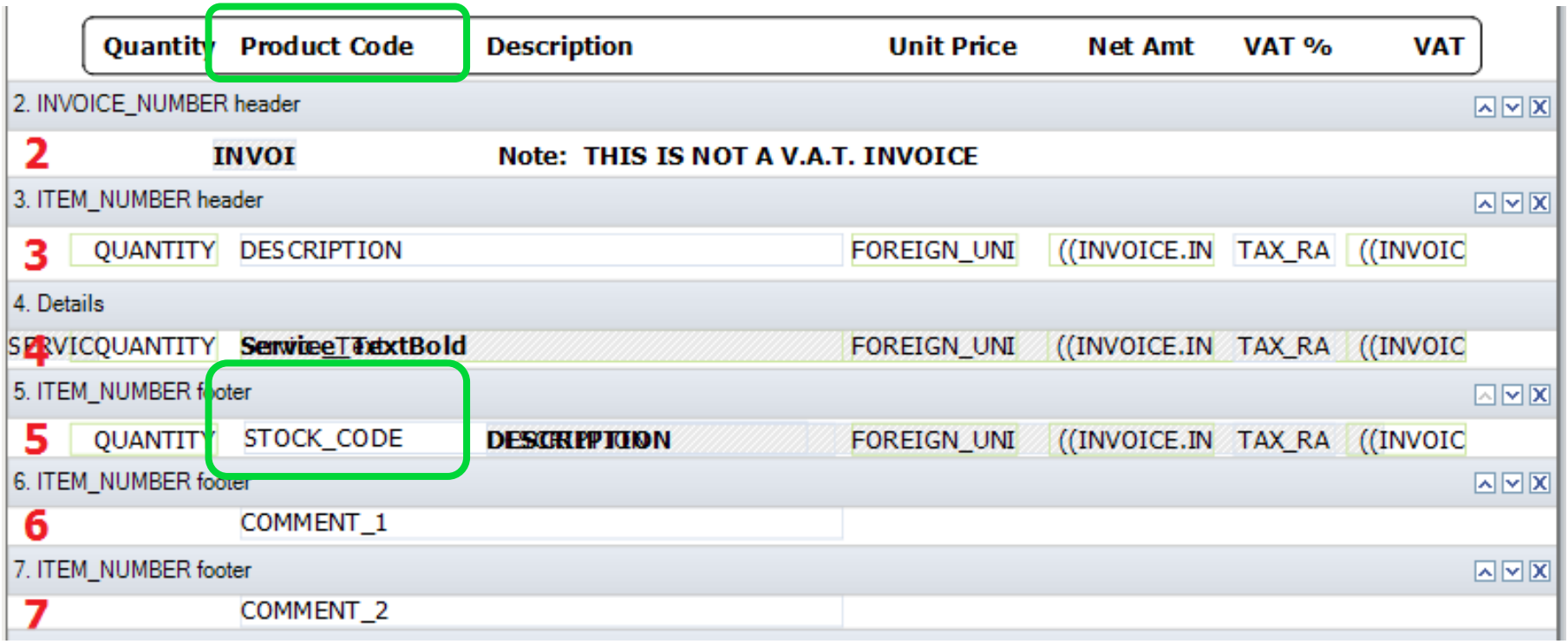
Adding Product Code to item line

Tables and Variables Help Centre article

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



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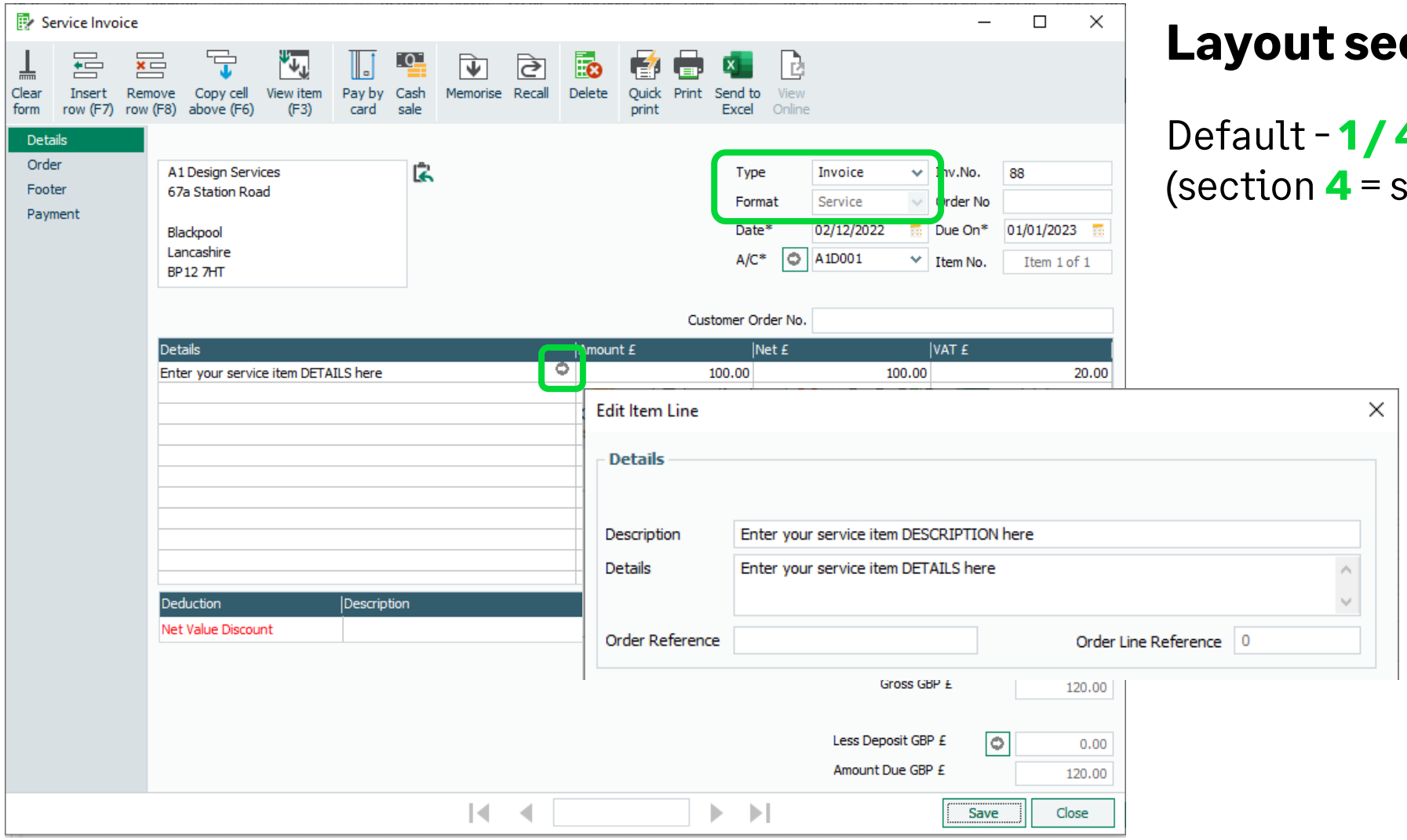
Service Invoices



Layout sections affected: -

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

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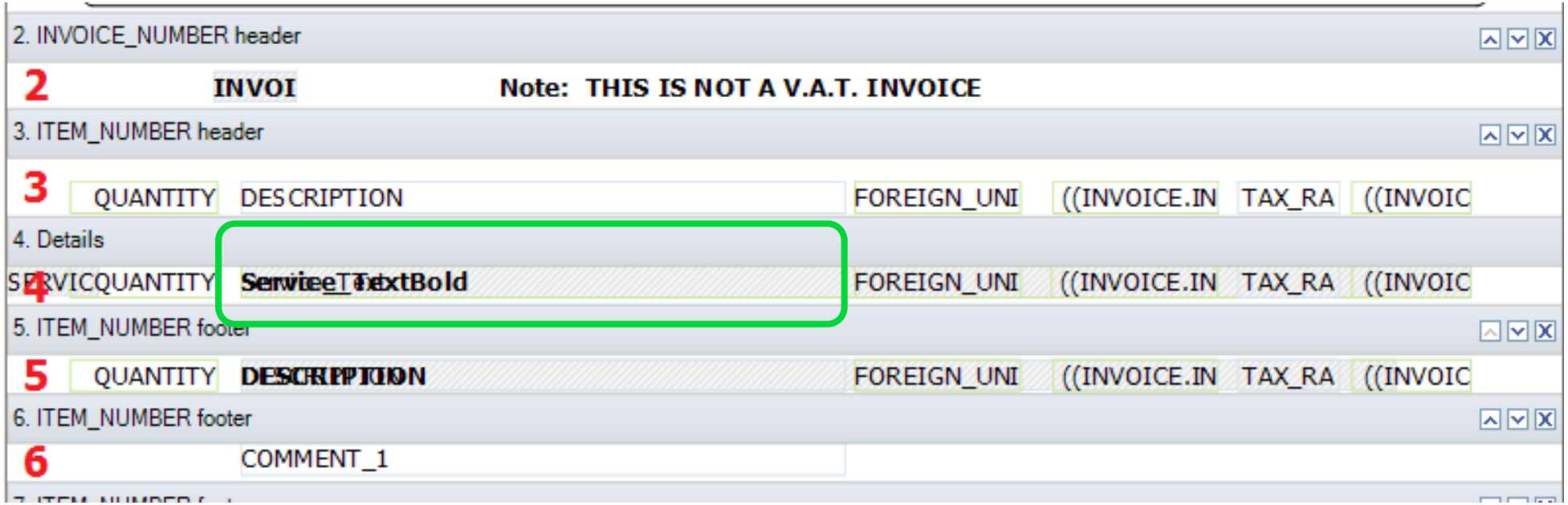
Making service Description appear

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



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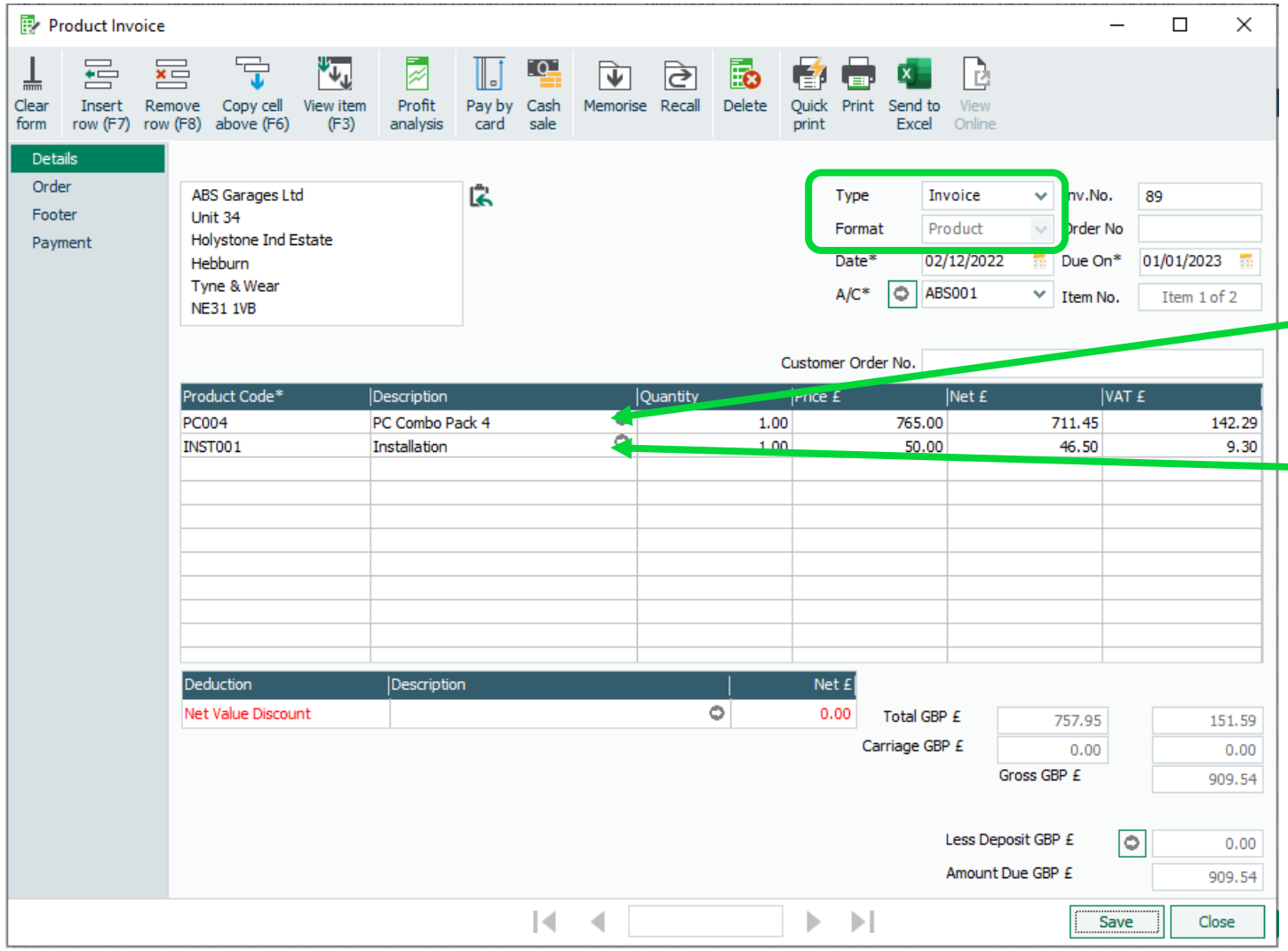
Product and Service Invoices (Mix / Match)



Layout sections affected: -

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

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

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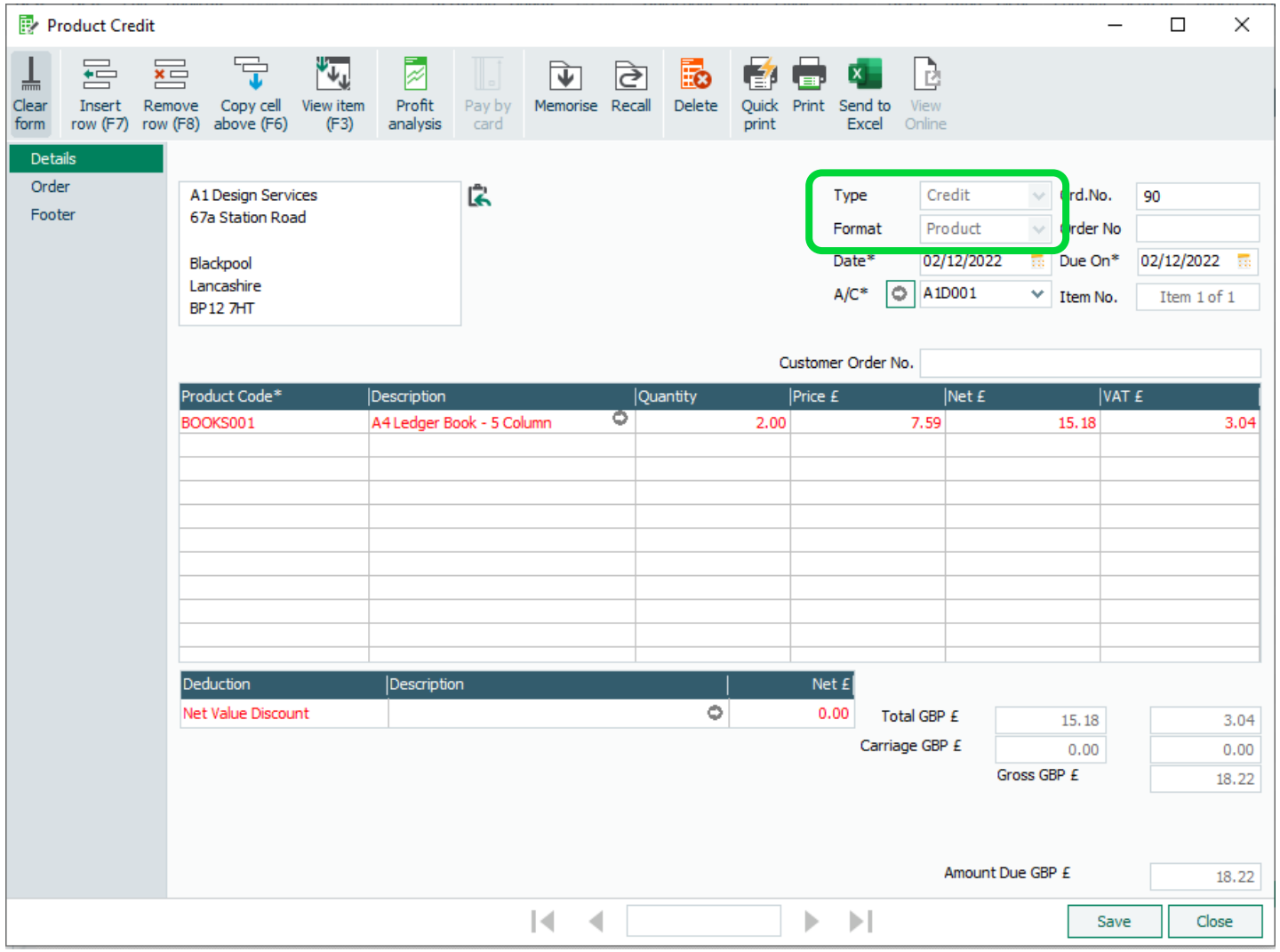
Credit Notes



Layout sections affected: -

Exactly the same as invoices!!

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

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

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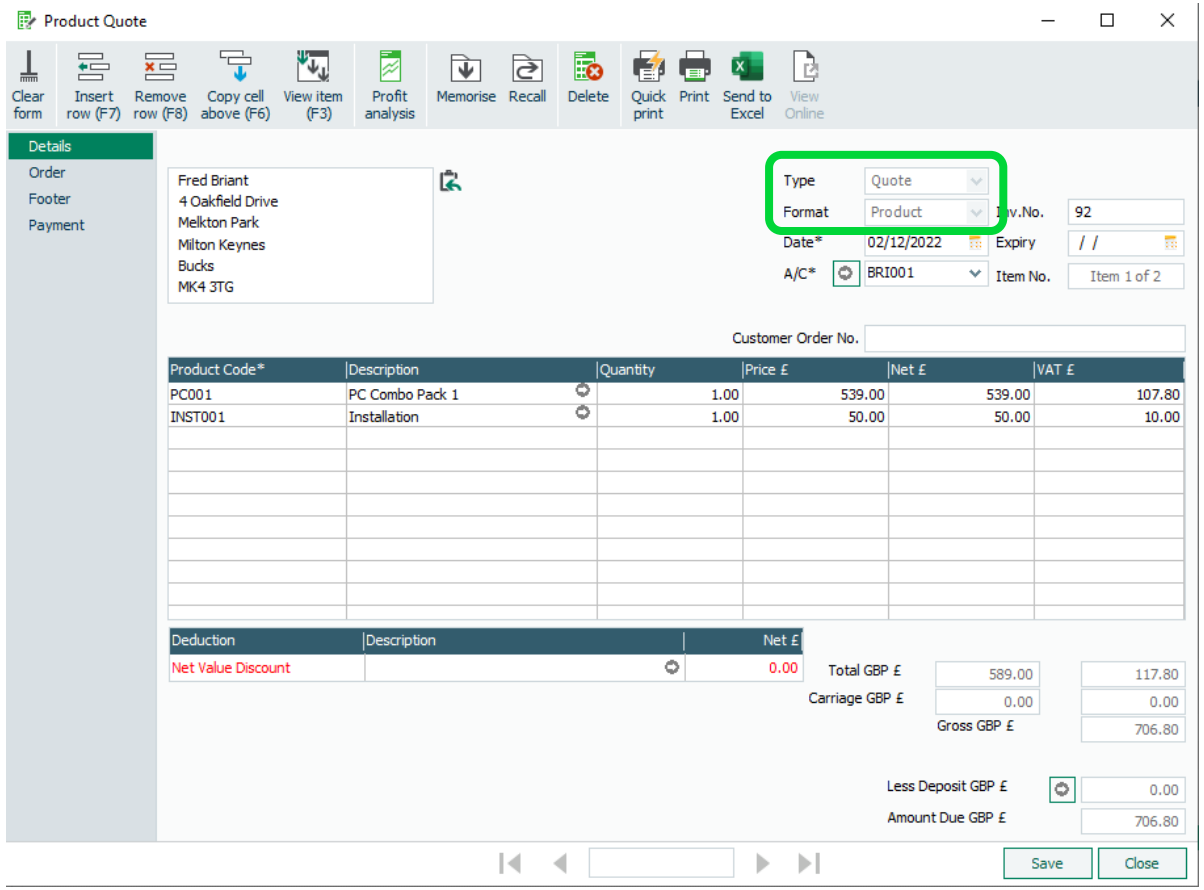
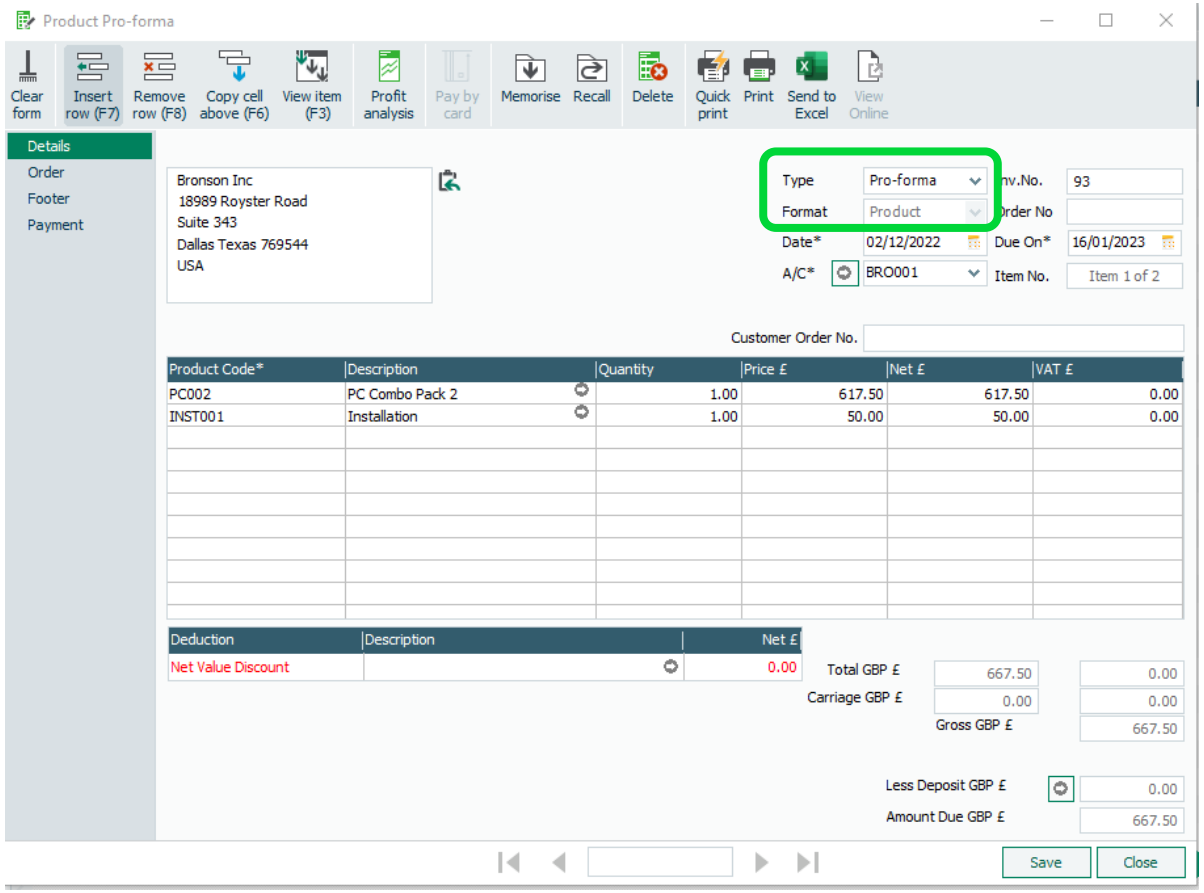
Quotes and Proforma

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





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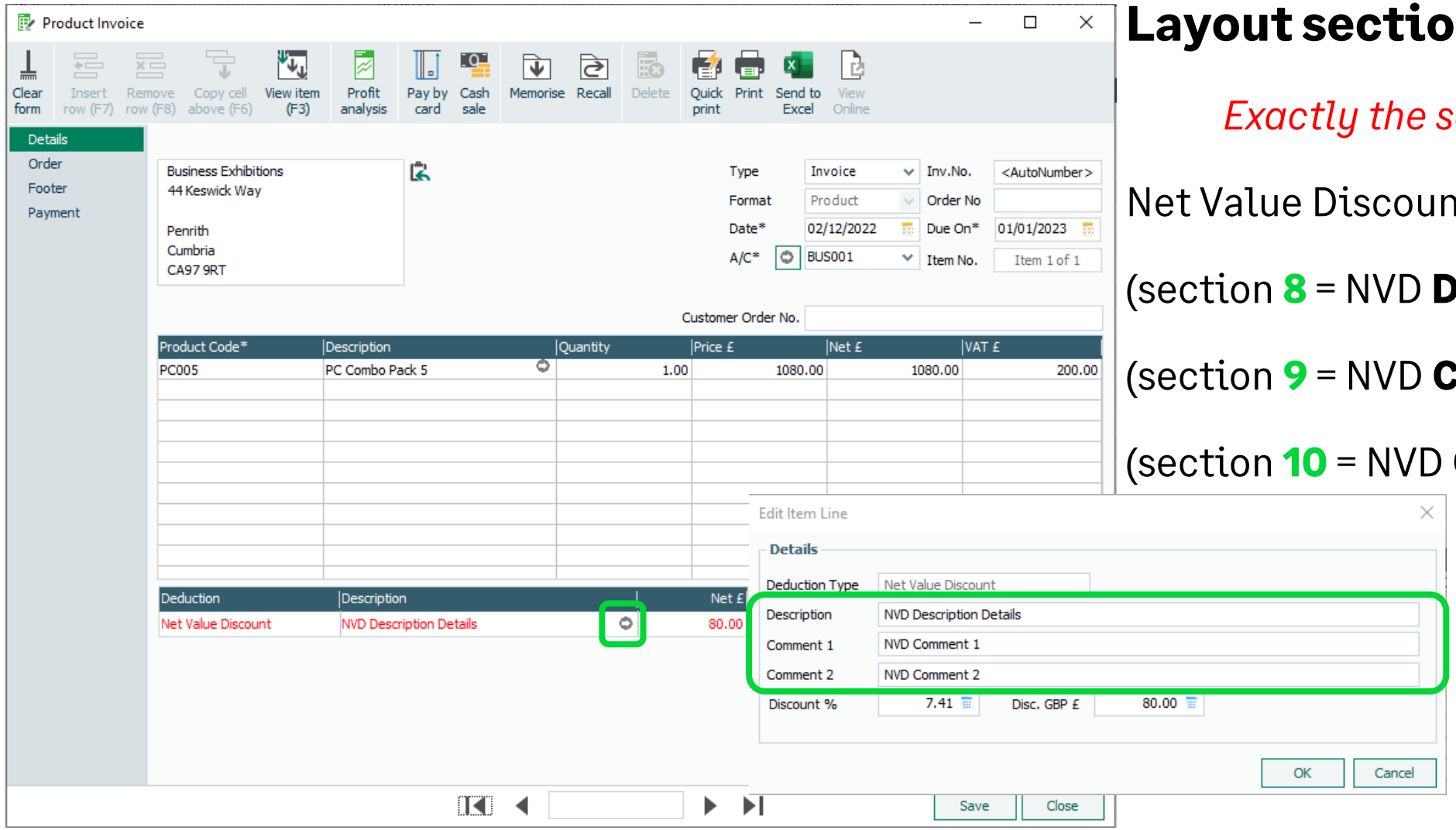
Net Value Discounts



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**)

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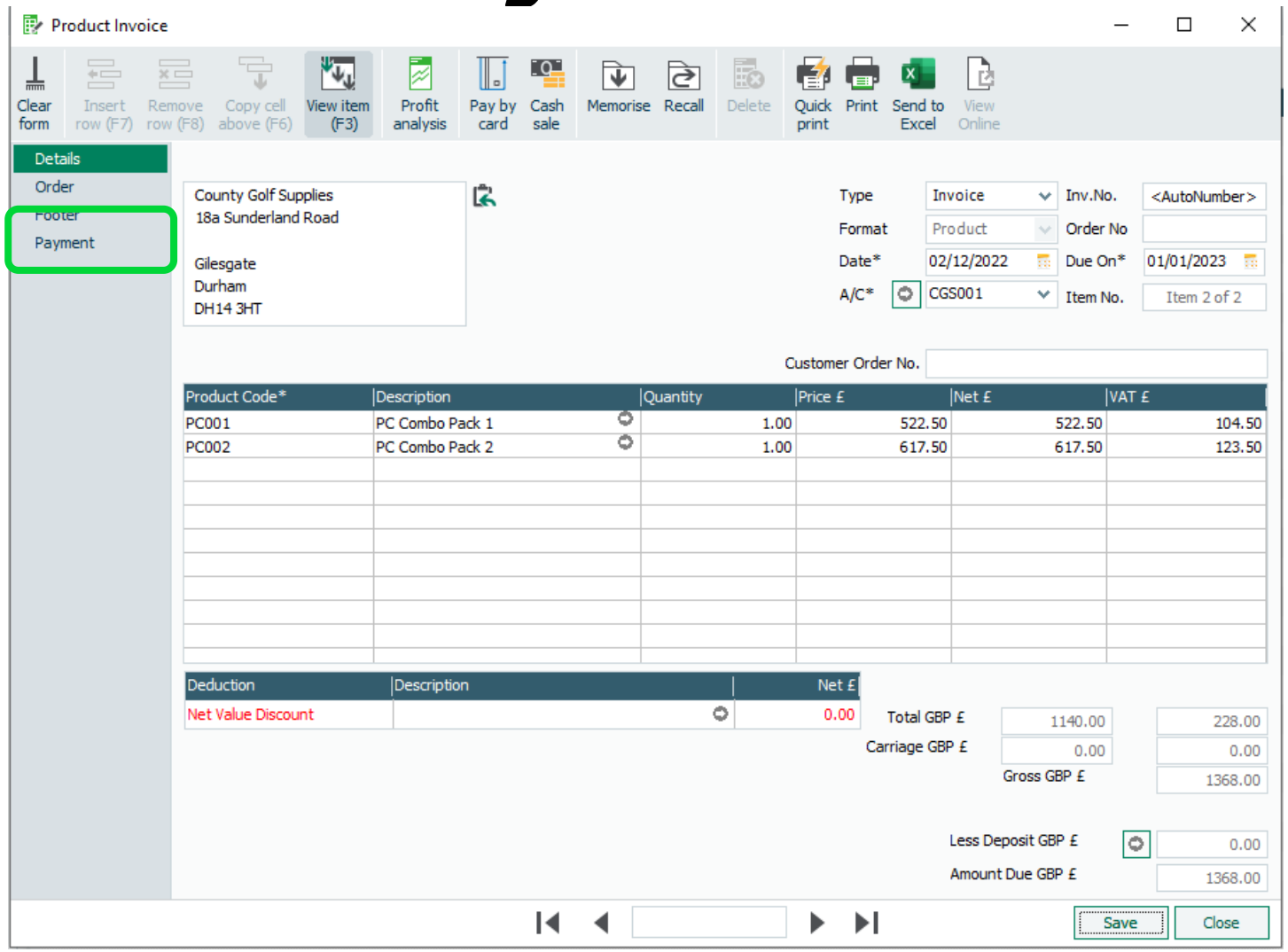
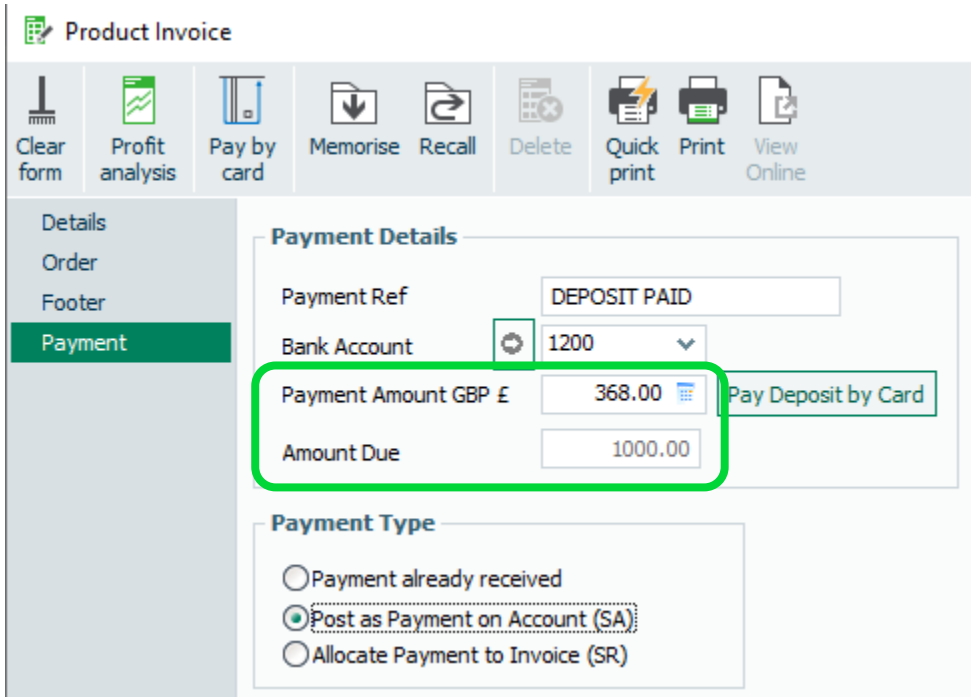
Invoice Payment Received



Same rules apply as either product or service invoice –

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



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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

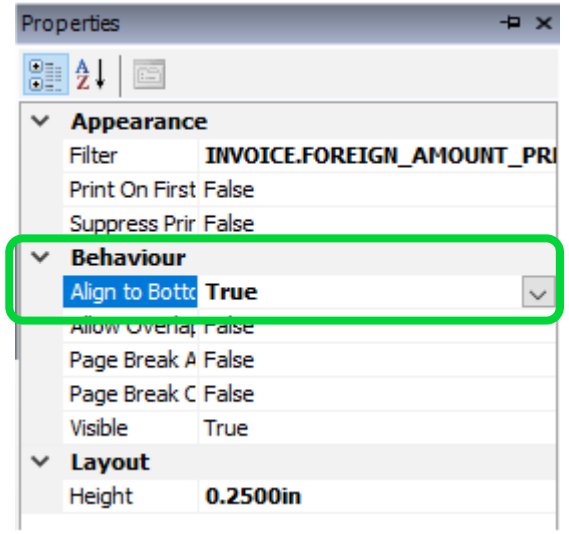
Amount Paid 368.00 **Amount Due** **1,000.00**

Deliver To :
County Golf Supplies
18a Sunderland Road

Gilesgate
Durham
DH14 3HT

Payment Due: 01/01/2023

Total Net Amount	£	1,140.00
Carriage Net	£	0.00
Total Tax Amount	£	228.00
Invoice Total	£	1,368.00



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

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Summary

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

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