

# Personalise your invoice layout

Tina Stewart

Sage



# Housekeeping

## Personalise your invoice layout

Tina Stewart



Questions

- Automatically Muted
- Submit your questions
- Download Handouts

Want answers?

Ask the staff a question

Exit Send

# Agenda

- **POLL – Do you currently print or email your invoices?**
- **Choosing the right invoice layout**
- **Creating a copy of your chosen layout**
- **Basic amendments**
  - Add company logo
  - Add text
  - Delete objects
  - Add data field
  - Draw box / line
- **Further support**

# Poll

**Do you currently print or email your customer invoices?**

- **PRINT – PLAIN PAPER**
- **PRINT – PRE-PRINTED STATIONERY**
- **EMAIL**
- **PRINT SOME / EMAIL SOME**
- **I'M NEW TO THIS SO NOTHING YET!**

# Choosing the right layout

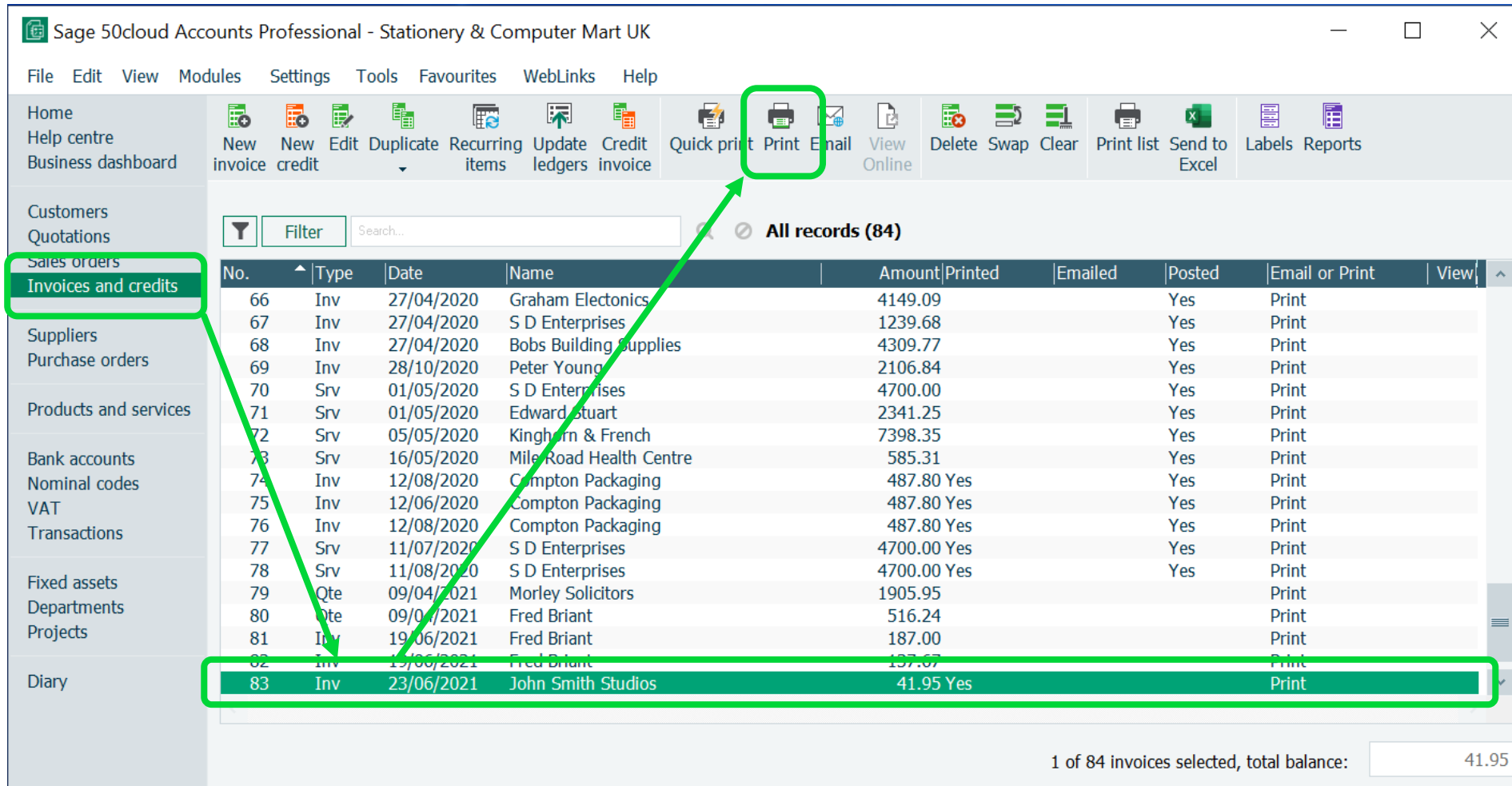


# Choosing the right layout

Things to consider when looking for the right layout: -

- Print or Email?
- Paper size – A4 or 11”?
- Discount?
- € values?
- Tax Breakdown?

# Accessing invoice layouts



Sage 50cloud Accounts Professional - Stationery & Computer Mart UK

File Edit View Modules Settings Tools Favourites WebLinks Help

Home Help centre Business dashboard

New invoice New credit Edit Duplicate Recurring items Update ledgers Credit invoice Quick print **Print** Email View Online Delete Swap Clear Print list Send to Excel Labels Reports

Customers Quotations

**Invoices and credits**

Suppliers Purchase orders

Products and services

Bank accounts Nominal codes VAT Transactions

Fixed assets Departments Projects

Diary

All records (84)

No.	Type	Date	Name	Amount	Printed	Emailed	Posted	Email or Print	View
66	Inv	27/04/2020	Graham Electronics	4149.09			Yes	Print	
67	Inv	27/04/2020	S D Enterprises	1239.68			Yes	Print	
68	Inv	27/04/2020	Bobs Building Supplies	4309.77			Yes	Print	
69	Inv	28/10/2020	Peter Young	2106.84			Yes	Print	
70	Srv	01/05/2020	S D Enterprises	4700.00			Yes	Print	
71	Srv	01/05/2020	Edward Stuart	2341.25			Yes	Print	
72	Srv	05/05/2020	Kinghorn & French	7398.35			Yes	Print	
73	Srv	16/05/2020	Mile Road Health Centre	585.31			Yes	Print	
74	Inv	12/08/2020	Compton Packaging	487.80	Yes		Yes	Print	
75	Inv	12/06/2020	Compton Packaging	487.80	Yes		Yes	Print	
76	Inv	12/08/2020	Compton Packaging	487.80	Yes		Yes	Print	
77	Srv	11/07/2020	S D Enterprises	4700.00	Yes		Yes	Print	
78	Srv	11/08/2020	S D Enterprises	4700.00	Yes		Yes	Print	
79	Qte	09/04/2021	Morley Solicitors	1905.95				Print	
80	Qte	09/04/2021	Fred Briant	516.24				Print	
81	Inv	19/06/2021	Fred Briant	187.00				Print	
82	Inv	19/06/2021	Fred Briant	187.00				Print	
83	Inv	23/06/2021	John Smith Studios	41.95	Yes			Print	

1 of 84 invoices selected, total balance: 41.95

- Invoices and Credits
- Select invoice(s) to print
- Print

# Filter layouts list

The screenshot shows the 'Layouts' application window. At the top, there is a toolbar with icons for New, Edit, Delete, Preview, Print, Export, Report to Excel, Data to Excel, and Email. A 'Filters' dropdown menu is open, showing options: 'A4 plain paper & en', 'All', '11" paper', 'A4 paper', 'A4 plain paper & en', 'Commercial Invoice', and 'Email'. The 'A4 plain paper & en' option is highlighted. Below the toolbar, there is a 'Favourites' sidebar with 'Layouts' selected. The main area is titled 'Layouts' and contains a table with columns: Name, Description, Last Run, and Filename. The table lists several layout entries, each with a star icon in the Name column. The last row of the table has a toolbar with icons for Preview, Print, Export, Report to Excel, Data to Excel, and Email, which is highlighted with a green box.

Name	Description	Last Run	Filename
★ A4 Commercial invoice - Plain Paper (Print or Email)	Designed to be emailed or printed on plain paper. A template including additional information which may be required for a commercial invoice.		COMINVPLAINA4
★ A4 Inv Settlement Discount - Plain Paper (Print or Email)	Designed to be emailed or printed on plain paper. Includes discount amounts and the settlement discount details. To be sent via post or email.		INVSETTPLAINA4
★ A4 Inv\Crd Discount - Plain Paper (Print or Email)	Designed to be emailed or printed on plain paper. Includes discount amounts in addition to the standard contents. To be sent via post or email.		INVDISPLAINA4
★ A4 Inv\Crd Without Discount - Plain Paper (Print or Email)	Designed to be emailed or printed on plain paper. No discount values are included. To be sent via post or email.		

Apply a filter to limit the layouts shown on screen

See how a layout will look by hovering over printer/magnifying glass



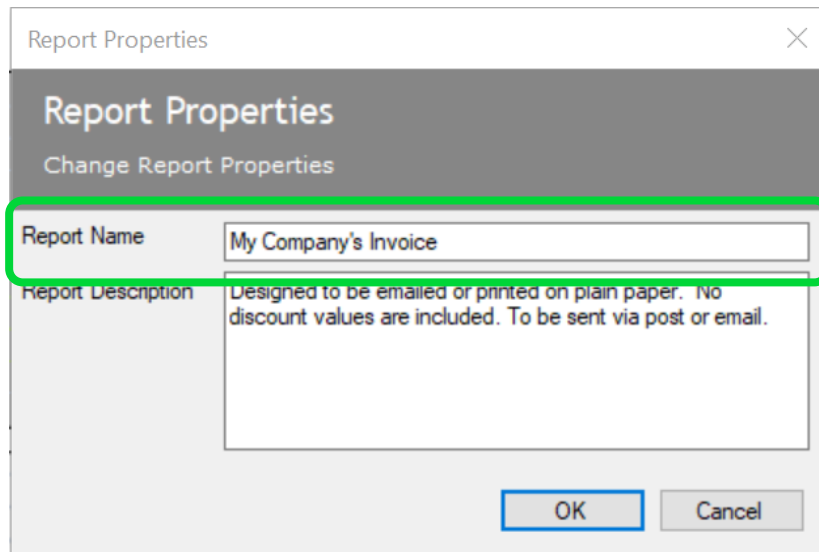
# Creating a copy of your chosen layout



# Creating a copy of a layout

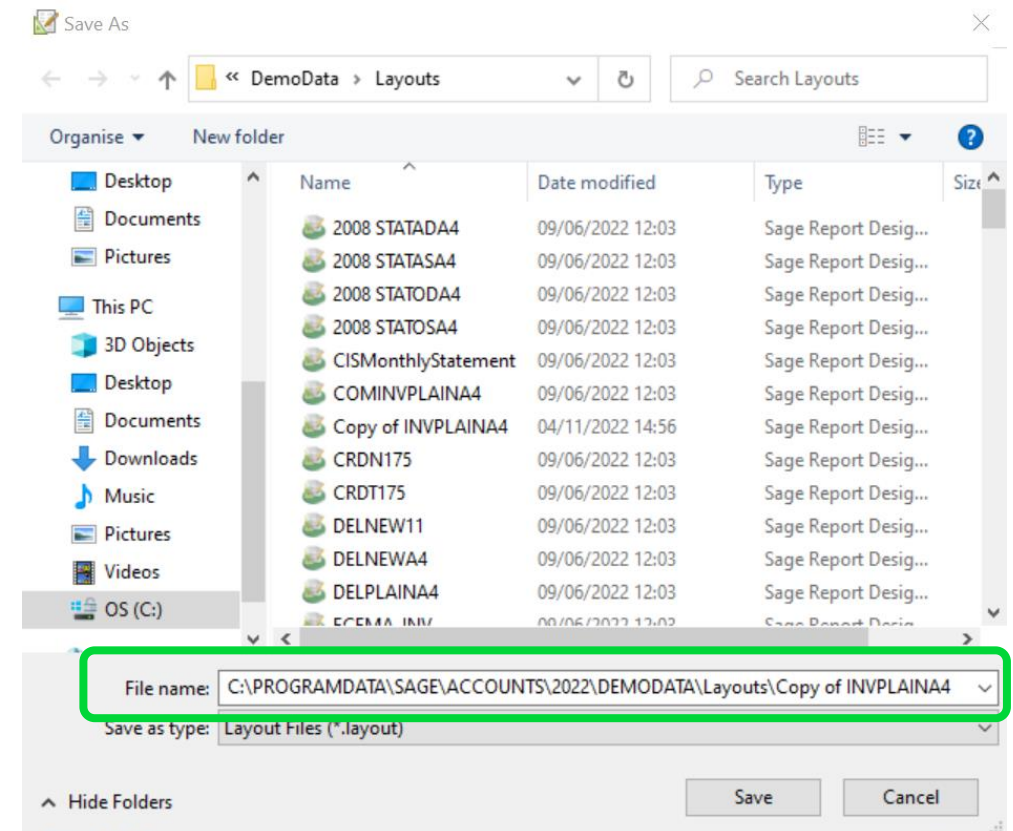
To change the **name** of the layout: -

- Report > Report Properties > change Report Name > OK



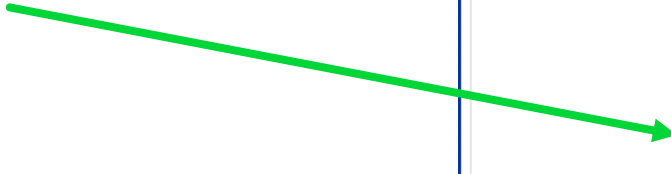
To change the **filename** of the layout: -

- File > Save As > either change filename or leave as “Copy of...” > Save



# Favourites

Click the star to the left of any invoice layout....



Layouts

New Edit Delete Preview Print Export Report Data Email Filters A4 plain paper £

**Favourites**

**Layouts**

Use these layouts to print out or email. Each group of layouts typically contains the same information, with certain layouts containing extra detail or designed for different types of paper and uses.

Name	Description	Last Run	Filename
★ M Company's Invoice	Designed to be emailed or printed on plain paper. No discount values are included. To be sent via post or email.	04/11/2022 14:56	COPY OF INVPLAINA4
★ A4 Inv\Crđ Without Discount - Plain Paper (Print or Email)	Designed to be emailed or printed on plain paper. No discount values are included. To be sent via post or email.		INVPLAINA4

Layouts

New Edit Delete Preview Print Export Report Data Email Filters All

**Favourites**

**Favourites**

Add the documents that you use most often to Favourites to access and generate them quickly. Documents are added and removed by clicking the star icon. You can drag and drop your favourites into any order you want.

Name	Description	Last Run	Filename
★ My Company's Invoice	Designed to be emailed or printed on plain paper. No discount values are included. To be sent via post or email.	04/11/2022 14:56	COPY OF INVPLAINA4

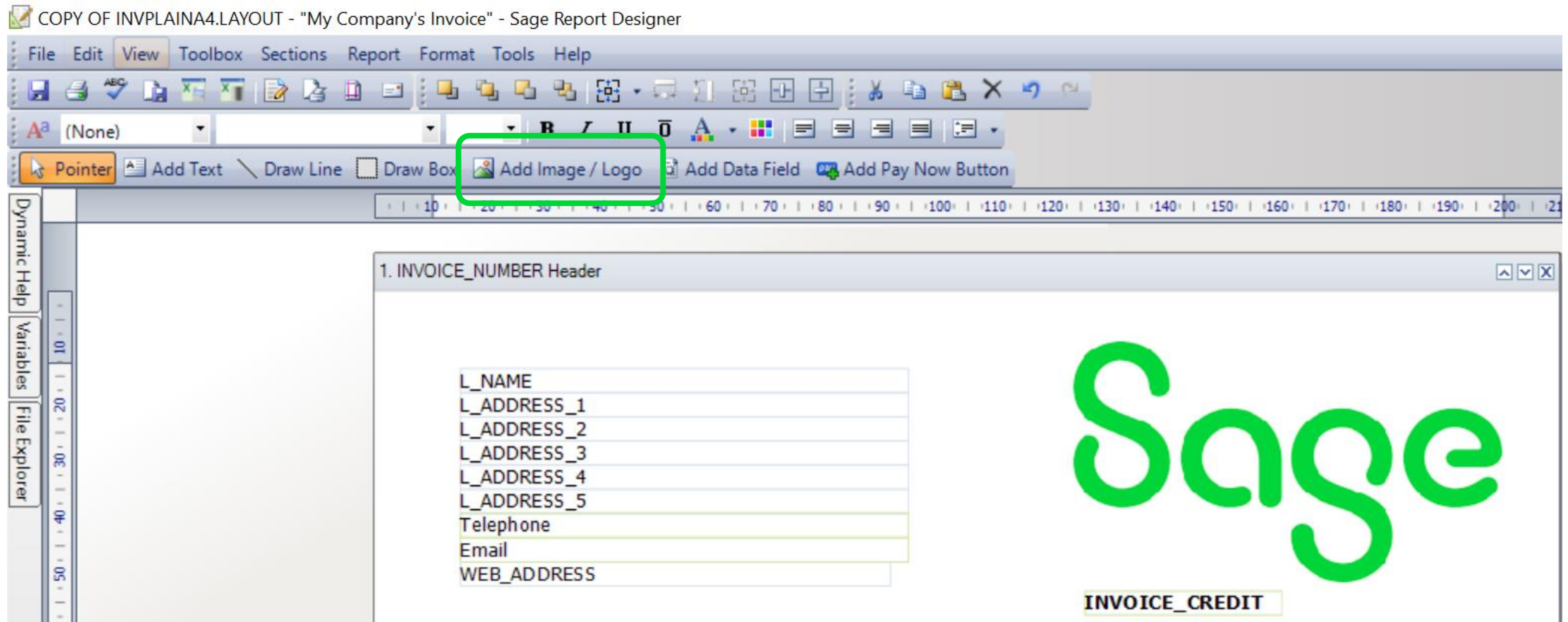
....to show it as a Favourite, for easy access

# Typical amendments



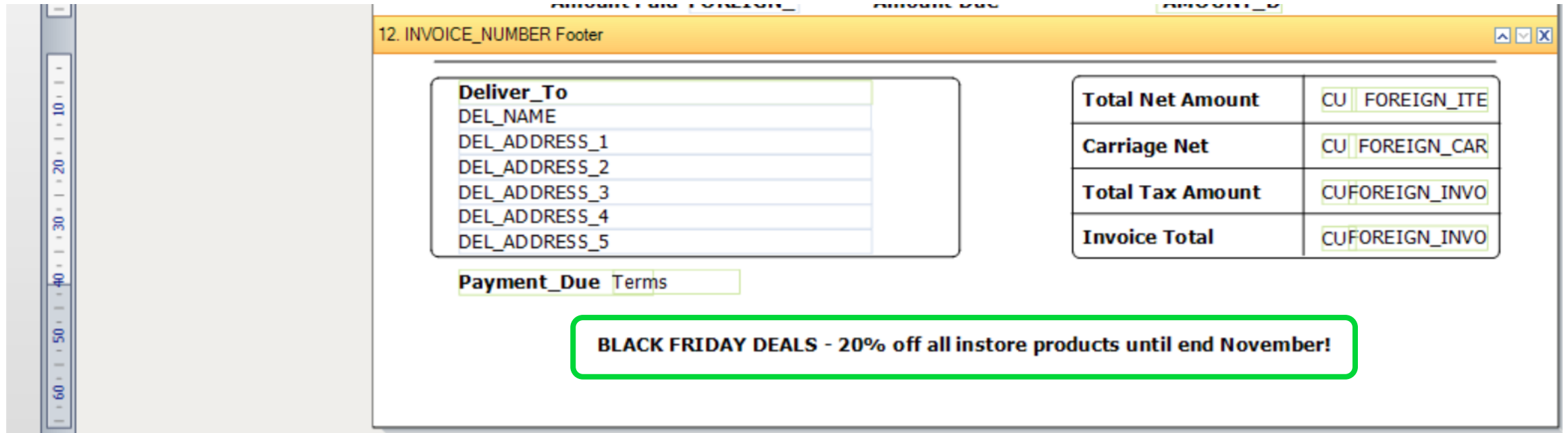
# Adding a logo

Add Image/Logo > draw box to size of logo > OK > browse to logo and select > Open



# Adding a text box

Add Text > click once to add box > start typing > click away when done



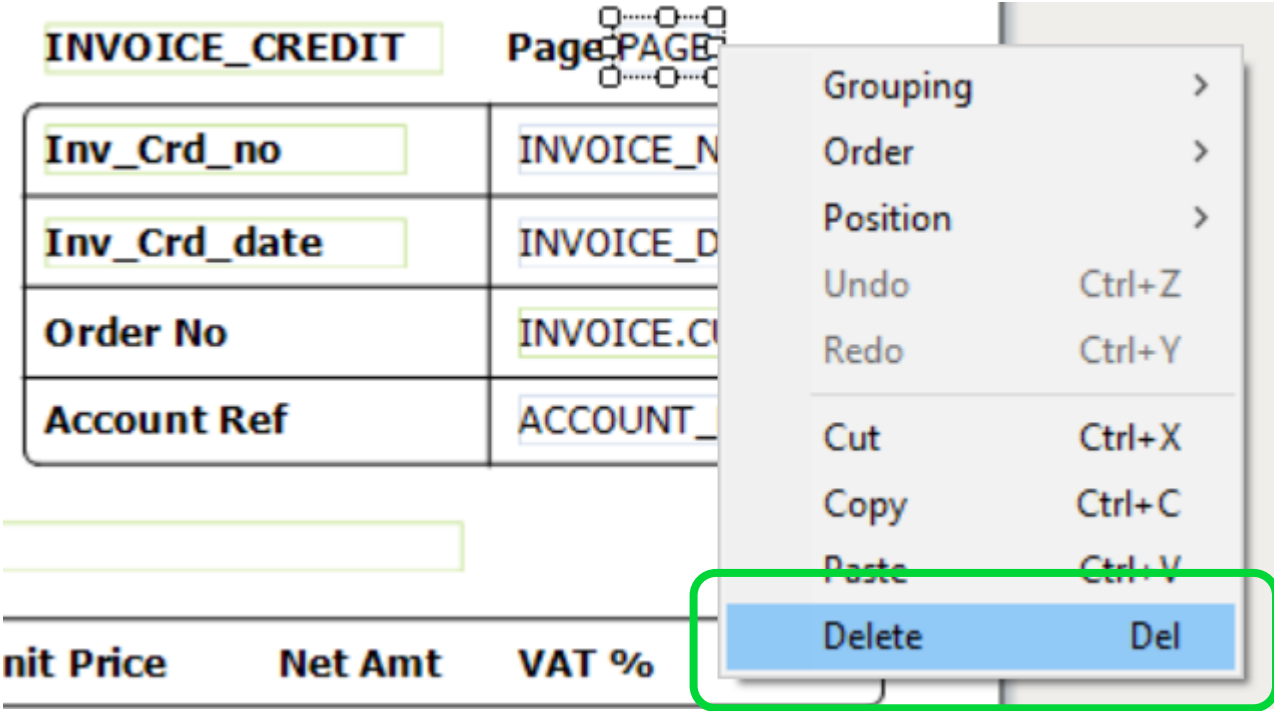
To change font, size etc; -

- Click on text box and change font, size etc from formatting toolbar



# Deleting objects

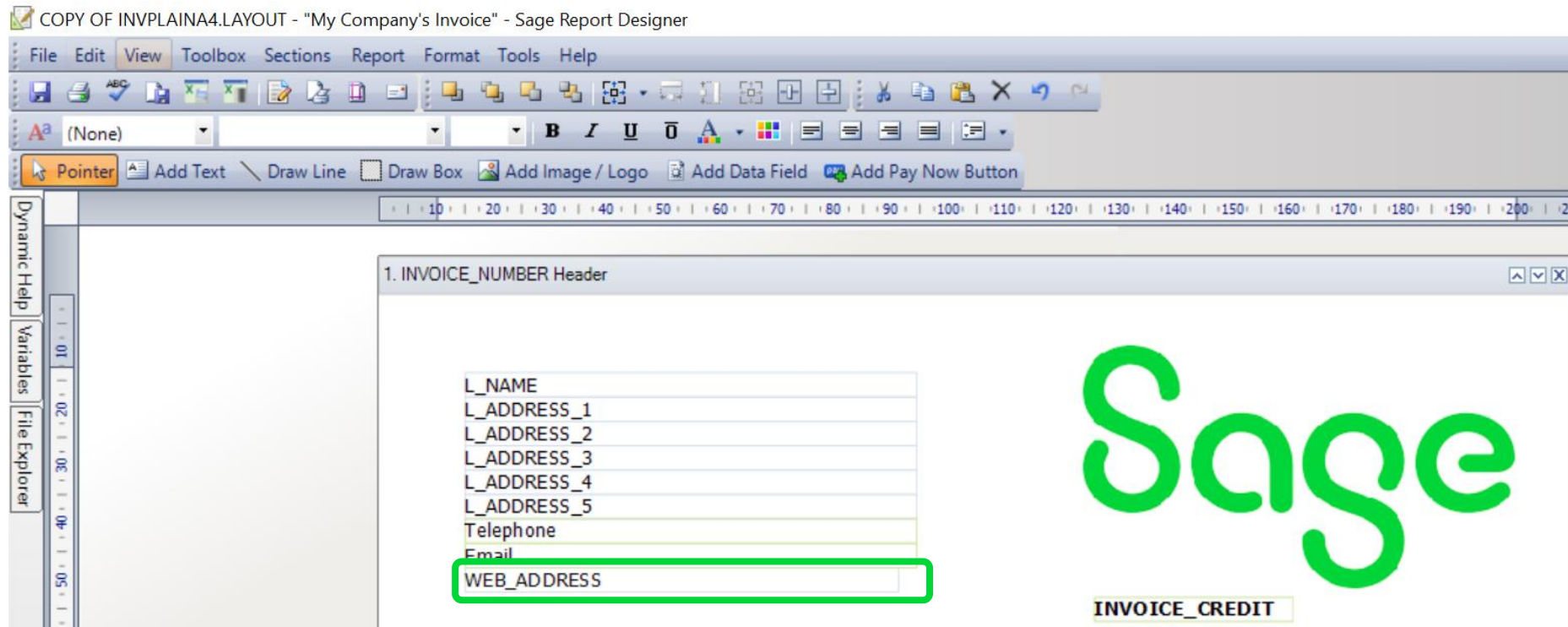
Select object > press delete key on keyboard, **or** select object > right click > Delete



# Adding a data field (aka variable)

Tables and Variables Help Centre article

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





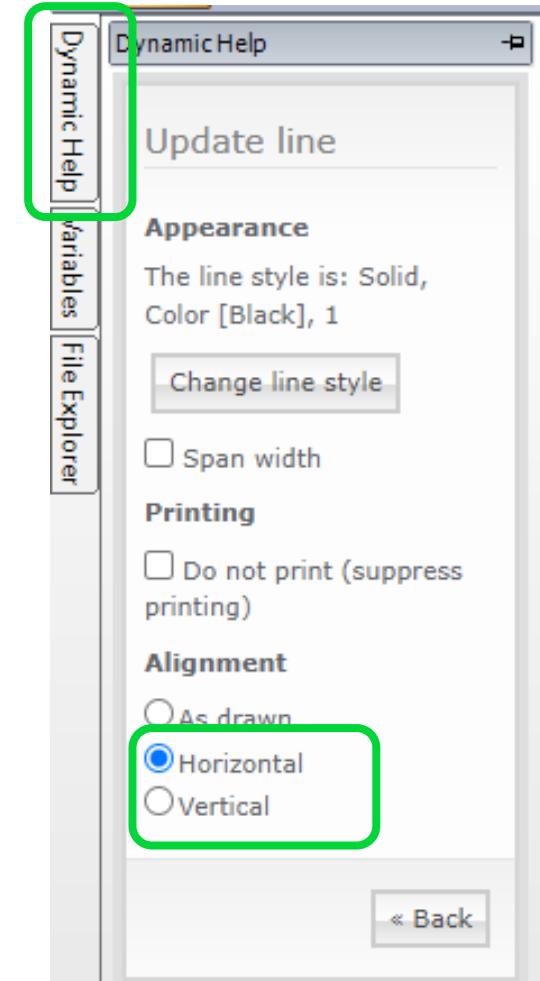
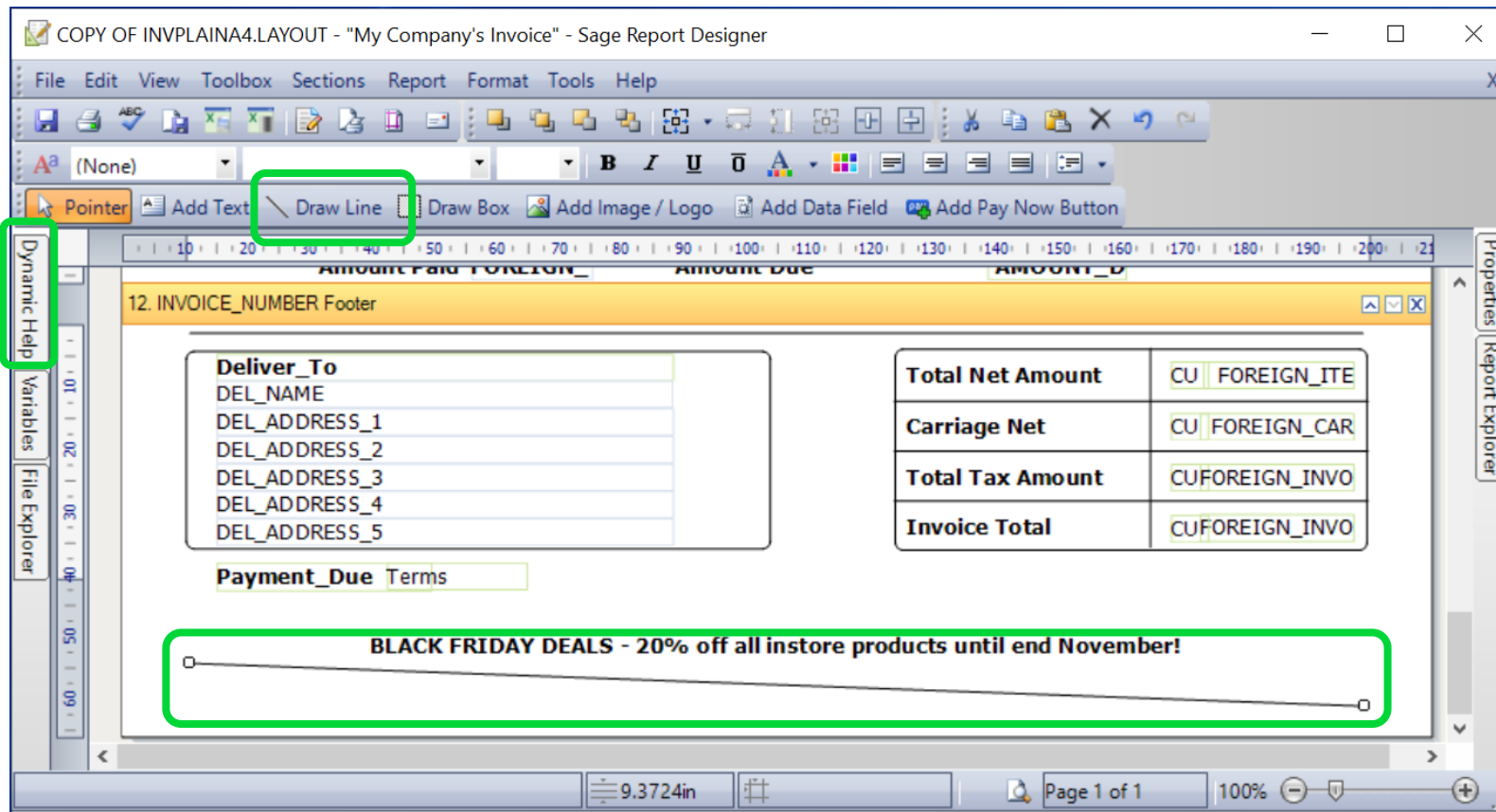
# Adding a box

Draw Box > draw box to size > can change background and border in Properties panel

The screenshot displays the Sage Report Designer interface. The title bar reads "COPY OF INVPLAINA4.LAYOUT - 'My Company's Invoice' - Sage Report Designer". The menu bar includes File, Edit, View, Toolbox, Sections, Report, Format, Tools, and Help. The toolbar contains various icons, with the "Draw Box" icon highlighted by a green box. The main workspace shows a report layout with a yellow header section labeled "1. INVOICE\_NUMBER Header". Below the header is a gray box containing the following text fields: L\_NAME, L\_ADDRESS\_1, L\_ADDRESS\_2, L\_ADDRESS\_3, L\_ADDRESS\_4, L\_ADDRESS\_5, Telephone, Email, and WEB\_ADDRESS. To the right of the gray box is the Sage logo in green, and below it is the text "INVOICE\_CREDIT". The Properties panel on the right side of the screen is open, showing the "Appearance" section. The "Background" property is set to "Solid Colour [LightGray]" and the "Border" property is set to "(Border style)". Both the "Draw Box" icon in the toolbar and the "Background" and "Border" properties in the Properties panel are highlighted with green boxes.

# Adding a line

Draw Line > draw box to size > can straighten it up in Dynamic Help panel



# Summary / Tops Tips

- Filter layouts list / Hover to preview
- Save As / Add to Favourites
- Make changes
- Save as you go!
- Adding data fields? – Tables and Variables article
- Same rules apply across all layouts!

## Further Support

[Tables and Variables](#)

[Sage Help Centre](#)

[Layouts Only Backup](#)

[Sage Report Design Service](#)

# Upcoming Webinars

## Upcoming

Chart of Accounts

Additional Reports Library

CIS - General

Month End

**\*\*New\*\* Report Designer –  
Introducing Groups & Sorts**

CIS – Domestic Reverse  
Charge

Journals and Corrections

## Key Topics

### **INTERNATIONAL ACCOUNTING DAY 2022** **Thursday 10 November**

Join us for the following sessions: -

**11am** – Sage Membership

**2pm** – Management Reports

**3pm** – Accounts Quiz

# Thank you!

Please take a minute to complete the short exit survey as you leave.

You'll receive a follow-up email with links to register for future webinars  
and watch recordings later today.

