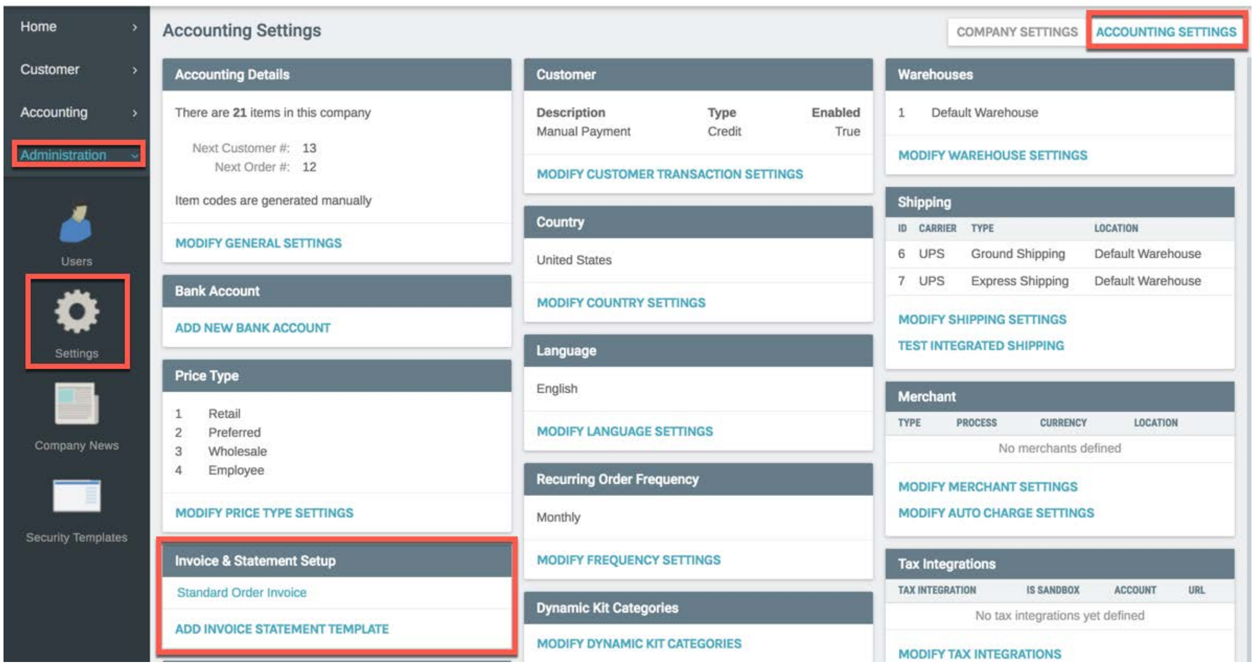
Invoices:

Create a New Invoice Template

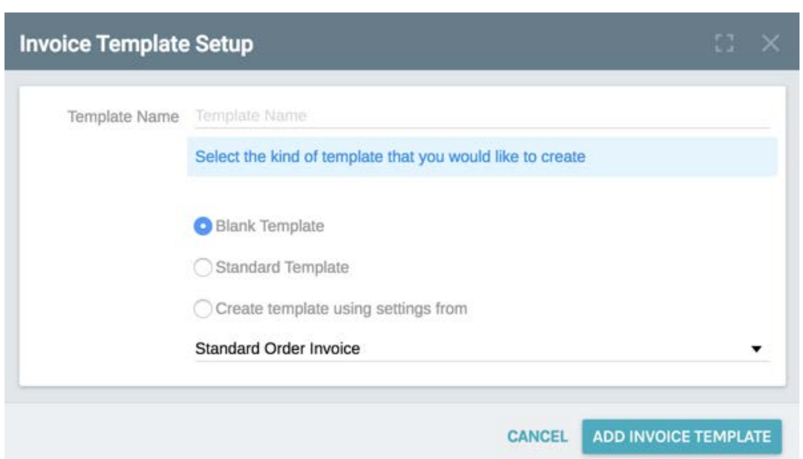
v 1.0

CREATING A NEW INVOICE TEMPLATE

1. Log in to Exigo.com.
2. Go to Administration > Settings > Accounting Settings > Invoice & Statement Setup

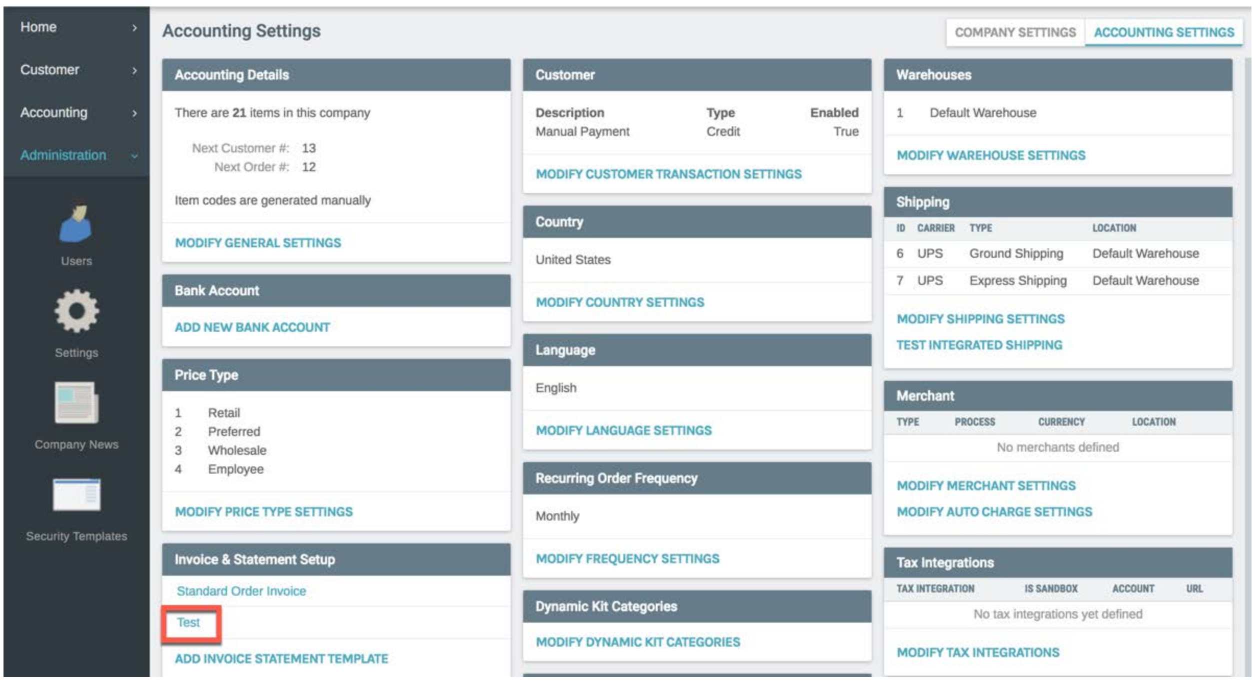


3. Click on “ADD INVOICE STATEMENT TEMPLATE”.



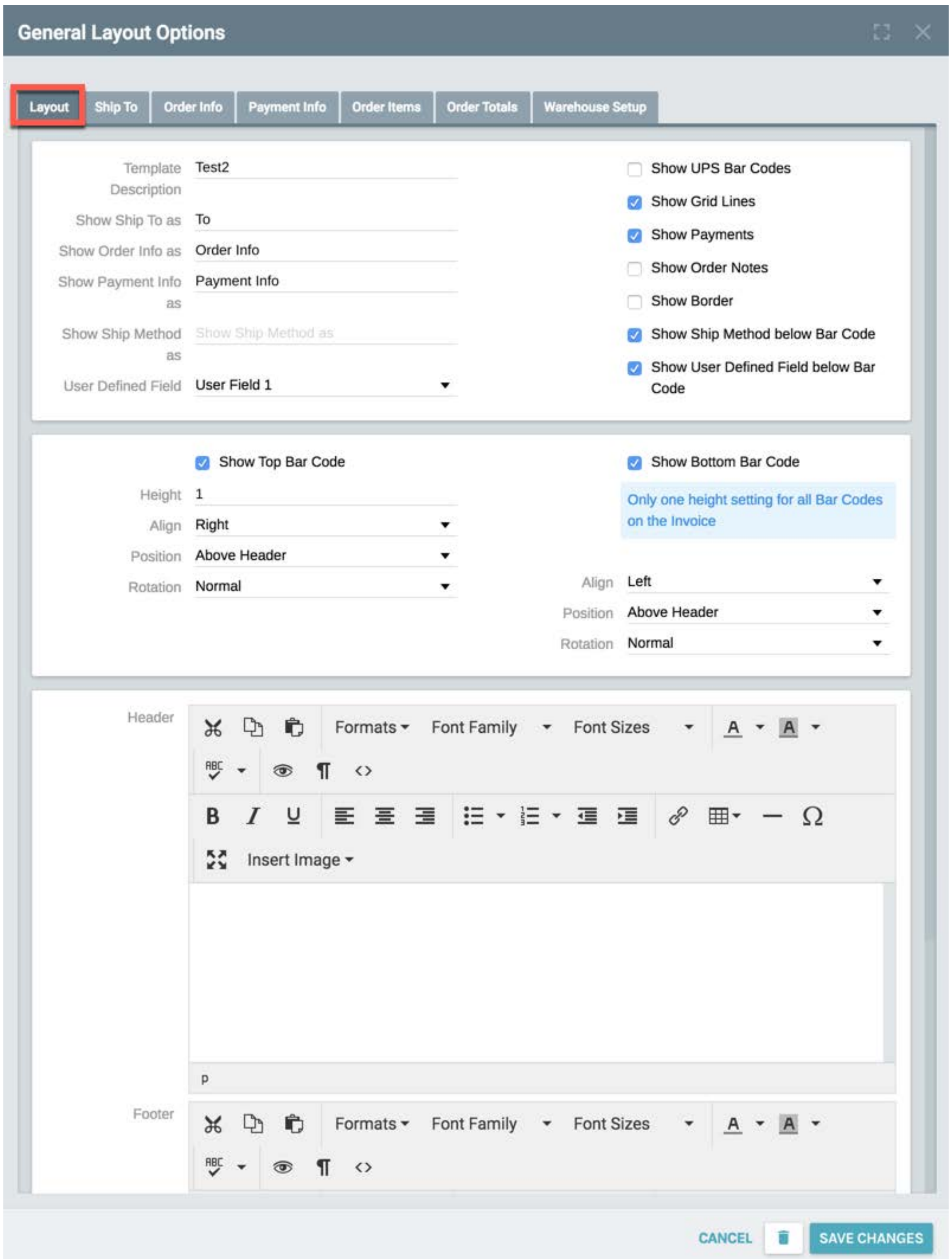
4. Enter a Name for the New Invoice Template (This name will be displayed in the Settings Section.

5. Choose the type of Template:
    a. Blank Template = Create a Template using no pre-populated fields.
    b. Standard Template = Create a Template using the most common pre-populated fields.
    c. Create Template Using Settings From = Create a Template based on another template in the drop down list.
6. Choose Standard Template.
7. Click “ADD INVOICE TEMPLATE”.
8. The Invoice & Statement Template Setup Section will now contain the newly created template.
9. Click on the newly created invoice (Test).



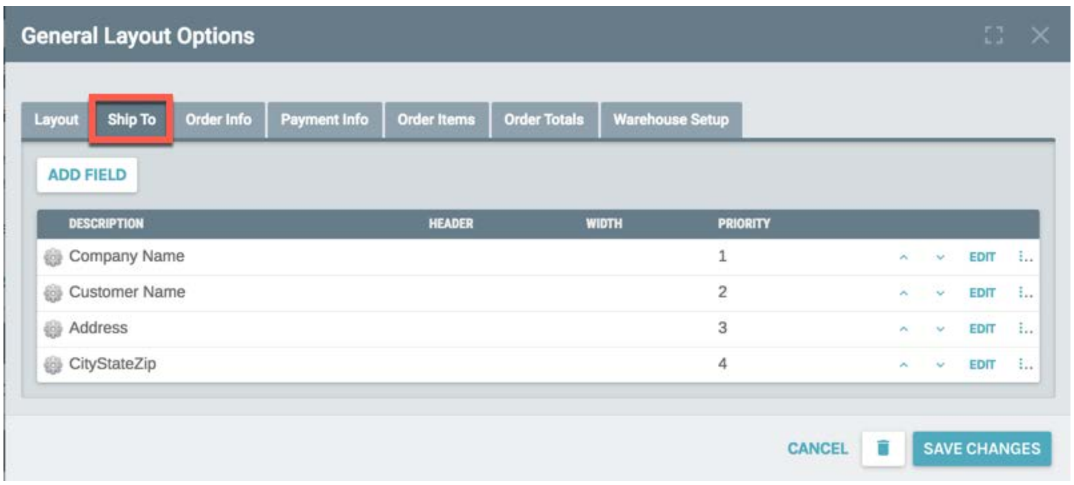
TO SET UP A BASIC INVOICE TEMPLATE:

1. Click on the Layout Tab.

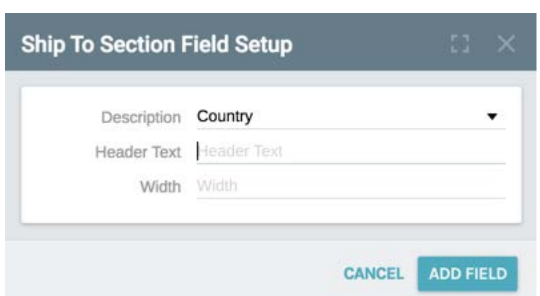


2. The top two sections are pre-populated with the most common settings.

3. The Company information such as logos, contact information, slogans, etc., may be inserted into the Header and/or Footer sections. Common editing options are available to edit fonts and the display.
4. Click on the Ship To Tab.

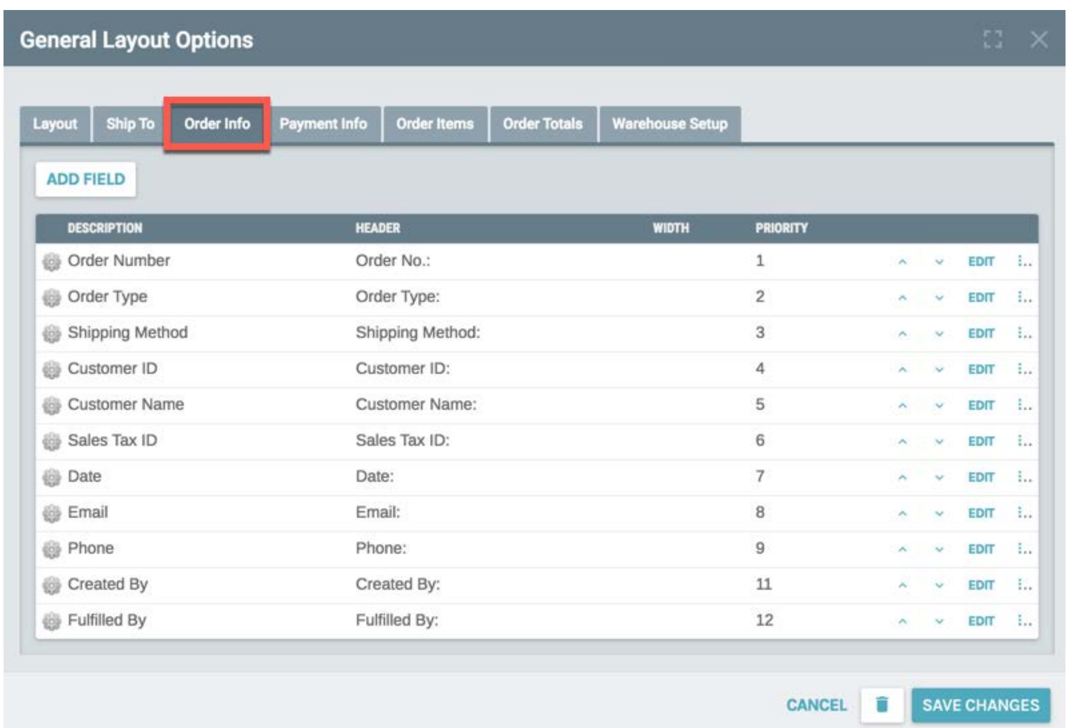


5. This section contains the Ship To Address information displayed on the invoice. The most common fields are pre-populated.
6. To add another field, Click “ADD FIELD”.
7. Click Drop Down arrow on the Description field to display a list of all available fields for this section.
8. Click “ADD FIELD”.

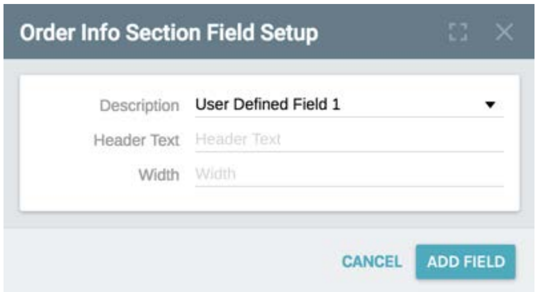


9. To Delete any field, Click the Vertical Ellipses then Click Delete.

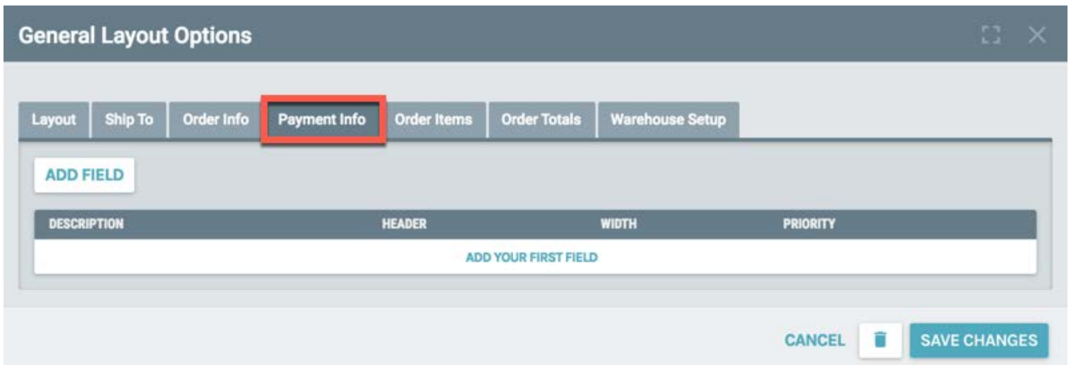
10. Click on the Order Info Tab.
11. This section contains the basic Order Information such as Order Number, Customer Name, and Contact Information. The most common fields are pre-populated.



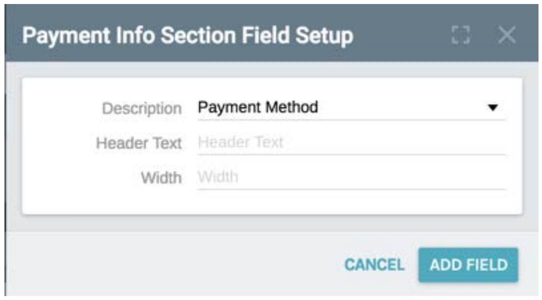
12. To add another field, Click “ADD FIELD”.
13. Click Drop Down arrow on the Description field to display a list of all available fields for this section.
14. Click “ADD FIELD”.



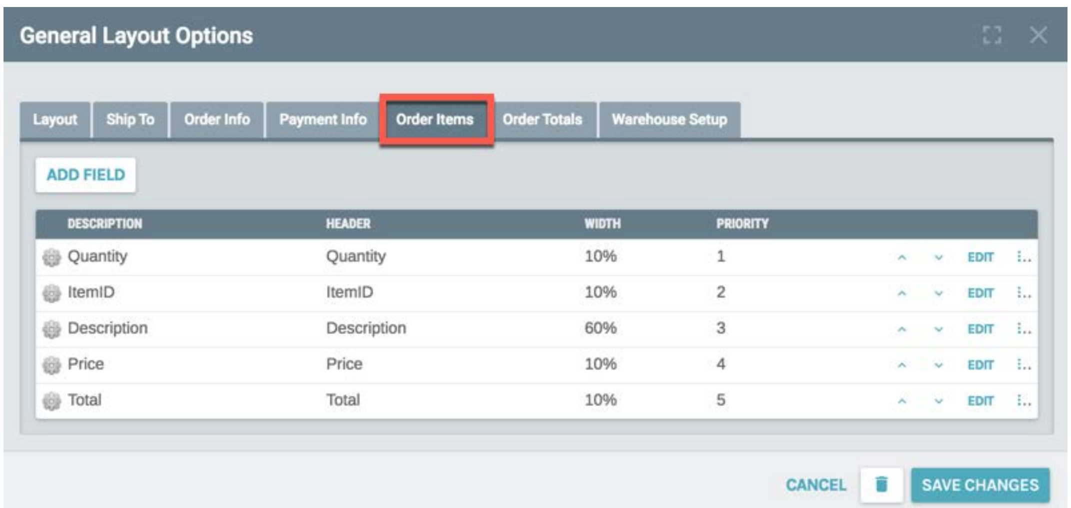
15. Click on the Payment Info Tab.
16. This section contains the order payment information.



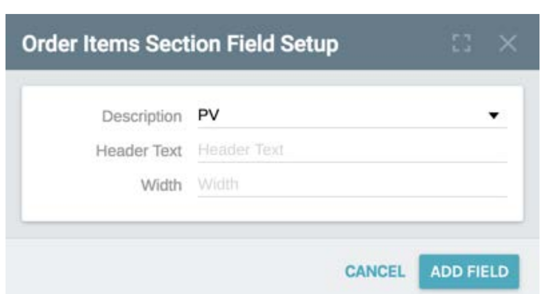
17. Click “ADD FIELD”.
18. Use the dropdown list to choose available fields.
19. Click “ADD FIELD”.



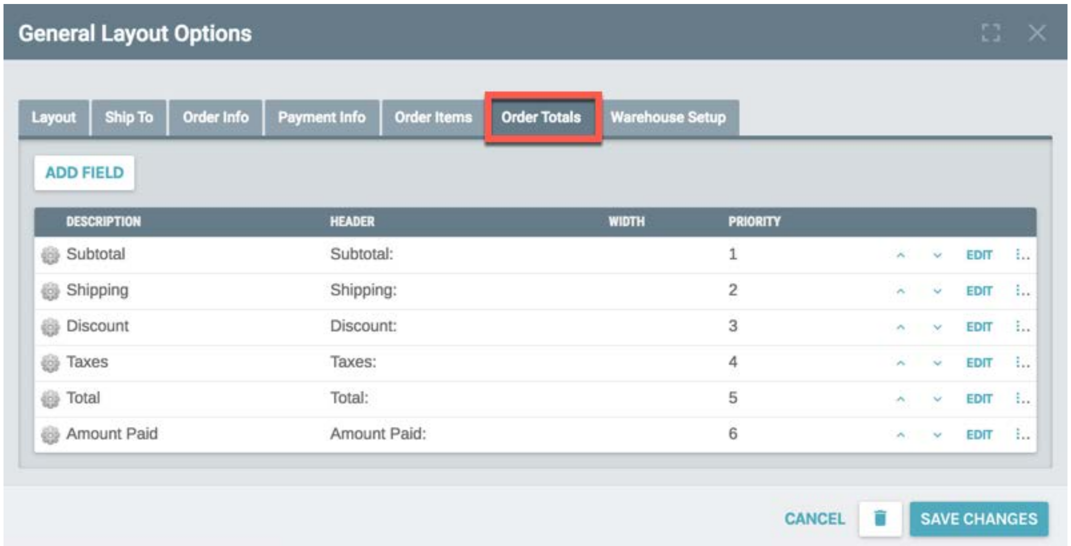
20. Click on the Order Items Tab.
21. This section contains the product detail from the Order. The most common fields are pre-populated.



22. To add another field, Click "ADD FIELD".
23. Click Drop Down arrow on the Description field to display a list of all available fields for this section.
24. Click "ADD FIELD".

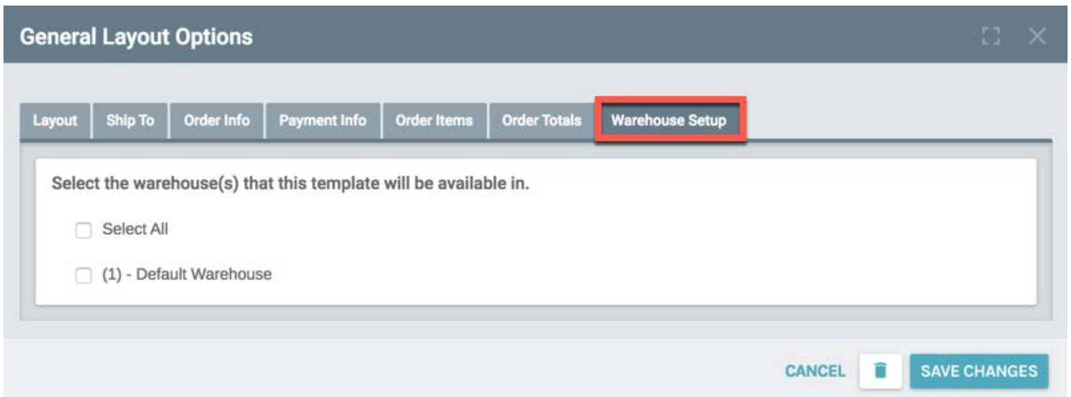


25. Click on the Order Totals Tab.
26. This section contains information about the totals, taxes, and shipping for the Order. The most common fields are pre-populated.



27. To add another field, Click "ADD FIELD".
28. Click Drop Down arrow on the Description field to display a list of all available fields for this section.
29. Click "ADD FIELD".

30. Click on Warehouse Setup Tab.
31. From the list, choose the Warehouse or multiple Warehouses to which this template will be made available. A template can only be used at a specific Warehouse if that Warehouse is selected here.



32. Click “SAVE CHANGES”.