



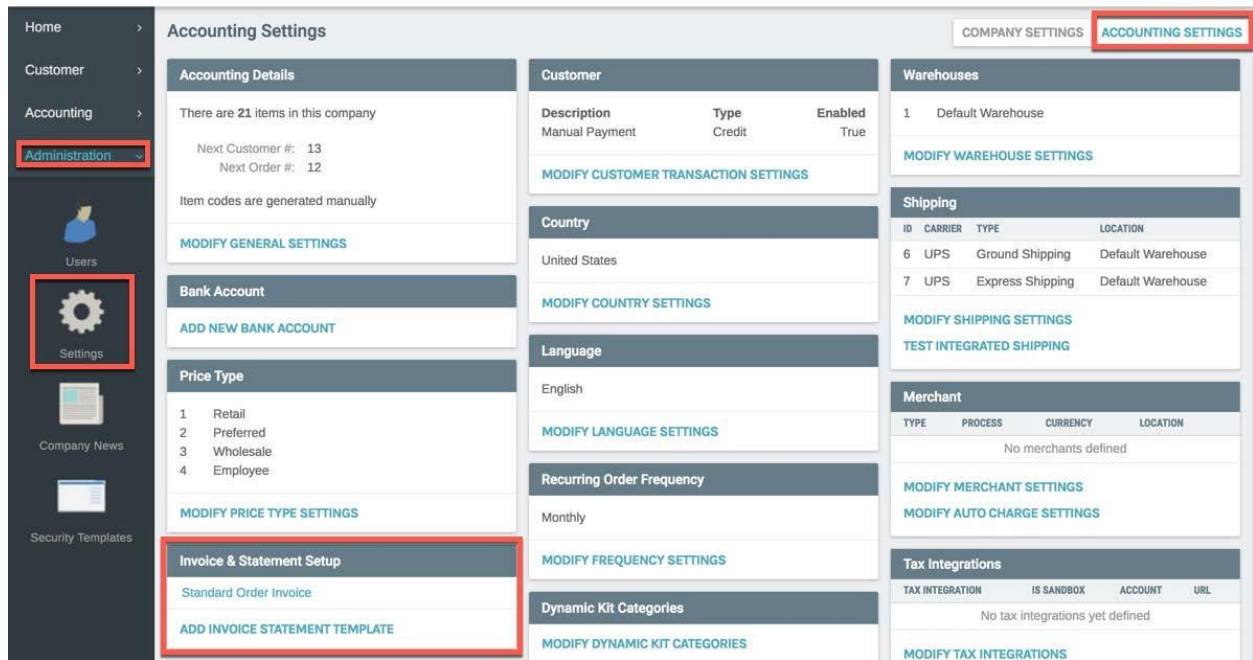
**Invoices:**

# **Create a New Invoice Template**

v 1.1

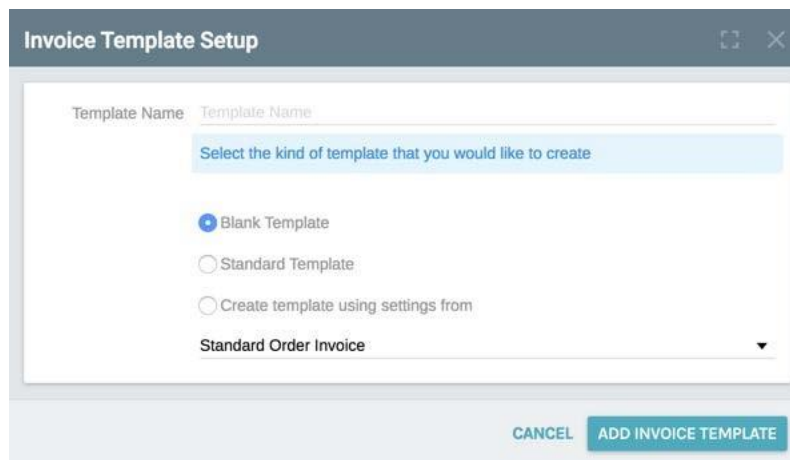
## CREATING A NEW INVOICE TEMPLATE

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



The screenshot shows the Exigo Accounting Settings interface. The left sidebar has 'Administration' and 'Settings' highlighted. The main content area shows 'Accounting Settings' with various sections: Accounting Details, Customer, Warehouses, Shipping, Merchant, and Tax Integrations. The 'Invoice & Statement Setup' section is highlighted with a red box, containing a link for 'Standard Order Invoice' and a button for 'ADD INVOICE STATEMENT TEMPLATE'.

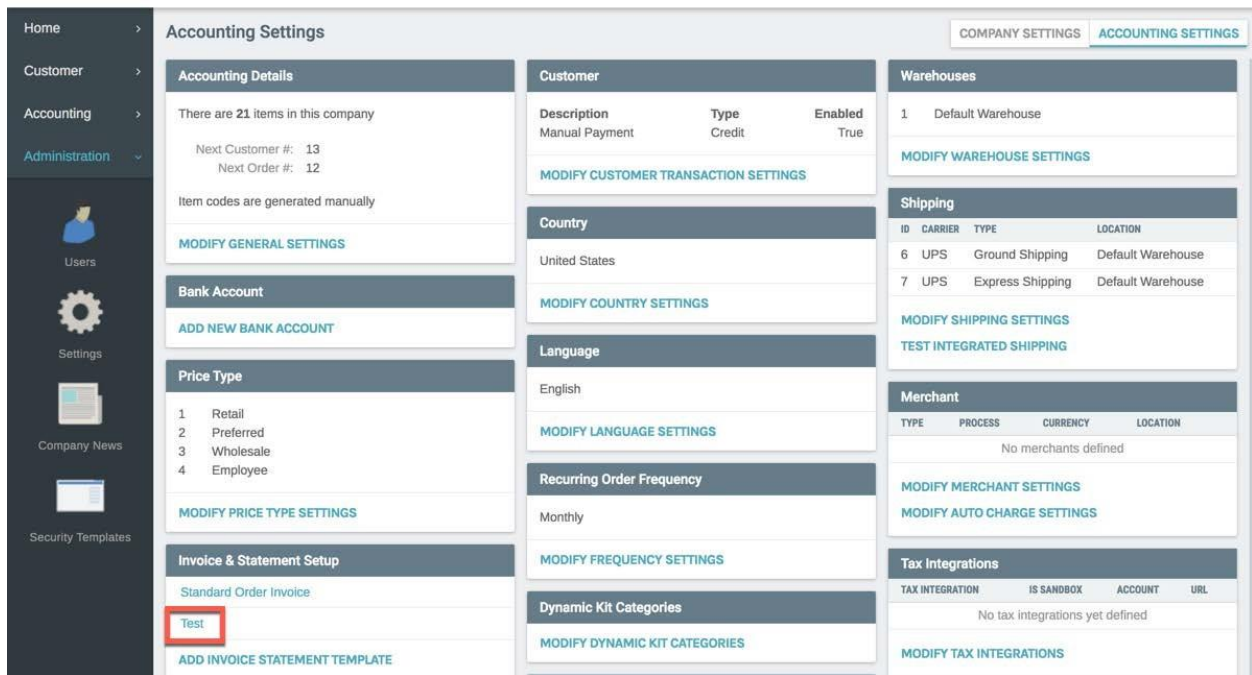
3. Click on “ADD INVOICE STATEMENT TEMPLATE”.



The 'Invoice Template Setup' dialog box contains the following elements:

- Template Name:
- Select the kind of template that you would like to create
- Blank Template
- Standard Template
- Create template using settings from
- Standard Order Invoice
- CANCEL
- ADD INVOICE 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).



The screenshot shows the 'Accounting Settings' page in the Exigo system. The left sidebar contains navigation options: Home, Customer, Accounting, Administration, Users, Settings, Company News, and Security Templates. The main content area is titled 'Accounting Settings' and is divided into several sections:

- Accounting Details:** Shows 'There are 21 items in this company', 'Next Customer #: 13', 'Next Order #: 12', and 'Item codes are generated manually'. Includes a 'MODIFY GENERAL SETTINGS' link.
- Bank Account:** Includes an 'ADD NEW BANK ACCOUNT' link.
- Price Type:** Lists four types: 1 Retail, 2 Preferred, 3 Wholesale, 4 Employee. Includes a 'MODIFY PRICE TYPE SETTINGS' link.
- Invoice & Statement Setup:** Contains a table with the following data:
 

Template Name	Type
Standard Order Invoice	
Test	

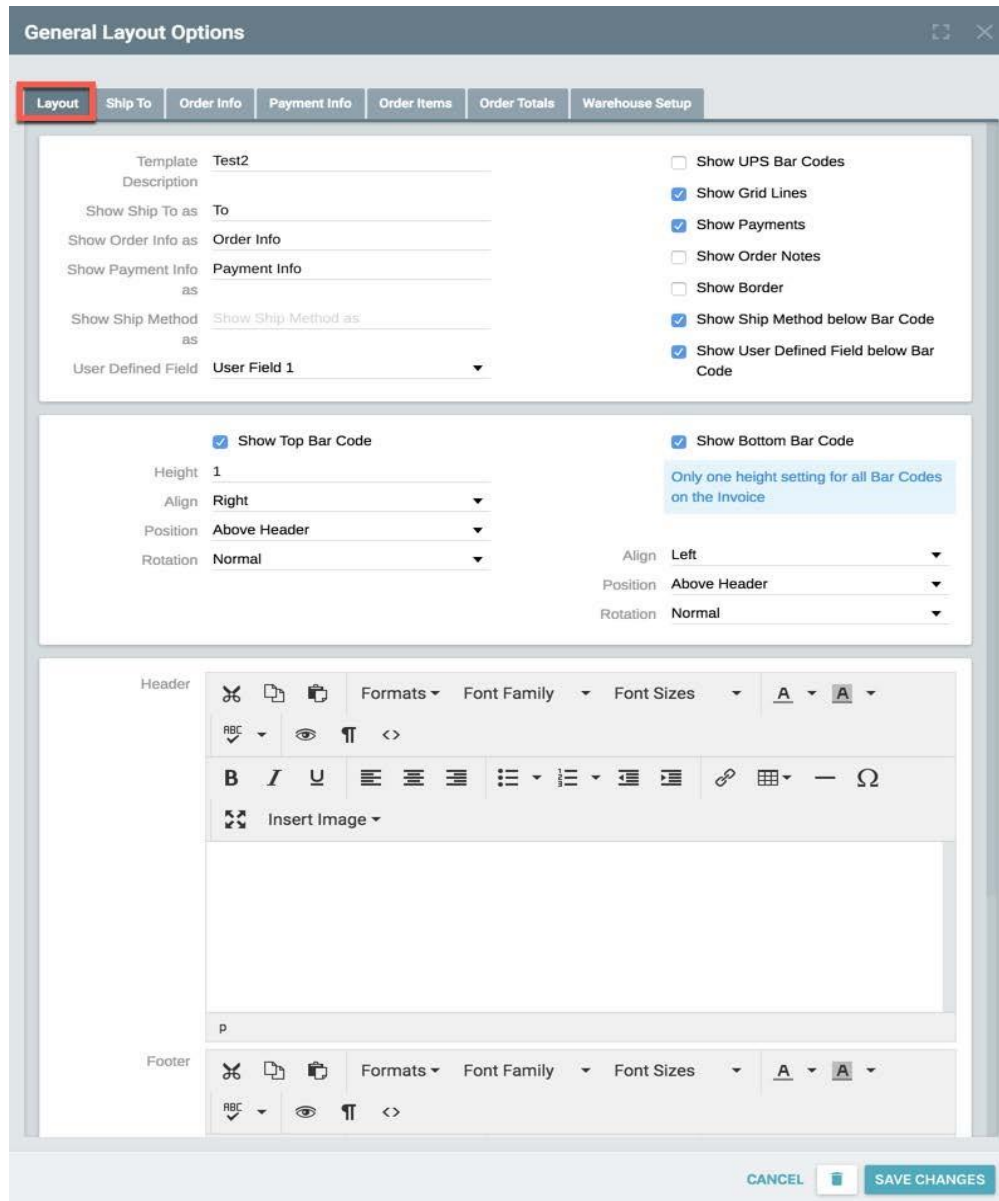
 Includes an 'ADD INVOICE STATEMENT TEMPLATE' link.
- Customer:** Shows 'Description: Manual Payment', 'Type: Credit', and 'Enabled: True'. Includes a 'MODIFY CUSTOMER TRANSACTION SETTINGS' link.
- Country:** Shows 'United States'. Includes a 'MODIFY COUNTRY SETTINGS' link.
- Language:** Shows 'English'. Includes a 'MODIFY LANGUAGE SETTINGS' link.
- Recurring Order Frequency:** Shows 'Monthly'. Includes a 'MODIFY FREQUENCY SETTINGS' link.
- Dynamic Kit Categories:** Includes a 'MODIFY DYNAMIC KIT CATEGORIES' link.
- Warehouses:** Shows a table with one row: '1 Default Warehouse'. Includes a 'MODIFY WAREHOUSE SETTINGS' link.
- Shipping:** Shows a table with two rows:
 

ID	CARRIER	TYPE	LOCATION
6	UPS	Ground Shipping	Default Warehouse
7	UPS	Express Shipping	Default Warehouse

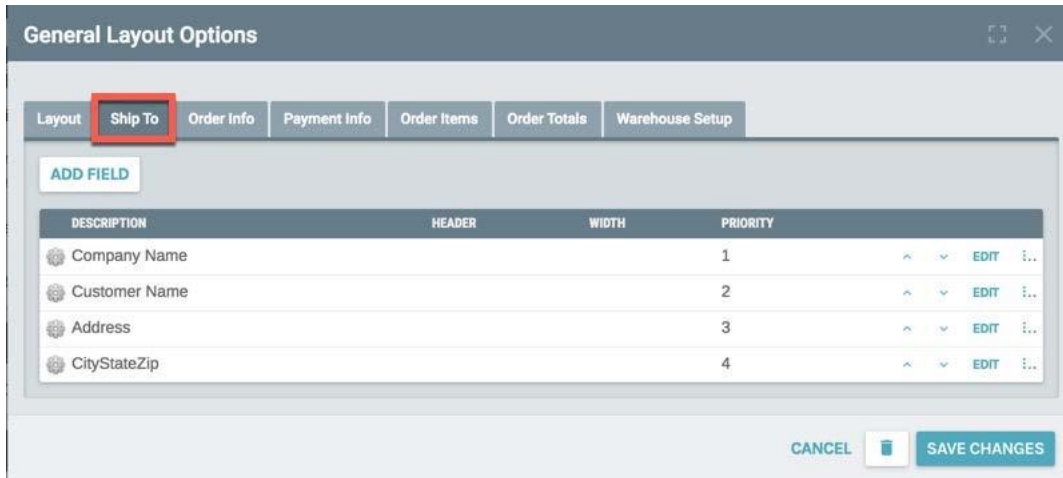
 Includes 'MODIFY SHIPPING SETTINGS' and 'TEST INTEGRATED SHIPPING' links.
- Merchant:** Shows 'No merchants defined'. Includes 'MODIFY MERCHANT SETTINGS' and 'MODIFY AUTO CHARGE SETTINGS' links.
- Tax Integrations:** Shows 'No tax integrations yet defined'. Includes a 'MODIFY TAX INTEGRATIONS' link.

**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.



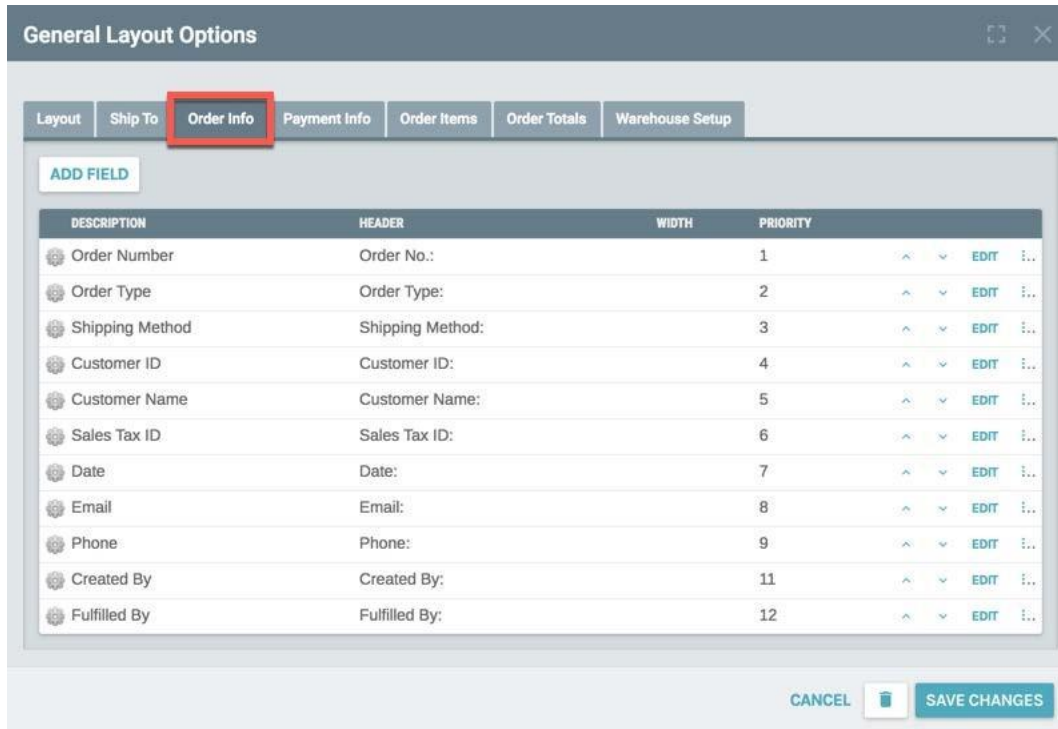
5. This section contains the Ship to Address information displayed on the invoice. The most common fields are pre-populated.
6. To add another field, click “ADD FIELD”.
7. Click Drop Down arrow on the Description field to display a list of all available fields for this section.
8. Click “ADD FIELD”.



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

DESCRIPTION	HEADER	WIDTH	PRIORITY			
Company Name			1	^	v	EDIT 
Customer Name			2	^	v	EDIT ...
Address			3	^	v	EDIT ...
CityStateZip			4	^	v	EDIT ...

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.




**General Layout Options**

Layout | Ship To | **Order Info** | Payment Info | Order Items | Order Totals | Warehouse Setup

**ADD FIELD**

DESCRIPTION	HEADER	WIDTH	PRIORITY
Order Number	Order No.:		1
Order Type	Order Type:		2
Shipping Method	Shipping Method:		3
Customer ID	Customer ID:		4
Customer Name	Customer Name:		5
Sales Tax ID	Sales Tax ID:		6
Date	Date:		7
Email	Email:		8
Phone	Phone:		9
Created By	Created By:		11
Fulfilled By	Fulfilled By:		12

CANCEL  SAVE CHANGES

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".



**Order Info Section Field Setup**

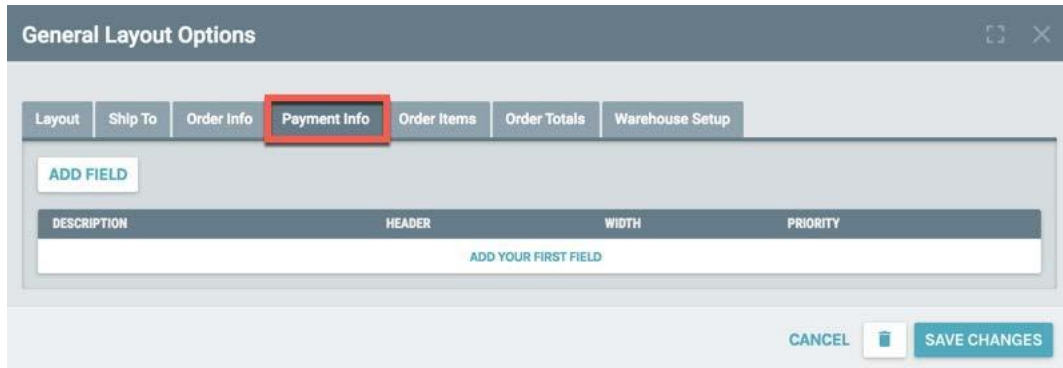
Description: **User Defined Field 1** ▼

Header Text:

Width:

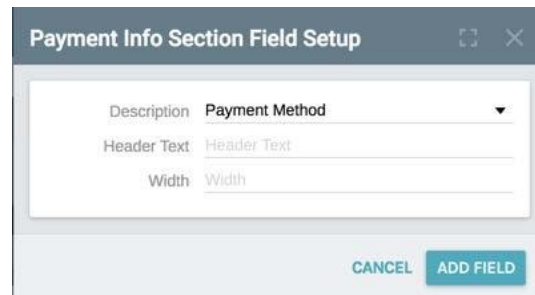
CANCEL **ADD FIELD**

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

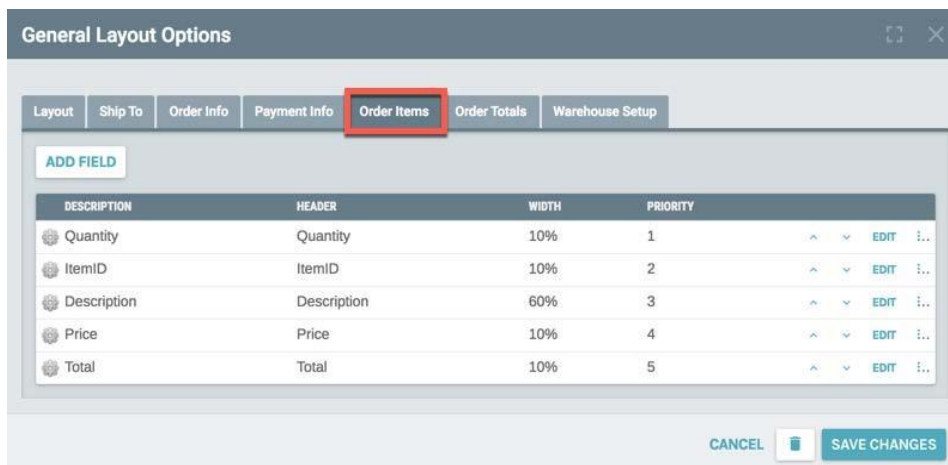


Click "ADD FIELD".

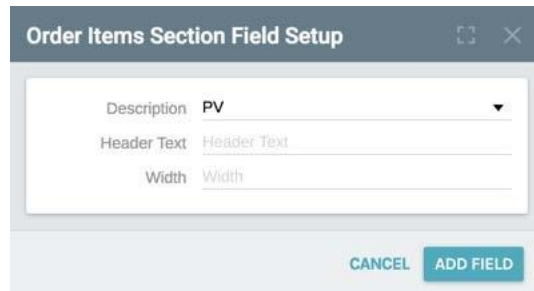
17. Use the dropdown list to choose available fields.
18. Click "ADD FIELD".



19. Click on the Order Items Tab.
20. This section contains the product detail from the Order. The most common fields are prepopulated.

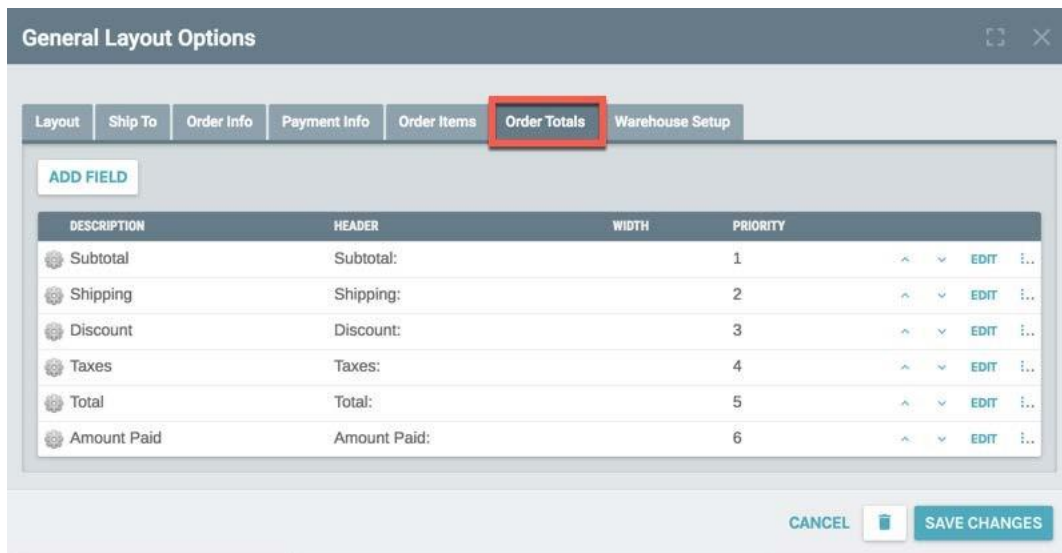


21. To add another field, click “ADD FIELD”.
22. Click Drop Down arrow on the Description field to display a list of all available fields for this section.
23. Click “ADD FIELD”.



The dialog box titled "Order Items Section Field Setup" contains three input fields: "Description" with a dropdown menu showing "PV", "Header Text" with the text "Header Text", and "Width" with the text "Width". At the bottom right, there are two buttons: "CANCEL" and "ADD FIELD".

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



The dialog box titled "General Layout Options" has several tabs: "Layout", "Ship To", "Order Info", "Payment Info", "Order Items", "Order Totals" (highlighted with a red box), and "Warehouse Setup". Below the tabs is an "ADD FIELD" button and a table with the following data:

DESCRIPTION	HEADER	WIDTH	PRIORITY		
Subtotal	Subtotal:		1	⏪	⏩ EDIT ⋮
Shipping	Shipping:		2	⏪	⏩ EDIT ⋮
Discount	Discount:		3	⏪	⏩ EDIT ⋮
Taxes	Taxes:		4	⏪	⏩ EDIT ⋮
Total	Total:		5	⏪	⏩ EDIT ⋮
Amount Paid	Amount Paid:		6	⏪	⏩ EDIT ⋮

At the bottom right, there are three buttons: "CANCEL", a trash icon, and "SAVE CHANGES".

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



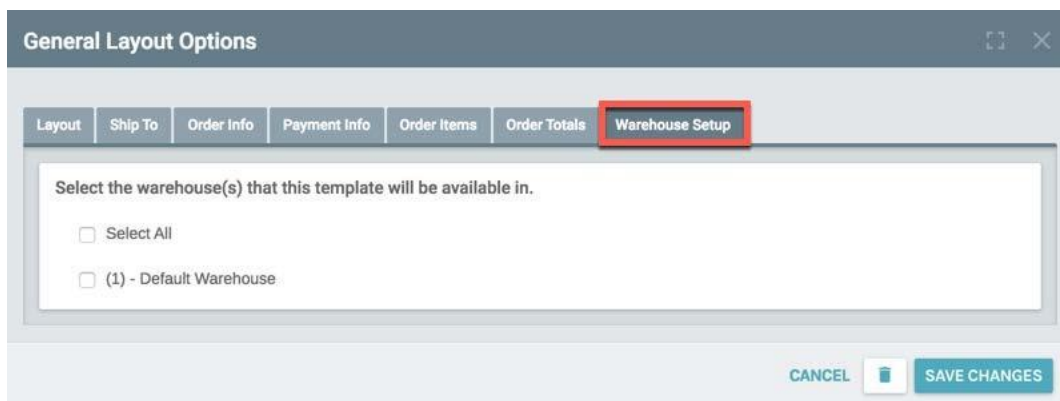


The dialog box is titled "Order Totals Section Field Setup" and contains the following fields:

- Description: Other1 (dropdown menu)
- Header Text: Header Text (text input)
- Width: Width (text input)

Buttons: CANCEL, ADD FIELD

29. Click on Warehouse Setup Tab.
30. 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.



The dialog box is titled "General Layout Options" and has several tabs: Layout, Ship To, Order Info, Payment Info, Order Items, Order Totals, and Warehouse Setup. The Warehouse Setup tab is highlighted with a red box.

Select the warehouse(s) that this template will be available in.

- Select All
- (1) - Default Warehouse

Buttons: CANCEL, SAVE CHANGES

31. Click "SAVE CHANGES".