

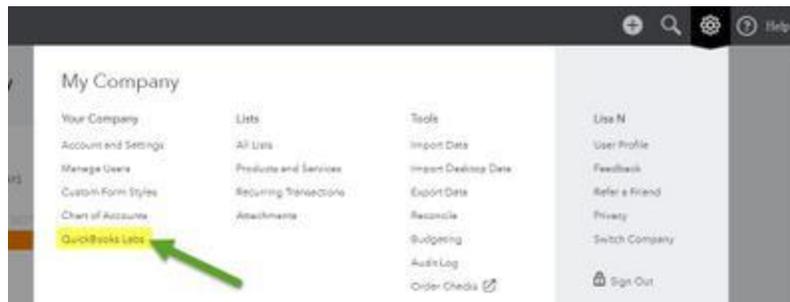
Import Styles User Guide

About Import Styles

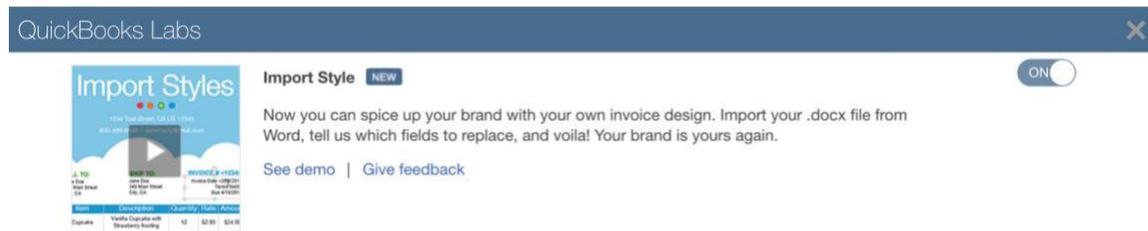
Import Styles Plugin allows you to import your company's branded templates for invoices and other forms to be used QBO. This post describes basics of Import Styles, how it works, and how to upload Microsoft word templates into QBO.

Setting Up Import Styles

Import Styles is an optional plugin in QB Labs. It is OFF by default. To use it you need to navigate to QuickBooks Labs and turn it ON. Click on the **Gear** icon in the upper right corner and select **QuickBooks Labs**.



Scroll down the screen until you find Import Styles Plugin and toggle the switch for Import Styles to **On** and Click on the **Done** button.



Invoking Import Styles

After Import Styles is turned **On**, you can invoke it from Custom form styles as shown by arrow below. [Note Custom form styles can be invoked from gear icon].

Making the import process pain-free

Understanding a few basic concepts will go a long way towards making your Import hassle-free. The concepts are Fields, Static vs Dynamic, EZ Map Fields and Table vs Scalar Fields.

Concept 1: Static Vs Dynamic

As you design your Template, identify information that don't change with each print. Ex. Logos, company information, certifications, and such. Make it part of your Template.

Concept 2: Fields

Import Style for Word, relies on a feature called Field codes in Microsoft Office, where parts of the Template which change, are setup as Fields. Word treats Fields as placeholders into which right data can be inserted from external sources, in our case, QBO. Note that it is poor practice to use fields for parts of your Template which will never vary.

EZ Map Fields

EZ Map fields are a set of known keywords (or fields), provided by Import Styles to ease the process of mapping QBO data to dynamic parts of a Template. Proper use of EZ Map Fields is critical for users of Import Styles. Text enclosed within angular braces (<>) and Form Type to which they belong (ex. Invoice, Estimate) together make EZ Map Fields unique.

When you use fields in the Template EXACTLY as they are in the catalog, Import Styles pulls the right data out of QBO, when your Template is filled with data. For example, using <refnum> with Invoice as Form Type tells Import Styles to fetch Invoice number data from an Invoice in QBO.

Two kinds of EZ Map Fields are supported, namely, Scalar and Table. They are described below. A reference to the entire catalog of EZ Map Keys for each Form Type is part of the help content.

Scalar Fields

Fields which are independent from each other and don't repeat, fall under the scalar category.

Rules for using Scalar fields are:

 Scalar fields can be placed separately or within tables in a Template
Scalar fields named "LeaveAsIs" will be left empty

 Scalar and Table fields should NOT be part of the same Table!

Table Fields

Table Fields are fields that go together as part of a larger entity and repeat. Ex. Fields that make up an Activity Table or Account summary on Invoice. New data rows in table fields expand the table. Rules for using Table Fields are:

- Table Fields must always be placed inside tables. If you place Table fields outside tables, I data from the first row is extracted
- Table Fields in **only** the first non-header row of a table is used as a template, to fetch other rows. All other rows are ignored
- Formatting of the first non-header row repeats on all rows. Don't be surprised by this
- To create an empty column in a table, you can use a special field called "LeaveAsIs". A table I can have only 1 such field

- Scalar and Table fields must NOT be part of the same Table!
- Table Fields that belong in different Tables must NOT be part of the same Table - ex. mixing Activity Table and Account Summary Table fields

Template Design

If you already have a design in docx (MS Word 2010+) format, you may directly proceed to mark it with EZ Map fields as described below. If you want to start afresh, we suggest to use a sample of ours. Download and copy the sample using the "Download import guide" link below.

Import Form Style

- 1 Upload
- 2 Check fields
- 3 Preview

First time importing an Invoice style?



Learn how to set up your DOCX file
[Download import guide](#)

- Start with a template. A sample template can be found in the import guide.
- Before you upload, open your file and add angle brackets <> around each field you want. QuickBooks to replace. Mark each field just once.

John Smith → <customername>
123 Main Street → <billingaddress>

Upload your DOCX file.

Select .docx file

Browse

Previous

Next

Importing your Template

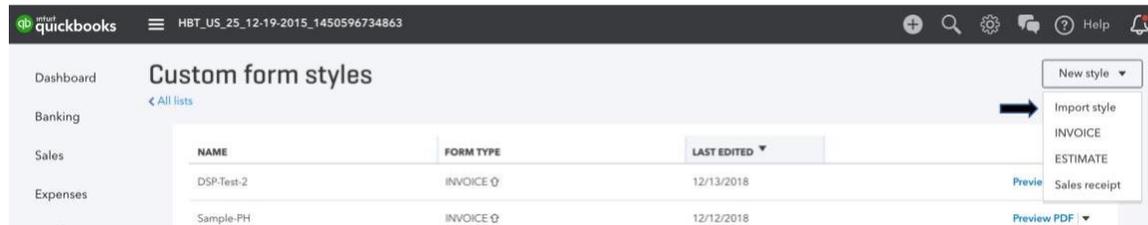
Step 1: Mapping QBO Data - Mark your Template with [EZ Map Fields](#)

This step occurs outside of Import Styles Plugin.

- Identify non-static content in the Template you want to import
- Replace content from '1' with Scalar or Table Fields, as applicable to your chosen Form
- Check that all Field names fall within the subset of EZ Map Keys defined in the QBO [EZ Map catalog](#).

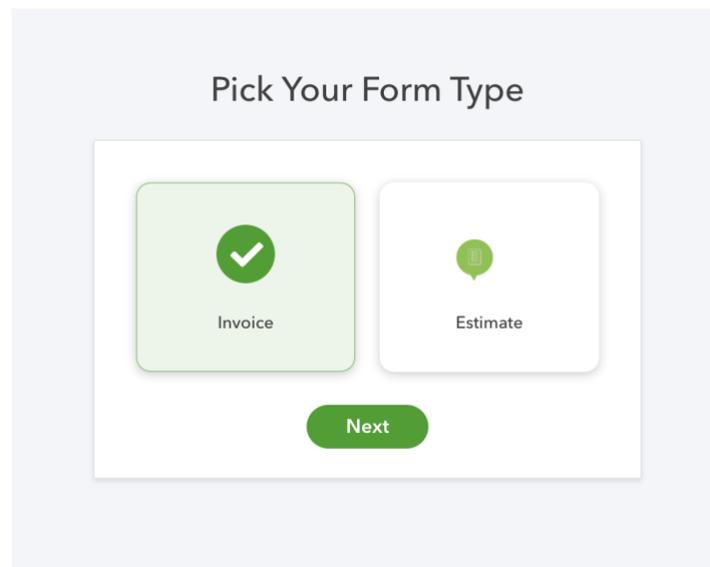
Step 2: Invoke Import Styles

After Import Styles is enabled as above, you can invoke it from Custom form styles as shown by the arrow below. [Note that Custom form styles can be invoked from the gear icon].



Step 3: Upload your Template

First, pick your **form type** by clicking on any of the available form types. After navigating to the next step, click on **Browse** to **upload** your file. Then click **Next** to begin the import process. The uploaded document is analyzed and scanned for marked fields prior to mapping. Upon a successful upload you should see the data-mapping screen that looks as the image provided in **step 4**. If unsuccessful you will see errors, which are documented in upload errors FAQ.



Import Form Style

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- Before you upload, open your file and add angle brackets <> around each field you want QuickBooks to replace. Mark each field just once.

John Smith → <customername>
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Upload your DOCX file.

Select .docx file

Step 4: Data Mapping

Data mapping screen allows you to map marked fields in your document to QBO data fields. You will **not** need to perform any further mapping provided you used Fields from [EZ Map Catalog](#) (highly recommended). In this case, the only action needed in this phase is to click *Next*.

If this step is successful it will generate a preview of the uploaded template with dummy (sample) data. If errors occur during this phase, please refer to FAQ in help content, and fix your Template before re-attempting the upload (Step 3). You may click the *Back* button to go back a step.

Import form style

Match your fields with Quickbooks fields

1 Save and upload your file.

2 Match your fields with Quickbooks fields

3 Preview and confirm your style

YOUR FIELD	QUICKBOOKS FIELD
subtotal	Subtotal (invoice summary)
discountaftertax	Discount after tax (invoice summary)
totalofnewcharges	Total Of New Charges
shippingcharge	Shipping cost/charge (invoice summary)
total	Invoice total due (invoice summary)
AmountDue	Total amount due/Balance due/Amount due
taxrate	Tax rate (tax summary)
taxamount	Total tax amount (tax summary)
netamount	Net amount (tax summary)
message	Sale Message



Saving your Template

On successful preview as below, you're all set.

Import form style

Preview and confirm your style

Before you save, preview your style to make sure it looks exactly the way you want it. To make changes, either click the back button or edit the file in your .dock editor and import it again.

Save and upload your file.

Match your fields with Quickbooks fields

Preview and confirm your style

Back Save

MyCompany Name Here
123 My Company Lane
My Town, CA, 12345

INVOICE
INVOICE NO. 12345
TERMS Net 30
DATE 01/12/2018
DUE DATE 02/13/2018

SHIP DATE 08/19/2012 SHIP ADDRESS John Smith, 2001 Lynton Lane, Redwood City, CA 94063 SHIP METHOD FEDEX TRACKING NUMBER 1234567890

BILLING ADDRESS (Customer's name) 23000 Via Serrano, San Jose, CA 95128

DATE	DESCRIPTION	QTY	RATE	TAX	AMOUNT
02/19/2015	Product name	2	225.00		450.00
02/19/2015	Service name	1	225.00		225.00

TAX RATE TAX AMOUNT NET AMOUNT

SUBTOTAL 675.00
DISCOUNT
NEW CHARGES
SHIPPING 3.00
TOTAL 708.00
BALANCE DUE USD 720.00

Transfer the amount to the business account below.
Bank Name (cannot open)

MESSAGE

If you like the PDF preview, you may give the new Style a name and save it by clicking on the Save button. Upon Save, Custom Styles browser will be updated with the newly created Style. Note that an Uploaded Style does not have an edit choice. The same also has an Arrow next to FormType to differentiate it from QBO standard Style. You are now ready to use this Style just as you would any QBO Style!

quickbooks HBT_US_25_12-19-2015_1450596734863

Dashboard Banking Sales Expenses Workers Reports

Custom form styles

New style

NAME	FORM TYPE	LAST EDITED	ACTION
Prabhat-France-Test	INVOICE ↕	12/25/2018	Preview PDF
DSP-Test-2	INVOICE ↕	12/13/2018	Preview PDF
Sample-PH	INVOICE ↕	12/12/2018	Make default
dsp	INVOICE ↕	12/03/2018	Rename
			Delete

Happy importing!

QuickBooks Online Team