Import Styles User Guide
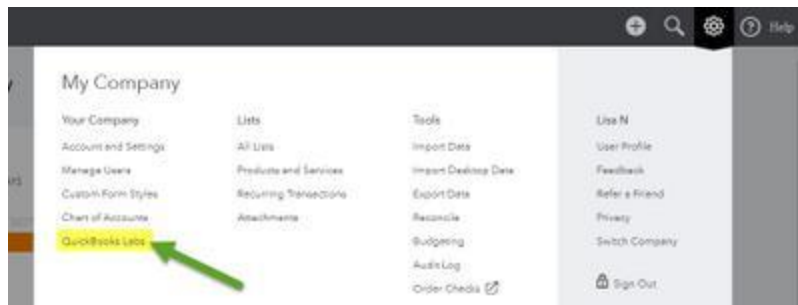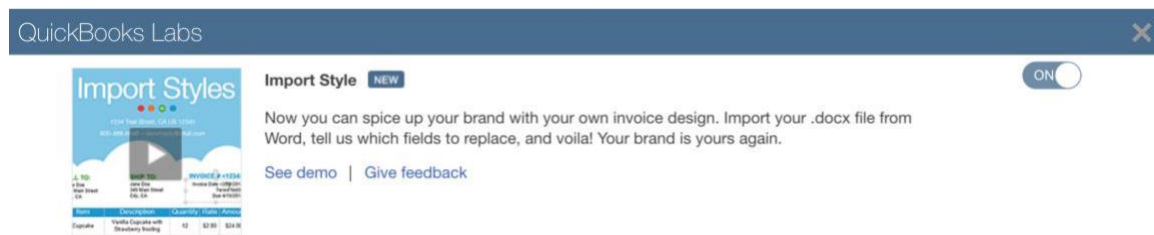
About Import Styles

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**.
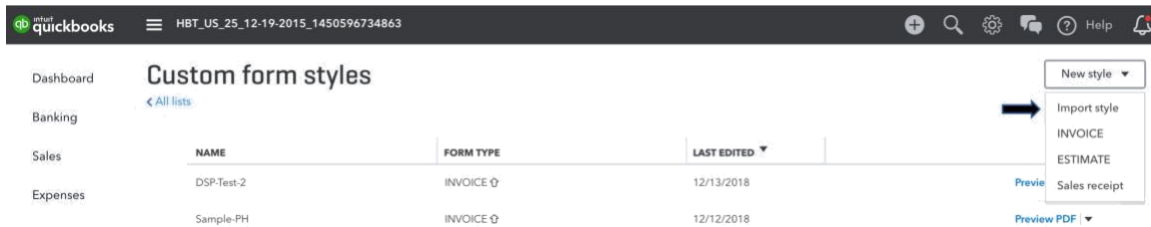

Scroll down the screen until you find Import Styles Plugin and toggle the switch for Import Styles to **On** and Click on the **Done** button.

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:

> ℹ️ 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:

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

o Scalar and Table fields must NOT be part of the same Table!
o 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.
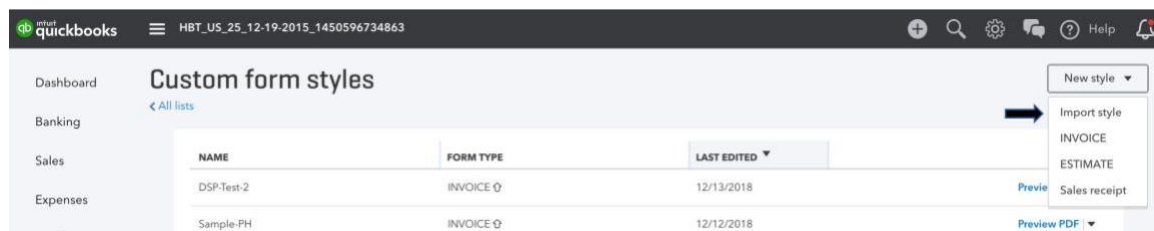
Importing your Template

Step 1: Mapping QBO Data - Mark your Template with EZ Map Fields

This step occurs outside of Import Styles Plugin.

- o   Identify non-static content in the Template you want to import
- o   Replace content from '1' with Scalar or Table Fields, as applicable to your chosen Form

- o   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.
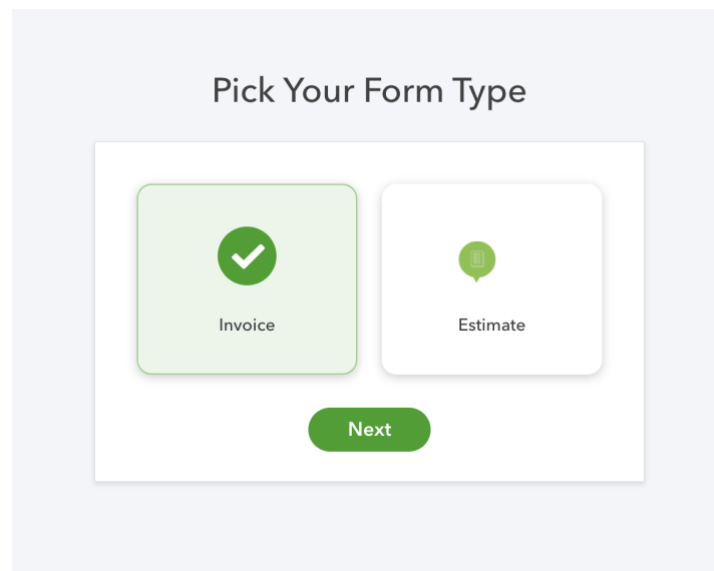
Step 4: *Data Mapping*

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.

Saving your Template

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

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!

Happy importing!

QuickBooks Online Team