Import Style Best Practices

Are you ready to import your own style? Before we get started, let's go over a few quick tips:

Use of EZ Map Fields – Please refer to the EZ Map Catalog provided in the zip that this document came in.

Avoid using fields for data in Template that does not change – If information like your company name, address, and contact information stays the same, you should just hard-wire them in the Template.

Use of Tables

1. Use Tables wisely. Tables are great to preserve layout and have common properties across multiple rows. Special care must be taken to ensure that Tables which are intended to contain repeating data (Table Fields) are placed separately. Do read Table Fields section of the guide before using them
2. Use gridlines to understand Table boundaries
3. Keep tables independent – We recommend keeping your table layouts simple to provide the best results. Tables placed inside of tables, or formed by merging and splitting cells must be carefully reviewed to ensure right fields are in them to avoid unexpected results

Fonts

For us to upload your style successfully, you will need to use one of our supported fonts:

- Arial Unicode MS
- Courier, Courier Bold, Courier Oblique, Courier Bold-Oblique
- Helvetica, Helvetica Bold, Helvetica Oblique, Helvetica Bold-Oblique
- Times Roman, Times Bold, Times Italic, Times Bold-Italic
- Symbol
- Zapf Dingbats

Other fonts in your template will not be used in your uploaded style. Don't worry though, more supported fonts are on the way!

Import Style Don'ts

While you're perfecting your template, be sure to avoid these things:

- Audio
- ClipArt, Word Art
- Animated GIFS
- Embedded files
- Adding or updating hidden links or merging fields
- Files over 2MB
- Non .docx file types or older MS Word documents renamed as .docx files

Having Trouble? Browse the FAQ below to get your queries answered

If you receive an error when uploading your style, don't worry, we'll have you fixed up in no time! Take a look at these quick hints:

Upload Errors

Error Code	What Does it Mean?	How can i fix it
size_validation_error	Your file is too large to upload	Your document must be less than 2MB
extension_format_error	The file you selected isn't of a type we support	Try uploading a Microsoft Office 2010 (*.docx) file

Mapping Errors

Note that Mapping Errors should be none or minimal if EZ Map Fields are used. We **do not recommend** use of Fields that do not belong in EZ Map Fields Catalog.

Error Code	What does it mean?	How can i fix it?
Fetching preview failed	An attempt to create a preview of your style failed	Check for chevrons applied wrong places or applied incorrectly. Try to reduce fields marked with chevrons until Preview succeeds and then add additional chevrons to isolate the mapping error.
Save Mapping failed	The selected mappings could not be saved	Please try again or contact support
No Mapping found	The mapping wizard could not find any field that required mapping	Please mark at least one data element on your template with chevrons in order for mapping to work
Multiple Page Document	The document uploaded has multiple pages	The document uploaded has multiple pages

FAQ

If you have any questions, we're here to help! We've put together answers to some common questions to get you back to business quickly.

- **"We can't display a preview. Please correct your mappings in the previous step and try again"**
  Certain fields (Fields where data repeat) are expected to be inside tables. For example, line item information like Quantity, Product, and Price are tabular and should be inside tables. Please make sure while mapping that these fields are mapped to fields inside tables in style being imported.

- **Some data is not appearing in the printed or preview document. Why?**
  We use settings in your Standard form style to decide how data is handled and presented in your imported templates. Please enable the desired settings in your standard style by following the steps below:
  * Click the Gear Icon then select Custom Form Styles.
  * Locate your Standard template, then click Edit.
  * Enable your desired settings and click Save.
  * Your data should now appear in your imported style.

It's also important to note that if you do not add mappings to your style for your invoice field, that data will not be displayed on your forms later. For example, if you do not map a field for "Shipping Charge Value", shipping costs will not appear on your form regardless of if you have entered them on your invoice.

- **Are there any restrictions on File formats I can upload?**
  Only word (.docx) documents under 2MB can be uploaded to QuickBooks.

- **Can I upload a style with multiple pages?**
  Yes

- **Can i download my imported Template back in docx form at a later time**
  Currently, you cannot download the style that was imported. We recommend that you save a local copy of the template you imported and take a quick note of the mappings you selected.

  Do I have to have a field mapped to import a style?
  Yes. The style you want to import should have one field that has to be mapped to data.

  I see a blank screen after mapping
  This situation can occur if the final output cannot be formed. This can happen due to any of the following reasons:
  * incorrect mapping (please refer use of Scalar and Table Fields)
  * Incorrect use of Table (ex. Some Table Fields are left empty) - First and last columns in Table's with Table fields must be   mapped
  * When EZ Map Keys for Tables are used they must always start after a table's header row
  * Typos (ex. missing braces)

- **How do i make my uploaded Style as default?**
  Click the Gear Icon, then select Custom Form Styles. Next to your newly uploaded template, click the arrow and select make default.

- **Why is my Table row tall?**
  Import Styles uses the properties of first non-header row of a table to format other rows in the same table

- **Do you support import for other form templates?**
  Currently, we only support import for Invoice & Estimates templates in US Region, but we're exploring other form types to support as well. France region has support for more Form Types. Keep your eyes peeled!

- **I need more data fields to be mapped**
  EZ Map Field catalog lists all data that may be mapped from QBO. Fields not present in this catalog can't be mapped into Templates. Please provide feedback via help widget to request for more fields