



Estimate Customization Checklist for QuickBooks Online

Your guide to creating professional, branded estimates

Prepare Your Brand Elements

Review logo colors from website - Use a color picker tool to get exact hex codes (e.g., #2C5282) and save them in a brand guide document

Ensure logo is in PNG or JPG format under 1MB for upload

Customize Estimate Template

Navigate to Settings > Custom Form Styles > New Style > Estimate

Upload logo and select color scheme

Finalize and Review

Preview estimate before sending

Email a test estimate to yourself for review