

HOW TO ENTER INVOICES IN QUICKBOOKS ONLINE

An invoice in QBO refers to the sales invoices that you send to your customers. It does not refer to the invoices that a vendor sends you – those are called “Bills” in QuickBooks Online.

ENTER AN INVOICE IN QUICKBOOKS ONLINE

To enter an invoice, click on the **Create (+) menu** at the center top and select **Invoice**

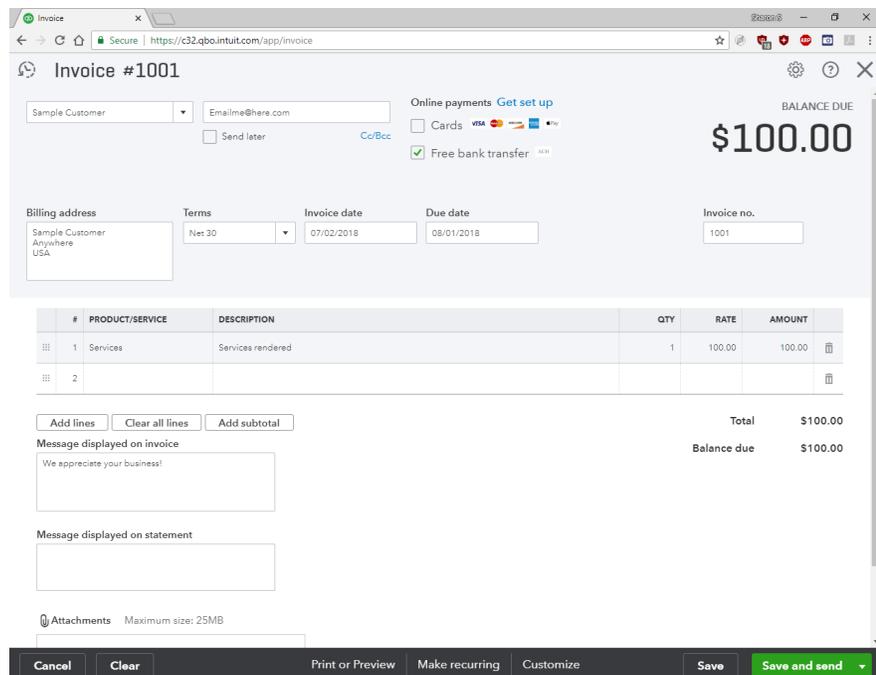


Create

Customers	Vendors	Employees	Other
Invoice	Expense	Single Time Activity	Bank Deposit
Receive Payment	Check	Weekly Timesheet	Transfer
Estimate	Bill		Journal Entry
Credit Memo	Pay Bills		Statement

When the **Invoice** window opens:

1. Enter the customer name or select it from the customer list.
2. Enter the customer’s email address.
3. The customer’s billing address will be automatically filled in if it’s already entered in the customer’s record in the Customer Center.
4. Enter the payment terms (the date when the customer is supposed to pay you).
5. Enter the invoice date.
6. The due date of the invoice will calculate automatically based on the payment terms.
7. Enter the corresponding product or service you are invoicing your customer.
8. Enter or edit the description
9. Enter the quantity sold (this may be quantities or hours).
10. Enter or edit the rate.
11. QBO will do the math for you to calculate the amount (quantity x rate).
12. If you collect sales tax, then check the sales tax box.
13. Enter a message to be displayed on the invoice – like “Thank you for your business!”
14. Verify that you are using the correct sales tax rate.
15. Once again QBO does all the math for you. The balance due is the amount that the customer owes you.



#	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT
1	Services	Services rendered	1	100.00	100.00
2					

Total: \$100.00
Balance due: \$100.00

HOW TO EMAIL AN INVOICE TO A CUSTOMER

After you click Save and Send, the Send Email window will open. On the left, you will see your customer’s email address, the subject line on the invoice, and the body of the message. On the right, you will see a preview of the email. Click **Send and Close** to email the invoice to your customer.