Invoices and Estimates

QuickBooks Online allows you to send estimates and invoices to your customers easily and quickly, and invoice customers promptly for better cash flow. This guide will help you make the most of this feature by showing you how to:

- Create an estimate or invoice.
- Manage invoices, including recording payments.
- Customize invoices with your company logo and preferred fonts.
- Save time by creating recurring invoices.

Quick Reminder: Before creating your first invoice, be sure you've set up QuickBooks Online to automatically include applicable sales taxes. If you need help, refer to our Quick Guide: Sales Tax Setup.

Creating Invoices

Invoices are easy to create and customize in QuickBooks Online.

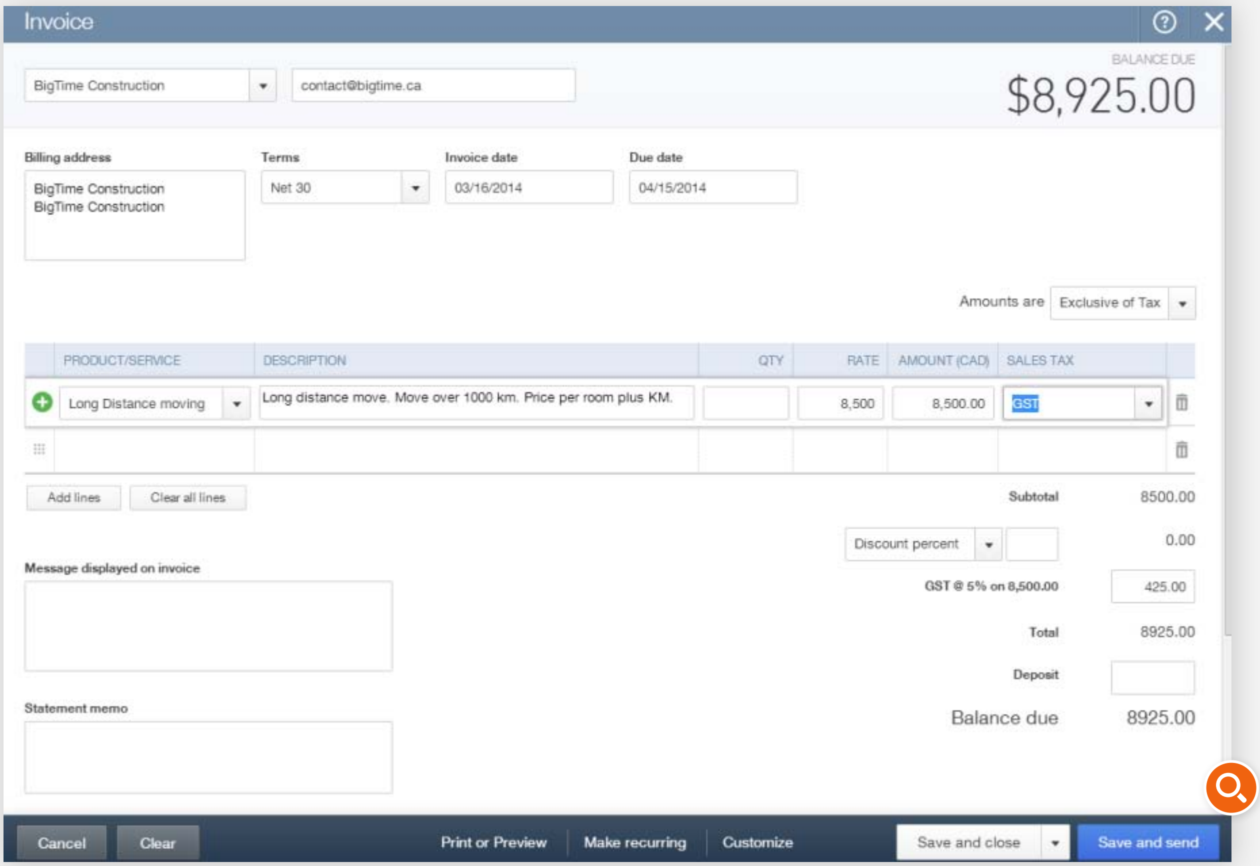
Invoices can be easily accessed and created from the **Create +** icon at the top of the page.

To create an invoice:

1. Go to the **Create +** at the top of the QuickBooks Online screen.
2. In the Quick Create window, select **Invoice**.

Invoices and Estimates

3 Complete the on-screen invoice, including selecting a customer, with the desired date, invoice number, whether amounts are tax inclusive/exclusive/out of scope of sales taxes, Products and Services of your choosing, the quantity and description and rate of each.



4 Add more lines, if needed.

5. Complete any other desired fields, such as the Discount or Add a message to be displayed on the invoice. If necessary, attach a document or any file by clicking on **Attachments** in the bottom left corner of the form.

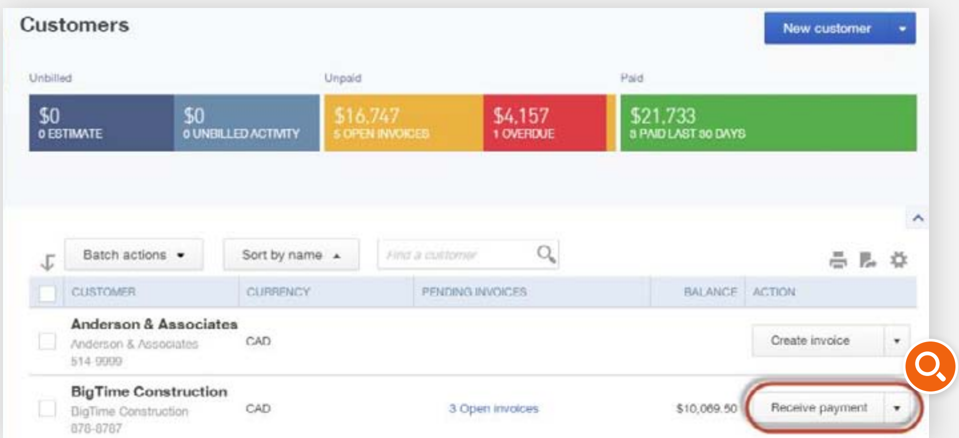
6 Select **Save and Send** to email the invoice to your customer, click **Save and Close** to simply save the invoice and return to the homepage or select **Save and New** to save the invoice and create a new one.

Invoices and Estimates

Managing Invoices

1 Open invoices can be found using the **Search** and **Recent Transactions** functions, as well as by running reports. More commonly, users access open invoices through the Customer Centre by selecting **Customers** from the left-hand navigation bar.

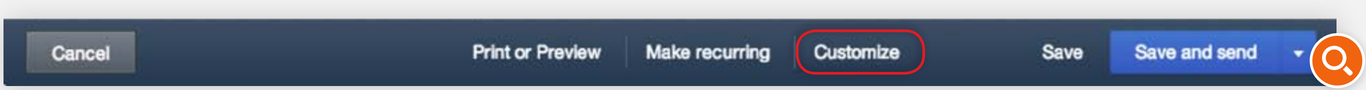
2 In the **Customer Centre**, choose **Unpaid** from the **Money Bar** to locate the customer for whom you wish to record a payment. QuickBooks Online will always offer the next logical step for this type of transaction. In this case, it is suggesting for you to receive payment for that customer. Choose **Receive payment**.



Invoices, whether open or paid, can also be found by selecting **Transactions ⟶ Sales** from the left-hand navigation bar.

Customizing Invoices

You can customize your invoices by going to the **Company Settings ⟶ Sales ⟶ Customize ⟶ Customize Look and Feel**. You can choose a template and accent colour, upload your logo, specify columns, header, footer and more. This same customization window can be accessed at the bottom of an invoice by selecting **Customize** at the bottom of the invoice form (as below).



Invoices and Estimates

Automating Invoices in QuickBooks Online

Creating an invoice will create an accounts receivable for your clients. There are several ways to create invoices. You can create recurring invoices from the customer centre.

1. Click **Customers** on the left hand navigation bar of the QBO window. The customer list displays.

2. To create an invoice for a specific customer, click **Create Invoice** next to their name. The invoice window displays.

3. Complete the **Invoice Form**. There are several key elements to completing the form. They are the following:

   a. Choose the **Customer**.

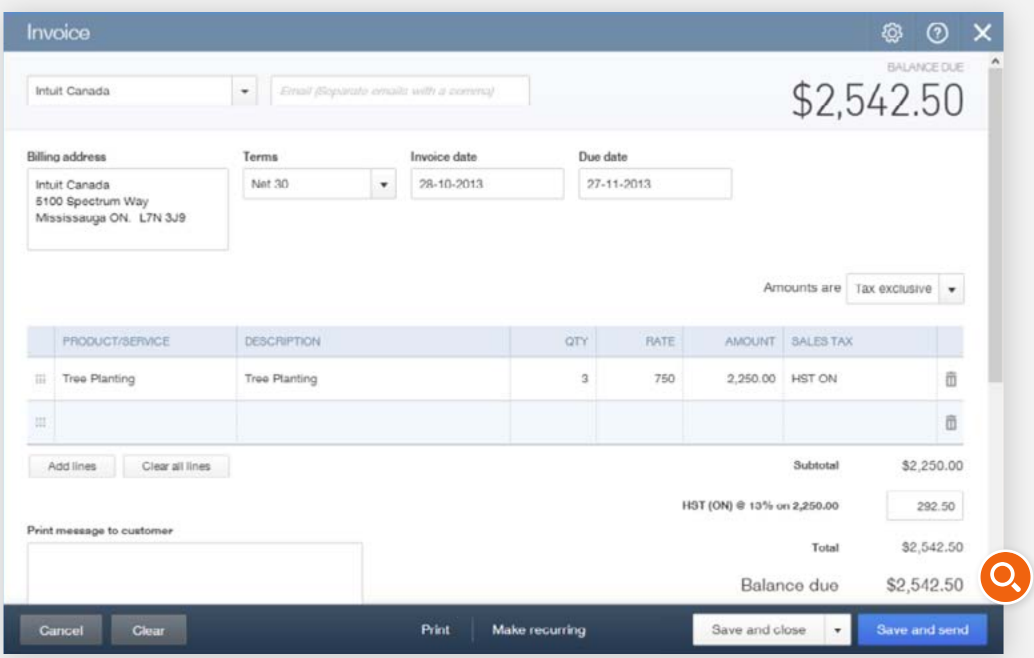
   b. Choose the **Invoice date** and **Due date** if applicable.

   c. Choose the **Product/Service**.

   d. Enter a **Quantity**.

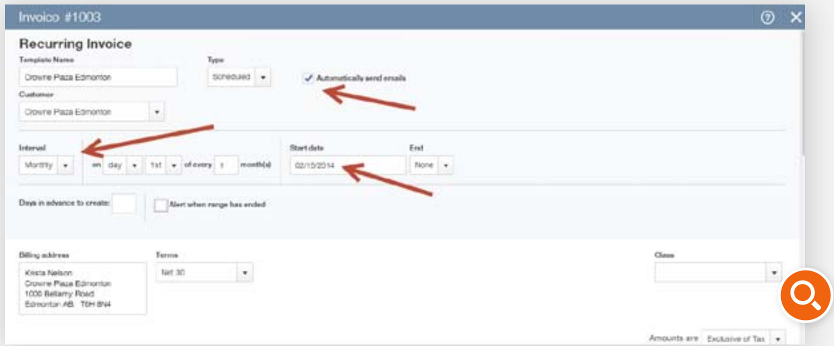
   e. QuickBooks Online may also enter a Rate from the product or service setup. If it does not, you can enter the sales rate. QuickBooks Online completes the Amount for you.

   f. Choose the **Sales Tax rate**.



Invoices and Estimates

4 Click **Make recurring from** bottom menu bar. This feature is available in the QuickBooks Online Essentials and Plus product versions.



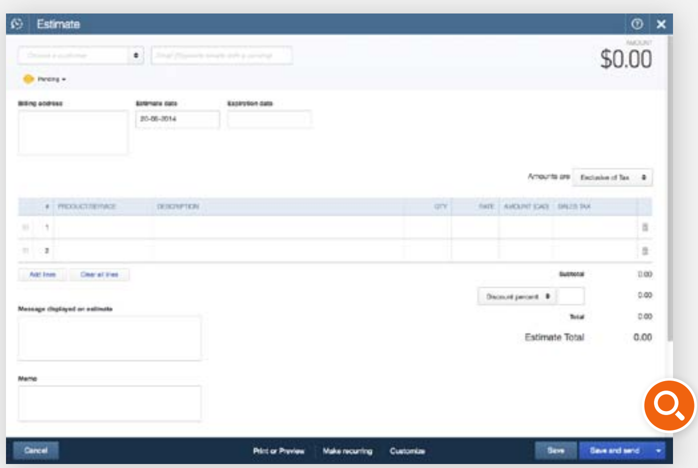
5 Click **Save Template**. This will not only create the invoice but also send it automatically on the assigned date as long as you select (or leave selected) Automatically send emails.

Creating Estimates

To create an estimate:

1 Click the **Create +** at the top middle of the screen.

2 Under the **Customer** heading click **Estimate.**



Invoices and Estimates

2 Choose an existing customer from the drop down list or **+ Add New Customer.**

4 Complete the Product/Service, Description, QTY, Rate, Amount, and select sales tax options.

5 Also, you have the option to include additional information in the Message displayed on the estimate or Memo fields and add Attachments.

6 Once you've entered all the information select a save option from the bottom menu bar.

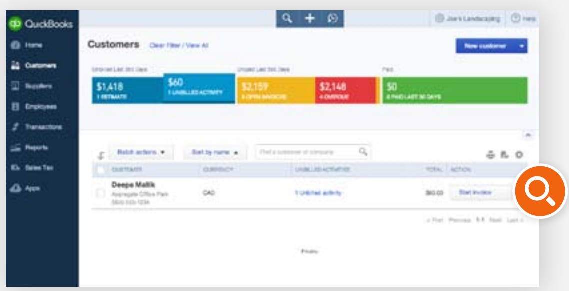
7 Check out the "Estimates by Customer" report by clicking **Reports** and entering **Estimates** in the search bar to see a record of the new estimate you created.

To update an estimate to an invoice:

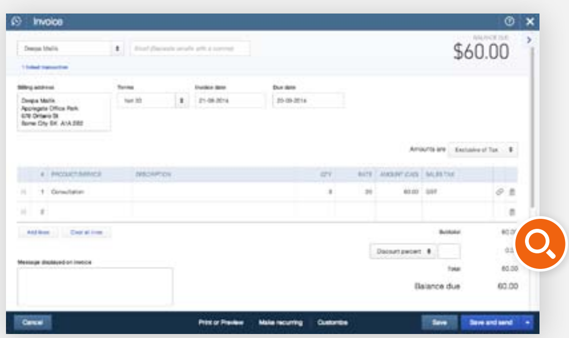
1 Select **Customers** from the left hand menu bar.

2 Select **Unbilled Activity** in the **Money Bar**

3 Click the **Start Invoice** button for the estimate you would like to turn into an invoice.



4 The invoice screen appears with some populated information from the estimate.



5 If you would like to add the service and cost information from the Estimate click the **Add All** button from the left hand side menu options.

6 Once you've entered all the information select a save option from the bottom menu bar.