

Creating Sales Receipts

Instead of creating invoices to record sales that will be paid later, you may receive funds at the time of the sale. Record these sales using Sales Receipts. With QuickBooks Online you can create the sale and record payment information on one form.

To create sales receipts:

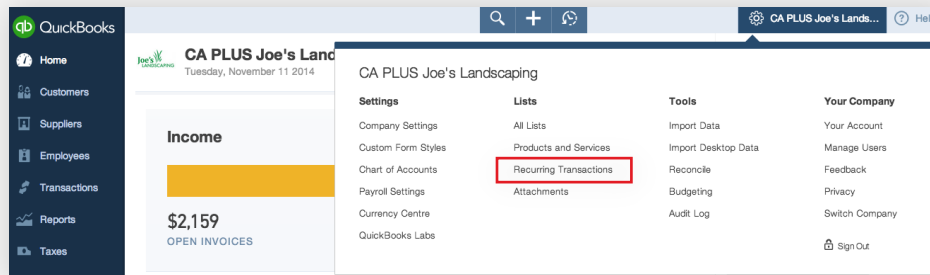
- 1 Click **Create (+)**.
- 2 In the Create menu, select **Sales Receipt** from the **Customers** heading.
- 3 In the Sales Receipt window, select a customer from the drop-down list or click **Add new** to add a customer.
- 4 Choose the **Payment method**. Typical methods include: Cash, Cheque, Credit Card and Debit Card. Or click **Add new** to add another type of payment.
- 5 Enter a **Reference Number**. If the customer paid with a cheque, you may want to enter the cheque number in this field.
- 6 In the **Deposit to** field, select the **Account** you want the sale recorded against.
- 7 Enter the sales using the **Product/Service** lines. Enter a **Description, Quantity, Rate** and **Discount Percent**.
- 8 Click **Save and Close** to save the receipt and close the window, or **Save and New** to save the information and enter another sales receipt.

Setting Up a Recurring Sales Receipt

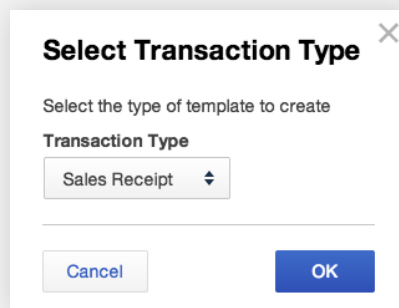
With QuickBooks Online, you can set up recurring sales transactions just like you track recurring expenses. For example, this is helpful for those of your customers who pay you on a schedule.

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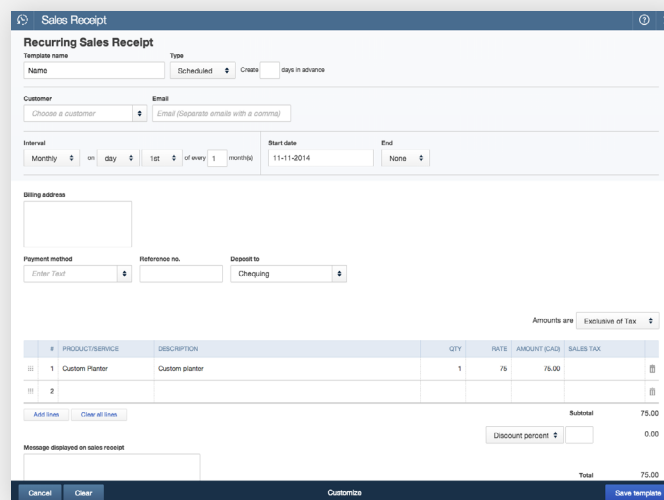
- 1 From the Company menu, select **Recurring Transactions** from the **Lists** heading.



- 2 In the Recurring Transactions window, click the **New** button.
- 3 Then select **Sales Receipt** as the transaction type and click **OK**.



- 4 A sales receipt template form appears.



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5. Give your new template a **Name** and make sure to select **Scheduled** as the template type.
6. Select a customer or choose **Add New** to enter information for a new customer. If you would like an email to automatically be sent each time the transaction goes through, be sure to enter an email address as well.
7. Set up the **Interval**, **Start Date**, and **End**.
 - **Interval:** Daily, Weekly, Monthly, Yearly.
 - Additional interval parameters are available to customize when the transaction is automatically created. For example, you could choose to charge your customer every 4 days or the second Tuesday of every other month.
 - The **Start Date** must be at least one day in the future. This is because scheduled recurring transactions are automatically created within the first half of the day, and choosing a day in the future will ensure the first time it runs is the day you've selected.
 - The **End Date** option (not required) allows you to stop the template from running after a certain number of times or on a specific date. If left empty, the template will continue to recur until you edit or delete it.
8. If you are setting up a recurring credit card payment, select **Credit Card** from the **Payment Method** drop-down list and enter the card details in the pop-up window if they are not yet saved in QuickBooks Online. Be sure to mark the **Use this credit card in the future for this customer** checkbox.
9. Enter the rest of the transaction information just as you would on a one-time sales receipt.
10. When you're finished, click **Save Template**. You'll be provided with a recurring credit card authorization form to print out.

Note: If you are setting up a recurring credit card transaction, card brand regulations require a recurring credit card authorization to be signed by the cardholder and retained by you. Ask your customer to fill out the form, sign it, and return it to you before the first recurring charge happens.

For your protection, we recommend keeping the signed form in a safe place for 18 months after the final charge takes place.