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QuickBooks Online Creating Invoice and Tracking Outstanding Payments

SingTel Training

QBO Supportability Team
Revised 1/03/2011

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QuickBooks Online (QBO) – Creating Invoice and Tracking Outstanding Payments

Last Updated: 1 March, 2011

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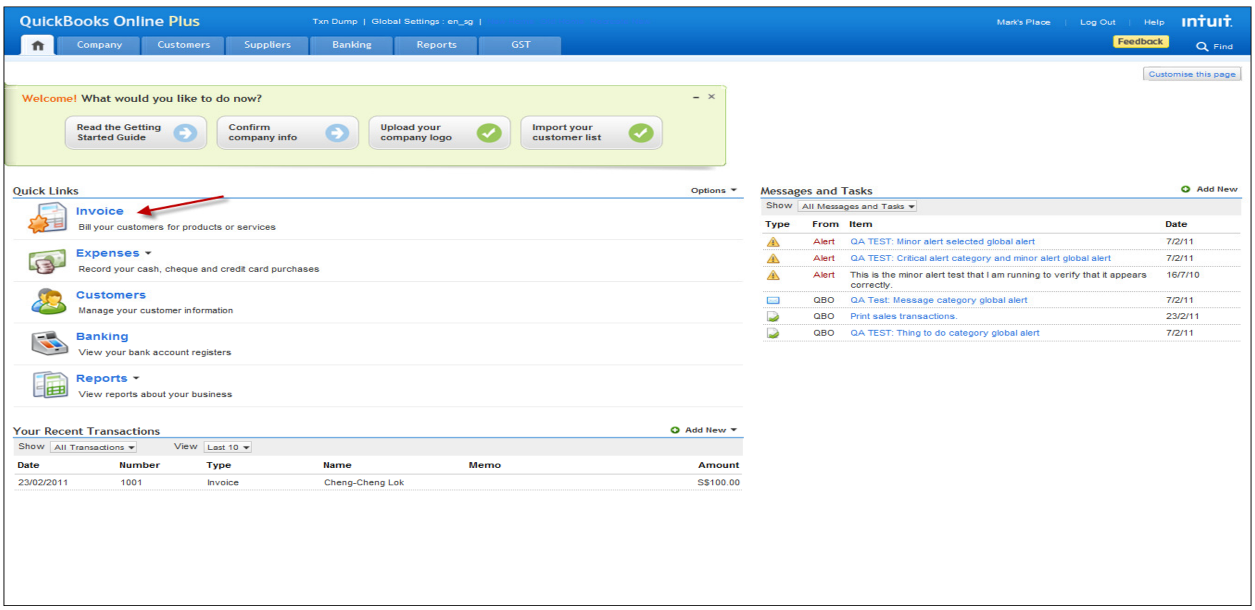
Creating Invoice

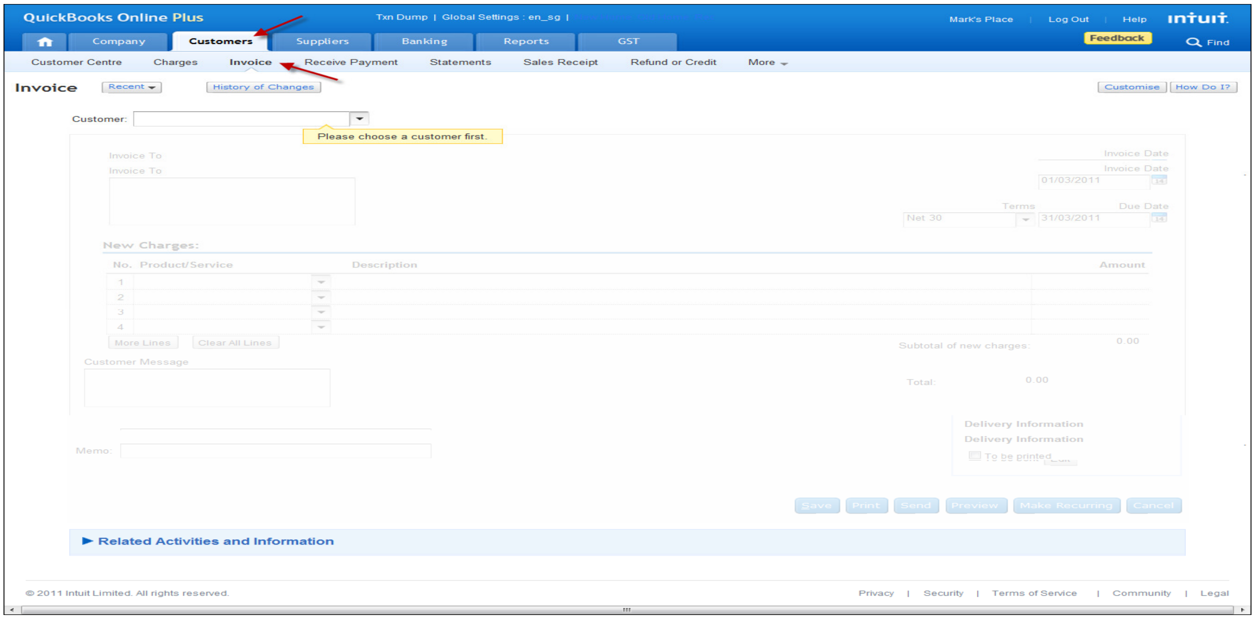
As soon as you're done with setting up your company and getting all your customers, products and services, vendors/suppliers and accounts ready, you can start using QuickBooks for your business.

To track your income in QuickBooks, you need to create sales transactions by creating invoices to start customer transactions.

Log in QuickBooks and either click on the Invoice option below the Quick Links at the Home Page.

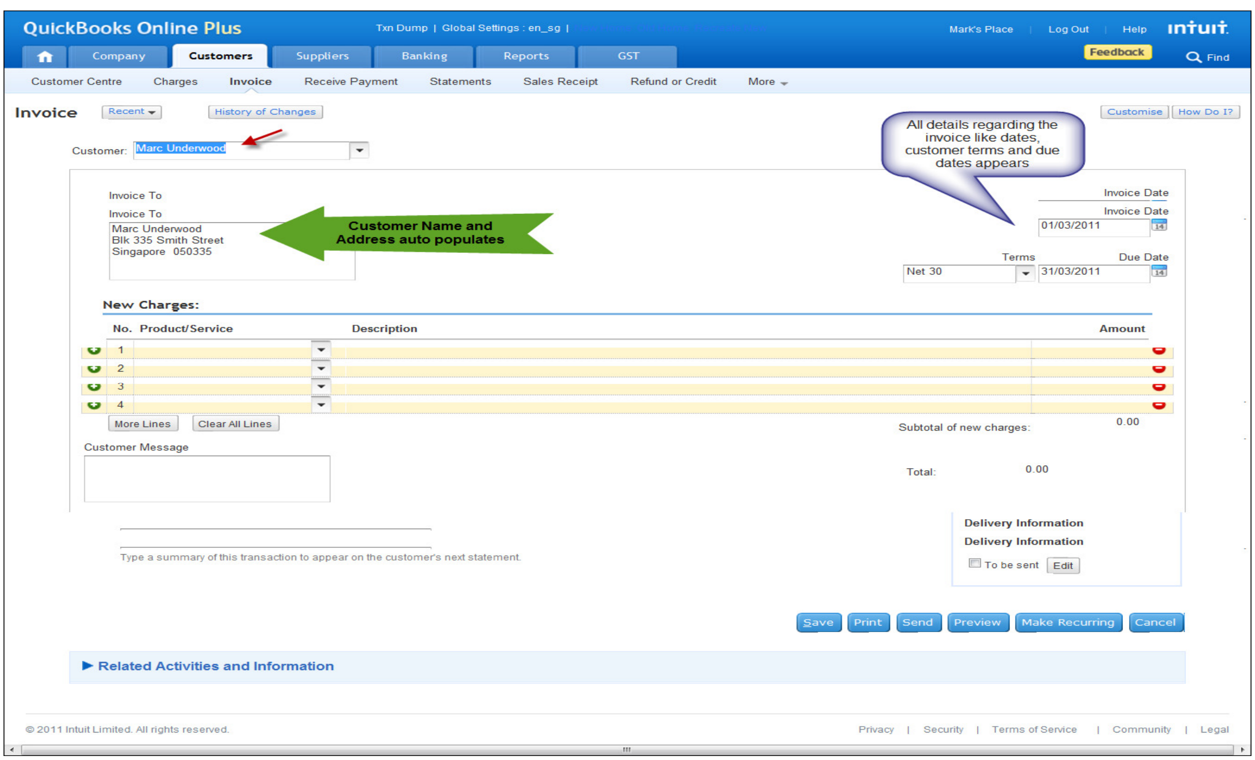


Or click on the Customers Tab and Invoice.



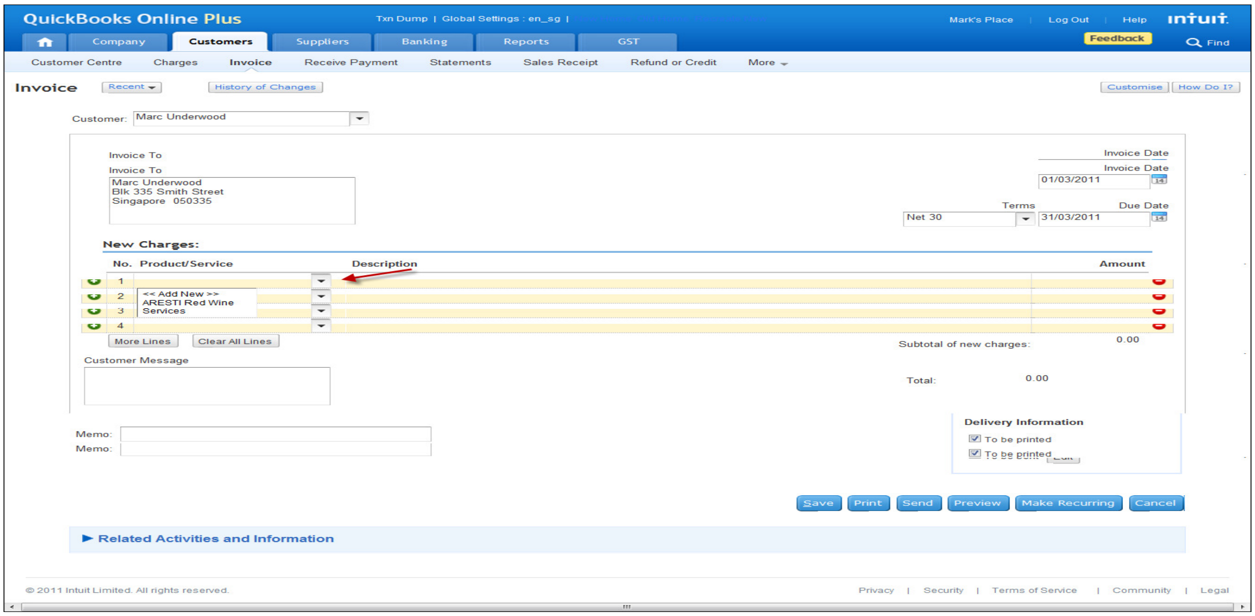
Either way, it will bring you to the invoice screen.

Clicking on the down arrow head at the Customer field will show you the list of customers that you entered before. Just choose from the list by clicking the name.

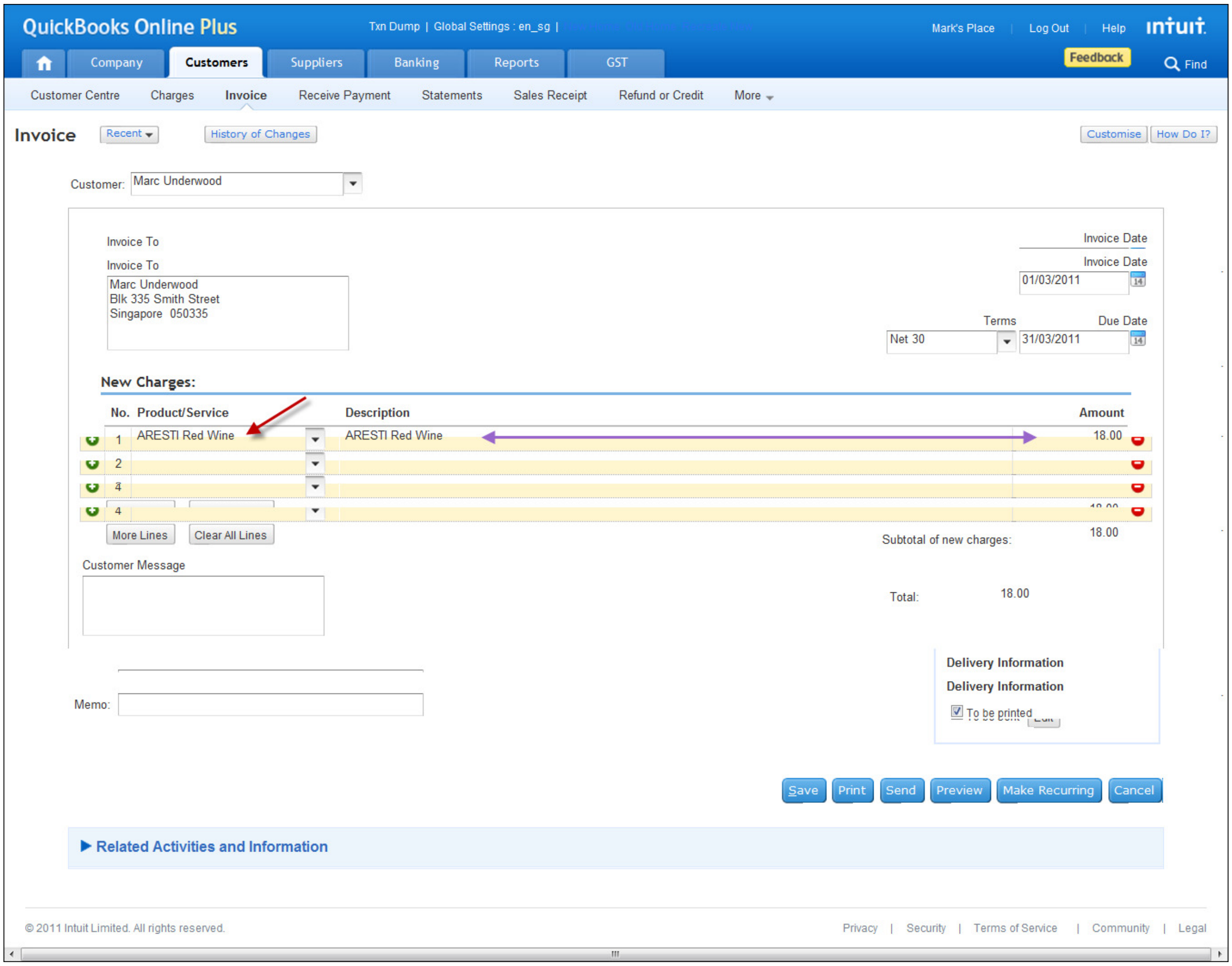


QuickBooks will auto populate the invoice with customer information, dates for invoice, customer payment terms and due dates.

Clicking on the down arrow will provide you with a list of products / services that you sell / provide.



Choosing the product and clicking on it will populate the “New Charges” part of the invoice with the product name, description and amount.



QuickBooks will display how much your customer owes you at the total.

After adding the product or service, just click on save and QuickBooks will save that invoice.

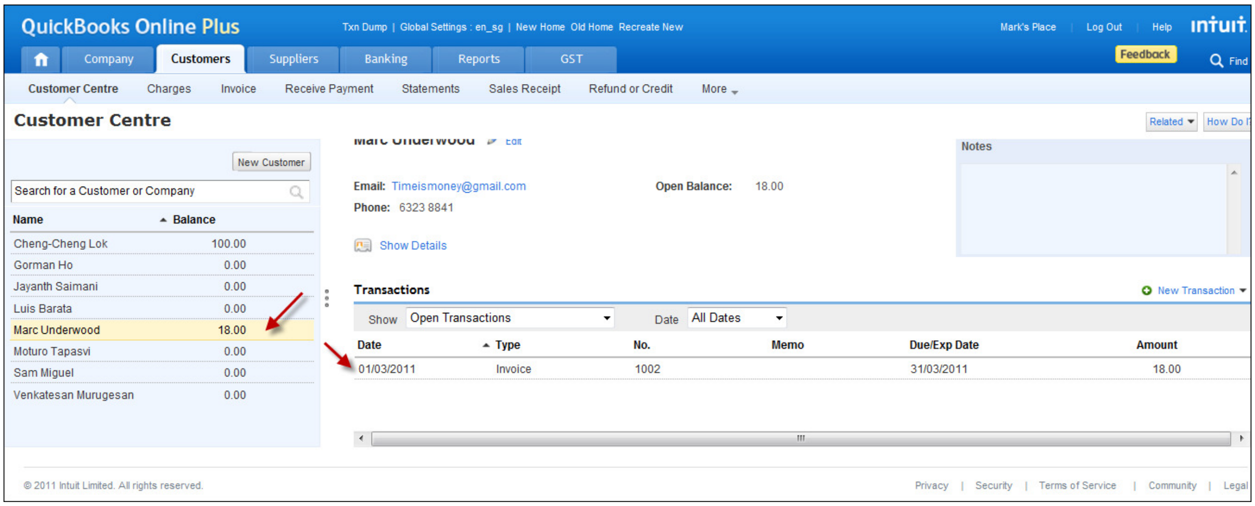
TIP: You can put in customer message like “Thank you for your Purchase” in the Customer Message field and Memo e.g. Customer requested delivery in the Memo field.

When you click on save, QuickBooks will go back to a blank invoice.

You can print the invoice, send it to the customer’s email or preview the invoice.

Tracking Outstanding Payments

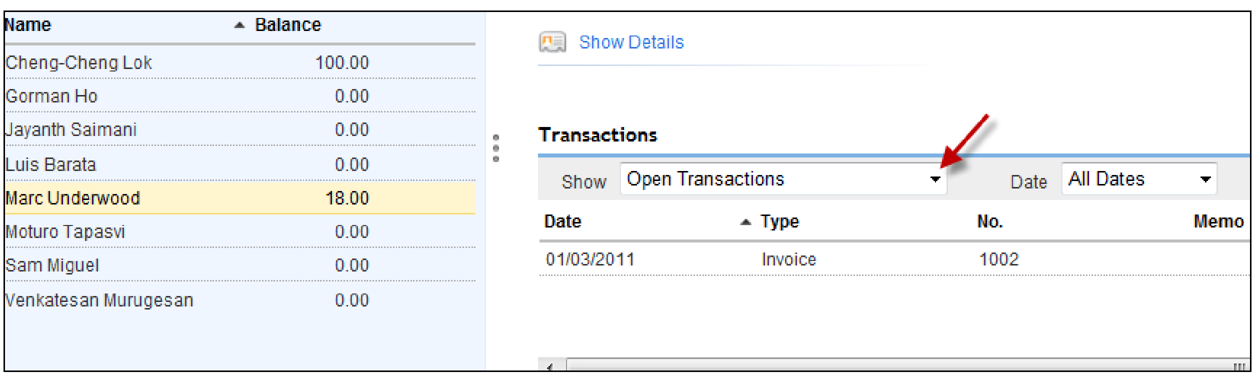
Going back to the Customer Centre, you will see the transaction posted at the customer's record.



To the right side of the customer's name will display the balance.

The right part of the Customer Centre shows the transaction (date, type of transaction, invoice number, due date and amount.

To track outstanding transactions, you can also click on the drop down arrow and choose Open Transactions.



This will make QuickBooks Online show only open transactions of that customer.

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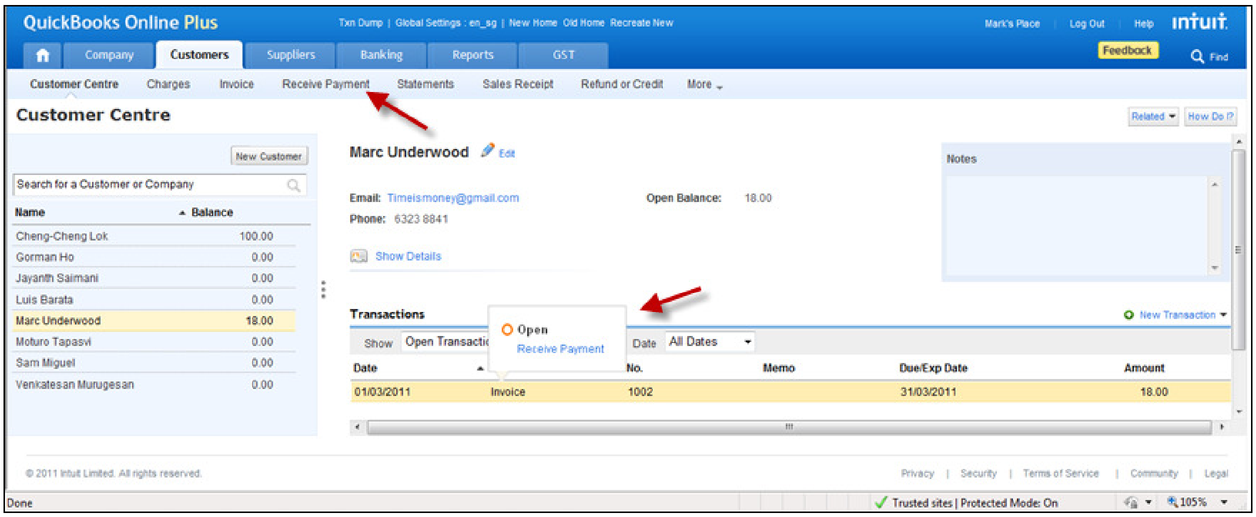
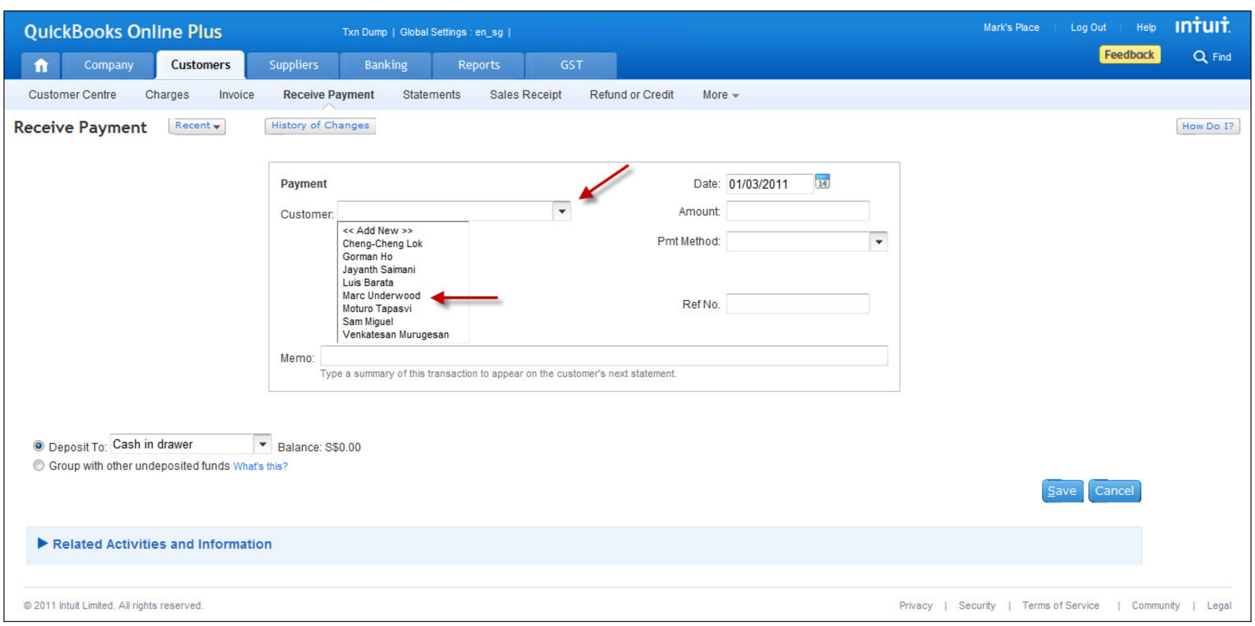
Receiving Payments

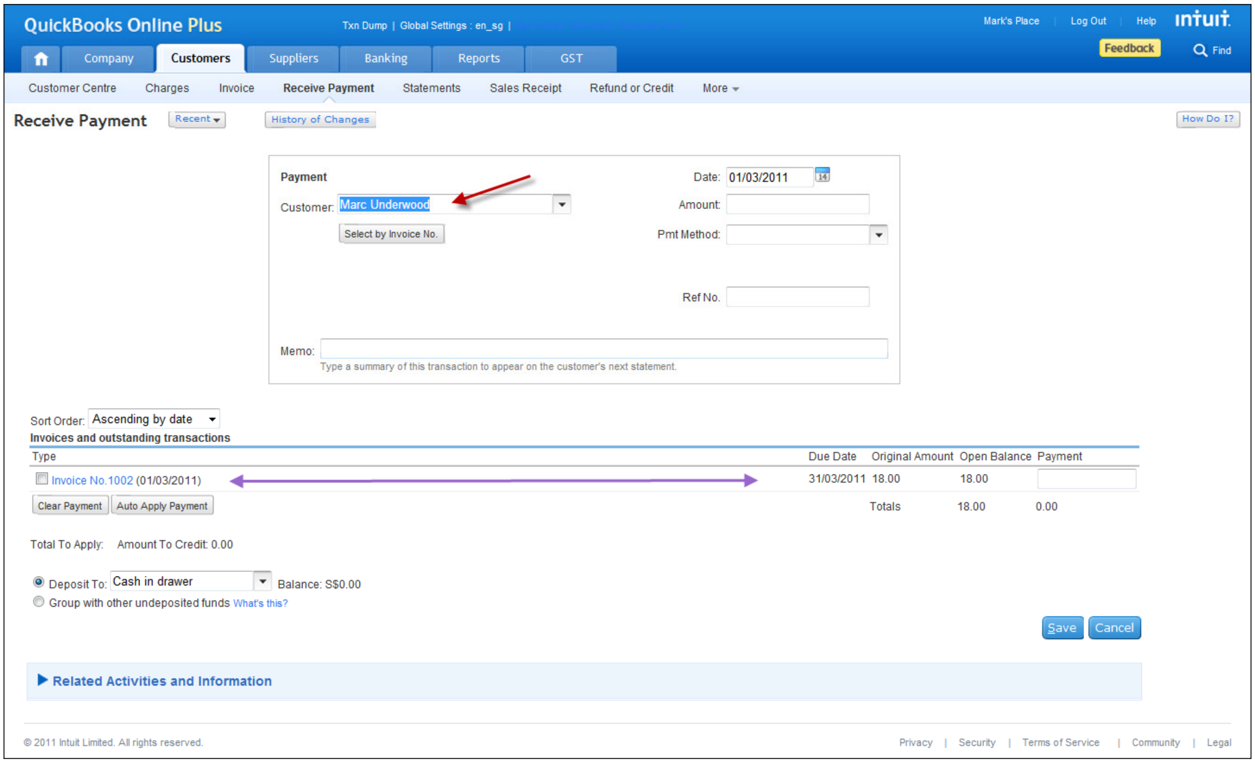
Once you receive a payment from a customer, you can just move your mouse pointer over the invoice and click on Receive Payments on the balloon or Receive Payments below the Customer Tab.



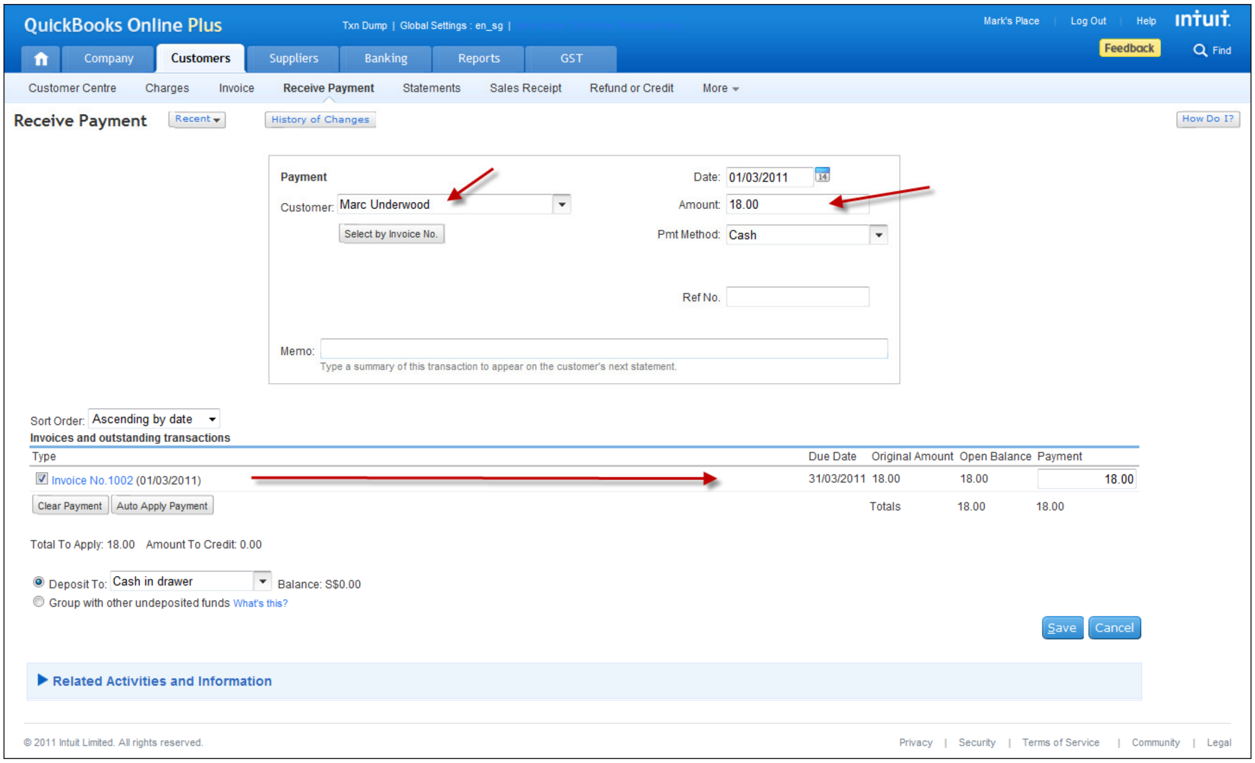
When you click on the Receive Payments below the tab, you will need to choose the name of the customer that owes you payment.



When you click on the Receive Payment Balloon, it will go directly to the receive payment window with the name of the customer fully populated automatically.



Enter the payment amount at the amount field to the right and choose the payment method. Then put a check mark at the tick box before the Invoice number below to apply the payment to the existing invoice.



After completing the steps, click on save to save the payment information.

QuickBooks will go back to a blank payment form once saved.

Going back to the Customer Centre, you will see that the customer's records show no more balance and no open transactions.