



QuickBooks Online Student Guide

Chapter 7

Customers and Sales Part II



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In this chapter, you'll learn how QuickBooks handles advanced features and transactions in the area of sales and customers. In addition to basic sales invoices, sales receipts there are advanced transactions to help you manage sales in QuickBooks

▶ Lesson Objectives

In this chapter, you'll learn how to:

- Use advanced options on sales transactions
- Credits and Refunds
- Customer Statements
- Delayed Charges & Delayed Credits
- Estimates
- Invoicing & Reimbursable Expenses

▶ Advanced Invoicing Options

There are several options available to you when creating sales invoices. They may be useful in different situations when creating sales invoices for your customers. To access these features, go to **Account and Settings**.

1. Click the **Gear** icon.
2. Click **Account and Settings**.
3. Click **Sales**.

The screenshot shows the 'Account and Settings' window with the 'Sales' tab selected. The 'Sales form content' section is active, allowing customization of invoice forms. The 'Preferred invoice terms' is set to 'Net 30', and the 'Preferred delivery method' is 'None'. The 'Shipping' toggle is turned off. Under 'Custom fields', the 'Event Rep' field is checked for both 'Internal' and 'Public' visibility. The 'Custom transaction numbers' toggle is turned on, while 'Service date', 'Discount', and 'Deposit' toggles are turned off. At the bottom, 'Show Product/Service column on sales forms' is turned on, 'Show SKU column' is turned off, and 'Turn on price rules' is a new feature indicated by a 'NEW' tag, currently turned off. A 'Done' button is visible at the bottom right.

Section	Setting	Value/Status	
Sales form content	Preferred invoice terms	Net 30	
	Preferred delivery method	None	
	Shipping	Off	
	Custom fields	Event Rep (Internal: On, Public: On)	
	Custom transaction numbers	On	
	Service date	Off	
	Discount	Off	
	Deposit	Off	
	Products and services	Show Product/Service column on sales forms	On
		Show SKU column	Off
Turn on price rules (NEW)		Off	

- **Preferred Invoice terms**—Determines the default terms to be added to customer invoices.
- **Preferred Delivery Method**—The delivery method default determines the way you'll deliver sales forms to newly-created customers.
- **Shipping**—Adds shipping fields (date, tracking number, destination, subtotal) to sales forms.
- **Custom fields**—Adds extra fields to sales forms. Select "**Internal**" to show the field in QuickBooks; select "**Public**" to show the field on customer forms.
- **Custom Transaction Numbers**—Lets you use your own numbering system. If left blank, invoice numbers are automatically assigned by QuickBooks.
- **Service Date**—Adds a **Service date** field if you need to track the date a service was performed separately from the invoice date.
- **Discount**—Adds a **Discount** field to invoices and other sales forms. In a related setting under Advanced → Chart of Accounts, you can assign what account to track the discount to.

Chart of accounts

Enable account numbers ?

Discount account ?

Markup income account ?

Billable expense income account ?

- **Deposit**—Adds a Deposit field to invoices so you can subtract a customer deposit from the total to calculate the balance due.

Now let's review some of these options in action on the sales invoice. You'll see several new options in the header of the invoice form. You see the following:

- Terms
- Shipping information
- Sales Rep and Territory (custom fields)
- Invoice Number

Invoice no.1001 Take a tour Help ×

Customer Customer email Cards Send later Cc/Bcc Online payments [Get set up](#)

BALANCE DUE
\$0.00

Billing address Invoice no.
 Terms Invoice date Due date
 Ship via Shipping date Tracking no.
 Shipping to Location
 Sales Rep

#	SERVICE DATE	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT
1						
2						

Subtotal **\$0.00**

Message on invoice

In the body of the invoice, you have several options to work with the information in the body section. You can click **Add lines** to add lines for more products and services. Click **Clear All Lines** to clear the section and click **Add subtotal** to add a subtotal to the invoice.

Invoice no.1001 Take a tour Help ×

Christopher's Orthotics Cards Send later Cc/Bcc Receive payment

BALANCE DUE
\$3,000.00

Billing address Invoice no.
 Christopher's Orthotics
 Christopher's Orthotics
 67 Invoiceme Street
 Townville MB A1A 1A3
 Terms Invoice date Due date
 Ship via Shipping date Tracking no.
 Shipping to Location
 Sales Rep

#	SERVICE DATE	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT
1		Sales	Landscape services	10	300	3,000.00
2						Subtotal: \$3,000.00
3						

Subtotal **\$3,000.00**

In the footer section of the invoice you can add a **Discount**. You can add a % discount or a flat rate discount. QuickBooks will calculate the amount and adds a line to the footer.

You can also receive a **Deposit** against this invoice. This acts as a payment against the invoice and reduces the amount owing by the amount of the deposit. Since your customer is giving you

a deposit, you must tell QuickBooks how you received the payment and what account you're depositing the funds to. These fields are activated after you enter the **Deposit** amount.

Subtotal	\$3,000.00
Discount percent ▾	10
	\$-300.00
Shipping	200.00
Total	\$2,900.00
Deposit	300.00
Balance due	\$2,600.00

Invoice no.1001 Take a tour ⚙️ ? Help ✕

Sales Rep

Payment method: Cheque ▾ Reference no. Deposit to: Chequing ▾

#	SERVICE DATE	PRODUCT/SERVICE ⓘ	DESCRIPTION	QTY	RATE	AMOUNT	
1		Sales	Landscape services	10	300	3,000.00	🗑️
2						Subtotal: \$3,000.00	🗑️
3							🗑️

Add lines Clear all lines Add subtotal

Message on invoice
This will show up on the invoice.

Message on statement
If you send statements to customers, this will show up as the description for this invoice.

Subtotal	\$3,000.00
Discount percent ▾	10
	\$-300.00
Shipping	200.00
Total	\$2,900.00
Deposit	300.00
Balance due	\$2,600.00

Cancel Revert Print or Preview Make recurring Customize More Save Save and send ▾

More Menu

After you save a transaction you can access more information about the saved transaction. After clicking save, QuickBooks adds a **More** menu to the bottom of the saved transaction.

Invoice no.1009

Customer: Benjamin Yeung
 Customer email: Benjamin Yeung's Architects
 Billing address: Benjamin Yeung, 4895 King Edward Ave, Barrie ON M2H 4G4
 Terms: Net 30
 Invoice date: 29/06/2021
 Due date: 29/07/2021
 Invoice no.: 1009

Online payments: Cards (VISA, MASTERCARD, AMEX)

BALANCE DUE: **\$7,345.00**

#	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE (CAD)	AMOUNT (CAD)	SALES TAX	CLASS	
1	General services:Badges:Name Badge	Name Badges	500	3	Copy	HST ON		
2	General services:Water Bottles - Gener	Water bottles - generic	500	10	Void	HST ON		
3					Delete			
							Subtotal	6,500.00

More menu options: Copy, Void, Delete, **Transaction journal**, Audit history

Buttons: Add lines, Clear all lines, Add subtotal, Save, Save and send

From this menu, you can do the following functions:

- **Copy**—Duplicate the transaction. Copy the transaction if you need to create a duplicate or similar transaction for a customer.

- **Void**—Click **Void** to void the invoice. Clicking **Void** will make the sales invoice a \$0.00 transaction while maintaining the history of the invoice number and other details.

Invoice no.1002
Take a tour ⚙️ ? Help ✕

Customer ?

Customer email ?

Online payments Get set up

 Cards VISA MEXICO 4Star

PAYMENT STATUS

VOID

Send later ? Cc/Bcc

Billing address

Terms ?

Invoice date

Due date

Location

Sales Rep

Amounts are Exclusive of Tax ▼

#	SERVICE DATE	PRODUCT/SERVICE ?	DESCRIPTION	QTY	RATE	AMOUNT	SALES TAX	
1		Sales	Landscape services	0		0.00	GST	🗑️
2								🗑️

Subtotal **\$0.00**

Message on invoice

This will show up on the invoice.

Discount percent ▼

\$0.00

GST @ 5% on 0.00 0.00

Print or Preview
Make recurring
Customize
More

- **Delete**—Click **Delete** to remove the transaction from QuickBooks. QuickBooks removes the transaction from QuickBooks but it keeps a history of the transaction in the Audit log. You can see the transaction history in the **Audit log**.
- **Transaction Journal**—Click the **Transaction journal** to discover the journal entry QuickBooks makes when you save a transaction. The transaction journal includes the debit and credit of the transaction.

Journal Report

[Back to report list](#)

Report period ?

Green Tree Landscapes

JOURNAL
All Dates

DATE	TRANSACTION TYPE	#	NAME	MEMO/DESCRIPTION	ACCOUNT	DEBIT	CREDIT
18/12/2019	Invoice	1002	Higgs Food Market		Accounts Receivable (A/R)	\$10,500.00	
				Landscape services	Sales		\$10,000.00
					GST/HST Payable		\$500.00
						\$10,500.00	\$10,500.00
TOTAL						\$10,500.00	\$10,500.00

- **Audit History**—Click the **Audit History** on the **More** menu to view the history of the transaction.

Audit History

History of this transaction: [Invoice No. 1003 ID: 13](#) Hide all

▼ Jan 2, 7:07 pm Central Standard Time: Added by Hank Norris

Type:	Invoice	Num:	1003
Date:	18/12/2019	Name:	Wendy's Magic Tricks and Treats
Amount:	7127.40	Address:	89 Salesreport Bend Anycity AB A1A 1A7
Open Balance:	7127.40	Location:	
Terms:	Net 30	Due Date:	17/01/2020
Payment Method:		Pmt Meth Ref No.:	
Custom Field 1:			
Sent:	Not sent	Email Address:	wendysmagic@example.ca
Last Sent:		Delivery Error:	
Printed:	Not printed		
Customer/Supplier Message:			
Memo:			

NO.	CUSTOMER	SUPPLIER	EMPLOYEE	SERVICE DATE	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	LOCATION	DEPOSITED	DEPOSIT ID
0	Wendy's Magic Tricks and Treats									Not deposited	
1	Wendy's Magic Tricks and Treats				Landscaping Work	Landscaping work at property	1	6788		Not deposited	
2	Wendy's Magic Tricks and Treats							5%		Not deposited	

▶ Credit Memos vs. Refund Receipt

There are times where you'll be required to issue credit and refunds back to customers for a variety of reasons. These may include faulty products, overcharging, poor service, etc. There are two ways to handle this type of situation in QuickBooks.

1. **Credit memo**—Create a credit memo in QuickBooks if you want to issue a credit and apply the credit against an outstanding or future invoice. If you have created an invoice for the customer you typically issue a credit memo. The workflow will be the following:

Invoice → *Credit Memo* → *Apply Credit Memo*

2. **Refund Receipt**—Create a Refund Receipt to refund a customer for a payment they've made for products or services. If you have created a Sales Receipt for the customer you typically issue a Refund Receipt. The workflow will be the following:

Sales Receipt → *Refund Receipt* → *Print Cheque (optional)*

Credit Memo

You can give a credit memo to immediately post the transaction. Or if you prefer to include the credit as a line on the customer's next invoice, enter a delayed credit.

A credit memo affects the customer's balance. However, QuickBooks does not apply the credit memo to a particular invoice.

It's important that you review and enable the Automatically Apply Credits setting. To do this:

1. Go to the **Gear** icon.
2. Click **Account and Settings**.
3. Click **Advanced** and then click **Automation**.


The screenshot shows the 'Account and Settings' interface. On the left, a sidebar lists categories: Company, Sales, Expenses, and Advanced. The 'Advanced' category is selected. The main area is divided into sections: Chart of accounts, Categories, Automation, Projects, Time tracking, and Language. The 'Automation' section is highlighted in light blue and contains four toggle switches: 'Pre-fill forms with previously entered content' (On), 'Automatically apply credits' (On), 'Automatically invoice unbilled activity' (Off), and 'Automatically apply bill payments' (On). A green arrow points to the 'Automatically apply credits' toggle. At the bottom of the 'Automation' section are 'Cancel' and 'Save' buttons. A 'Done' button is located at the bottom right of the entire settings window.






NOTE Select **Automatically Apply Credits** if you want QuickBooks to immediately apply the credit to the oldest outstanding invoice. If you want to be able to apply a specific credit against a specific invoice.

To create the credit memo:

1. Click the **New** menu.
2. Click **Credit memo**.
3. Complete the Credit memo in the same way as you create an invoice.

 To learn how to create and apply credit memos watch this video: <https://youtu.be/L6iwaA9yn94>

 **Credit Memo**
 Help 

Customer
 ▼

Email

 Send later Cc/Bcc

Billing address

Credit Memo Date

Sales Rep

AMOUNT TO REFUND
\$840.00

Location

Amounts are Exclusive of Tax ▼

#	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT	SALES TAX
+	1	Landscaping Work				
		Landscaping work at property	1	800	800.00	GST
⋮	2					

Subtotal \$800.00

Message displayed on credit memo

\$0.00

GST @ 5% on 800.00 40.00



NOTE Make sure that you use the same **Product/Service** item as you added to the original invoice. This will ensure that you affect the same account that was used on the original transaction.

4. The next step is to apply the **Credit memo** against an outstanding invoice(s). Click **New Menu**.
5. Click **Receive Payments**.

6. Enter the **Name** of customer. QuickBooks displays the **Outstanding Transactions** and **Credits**.

Receive Payment
Help ✕

Customer: Email:

Send later Cc/Bcc

Payment date:

Payment method: Reference no.: Deposit to:

[Accept payments in QuickBooks](#)

AMOUNT RECEIVED

\$2,187.97

Amount received:

Outstanding Transactions

All ⚙️

	DESCRIPTION	DUE DATE	ORIGINAL AMOUNT	OPEN BALANCE	PAYMENT
<input checked="" type="checkbox"/>	Invoice # 1004 (18/12/2019)	17/01/2020	4,028.85	2,187.97	<input type="text" value="2,187.97"/>

< First Previous 1-1 of 1 Next Last >

Amount to Apply: \$2,187.97
Amount to Credit: \$0.00

Print

7. Select the outstanding invoices to apply the credit against.
8. Select the **Credits** to apply.
9. QuickBooks applies the amount against the invoice and leaves the difference in the **Amount received**. At this point you can choose to Receive the payment of just apply the credit. If you only choose to apply the credit, make sure that you enter \$0.00 in the **Amount received**.

Receive Payment
Help ✕

Outstanding Transactions

All ⚙️

	DESCRIPTION	DUE DATE	ORIGINAL AMOUNT	OPEN BALANCE	PAYMENT
<input checked="" type="checkbox"/>	Invoice # 1004 (18/12/2019)	17/01/2020	4,028.85	3,027.97	<input type="text" value="3,027.97"/>

< First Previous 1-1 of 1 Next Last >

Credits

All ⚙️

	DESCRIPTION	ORIGINAL AMOUNT	OPEN BALANCE	PAYMENT
<input checked="" type="checkbox"/>	Credit Memo # 1006 (18/12/2019)	916.65	916.65	<input type="text" value="916.65"/>

< First Previous 1-1 of 1 Next Last >

Amount to Apply: \$3,027.97
Amount to Credit: \$0.00

Print

- Click **Save** to apply the credit against the outstanding invoice(s) and receive a payment if you choose.

Refund Receipts

When a customer has paid for products and services on a sales receipt in QuickBooks you will use the **Refund receipt** to create a refund transaction.

The refund receipt is similar to the sales receipt. In the case of the refund receipt, you will tell QuickBooks what product or service you're issuing a refund for and add the refund information at the time of the refund.

- Review the original **Sales Receipt** to make sure that you issue a refund for the appropriate products or services.

Sales Receipt no.1007 ? Help X

Customer: Roy's Pancake Hut | Email: roys_pancakes@example.ca | **AMOUNT \$15,738.45**

Billing address: Roy's Pancake Hut, 56 Money Cres., Montreal, QC. | Sales Receipt date: 20/12/2019 | Location: []

Payment method: [Choose payment method] | Reference no.: [] | Deposit to: Chequing

#	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT	SALES TAX
1	Landscaping Work	Landscaping work at property	1	14,989	14,989.00	GST
2						

Subtotal: \$14,989.00

Buttons: Cancel, Print or Preview, Make recurring, Customize, More, Save, Save and close

- Click **New Menu** then click **Refund receipt**.

CUSTOMERS	SUPPLIERS	EMPLOYEES	OTHER
Invoice	Expense	Single time activity	Bank deposit
Receive payment	Cheque	Weekly timesheet	Transfer
Estimate	Bill		Journal entry
Credit memo	Pay bills		Statement
Sales receipt	Purchase order		Inventory qty adjustment
Refund receipt	Supplier credit		Pay down credit card
Delayed credit	Credit card credit		
Delayed charge	Print cheques		

[Show less](#)

3. Complete the **Refund Receipt** as you would a **Sales Receipt**.

Refund Receipt
Help

Customer: Roy's Pancake Hut

Email: roys_pancakes@example.ca

CC/BCC

AMOUNT

\$1,575.00

Billing address: Roy's Pancake Hut, Roy's Pancake Hut, 56 Money Cres, Citytown QC A1A 1A5

Refund Receipt date: 20/12/2019

Location:

Sales Rep:

Payment method: Direct Debit

Refund From: Chequing

Balance: \$15,738.45

Cheque no.: 1

Print later

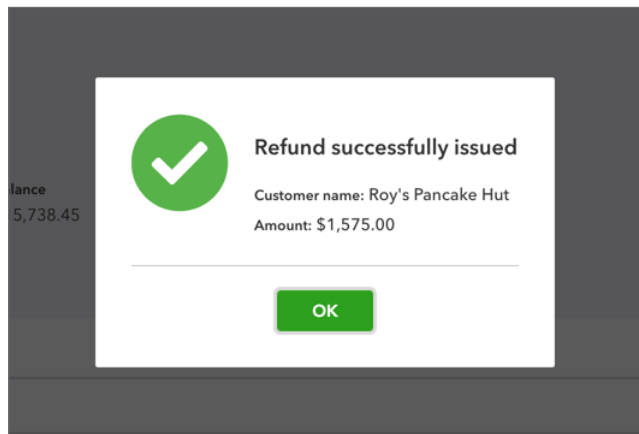
Refund payments in QuickBooks

Amounts are: Exclusive of Tax

#	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT	SALES TAX
1	Landscaping Work	Landscaping work at property	1	1,500	1,500.00	GST
2						

Cancel Clear
Print or Preview Make recurring
Save and new

4. Add the payment information for the refund using the **Payment method**, **Refund From**, and **Cheque** (optional).
5. Click **Save**. QuickBooks displays confirmation that the refund was successful.



To learn how to create a refund receipt watch this video: <https://youtu.be/egsnUcl0i1Q>

▶ Customer Statements

A customer statement is the status of a customer's account at a particular point in time. Customer statements in QuickBooks don't offer as much detail on each individual sales transaction as an invoice or sales receipt would.

Statements are often sent out on a regular, say monthly, basis to let your customers know where they stand and if they still owe you any money. Each line item on a statement represents sales transactions, credits, and payments for the time period of the statement.

You can create a balance forward, open item, or transaction statement.

- **Balance Forward**—Displays all activity dated between Start and End dates. Will show a Balance Forward amount at the top.
- **Open Item**—Displays all open invoices from a specific date back.
- **Transaction Statement**—Doesn't show a balance, just the amount of transactions and the amount received for each individual transaction.

To create statements for multiple customers:

1. Click the **New** menu.
2. Click **Statement**.

CUSTOMERS	SUPPLIERS	EMPLOYEES	OTHER
Invoice	Expense	Single time activity	Bank deposit
Receive payment	Cheque	Weekly timesheet	Transfer
Estimate	Bill		Journal entry
Credit memo	Pay bills		Statement
Sales receipt	Purchase order		Inventory qty adjustment
Refund receipt	Supplier credit		Pay down credit card
Delayed credit	Credit card credit		
Delayed charge	Print cheques		

[Show less](#)

3. Under **Choose statement type** click to select **Balance Forward**, **Open Item**, or **Transaction Statement** depending on your preference.
4. Enter **Statement Date**, **Start Date**, and **End Date**.
5. Set additional statement criteria, if needed.

6. Click **Apply**.

Create Statements ? X

Statement Type: Balance Forward TOTAL BALANCE FOR 2 CUSTOMERS
\$10,242.72

Statement Date: 02/01/2020

Customer Balance Status: Open Start Date: 02/12/2019 End Date: 02/01/2020

▶ Recipients List

Missing email address (0) Statements available (2)

RECIPIENTS	EMAIL ADDRESS	BALANCE
<input checked="" type="checkbox"/> Blakey's Bin Liners	blakeybins@example.ca	\$2,111.32
<input checked="" type="checkbox"/> Wendy's Magic Tricks and Treats	wendysmagic@example.ca	\$8,131.40

Cancel Print or Preview Save Save and send ▼

7. The **Statements** window displays. Read the instructions at the top, select the appropriate customer(s) and click **Create/Send Selected Statements**. This will send any statements that you've chosen to email.

8. To print statements, click Print or Preview (or **Print Statements**) then click **Print**.

9. The preview window will open so you can look at the statements before sending to the printer.

Create Statements ? X

Statement Type: Balance Forward TOTAL BALANCE FOR 2 CUSTOMERS
\$10,242.72

Statement Date: 02/01/2020

Customer Balance Status: Open Start Date: 02/12/2019 End Date: 02/01/2020


▶ Recipients List

Missing email address (0) Statements available (2)

Print Statement X 72

To print, right-click the preview and select **Print**. Or, click the **Print** icon if you see one below.

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Statement

TO
Blakey's Bin Liners
Blakey's Bin Liners
49 Main
Barrie ON M4N 3J8

STATEMENT NO. 1002
DATE 02/01/2020
TOTAL DUE \$2,111.32
ENCLOSED

DATE	DESCRIPTION	AMOUNT	BALANCE
01/12/2019	Balance Forward		1,000.00

Close Print

Cancel Print or Preview Save Save and send ▼



NOTE To send a **Transaction Statement** or **Open Item** statement choose the appropriate statement type and then follow the same instruction as above.

Delayed Charge

When you provide services to customers you may not create an invoice for each service. You may add charges to customers' accounts and invoice for all services in a period of time on one invoice. QuickBooks lets you create a **Delayed Charge** to handle this type of situation. You can create one or more delayed charges and add them to an invoice at a time that you choose.



NOTE Delayed charges are only available in the QuickBooks Online Plus version.

To create a **Delayed Charge**:

1. Click the **New** menu.
2. Click **Delayed Charge**.

- Complete the **Delayed Charge** form just like an invoice form.

Delayed Charge

Customer: Fouts Cookouts

Delayed Charge Date: 04/09/2019

Location:

AMOUNT: **\$45.00**

Amounts are: Exclusive of Tax

#	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT	SALES TAX
1	Lawn Maintenance		1	45	45.00	GST
2						

Total: \$45.00

Memo:

Attachments: Maximum size: 25MB
Drag/Drop files here or click the icon

Buttons: Cancel, Clear, Make recurring, Save and new

- Click **Save**.
- Repeat the process for each additional charge.

Delayed Charge

Customer: Fouts Cookouts

Delayed Charge Date: 11/09/2019

Location:

AMOUNT: **\$45.00**

Amounts are: Exclusive of Tax

#	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT	SALES TAX
1	Lawn Maintenance		1	45	45.00	GST
2						

Total: \$45.00

Memo:

Attachments: Maximum size: 25MB
Drag/Drop files here or click the icon

Buttons: Cancel, Clear, Make recurring, Save and new

Delayed Charge
Help ✕

Customer: Fouts Cookouts

Delayed Charge Date: 18/09/2019 Location:

AMOUNT

\$45.00

Amounts are: Exclusive of Tax

#	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT	SALES TAX	
1	Lawn Maintenance		1	45	45.00	GST	🗑️
2							🗑️

Add lines Clear all lines

Memo:

Attachments: Maximum size: 25MB

Drag/Drop files here or click the icon

Total **\$45.00**

Cancel
Clear
Make recurring
Save and new ▼

You can view the **Delayed Charges** on the Customer centre. Click the **Unbilled Activity** section.

Green Tree Landscapes
Help 🔍 🔔 ⚙️

Overview All Sales Invoices **Customers** Products and Services

Customers New customer ▼

Unbilled Last 365 Days

\$0
0 ESTIMATE

Unpaid Last 365 Days

\$142
3 UNBILLED ACTIVITY

Overdue

\$0
0 OVERDUE

Open Invoices

\$9,239
3 OPEN INVOICES

Paid

\$14,163
3 PAID LAST 30 DAYS

Batch actions ▼

🖨️ 📄 ⚙️

	CUSTOMER / PROJECT ▲ / COMPANY	PHONE	SALES TAX	OPEN BALANCE	ACTION
<input type="checkbox"/>	Blakey's Bin Liners ✉️ <small>Blakey's Bin Liners</small>	905-555-2345		\$2,111.32	Receive payment ▼
<input type="checkbox"/>	Christopher's Orthotics ✉️ <small>Christopher's Orthotics</small>	204-555-3456		\$235,788.01	Receive payment ▼
<input type="checkbox"/>	Cioran's Acorns ✉️ <small>Cioran's Acorns</small>	905-555-3690		\$19,999,999,999...	Receive payment ▼

Create Invoices from Delayed Charges

You can add as many delayed charges as required over any period. You can transfer one or more delayed charge to an invoice. You can add delayed charges to invoices in two different ways.

Method #1 Customer Centre

1. Go to the **Customer Centre**.
2. Click **Unbilled Activities**.

Overview All Sales Invoices **Customers** Products and Services

Customers [Clear Filter / View All](#) New customer

Unbilled Last 365 Days: \$0 (0 ESTIMATE) | \$142 (3 UNBILLED ACTIVITY) | Unpaid Last 365 Days: \$0 (0 OVERDUE) | \$9,239 (3 OPEN INVOICES) | Paid: \$14,163 (3 PAID LAST 30 DAYS)

Batch actions Search

CUSTOMER / PROJECT ▲ / COM	PHONE	SALES TAX	UNBILLED ACTIVITIES	UNBILLED AMOUNT	ACTION
Fouts Cookouts	604-555-4567		3 Unbilled activities	\$135.00	Start invoice

< First Previous 1-1 Next Last >

3. Click **Start Invoice**. QuickBooks transfers the information from the delayed charge to the invoice.
4. Click **Save**.

Invoice Take a tour Help

Customer: Fouts Cookouts Customer email: foutscookouts@example.ca Online payments: Cards VISA MasterCard Amex Apple

BALANCE DUE: **\$141.75**

3 linked transactions Send later Co/Bcc

Billing address: Fouts Cookouts, Fouts Cookouts, 6789 Expensereport Road, Cityville BC A1A 1A4

Terms: Net 30 Invoice date: 30/09/2019 Due date: 30/10/2019 Location: []

Sales Rep: []

Amounts are: Exclusive of Tax

#	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT	SALES TAX		
1	Lawn Maintenance		1	45	45.00	GST		
2	Lawn Maintenance		1	45	45.00	GST		
3	Lawn Maintenance		1	45	45.00	GST		
4								

Add lines Clear all lines Add subtotal Subtotal \$135.00

Cancel Clear Print or Preview Make recurring Customize Save **Save and close**

Method #2 Invoice

You can also transfer the delayed charge(s) directly from the invoice window.

1. Click **New**.
2. Click **Invoice**.
3. Choose the **Customer** and then click Tab. QuickBooks immediately displays the outstanding **Delayed Charges** on the right-side of the **Invoice** window.

Invoice

Customer: Fouts Cookouts
Customer email: foutscookouts@example.ca
Online payments: Cards VISA MASTERCARD AMEX PAY

BALANCE DUE: **\$0.00**

Filter by: All dates

Add all

Charge #1
Sept 4, 2019
\$45.00 | Taxable
Add Open

Charge #2
Sept 11, 2019
\$45.00 | Taxable
Add Open

Charge #3
Sept 18, 2019
\$45.00 | Taxable
Add Open

#	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT	SALES TAX
1						
2						

Subtotal: \$0.00

Discount percent: \$0.00

Save Save and close

4. Edit the transaction as needed. Click **Save**.

Invoice

Customer: Fouts Cookouts
Customer email: foutscookouts@example.ca
Online payments: Cards VISA MASTERCARD AMEX PAY

BALANCE DUE: **\$141.75**

Filter by: All dates

Add all

3 linked transactions

Charge #1
Sept 4, 2019
\$45.00 | Taxable
Add Open

Charge #2
Sept 11, 2019
\$45.00 | Taxable
Add Open

Charge #3
Sept 18, 2019
\$45.00 | Taxable
Add Open

#	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT	SALES TAX
1	Lawn Maintenance		1	45	45.00	GST
2	Lawn Maintenance		1	45	45.00	GST
3	Lawn Maintenance		1	45	45.00	GST
4						

Subtotal: \$135.00

Discount percent: \$0.00

Save Save and close

▶ Delayed Credit

The delayed credit is like the Delayed Charge. It is a credit that can be applied at a later time. The delayed credit is also a non-posting transaction. This means that it will not post to an account until you apply the credit to a transaction.

To create a Delayed Credit:

1. Click **New**.
2. Click **Delayed Credit**.

CUSTOMERS	SUPPLIERS	EMPLOYEES	OTHER
Invoice	Expense	Single time activity	Bank deposit
Receive payment	Cheque	Weekly timesheet	Transfer
Estimate	Bill		Journal entry
Credit memo	Pay bills		Statement
Sales receipt	Purchase order		Inventory qty adjustment
Refund receipt	Supplier credit		Pay down credit card
Delayed credit	Credit card credit		
Delayed charge	Print cheques		

[Show less](#)

3. Complete the **Delayed Credit** like a **Delayed Charge**.
4. Click **Save**.

Delayed Credit
? Help X

Customer

AMOUNT

\$22.50

Delayed Credit date

Location

Amounts are Exclusive of Tax

#	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT	SALES TAX	
+	1	Lawn Maintenance	1	22.50	22.50	GST	🗑️
⋮	2						🗑️

Total **\$22.50**

Memo

Attachments Maximum size: 25MB

Drag/Drop files here or click the icon

[Show existing](#)

Make recurring

Follow the same instructions as above to transfer the delayed credits to the invoice.

Invoice Take a tour Help

Customer: Fouts Cookouts | Customer email: foutscookouts@example.ca | Online payments: [Get set up](#)

BALANCE DUE: **\$0.00**

Charges:

- Charge #1: Sept 4, 2019, \$45.00 | Taxable
- Charge #2: Sept 11, 2019, \$45.00 | Taxable
- Charge #3: Sept 18, 2019, \$45.00 | Taxable
- Credit #4: Sept 18, 2019, \$-22.50 | Taxable

#	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT	SALES TAX
1						
2						

Subtotal: \$0.00

Invoice Take a tour Help

Customer: Fouts Cookouts | Customer email: foutscookouts@example.ca | Online payments: [Get set up](#)

BALANCE DUE: **\$118.12**

Charges:

- Charge #1: Sept 4, 2019, \$45.00 | Taxable
- Charge #2: Sept 11, 2019, \$45.00 | Taxable
- Charge #3: Sept 18, 2019, \$45.00 | Taxable
- Credit #4: Sept 18, 2019, \$-22.50 | Taxable

#	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT	SALES TAX
1	Lawn Maintenance		1	45	45.00	GST
2	Lawn Maintenance		1	45	45.00	GST
3	Lawn Maintenance		1	45	45.00	GST
4	Lawn Maintenance		-1	22.50	-22.50	GST
5						

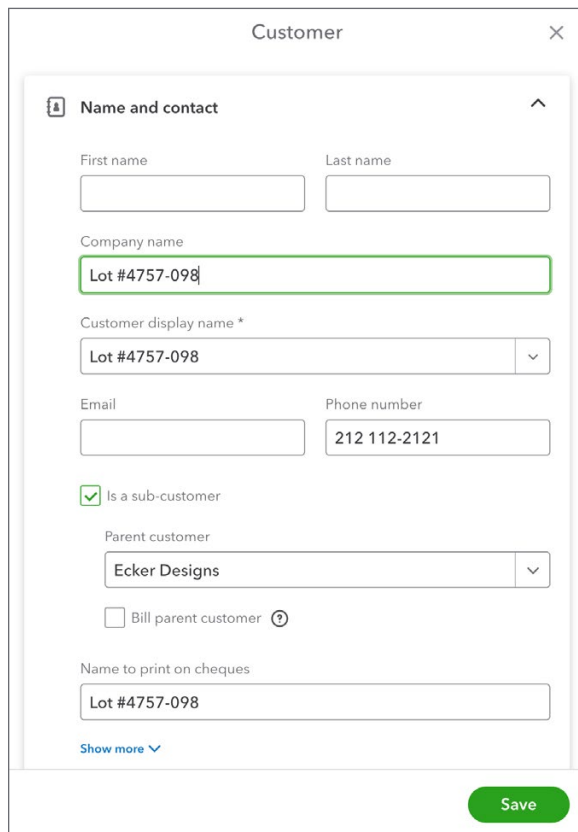
Subtotal: \$118.12

To learn how to work with delayed charges watch this video: https://youtu.be/M_4tPsC4Jp0

▶ Sub-Customers

At times in your business, you may want to track more detail about customers. At times, you may work on different jobs, or projects for customers. QuickBooks lets you track the details of these customer projects using sub-customers. A sub-customer is a name linked to the customer. As you create a sub-customer, QuickBooks will display the name indented below the “parent” customer on the customer centre. To create a sub-customer:

1. On the Customer centre, click **New**.
2. Add the sub-customer information just like you would enter for a regular customer.
3. Click **Is sub-customer**.
4. Choose the parent customer.



The screenshot shows the 'Customer' form in QuickBooks. The form is titled 'Customer' and has a close button (X) in the top right corner. The form is divided into sections. The first section is 'Name and contact', which includes fields for 'First name', 'Last name', 'Company name', 'Customer display name *', 'Email', and 'Phone number'. The 'Company name' field contains 'Lot #4757-098'. The 'Customer display name *' dropdown menu also shows 'Lot #4757-098'. The 'Phone number' field contains '212 112-2121'. Below these fields, there is a checkbox labeled 'Is a sub-customer' which is checked. Underneath, there is a 'Parent customer' dropdown menu showing 'Ecker Designs'. There is also an unchecked checkbox labeled 'Bill parent customer' with a help icon. At the bottom of the form, there is a field for 'Name to print on cheques' containing 'Lot #4757-098'. A 'Show more' link is visible at the bottom left of the form. A green 'Save' button is located at the bottom right of the form.

▶ Estimates & Quotes

Many small businesses create proposals, quotes, or estimates for projects or jobs for customers. QuickBooks includes an Estimate transaction that lets you create an Estimate for a customer and then copy the estimate to the invoice.

QuickBooks lets you create multiple estimates for any project or job. You can assign a status of **Pending, Accepted** or **Rejected**.



NOTE The Estimate transaction is a non-posting transaction. This means that you can create as many estimates as needed for any customer and it won't affect your accounting until you convert the estimate to an invoice. At this point you record a sale in your business.

Creating an Estimate is similar to the Invoice. It lets you:

- Customize the headings, fields, and columns that appear on your estimates.
- Apply each estimate to a customer or job or apply multiple estimates to a job.
- Start with a blank estimate and enter items already on your Items list, or enter new items as you write. You can also start with a saved estimate (recurring transaction) that is partly filled in. Making an estimate a recurring transaction is useful if your estimates often contain the same information.
- Modify an existing estimate anytime and resubmit it to your customer.
- E-mail the estimate to your customer directly from QuickBooks.
- Convert estimates in a series of progress invoices based on %'s or amounts of the entire estimate or individual lines on the estimate form.

To use estimates in QuickBooks you should review the Company Settings related to Estimates:

1. Click **Gear** icon.
2. Click **Account and Settings** and then click **Sales**.
3. Click the pencil icon next to **Progress Invoicing** to edit.

4. Select the checkbox labeled **Create multiple partial invoices from a single estimate**.

Account and Settings Help ✕

Company	Service date	Off
Sales	Discount	On
	Deposit	Off
Expenses	Products and services	
	Show Product/Service column on sales forms	On
	Show SKU column	Off
	Turn on price rules <small>NEW</small>	Off
	Track quantity and price/rate	On
	Track inventory quantity on hand	On
Advanced	Progress Invoicing	
	Create multiple partial invoices from a single estimate	<input checked="" type="checkbox"/>
	Cancel Save	
	Messages	
	Default email message sent with sales forms	
	Reminders	
	Auto invoice reminders	Off
	Online delivery	
	Email options for all sales forms	
	Statements	
	Show aging table at bottom of statement	On

Done

5. Click **Save**.

Creating Estimates

You can create estimates in a similar way to invoices. Click the **Gear** icon and then click **Estimates**.

CUSTOMERS	SUPPLIERS	EMPLOYEES	OTHER
Invoice	Expense	Single time activity	Bank deposit
Receive payment	Cheque	Weekly timesheet	Transfer
Estimate	Bill		Journal entry
Credit memo	Pay bills		Statement
Sales receipt	Purchase order		Inventory qty adjustment
Refund receipt	Supplier credit		Pay down credit card
Delayed credit	Credit card credit		
Delayed charge	Print cheques		

[Show less](#)

1. Enter the **Customer** name.
2. Choose the **Status** of the estimate from the drop-down menu below the customer name.

The screenshot shows the 'Estimate' form with the following fields and values:

- Customer:** Cioran's Acorns
- Estimate status:** Pending (dropdown menu is open showing options: Pending, Accepted, Closed, Rejected)
- Email:** cioransacorns@example.ca
- Billing address:** Cioran's Acorns, Cioran's Acorns, 4890 Easy Street, Midtown ON A1A 1
- Estimate date:** 18/09/2019
- Expiration date:** (empty)
- Sales Rep:** (empty)

3. Enter the **Date**.
4. In the body of the estimate add the **Products/services** you're selling to the customer.
5. Enter the **Description, Quantities, Amounts** and **Sales Tax**.

The screenshot shows the 'Estimate' form with the following fields and values:

- Customer:** Cioran's Acorns
- Estimate status:** Pending
- Email:** cioransacorns@example.ca
- Billing address:** Cioran's Acorns, Cioran's Acorns, 4890 Easy Street, Midtown ON A1A 1A8
- Estimate date:** 01/11/2019
- Expiration date:** (empty)
- Sales Rep:** (empty)
- Location:** (empty)
- Amount:** \$26,250.00
- Amounts are:** Exclusive of Tax

#	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT	SALES TAX
1	Landscaping Work	Landscaping work at property	1	25,000	25,000.00	GST
2						
3						

Buttons: Add lines, Clear all lines, Add subtotal, Subtotal \$25,000.00, Discount percent, \$0.00

Footer: Cancel, Clear, Print or Preview, Make recurring, Customize, Save, Save and send

6. Click **Save**.

Reporting on Estimates

You can view the open estimates on the **Customer** centre. Click **Estimates**.

Green Tree Landscapes

Overview All Sales Invoices **Customers** Products and Services

Customers New customer

Unbilled Last 365 Days Unpaid Last 365 Days Paid

\$26,250 1 ESTIMATE \$0 0 UNBILLED ACTIVITY \$118 1 OVERDUE \$9,357 4 OPEN INVOICES \$14,163 3 PAID LAST 30 DAYS

CUSTOMER / PROJECT / COMPANY	PHONE	SALES TAX	OPEN BALANCE	ACTION
<input type="checkbox"/> Blakey's Bin Liners Blakey's Bin Liners	905-555-2345		\$2,111.32	Receive payment
<input type="checkbox"/> Christopher's Orthotics Christopher's Orthotics	204-555-3456		\$235,788.01	Receive payment
<input type="checkbox"/> Cioran's Acorns Cioran's Acorns	905-555-3690		\$19,999,999,999...	Receive payment
<input type="checkbox"/> Fouts Cookouts Fouts Cookouts	604-555-4567		\$1,352.12	Receive payment
<input type="checkbox"/> Higgs Food Market Higgs Food Market	604-555-1234		\$234,000.12	Receive payment

Run a report on estimates:

1. Click **Reports**.
2. Scroll to **Sales and Customers**.
3. Click **Estimates by Customer**.

Sort Add notes

Green Tree Landscapes

ESTIMATES BY CUSTOMER
All Dates

DATE	#	ESTIMATE STATUS	ACCEPTED DATE	ACCEPTED BY	EXPIRATION DATE	INVOICE #	AMOUNT
01/11/2019	1001	Pending					26,250.00
Total for Cioran's Acorns							\$26,250.00

Copying Estimates to Invoices

After you've created estimates and delivered the product and services to the customer, you can copy the estimate information directly to the invoice. You can copy the entire estimate at one time or use Progress Invoicing to convert the estimate multiple times. This lets you convert specific percentages or amounts of the estimate or specific amounts of specific lines from the estimate over an extended period of time.

To copy an estimate to an invoice:

1. Click the **New** menu.
2. Click **Invoice**.
3. Choose the customer and then press tab. QuickBooks display the open estimates in the right side of the Invoice window.
4. Click **Add** or **Add all** to the estimates you want to copy across.

The screenshot shows the QuickBooks 'Invoice' window. The 'Customer' is 'Cioran's Acorns' with email 'cioransacorns@example.ca'. The 'BALANCE DUE' is '\$0.00'. The 'Add to Invoice' sidebar on the right shows a filter set to 'All dates' and an 'Add all' button. Below that, an estimate card for 'Estimate #1001' is displayed, dated 'Nov 1, 2019', with a total of '\$26,250.00 | Taxable' for 'Landscaping work at property'. The card has 'Add' and 'Open' buttons. A green arrow points from the 'Add' button to the first line item in the main table.

#	PRODUCT/SERVICE	DESCRIPTION	UNIT	RATE	AMOUNT	SALES TAX
1						
2						

Subtotal: \$0.00
Discount percent: \$0.00



NOTE QuickBooks recognizes that you're converting an estimate to an invoice and asks you the question: **How much do you want to invoice?** You have three options:

- **Total of all estimate lines**—This option lets you invoice the entire amount of the estimate and the estimate is closed automatically.
- **% of each line**—This option lets you enter a % to invoice. This will invoice a set percentage of each line on the estimate.
- **Custom amount for each line**—This option lets you enter a \$dollar amount for each line on the estimate.

5. Select the option that works for your situation.
6. Enter the %'s or amounts as needed.

7. Click **Copy to invoice**.

How much do you want to invoice?

Total of all estimate lines = \$25,000.00

50% of each line = \$12,500.00

Custom amount for each line

Copy to invoice

QuickBooks copies that amount to the invoice. Enter any other details as needed on the invoice. Click **Save and close** to save the progress invoice.

Invoice Take a tour Help X

Customer: Cioran's Acorns 1 linked transaction Customer email: cioransacorns@example.ca Send later Co/Bcc Online payments: Cards VISA Mastercard Amex Discover Get set up **BALANCE DUE** **\$26,250.00**

Billing address: Cioran's Acorns, Cioran's Acorns, 4890 Easy Street, Midtown ON A1A 1A8 Location

Terms: Net 30 ? Invoice date: 01/11/2019 ? Due date: 01/12/2019 ? Sales Rep:

Amounts are: Exclusive of Tax

#	PRODUCT/SERVICE	DESCRIPTION	DUE	QTY	RATE	AMOUNT	SALES TAX
1	Landscaping Work	Landscaping work at property	25,000.00 of 25,000.00	1	25,000	25,000.00	GST
2							

Subtotal \$25,000.00

Message on invoice: Discount percent **\$0.00**

Message on statement: GST @ 5% on 25,000.00 **1,250.00**

Cancel **Clear** Print or Preview Make recurring Customize **Save** **Save and close**

To learn how to work with estimates watch this video: <https://youtu.be/CSJT0Ug80LA>

Reimbursable Expenses

In some businesses, you may incur expenses that you will be reimbursed by your customers. This is common in many types of services business like law firms, consulting firms, and other service

professionals. Reimbursable expenses vary from business to business; i.e., a lawyer may seek reimbursement for laser copies, postage, delivery, etc.

For billable time: Record the hours spent on the job, using either a weekly timesheet or a single activity entry. Assign the hours to the customer or job (if you're tracking by job). Each entry will automatically be checked in the Billable column on the form.

For job-related purchases (items purchased for a job, subcontracted services): Use a bill, cheque, or credit card charge to record the purchase. On the Items tab, enter each item or service you purchased. In the Customer column, be sure to assign each item or service to the customer or job (if you're tracking by job).

For overhead expenses: Expenses not caused by any specific job (rent, office supplies, etc.) should not be assigned to a Customer:Job. However, you might still want to see these expenses on job costing reports. To do that, create a dummy Customer:Job called "Overhead" and then assign all of your overhead costs to that fake job.

For other expenses (freight charges, postage, etc.): Use a bill, cheque, or credit card charge to record the expenses. On the Expenses tab, enter each expense. In the customer column, be sure to assign each expense to the customer or sub-customer (if you're tracking by sub-customer).

To track reimbursable time and expenses you should review the Company Settings. Click the **Gear** icon and then click **Company Settings**. Click **Expenses**.

Select the option **Make expenses and items billable**.

Account and Settings Help ×

Company

Sales

Expenses

Advanced

Bills and expenses

Show Items table on expense and purchase forms ⓘ

Track expenses and items by customer ⓘ

Make expenses and items billable ⓘ

Markup with a default rate of % ⓘ

Track billable expenses and items as income ⓘ

Default bill payment terms

Purchase orders

Use purchase orders On ✎

Messages

Default email message sent with purchase orders ✎

[Privacy](#) | [Security](#) | [Terms of Service](#)



NOTE Use one or more income accounts to track billable expenses. A related setting can be added. Click **Advanced** and then click **Chart of accounts** and then choose Billable expenses income account.

Chart of accounts Enable account numbers ? Off

Discount account ? Discounts given ▼

Billable expense income account ? Billable Expense Income ▼

Cancel Save

To track reimbursable expenses and time you can use one or more of the following transaction types:

- Weekly timesheets
- Expenses
- Bills
- Single Time Activity
- Cheques

To track time to a sub-customer:

1. Click the **New** menu.
2. Click **Weekly timesheet**.
3. **Add the employee or supplier name.**
4. Under the Details section choose the sub-customer to track the time.
5. Enter the hours in the appropriate column.
6. Click **Save**.

Weekly Timesheet ⚙️ ? Help ✕

Chuck's Sod ▼
29/12/2019 to 4/1/2020 ▼
TOTAL HOURS
40:00

	# DETAILS	SUN 29	MON 30	TUE 31	WED 1	THU 2	FRI 3	SAT 4	TOTAL
1	Christopher's Orthotics ▼ Choose a location ▼ Sod planting. <input checked="" type="checkbox"/> Billable (/hr) 50.00	8:00	8:00	8:00	8:00	8:00			Hrs 40:00 Billable \$2,000.00
2	Choose a customer ▼ Choose a location ▼ Description <input type="checkbox"/> Billable (/hr)								Hrs Billable
3	Choose a customer ▼ Choose a location ▼ Description <input type="checkbox"/> Billable (/hr)								Hrs Billable
TOTAL		8:00	8:00	8:00	8:00	8:00			40:00

Add lines
Clear all lines

Cancel
Copy last timesheet
Save
Save and new ▼

To track expenses to a sub-customer:

1. Click the **New** menu.
2. Click **Expense**.
3. Create the transaction as you normally would.
4. Add the name of the sub-customer to track the expense.
5. Click **Save**.

Expense Take a tour Help X

Payee: Chuck's Sod Payment account: Chequing Balance \$14,163.45 AMOUNT: \$3,150.00

Payment date: 01/11/2019 Payment method: What did you pay with? Ref no.: Location:

Amounts are: Exclusive of Tax

#	CATEGORY	DESCRIPTION	AMOUNT	SALES TAX	BILLABLE	CUSTOMER
1	Job Materials	Sod	3,000.00	GST	<input checked="" type="checkbox"/>	Christopher's Ort
2						

Subtotal: \$3,000.00

Buttons: Cancel, Clear, Print, Make recurring, Save, Save and close

To track expenses on a cheque to a sub-customer:

1. Click the **+New** menu.
2. Click **Cheque**.
3. Create the transaction as you normally would.
4. Add the name of the **sub-customer** to track the expense on the cheque.

5. Click **Save**.

Cheque no.2 ? Help X

Payee: Deere Snow Removal Bank Account: Chequing Balance \$11,013.45 AMOUNT
\$2,625.00

Mailing address: Deere Snow Removal Payment date: 01/11/2019 Cheque no.: 2
 Print later
 Location:

Amounts are:

▼ Category details

#	CATEGORY	DESCRIPTION	AMOUNT	SALES TAX	BILLABLE	CUSTOMER
1	Subcontractors	subcontracted services	2,500.00	GST	<input checked="" type="checkbox"/>	Christopher's Ort
2						

Add lines Clear all lines

▶ Item details

Memo Subtotal \$2,500.00

Cancel Clear Print or Preview Make recurring More **Save and close**

To track expenses from a bill to a sub-customer:

1. Click the **+New** menu.
2. Click **Bill**.
3. Create the transaction as you normally would.
4. Add the name of the **sub-customer** to track the expense on the cheque.

5. Click **Save**.

Bill ? Help X

Supplier: Bobcat Unlimited

BALANCE DUE
\$1,363.95

Mailing address: Bobcat Unlimited

Terms: [Dropdown] Bill date: 01/11/2019 Due date: 01/11/2019

Bill no.: [Text] Location: [Dropdown]

Amounts are: Exclusive of Tax

▼ Category details

#	CATEGORY	DESCRIPTION	AMOUNT	SALES TAX	BILLABLE	CUSTOMER
1	Subcontractors	bobcat services	1,299.00	GST	✓	Christopher's Orthotics
2						

Add lines Clear all lines

► Item details

Memo: [Text]

Subtotal \$1,299.00

Cancel Clear Make recurring Save Save and close

Transfer Billable Expenses and Time to Customer

After tracking time and expenses to a customer, you're now ready to issue an invoice that includes the reimbursable expenses. Create the invoice:

1. Click the **New** menu and then click **Invoice**.
2. Choose the **Customer** and then press tab. QuickBooks displays the reimbursable expenses on the right-side of the QuickBooks window.

- After completing the invoice as needed, select the reimbursable expenses on the right-side of the window to add them.

Invoice Take a tour Help

Customer: Christopher's Orthotics | Customer email: chris_smith@example.ca | Online payments: Cards VISA MasterCard Amex Apple Pay

4 linked transactions | Send later | Co/Bcc

Billing address: Christopher's Orthotics, Christopher's Orthotics, 67 Invoiceme Street, Townville MB A1A 1A3

Terms: Net 30 | Invoice date: 01/11/2019 | Due date: 01/12/2019 | Location: [Dropdown]

Sales Rep: [Text Field]

BALANCE DUE
\$4,350.00

#	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT	SALES TAX
1	Hours	Sod planting.	1	50	400.00	
2	Hours	Sod planting.	8	50	400.00	
3	Hours	Sod planting.	8	50	400.00	
4		Sod			3,000.00	GST
5						

Amounts are: Exclusive of Tax

Billable time
Jan 2 8:00
\$400.00
Sod planting.
[Add](#) [Open](#)

Added to your invoice

Billable expense
Nov 1, 2019
\$2,500.00 | Taxable
subcontracted services
[Add](#) [Open](#)

Billable expense
Nov 1, 2019
\$1,299.00 | Taxable
bobcat services
[Add](#) [Open](#)

Invoice Take a tour Help

Customer: Christopher's Orthotics | Customer email: chris_smith@example.ca | Online payments: Cards VISA MasterCard Amex Apple Pay

8 linked transactions | Send later | Co/Bcc

Billing address: Christopher's Orthotics, Christopher's Orthotics, 67 Invoiceme Street, Townville MB A1A 1A3

Terms: Net 30 | Invoice date: 01/11/2019 | Due date: 01/12/2019 | Location: [Dropdown]

Sales Rep: [Text Field]

BALANCE DUE
\$9,138.95

#	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT	SALES TAX
1	Hours	Sod planting.	8	50	400.00	
2	Hours	Sod planting.	8	50	400.00	
3	Hours	Sod planting.	8	50	400.00	
4		Sod			3,000.00	GST
5	Hours	Sod planting.	8	50	400.00	

Amounts are: Exclusive of Tax