QuickBooks Online Series

AMERICA'S SBDC NEVADA

Week 3

POWERED BY SBA U.S. Small Business Administration

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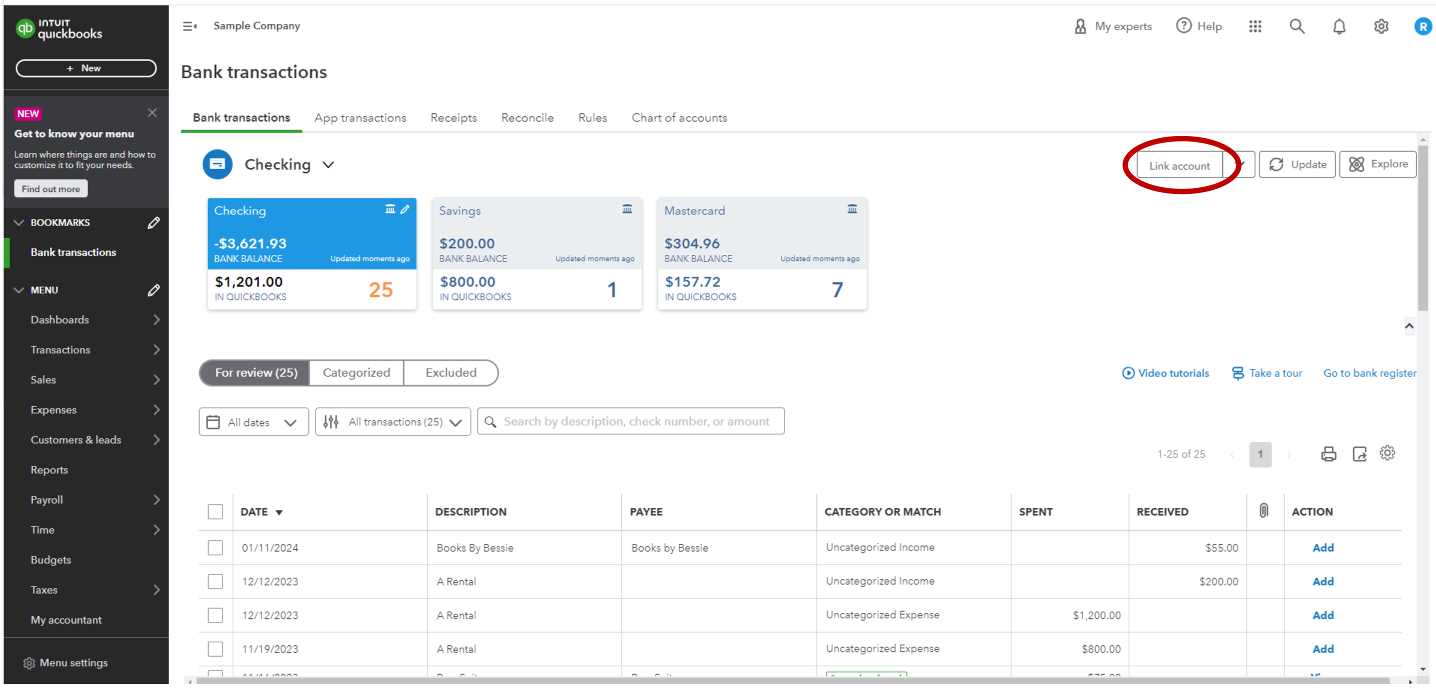
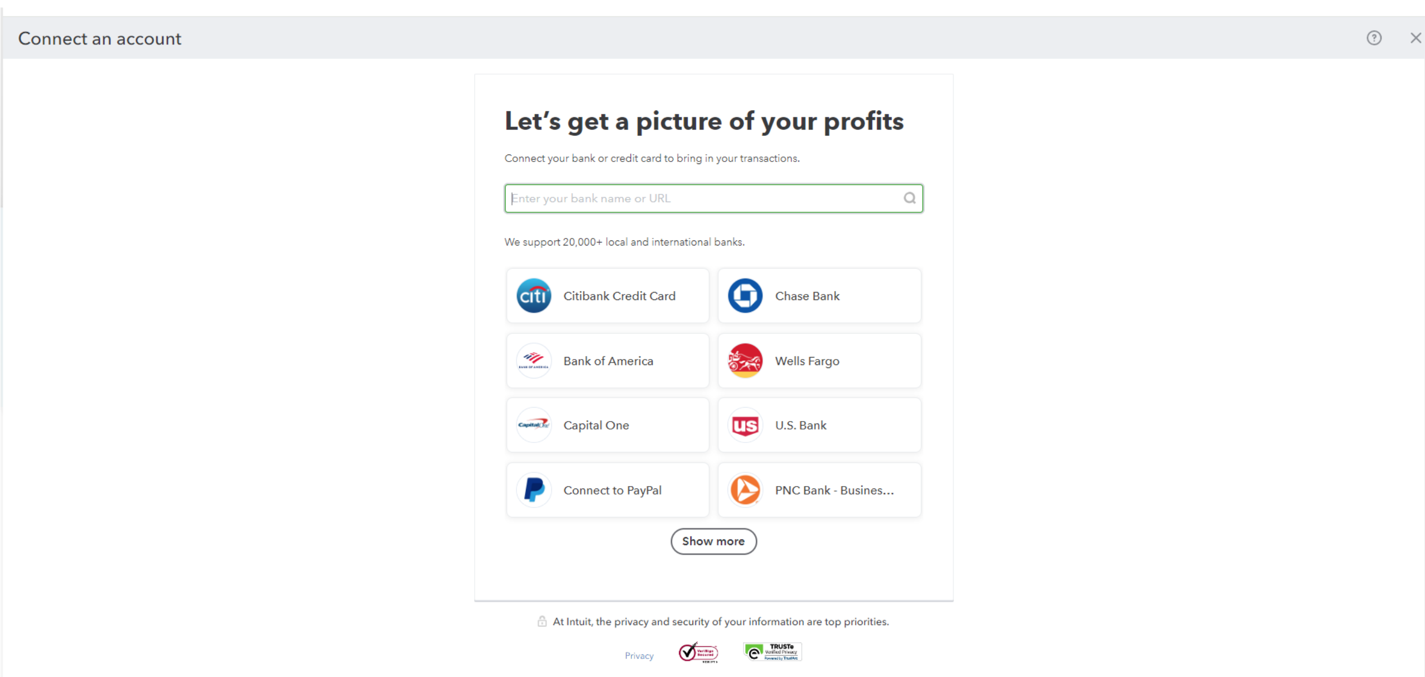
QuickBooks Online Sample

https://qbo.intuit.com/redir/testdrive

Setting up your Bank Feed

1. Click **Transactions**
    2. Click **Bank Transactions**
        3. Click **Link Account**

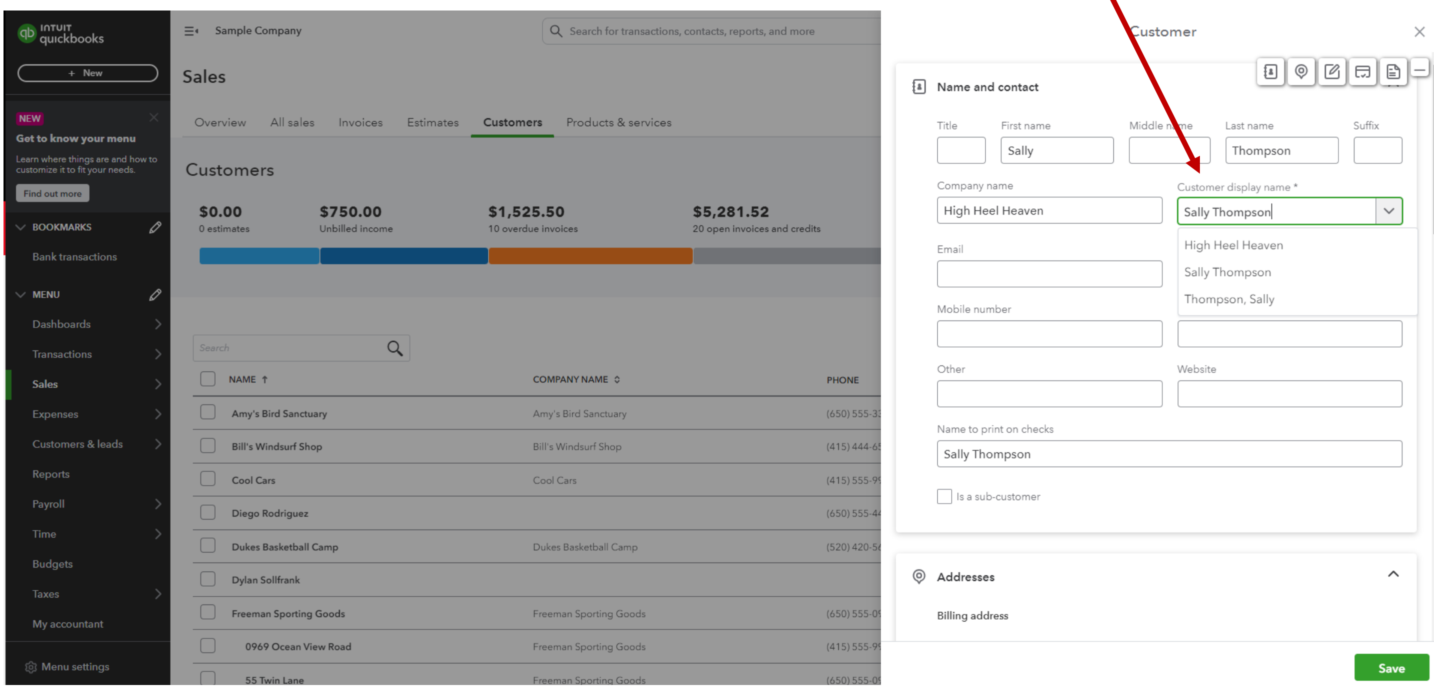




Setting up a Customer

1. Click **Sales**
2. Click **Customers**
3. Click **New customer**
4. Add in their information and attach the customer's resale certificate if needed
5. Click **Save**

This can be the customer's name or company name



Creating Invoices

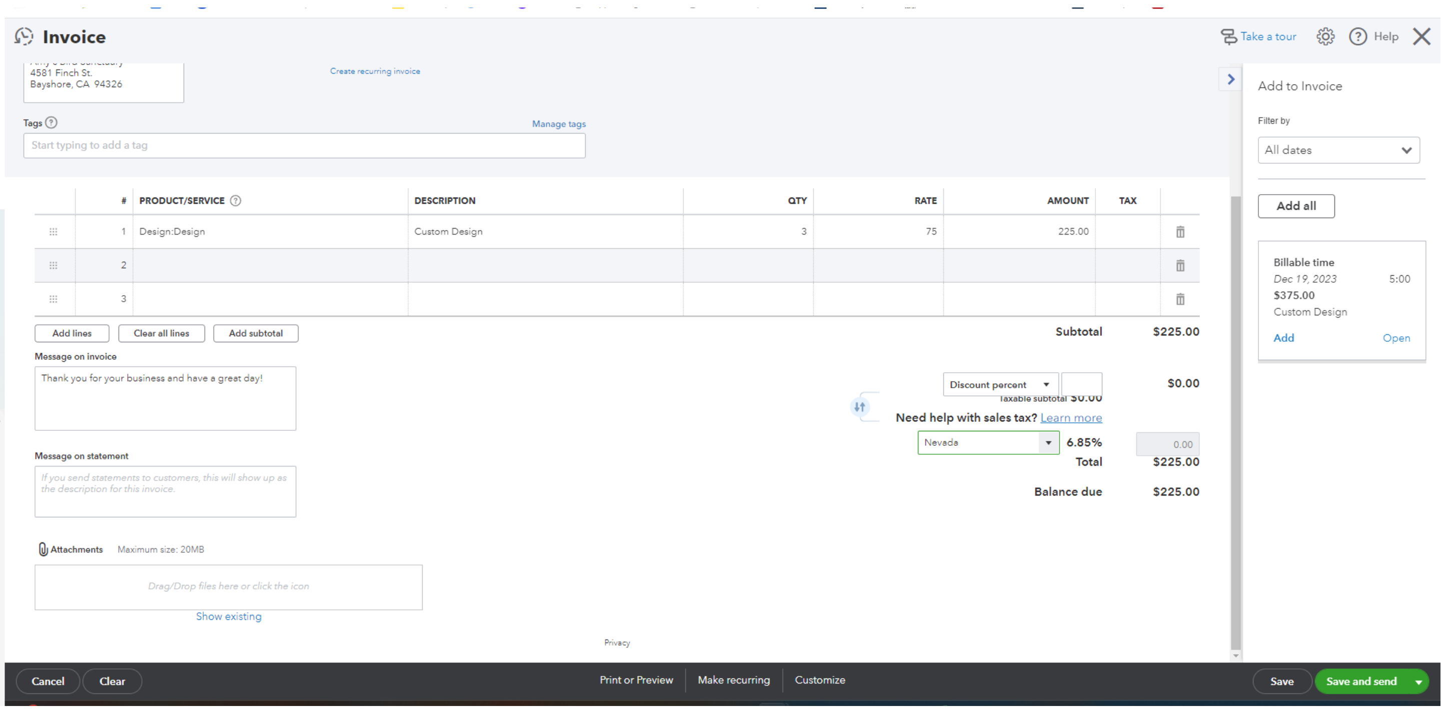
1. Click **Sales**

2. Click **Customers**

3. Find the customer you want to send an invoice and click the **Create invoice** or the down arrow to find **Create invoice** if it is not the visible action

4. Input the product/service, quantity, and select if it is taxable.

5. Click **Save and send** or the down arrow for other saving options



You can print or make this a reoccurring invoice

To view open invoices:

1. Click **Reports**

2. Scroll down to the Who owes you section and click **Open Invoices**

3. Click on any of these invoices and you can receive payment here as well.

Creating Sales Receipts

1. Click **Sales**

2. Click **Customer**

3. Find the customer you want to send a Sales Receipt to and click the down arrow to find **Create sales receipt**

4. Input the product/service, quantity, and select if it is taxable.

5. Click **Save and send** or the down arrow for other saving options

Creating Estimates

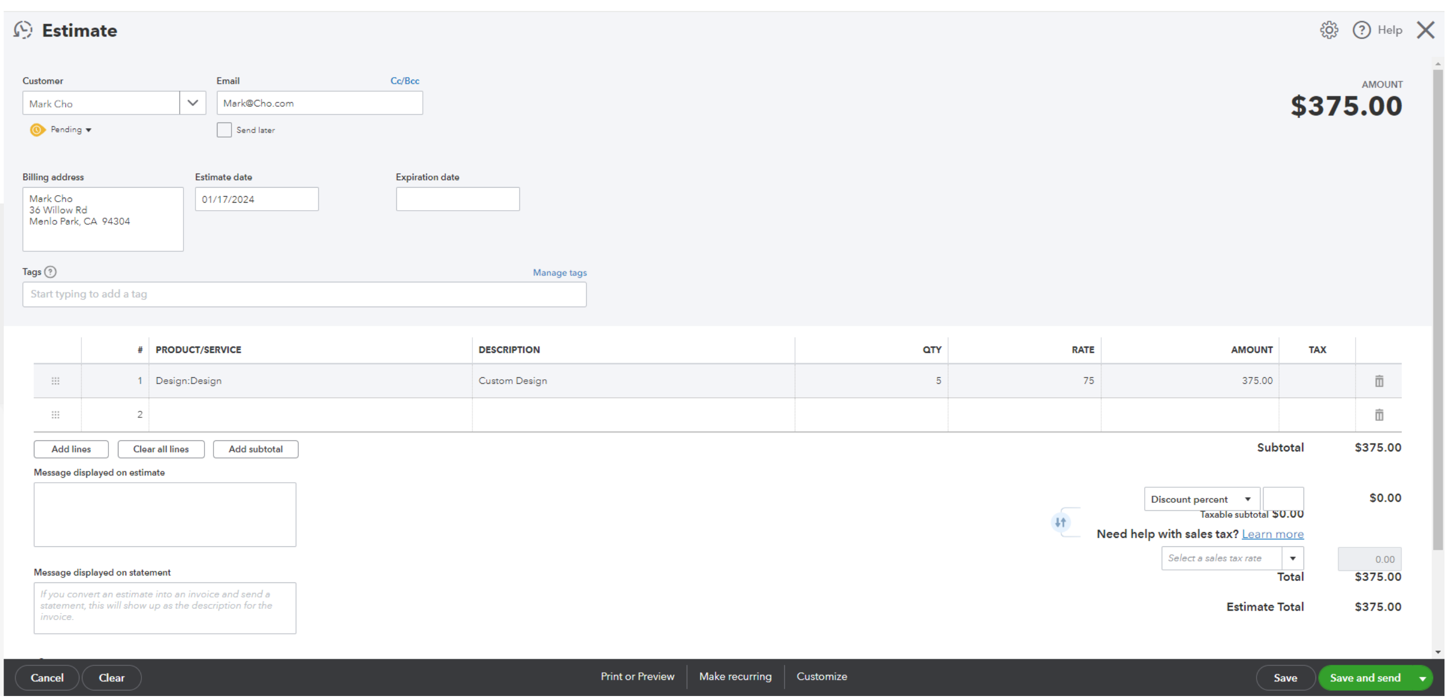
1. Click **Sales**

2. Click **Estimates**

3. Click **Create Estimate**

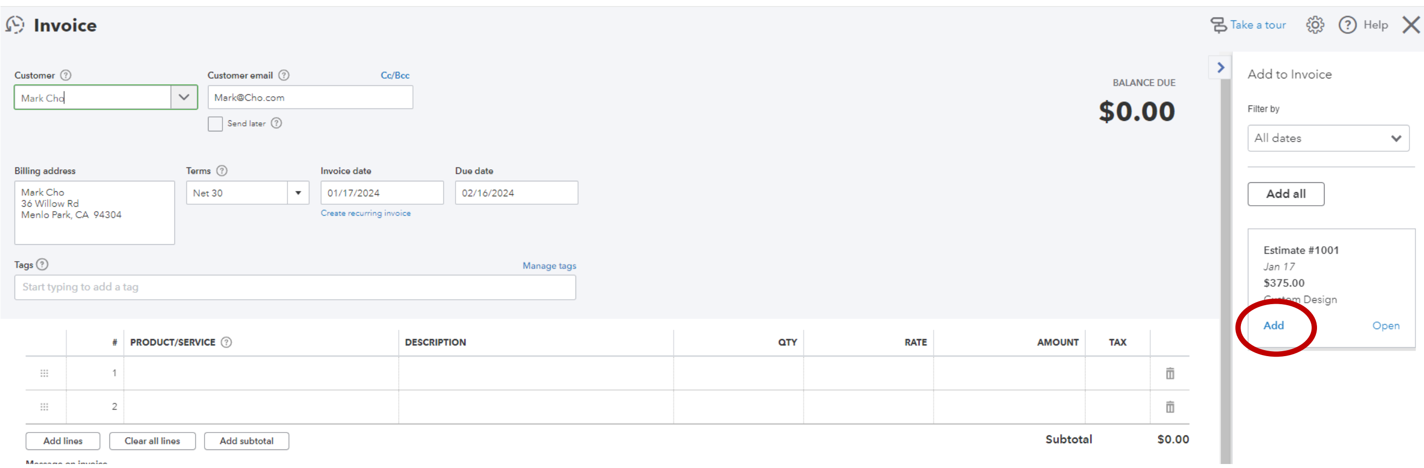
4. Find the customer and input the product/service, optional message on the estimate, and message on statement.

5. Click **Save and send** or the down arrow for other saving options



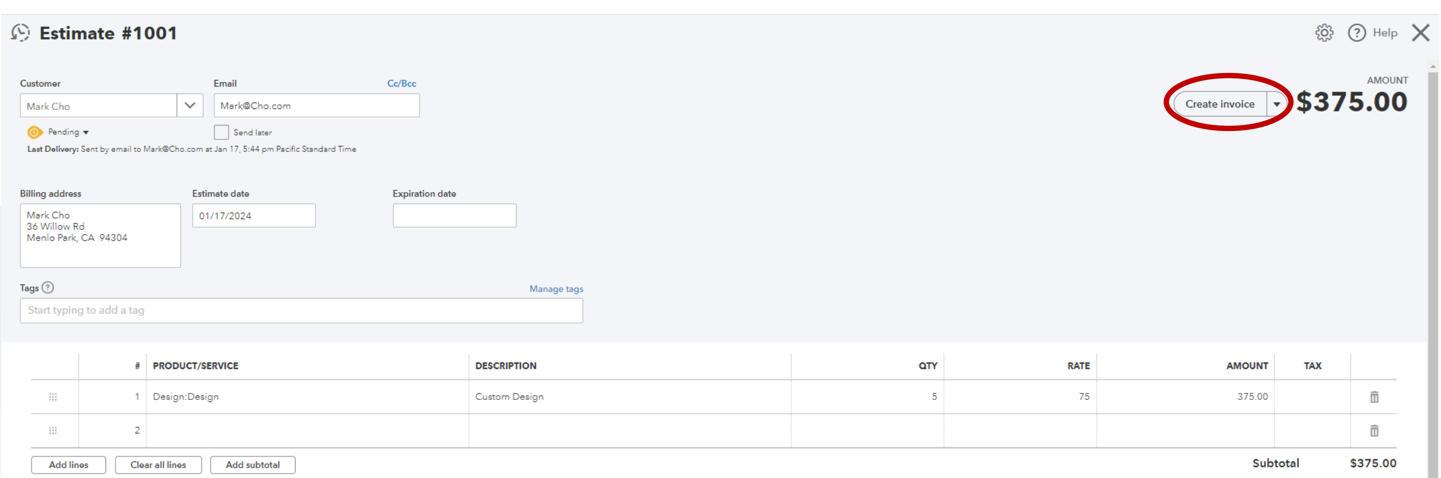
Creating Invoices from Estimates

1. Click **Sales**
2. Click **Invoices**
3. Click **Create invoice**
4. Search for the customer and once selected, their open estimate will populate on the right hand side
5. Click **Add** on the correct estimate
6. Click **Save and send** or the down arrow for other saving options



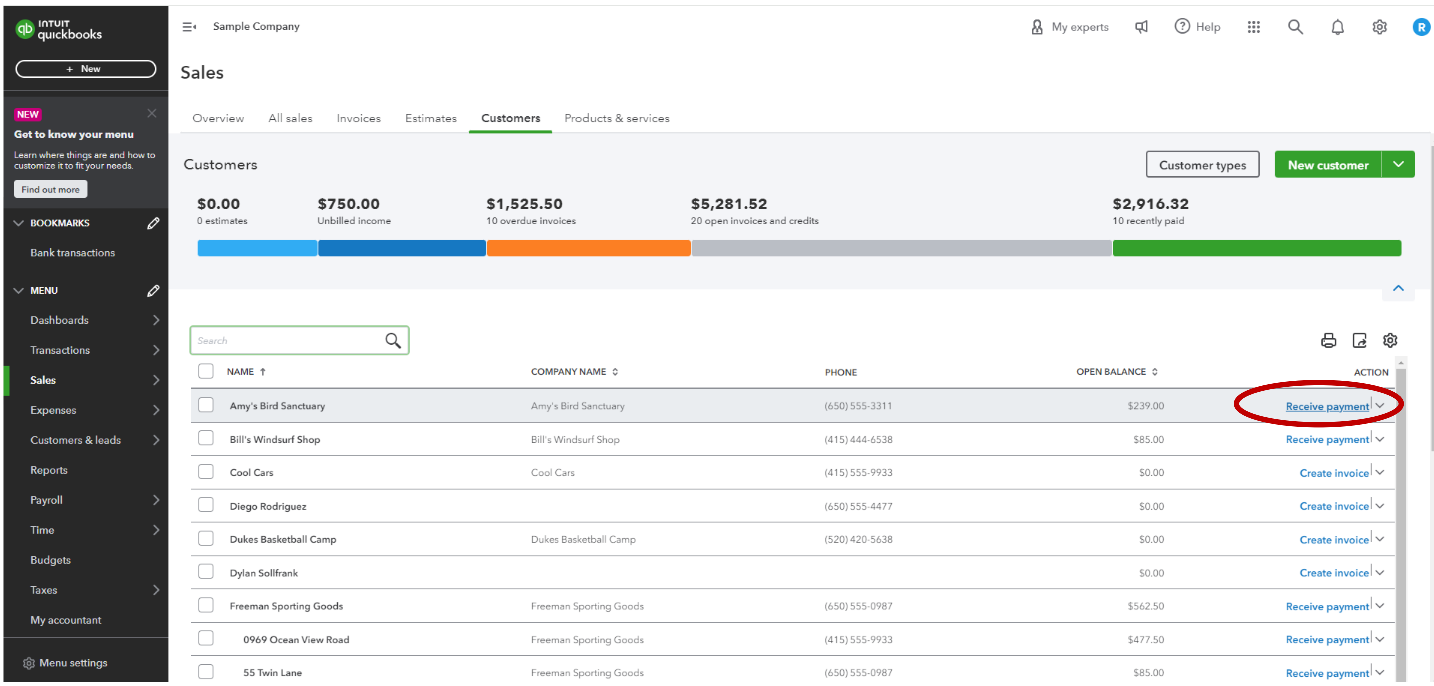
You can also **Create invoice** when viewing an Estimate

1. Click **Sales**
2. Click **Estimates**
3. Click the down arrow under Action on the estimate you would like to create an invoice for to click **View/Edit**
4. Click **Create invoice**
6. Click **Save and send** or the down arrow for other saving options

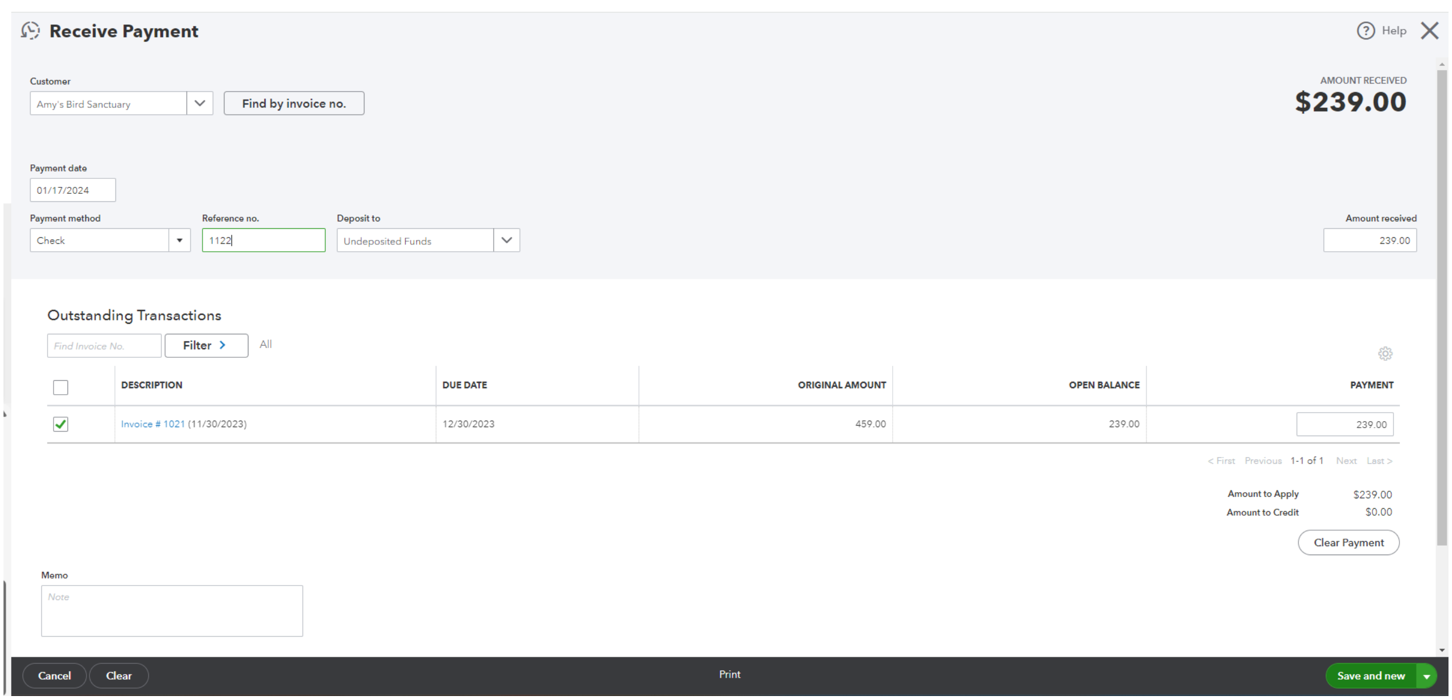


Receiving Payments

1. Click **Sales**
2. Click **Customers**
3. Find the customer you want to receive from and click **Receive payment**
4. Input the payment method and where you want to deposit it
5. Click **Save and new** or the down arrow for other saving options



You deposit to **Undeposited Funds** when you want to batch payments for a bank deposit.

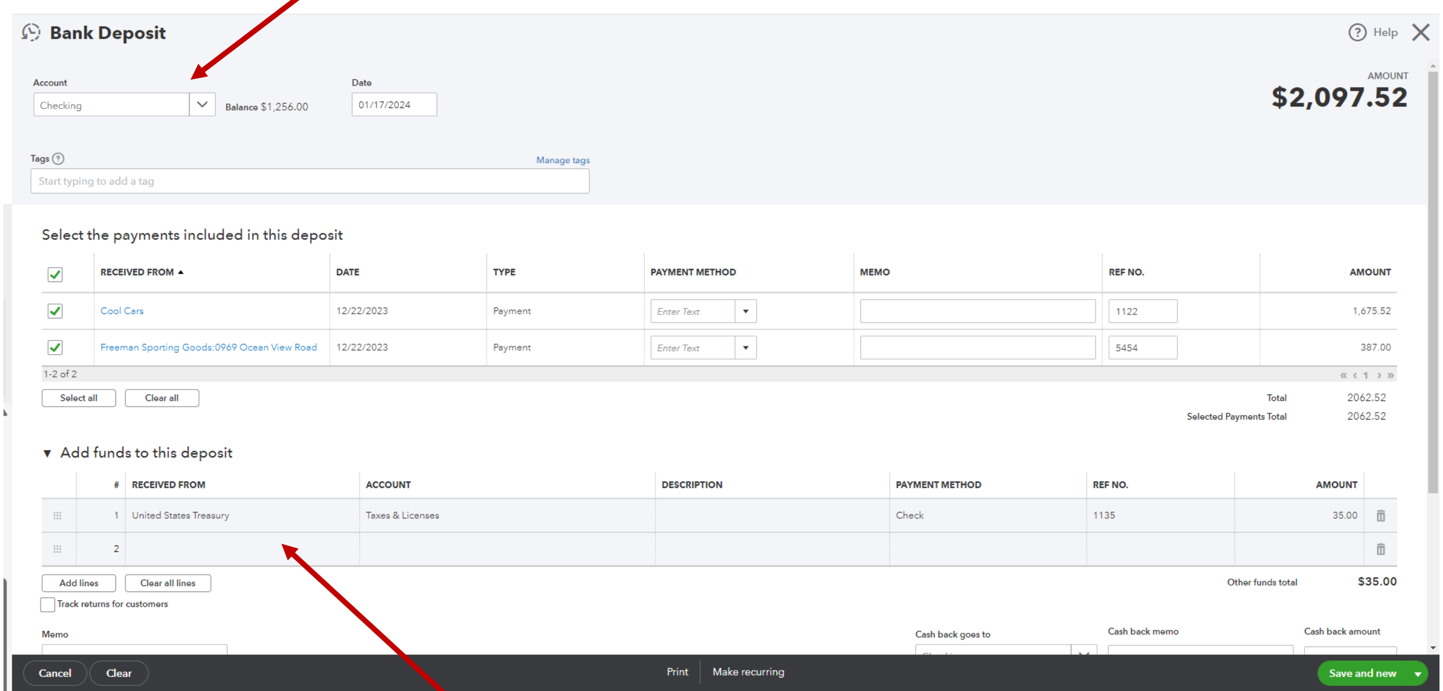


Receiving Payments

When you are ready to take a batch of payments to the bank, follow these instructions

1. Click **Sales**
2. Click **Overview**
3. Click **Bank deposit** in the Quick Actions section
4. Select all the payments that will be in the bank deposit
5. Click **Save and new** or the down arrow for other saving options

Be sure to pick the correct bank account you are depositing in.



An example of an added fund to the deposit would be a refund. It is not income, therefore it should not be included in the payment section, because there is no invoice to match it with.

Accounts Payable

1. Click **Reports**
2. Scroll down to the What you owe section and click **Accounts Payable Aging detail**
3. Click on any of these bills and you can pay online or mark as paid
4. Click **Save and close**