

## Make a Credit Sale

The Create Invoices window is used to process and record a sale when payment is expected in the future. After entering information and saving the completed Create Invoices window, the following has occurred:

Transactions	DR	CR	Subsidiary Records Updated	General Ledger Updated
Accounts Receivable	\$		✓	✓
Cost of Goods Sold*	\$			✓*
Sales Revenue		\$		✓
Inventory*		\$	✓*	✓*
Sales Taxes Payable		\$		✓

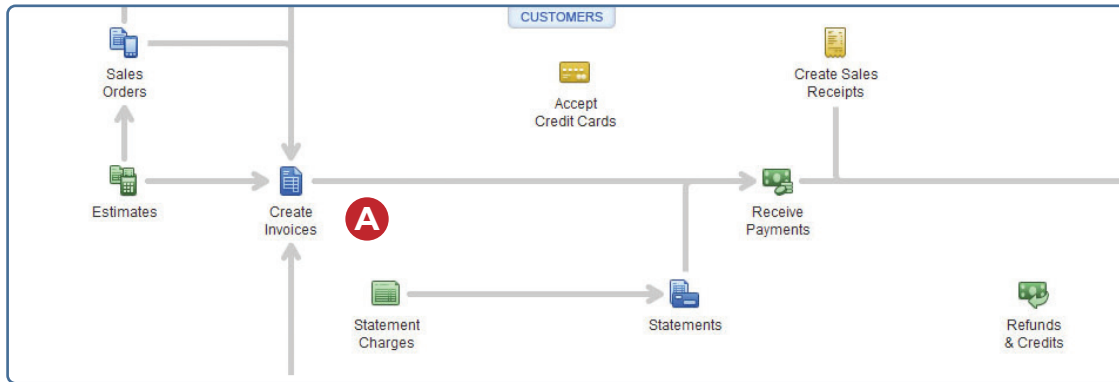
\*Applies only to sales of inventory, not services.

## Quick Reference Table

Step	Box or Other Location	Procedure
<b>A</b>	Home Page	Click the Create Invoices icon under Customers.
<b>B</b>	Customer: Job	Select a customer from the drop-down list or add new.
<b>C</b>	Date	Accept default date or edit.
<b>D</b>	Invoice #	Accept default number or edit.
<b>E</b>	Bill To	Verify that the correct customer information is displayed or edit.
<b>F</b>	P.O. Number	Enter the customer purchase order number.
<b>G</b>	Terms	Accept the default terms or select different terms from the drop-down list.
<b>H</b>	Quantity	Enter the quantity ordered for the first item sold. <i>(Note that the item code will be entered next.)</i>
<b>I</b>	Item Code	For the first item sold, select the item from the drop-down list or add new.
<b>J</b>	Description	Accept the default description or edit.
<b>K</b>	Price Each	Accept the default price or edit.
<b>L</b>	Various	Repeat steps H – K for each inventory item sold.
<b>M</b>	Balance Due	Verify that the balance due is correct. <i>(Not possible to verify unless information is provided.)</i>
<b>N</b>	Create Invoices – Accounts Receivable window	Review the information to verify that it is correct.
<b>O</b>	Print button	Select the print button at the top of the window only if the invoice is to be printed.
<b>P</b>	Save & Close/ Save & New buttons	Click the Save & Close or Save & New button.

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## QuickBooks windows



**N** Create Invoices - Accounts Receivable

Main Formatting Send/Ship Reports **O**

Find New Save Delete Memorize Mark As Pending Print Email Email Later Attach File Add Time/Costs Apply Credits Receive Payments Create a Batch Refund/Credit

CUSTOMER:JOB **B** CLASS ACCOUNT 10200 · Accounts Re... TEMPLATE Intuit Product Invoice

### Invoice

DATE **C** 12/15/2021 BILL TO **E** SHIP TO

INVOICE # **D** 1

F.O. NUMBER **F** TERMS **G** REP SHIP 12/15/2021 VIA UPS F.O.B.

QUANTITY	ITEM CODE	DESCRIPTION	U/M	PRICE EACH	CLASS	AMOUNT	TAX
<b>H</b>	<b>I</b>	<b>J</b>		<b>K</b>			

TAX (0.0%) 0.00

CUSTOMER MESSAGE

MEMO CUSTOMER TAX CODE

TOTAL 0.00  
PAYMENTS APPLIED 0.00  
BALANCE DUE **M** 0.00

Save & Close **P** Save & New Clear