

## Make a Credit Sale

The Invoice window is used to process and record a sale when payment is expected in the future. After entering information and saving the completed Invoice 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		\$	*	✓*

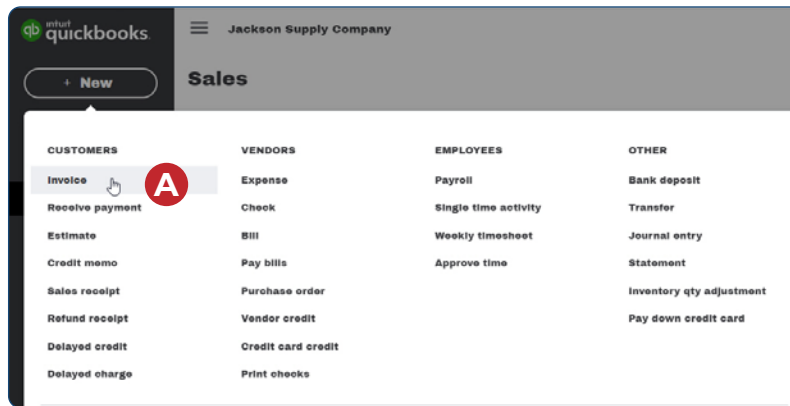
\*Applies only to sales of inventory, not services.

### Quick Reference Table

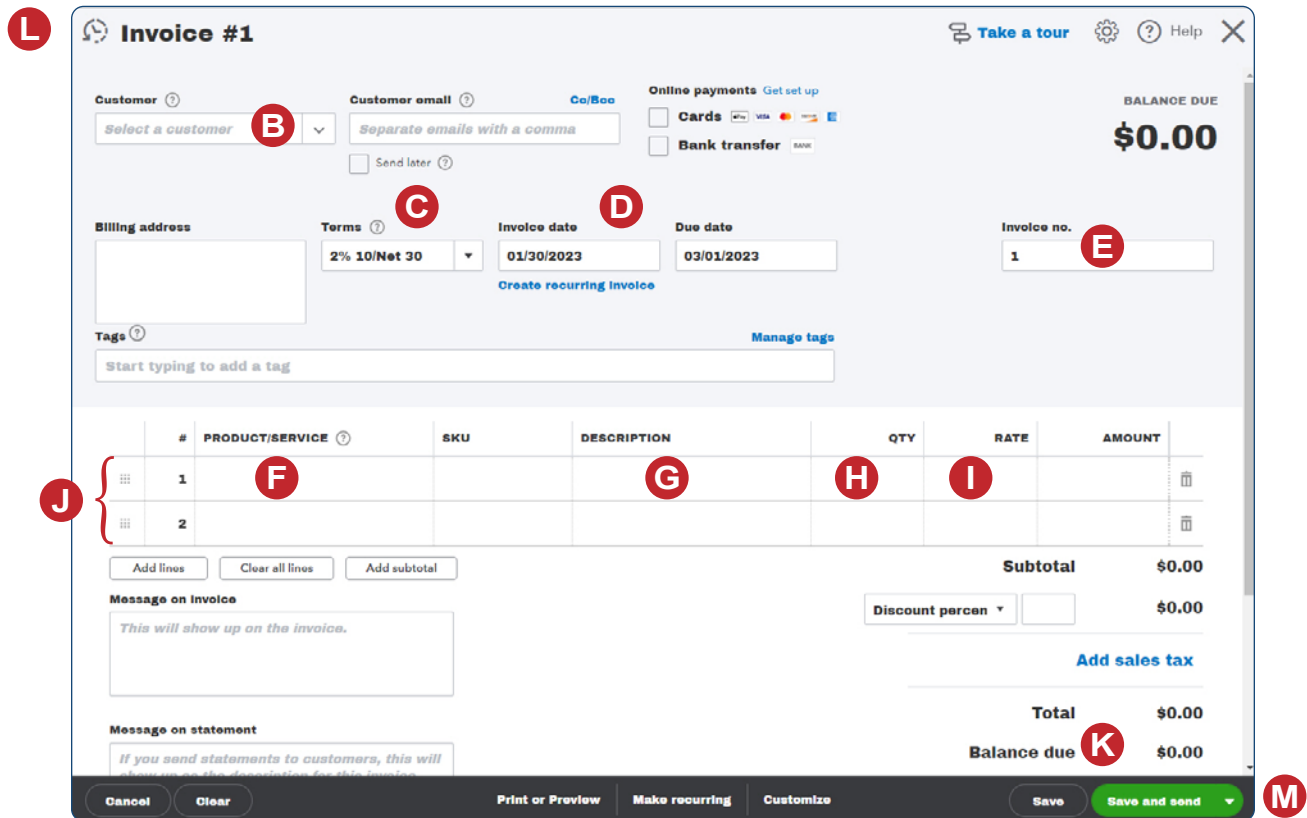
Step	Box or Other Location	Procedure
<b>A</b>	<b>QBO Home Page</b>	Click the <b>+ New button</b> → <b>Invoice</b> (in the <b>Customers category</b> ) to open the <b>Invoice window</b> . If Intuit's new Invoice layout appears, click the <b>Old layout button</b> to return to the format used in these materials. If you have no other choice but to use the new layout, we have provided an image of this new layout on the last page of this reference section, along with the appropriate letters from this quick reference table that reflect the new Invoice window layout as of our latest publication date.
<b>B</b>	<b>Customer (Add customer in new layout)</b>	Select a customer from the drop-down list or add new.
<b>C</b>	<b>Terms</b>	Accept the default terms or select different terms from the drop-down list.
<b>D</b>	<b>Invoice date</b>	Accept the default date or change.
<b>E</b>	<b>Invoice no.</b>	Accept the invoice number or change.
<b>F</b>	<b>Product/Service (may say Variant)</b>	For the first item sold, select the item from the drop-down list or add new.
<b>G</b>	<b>Description</b>	Accept the default description or edit.
<b>H</b>	<b>Qty</b>	Enter the quantity ordered by the customer.
<b>I</b>	<b>Rate</b>	Accept the default price or edit.
<b>J</b>	<b>Various</b>	Repeat steps F-I for each inventory item sold.
<b>K</b>	<b>Balance Due (Invoice total in new layout)</b>	Verify that the balance due is correct.
<b>L</b>	<b>Invoice window</b>	Review the information to verify that it is correct.
<b>M</b>	<b>Save options</b>	Save the invoice and close the window.



**Make a Credit Sale**  
QBO windows



**Standard (Old) Layout** - see next page for new layout view



## New Invoice Layout

**INVOICE**

Jackson Supply Company    wrenstud3@gmail.com

[Edit company](#)

[Add customer](#) ▼

[Add logo](#)  
Max size: 1 MB

Invoice no.	1001
Terms	2% 10/Net 30
Invoice date	11/12/2023
Due date	12/12/2023

Tags (hidden): [Manage tags](#)

Start typing to add a tag

	Product/Service	SKU	Description	Qty	Rate	Amount
⋮	1					0

[Add product or service](#)

**Customer payment options** [Edit](#)

iPay  
  VISA  
  MYPAY  
  BANK  
  PayPal  
  CASH

Activate online card or bank transfer payments for your customers. [Activate Payments](#)

Tell your customer how you want to get paid

Subtotal \$0.00

Sales tax [Set up](#)

Discount 0% % \$ \$0.00

Invoice total \$0.00

[Edit totals](#)

Save ▼

Review and send ▼

