

Sales Receipts & Invoices

The screenshot displays the QuickBooks Pro 2015 Home Page for the Madison Soil Conservation District. The interface is organized into several sections:

- Top Menu:** File, Edit, View, Lists, Favorites, Company, Customers, Vendors, Employees, Banking, Reports, Window, Help, Special Offers.
- Search:** Search Company or Help.
- My Shortcuts (Left Sidebar):** Home, My Company, Income Tracker, Calendar, Snapshots, Customers, Vendors, Employees.
- Home Page (Main Area):**
 - VENDORS:** Enter Bills, Pay Bills, See Funding Options, Manage Sales Tax.
 - CUSTOMERS:** Accept Credit Cards, Create Sales Receipts, Receive Payments, Refunds & Credits, Statements, Statement Charges.
 - EMPLOYEES:** Payroll Center, Enter Time, Pay Employees, Pay Liabilities, Process Payroll Forms, HR Essentials and Insurance.
- COMPANY (Right Sidebar):** Chart of Accounts, Items & Services, Order Checks, QuickBooks Mobile, Calendar.
- BANKING (Right Sidebar):** Record Deposits, Reconcile, Write Checks, Check Register, Print Checks.

An **Important Notice** is displayed in the bottom left corner, stating: "On 5/31, Payroll service will no longer work with your version of QuickBooks." with an **Act Now** button.

The easiest two ways to prepare either a Sales Receipt or Invoice is either on your home screen or by clicking on the Customers button in the top menus. A basic rule is if you receive payment upon the sale of items or services then prepare a Sales Receipt. If payment will be received later, then when items or services are purchased then prepare an Invoice. A good example for Invoices is government entities or school districts.

Sales Receipts & Invoices

The screenshot displays the QuickBooks Pro 2015 interface for the 'Madison Soil Conservation District'. The 'Customers' menu is open, showing options like 'Create Invoices', 'Enter Sales Receipts', and 'Receive Payments'. The main workspace is divided into sections: VENDORS, CUSTOMERS, EMPLOYEES, COMPANY, and BANKING. A flow diagram highlights the path from 'Enter Sales Receipts' to 'Create Sales Receipts', then to 'Receive Payments', 'Statements', and 'Refunds & Credits'. An 'Important Notice' is visible in the bottom left corner.

Customers Menu:

- Customer Center (Ctrl+J)
- Create Estimates
- Create Invoices (Ctrl+I)
- Create Batch Invoices
- Enter Sales Receipts
- Enter Statement Charges
- Create Statements...
- Assess Finance Charges
- Receive Payments
- Create Credit Memos/Refunds
- Income Tracker
- Lead Center
- Add Credit Card Processing
- Link Payment Service to Company File
- Enter Time
- Item List
- Change Item Prices

Navigation Flow:

- Enter Sales Receipts (CUSTOMERS)
- Create Sales Receipts (CUSTOMERS)
- Receive Payments (CUSTOMERS)
- Statements (CUSTOMERS)
- Refunds & Credits (CUSTOMERS)
- Payroll Center (EMPLOYEES)
- Enter Time (EMPLOYEES)
- Pay Employees (EMPLOYEES)
- Pay Liabilities (EMPLOYEES)
- Process Payroll Forms (EMPLOYEES)
- HR Essentials and Insurance (EMPLOYEES)

Other Sections:

- VENDORS:** Pay Bills, See Funding Options, Manage Sales Tax
- COMPANY:** Chart of Accounts, Items & Services, Order Checks, QuickBooks Mobile, Calendar
- BANKING:** Record Deposits, Reconcile, Write Checks, Check Register, Print Checks

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The above screen shows the Customers button be used to select Sales Receipt or Invoice.

Sales Receipts & Invoices

Madison Soil Conservation District - QuickBooks Pro 2015 - [Enter Sales Receipts]

File Edit View Lists Favorites Company Customers Vendors Employees Banking Reports Window Help Special Offers

Search Company or Help

My Shortcuts: Home, My Company, Income Tracker, Calendar, Snapshots, Customers, Vendors, Employees

View Balances, Run Favorite Reports, Open Windows

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[Act Now](#)

Main Formatting Send/Ship Reports Payments

Find New Save Delete Create a Copy Memorize Mark As Pending Print Email Email Later Attach File Add time/costs Process payment Add Credit Card Processing

CUSTOMER:JOB [] TEMPLATE Custom Sale...

Sales Receipt

DATE: 04/23/2018 SOLD TO: []

SALE NO.: 18-18 CHECK NO.: []

ITEM	DESCRIPTION	QTY	RATE	AMO...	TAX

TAX: Idaho Tax (6.0%) TOTAL: 0.00

CUSTOMER MESSAGE: []

MEMO: [] CUSTOMER TAX CODE: []

Save & Close Save & New Clear

Summary, Recent Transactions, Notes

The above screen shows a Sales Receipt. Note that when the Sales Receipt is complete and saved, the payment will then show up when you prepare your next deposit. To indicate which type of payment was used click on the Cash, Check or Credit Card (if applicable) button & make sure you put in the check number if the payment is made by check.

Sales Receipts & Invoices

Madison Soil Conservation District - QuickBooks Pro 2015 - [Create Invoices]

File Edit View Lists Favorites Company Customers Vendors Employees Banking Reports Window Help Special Offers

Search Company or Help

My Shortcuts

- Home
- My Company
- Income Tracker
- Calendar
- Snapshots
- Customers
- Vendors
- Employees

My Shortcuts

- View Balances
- Run Favorite Reports
- Open Windows

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Main Formatting Send/Ship Reports

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

CUSTOMER_JOB [] TEMPLATE Intuit Product In...

Invoice

DATE: 04/23/2018
INVOICE #: 18-12

BILL TO [] SHIP TO []

P.O. NUMBER [] TERMS [] REP [] SHIP: 04/23/2018 VIA [] F.O.B. []

QUANTITY	ITEM CODE	DESCRIPTION	PRICE EACH	AMOUNT	TAX

TAX: (0.0%) 0.00
TOTAL: 0.00
PAYMENTS APPLIED: 0.00
BALANCE DUE: 0.00

CUSTOMER MESSAGE []
MEMO [] CUSTOMER TAX CODE []

Save & Close Save & New Clear

Name Transaction

SUMMARY

CUSTOMER PAYMENT

RECENT TRANSACTIONS

NOTES

The above screen shows what an Invoice looks like.