

Forms

We've moved and grouped some things to make them easier to find. It might feel different at first, but as soon as you get used to the new forms, you'll be able to get your work done even faster.

Below, you'll see where something was (before QuickBooks 2013), and then you'll see where to find it now (just match the color).

Write Checks

Write Checks - Checking

Previous Next Save Print Find Journal Attach

Bank Account 10100 · Checking USD Ending Balance USD 46,969.10

No. 517
Date 12/15/2016

Pay to the Order of Vu Contracting USD 1,000.00

One thousand and 00/100*****USD

Vu Contracting
Don Vu
89304 Freedom Dr.
San Mateo, CA

Memo

Order Checks

Expenses USD 1,000.00 Items USD 0.00 Online Payment To be printed

Account	Amount (USD)	M.	Customer:Job	Bill...	Class
54000 · Job Expenses	1,000.00		Abercrombie, Kristy	<input checked="" type="checkbox"/>	Remodel

Exchange Rate 1 USD = 1 USD

Clear Splits Recalculate Save & Close Save & New Clear

Write Checks - Checking

Main Reports Find New Save Delete Create a Copy Memorize Print Attach File Pay Online Select PO Enter Time Clear Splits Recalculate

BANK ACCOUNT 10100 · Checking ENDING BALANCE 46,969.10

NO 517
DATE 12/15/2017

PAY TO THE ORDER OF Vu Contracting \$ 1,000.00

One thousand and 00/100*****DOLLARS

Vu Contracting
Don Vu

Enter Bills

Enter Bills

Previous Next Save Find History Journal Attach Pay bill

Bill Credit Bill Received

Bill

Vendor Vu Contracting Date 12/15/2016

Address Vu Contracting
Don Vu
89304 Freedom Dr.
San Mateo, CA Ref. No.

Amount Due USD 1,000.00

Bill Due 12/30/2016

Terms Net 15 Discount Date

Memo

Expenses USD 1,000.00 Items USD 0.00

Account	Amount (USD)	Memo	Customer:Job	Billable?	Class
54000 · Job Expenses	1,000.00		Abercrombie, Kristy	<input checked="" type="checkbox"/>	

Exchange Rate 1 USD = 1 USD

Clear Splits Recalculate Save & Close

Enter Bills

Main Reports Find New Save Delete Memorize Print Attach File Select PO Enter Time Clear Splits Recalculate Pay Bill

BILL CREDIT BILL RECEIVED

Bill

VENDOR Vu Contracting DATE 12/15/2017

ADDRESS Vu Contracting
Don Vu
89304 Freedom Dr.
San Mateo, CA REF. NO.

AMOUNT DUE 1,000.00

BILL DUE 12/30/2017

Exchange Rate 1 USD = 1 USD

Clear Splits Recalculate Pay Bill

Enter Credit Card Charges

Enter Credit Card Charges - QuickBooks Credit Card

Previous Next Save Find Download Card Charges Journal Attach

Credit Card 20500 - QuickBooks Credit USD Ending Balance USD 94.20

Purchase/Charge Refund/Credit

Credit Card Purchase/Charge

Purchased From _____ Date 12/15/2016

Ref No. _____

Amount USD 0.00

Memo _____

Manage your business expenses with QuickBooks Platinum Plus for Business MasterCard [Learn More](#)

Are you ready to pay a bill from this credit card company?

Expenses USD 0.00 Items USD 0.00

Account	Amount ...	M..	Customer:Job	Billa...	Class

Exchange Rate 1 USD = 1 USD

Clear Splits Recalculate Save & Close Save & New Clear

Enter Credit Card Charges - QuickBooks Credit Card

Main Reports

Find New Save Delete Create a Copy Memorize Attach File Download Card Charges Select PO Enter Time Clear Splits Recalculate

CREDIT CARD 20500 - QuickBooks Credit Card ENDING BALANCE 94.20 PURCHASE/CHARGE REFUND/CREDIT

Credit Card Purchase/Charge

PURCHASED FROM _____ DATE 12/15/2017

REF NO. _____

AMOUNT 0.00

Create Purchase Order

Vendor: [] Class: [] Drop Ship To: [] Template: [] Print Preview: []
Date: 12/15/2016 P.O. No.: 6238
Ship To: Rock Castle Construction
1735 County Road
Bayshore, CA 94326

Item	Description	Qty	Rate	Customer	U/M	Amount

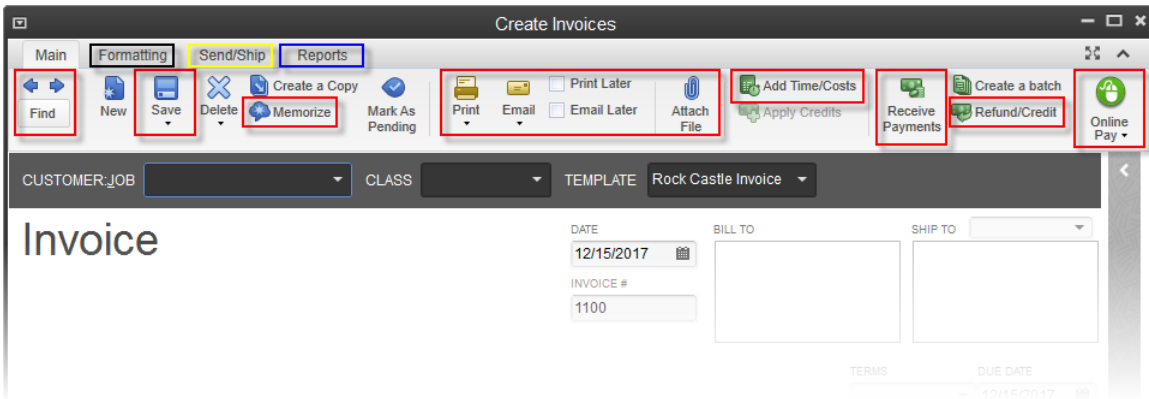
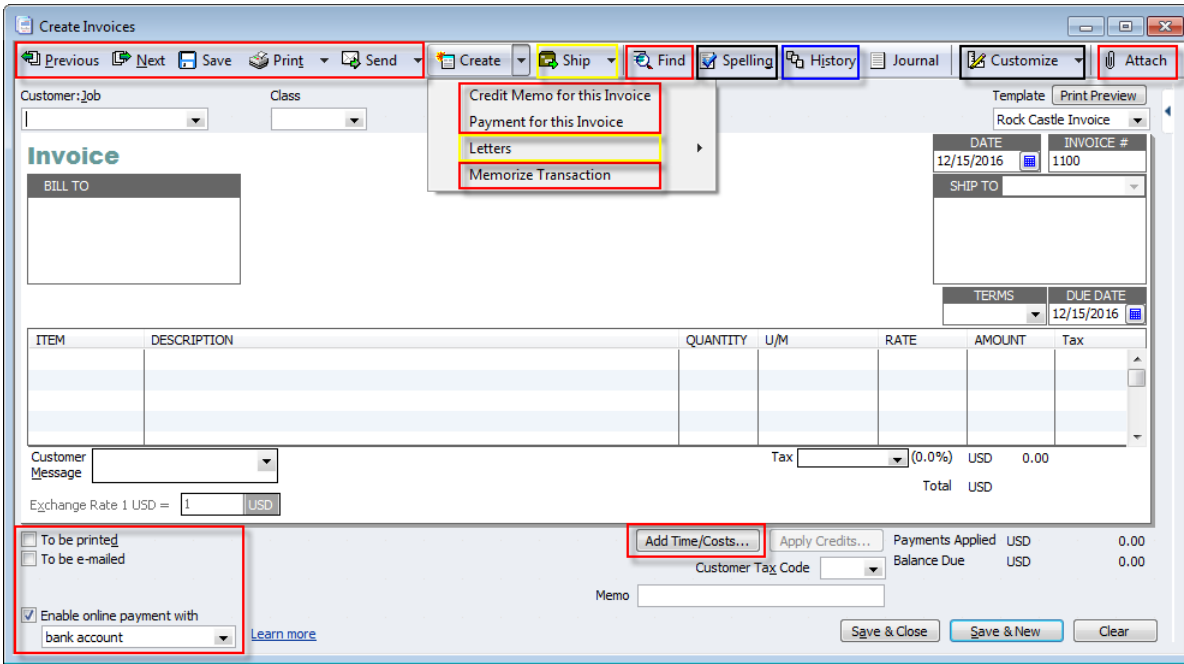
Vendor Message: [] Exchange Rate 1 USD = 1 USD
Total USD: []
 To be printed To be e-mailed
Memo: [] Save & Close Save & New Clear

Main Formatting Reports
Find New Save Delete Memorize Mark As Closed Print Email Print Later Email Later Attach File Create Item Receipts Select Items Receipts

VENDOR: [] CLASS: [] DROP SHIP TO: [] TEMPLATE: Custom Pur...
Date: 12/15/2017 Vendor: [] Ship To: Rock Castle Constructi
P.O. No.: 6238 1735 County Road
Bayshore, CA 94326

ITEM	DESCRIPTION	QTY	RATE	CUSTOMER	U/M	AMOUNT

Create Invoices



Receive Payments

Receive Payments

Previous Next Print History Journal Attach

Customer Payment

Received From: Allard, Robert Customer Balance: USD 14,510.00

Amount: USD 0.00 Date: 12/15/2016

Pmt. Method: Check Exchange Rate 1 USD = 1 USD

Memo: [Where does this payment go?](#)

Process payment when saving

Date	Job	Number	Orig. Amt.	Amt. Due	Payment
09/12/20...	Remodel	1058	14,510.00	14,510.00	0.00
Totals USD			14,510.00	14,510.00	0.00

Amounts for Selected Invoices

Auto Apply Payment Applied USD 0.00

Discount & Credits... Discount and Credits Applied USD 0.00

Save & Close Save & New Clear

Receive Payments

Main Reports Payments

Find New Delete Print Attach File Look up Customer/Invoice Auto Apply Payment Discounts And Credits Add Credit Card Processing

Customer Payment

RECEIVED FROM: Allard, Robert Remode CUSTOMER BALANCE: 14,510.00

AMOUNT: 0.00 DATE: 12/15/2017

PMT. METHOD: Check CHECK #:

[Where does this payment go?](#)

DATE	NUMBER	ORIG. AMT.	AMT. DUE	PAYMENT
09/12/20...	1058	14,510.00	14,510.00	0.00
Totals		14,510.00	14,510.00	0.00

AMOUNTS FOR SELECTED INVOICES

AMOUNT DUE: 0.00

APPLIED: 0.00

DISCOUNT AND CREDITS APPLIED: 0.00

MEMO: Process payment when saving

Save & Close Save & New Clear

Refund/Credit

Create Credit Memos/Refunds

Previous Next Save Print E-mail Find Spelling History Journal Use Credit to Customize Attach

Customer: Job Class

Credit Memo

CUSTOMER

DATE: 12/15/2016 CREDIT NO.: 1100

ITEM	DESCRIPTION	QTY	U/M	RATE	AMOUNT	Tax

Customer Message Tax (0.0%) USD 0.00

Exchange Rate 1 USD = 1 USD

Total USD

To be printed To be e-mailed Customer Tax Code Remaining Credit USD 0.00

Memo Save & Close Save & New Clear

Create Credit Memos/Refunds

Main Formatting Reports

Find New Save Delete Create a Copy Memorize Mark As Pending Print Email Print Later Email Later Attach File Use credit to give refund Use credit to apply to invoice

CUSTOMER_JOB CLASS TEMPLATE Custom Cr...

Credit Memo

DATE: 12/15/2017 CUSTOMER

CREDIT NO.: 1100

P.O. NO.

ITEM	DESCRIPTION	QTY	U/M	RATE	A...	TAX

TAX (0.0%) 0.00

Total 0.00

Customer Message

REMAINING CREDIT 0.00

Memo Customer Tag Code Save & Close Save & New Clear