

Using forms

All of your everyday QuickBooks tasks, like invoicing, paying bills, and writing checks, are done on forms. You can reach every form in QuickBooks from the Home page or the menus. We'll use an invoice to show you how forms work.

Use the arrows to move through a list of transactions.

Click the tabs on this ribbon to find everything you need to do on a form.

The screenshot shows the 'Create Invoices' window in QuickBooks. The ribbon at the top includes tabs for 'main', 'Formatting', 'Send/Ship', and 'Reports'. The 'main' tab is active, showing options like 'Find', 'New', 'Save', 'Delete', 'Create a Copy', 'Memorize', 'Mark As Pending', 'Print', 'Email', 'Print Later', 'Email Later', 'Attach File', 'Add Time/Costs', 'Apply Credits', 'Progress', 'Receive Payments', 'Create a batch', and 'Refund/Credit'.

The form header shows 'CUSTOMER_JOB' set to 'Abercrombie, Kri...' and 'TEMPLATE' set to 'Rock Castle Inv'. The main title is 'Invoice'.

Key fields include: DATE (12/15/2013), INVOICE # (1101), BILL TO (Kristy Abercrombie, 5647 Cypress Hill Rd, Bayshore CA 94326), and SHIP TO (Ship To 1, Kristy Abercrombie, 5647 Cypress Hill Rd, Bayshore, CA 94326). TERMS are 'Net 30' and DUE DATE is '01/14/2014'.

ITEM	DESCRIPTION	QUANTITY	RATE	AMOUNT	TAX
Framing	Framing labor	16	55.00	880.00	Non
Installation	Installation labor	12	35.00	420.00	Non
Removal	Removal labor	16	35.00	560.00	Non
Subs.Tile &Co...	Install tile or counter		825.00	825.00	Non

At the bottom right, the summary shows: San Tomas (7.75%) 0.00, TOTAL 3,114.00, PAYMENTS APPLIED 0.00, and BALANCE DUE 3,114.00. Buttons for 'Save & Close', 'Save & New', and 'Revert' are at the bottom.

If you see an arrow, click it to select from a list. If you don't see what you need, select **Add New**.

If you don't see an arrow, enter the appropriate information.

Click here to save your work on a form.