



**Invoicing on the go**





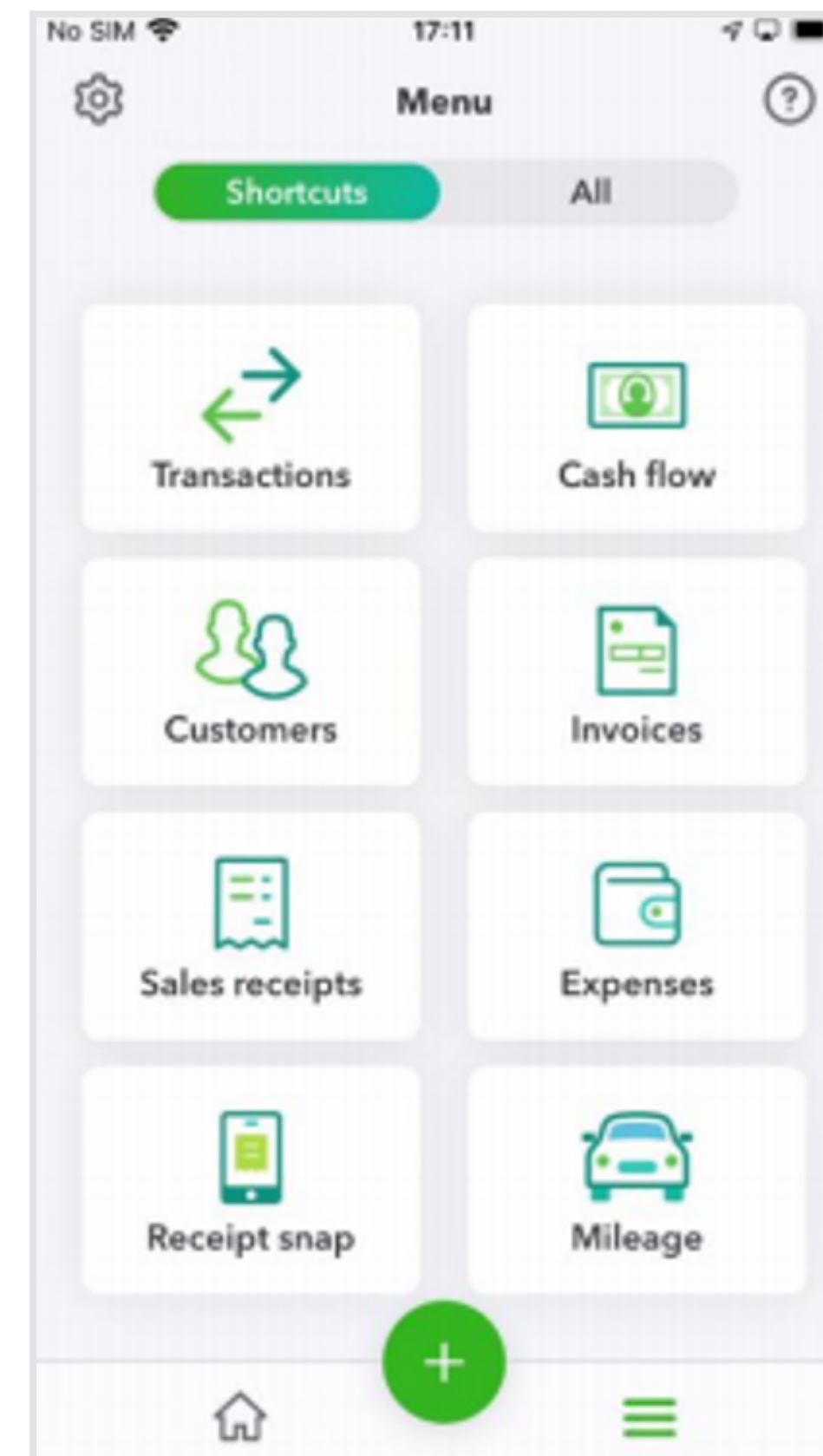
# How to send estimates and invoices with the QuickBooks mobile app

There's an easier way to get paid. Speed up your invoicing and improve your cash flow with QuickBooks invoicing. You can send invoices and estimates on the go, get paid with a touch of a button and set automatic payment reminders in the QuickBooks app.

Here's how to get started.

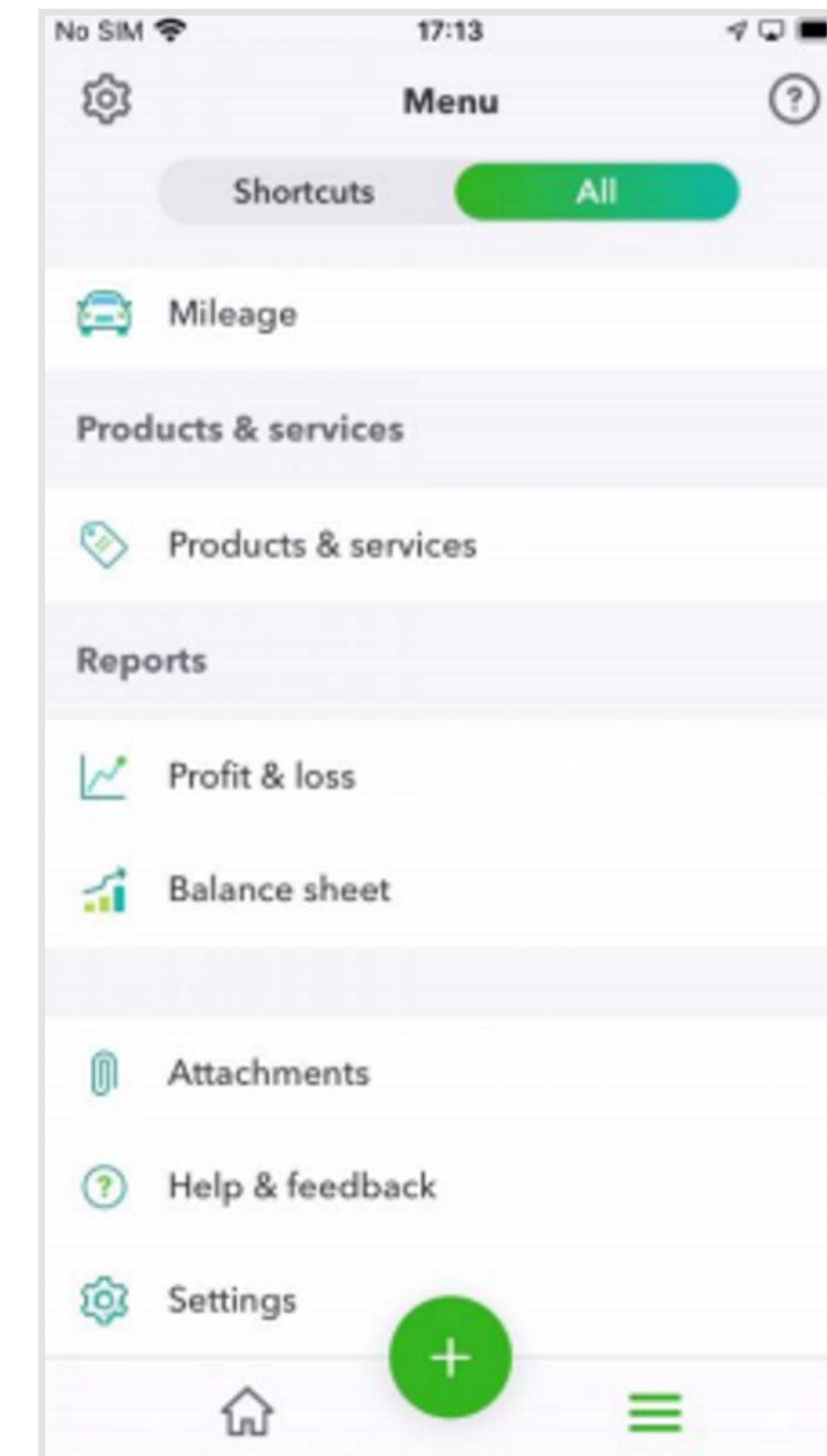
# Create a customer

- In the app, select Menu ≡ then Customers.
- Select (+) in the bottom right of the screen to create a new customer
- Enter the recipient's email address, phone and address (optional). You can also import from your contacts using the icon in the top right hand corner.
- Save your entry.

A screenshot of the 'New customer' form in the app. The top bar is green with 'Cancel', 'New customer', and 'Save' buttons. The form has several input fields: 'Display name (required)' with a green ID card icon; 'First name' and 'Last name' fields; a 'Company' field; 'Email' with a hint 'Tap return between emails'; 'Phone', 'Mobile', and 'Fax' fields, each with a 'Phone' hint; a 'Billing address' section with three lines for 'Address line 1', 'Address line 2', and 'Address line 3'; and 'City/Town' and 'County' fields at the bottom.

# Create a product or service

- In the app, select Menu ≡
- Open All at the top of the page
- Scroll down to Products & services
- Select (+) in the bottom right of the screen to create a new product or service





# Create a product or service

- Enter the name, unit price (tax code if inclusive of tax), the account and category if you have set them up online (optional)
  - The description is what the customer will see when you send an invoice or sales receipt.
  - Enter the sale price/rate or leave blank if it changes from sale to sale.
  - The income account is the category QuickBooks uses to categorise the income when you enter a sales transaction.
- Save the record.

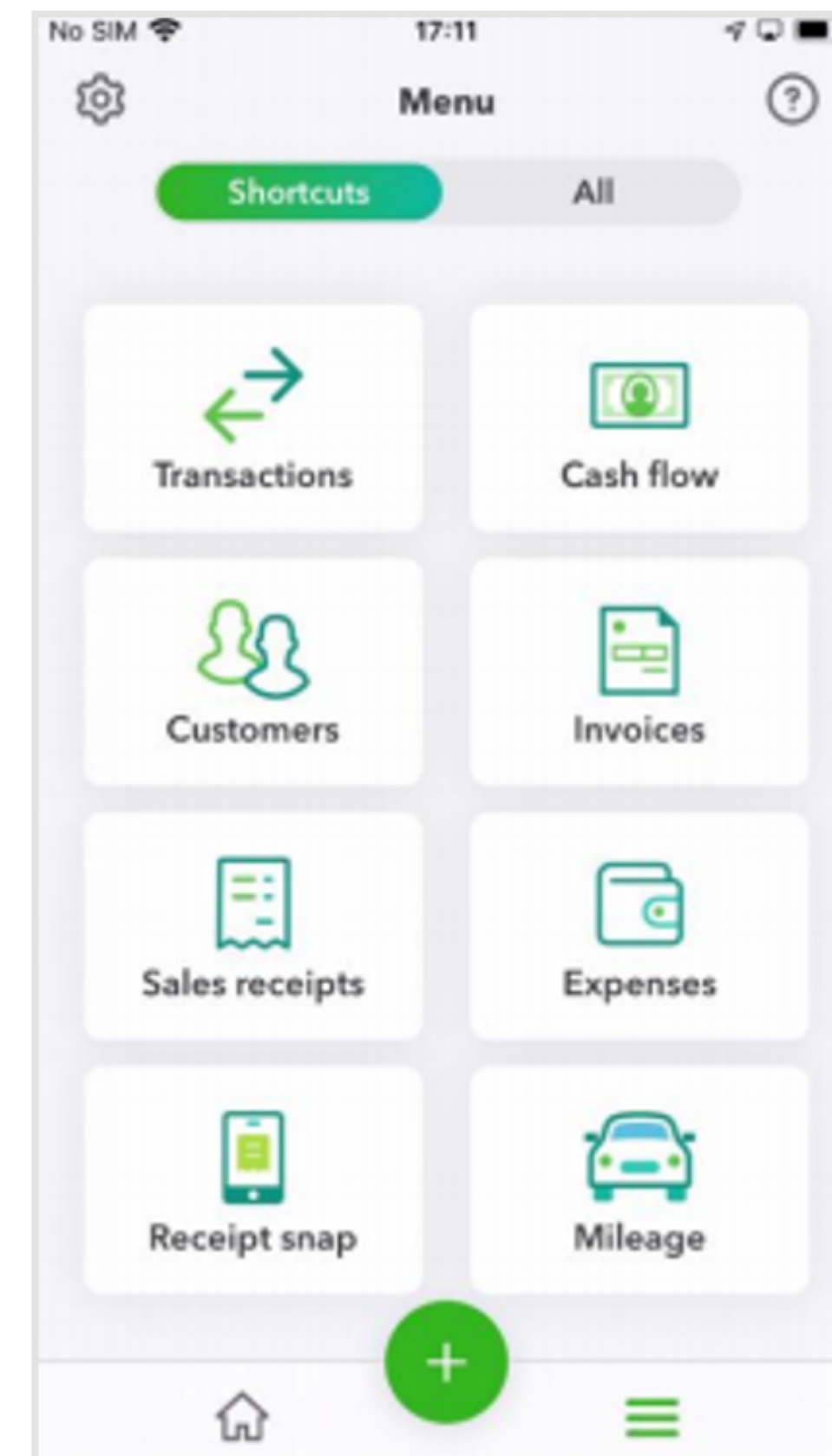
The screenshot shows a mobile application interface for creating a new product or service. At the top, there is a green header bar with the text 'New product or service' and buttons for 'Cancel' and 'Save'. Below the header, the form is divided into several sections. The first section is for 'Name' and 'Required'. The second section is for 'Description'. The third section is for 'Unit price or rate', which is currently set to '£0.00'. The fourth section is for 'Inclusive of Tax', which has a toggle switch. The fifth section is for 'Tax Code', which has a green arrow pointing right. The sixth section is for 'Account', which has a green arrow pointing right. The seventh section is for 'Category', which has a green arrow pointing right. The bottom of the form is a large, empty light blue area.

Name	Required
Description	
Unit price or rate	
Inclusive of Tax	
Tax Code	
Account	
Category	



# Create a product or service

- In the app, select (+) then Estimate
- Choose Customer or Project at the top of the form
- Select an existing customer or (+) in the bottom-right corner to create a new customer.
- To change or remove a customer, tap on the customer name.
- Either enter an Estimate Number or the next sequential number will automatically be added
- Enter the date, expiry and estimate of the status.

A screenshot of the 'New estimate' form in the app. The top bar is green with 'Cancel', 'New estimate', and 'Save' buttons. The form has several input fields: 'Customer or Project' with a right arrow, 'Estimate no.' with the placeholder 'Enter or let us assign', 'Date' with the value '4 June 2020', 'Expires' (empty), and 'Status' with the value 'Pending'. Below these is a green button with a plus icon and the text 'Add product or service'. The bottom section shows a summary: 'Subtotal' £0.00, 'Tax' 'Tax is exclusive', and 'Total' £0.00. At the very bottom is a text field labeled 'Message to customer'.



# Create a product or service

- Select Add Product or Service to select an existing product or service or (+) to create a new one.
- Select Add in the top right-hand corner.
- Add a customer message (optional) if sending via email.
- Save in the top right-hand corner
- Review or delete the estimate by selecting the 3 dots in the top right-hand corner.
- Send Estimate to your client via email.

The screenshot shows a mobile app interface for creating a new estimate. At the top, there's a green header bar with 'Cancel', 'New estimate', and 'Save' buttons. Below this is a form with several fields: 'Customer or Project' with a right arrow, 'Estimate no.' with the placeholder 'Enter or let us assign', 'Date' set to '4 June 2020', 'Expires' (empty), 'Status' set to 'Pending', and a green '+ Add product or service' button. At the bottom, there's a 'Message to customer' text area. The subtotal and total are both £0.00.

Estimate no.	Enter or let us assign
Date	4 June 2020
Expires	
Status	Pending
<a href="#">+ Add product or service</a>	
Subtotal	£0.00
Tax	Tax is exclusive
Total	£0.00
Message to customer	

The screenshot shows the 'Estimate' review screen. At the top, there's a header with 'Estimate' and 'Lynda Higgs' with a right arrow. Below this, the total amount '£30' is displayed in large blue text. A blue button 'Send Estimate >' is prominent. Below the button, the estimate details are shown: 'ESTIMATE #10005', 'Status: Pending', 'Expires: 05/06/2020', and '04/06/2020'. A section titled '1 ITEM' lists 'Football Coaching' for 25.00, with a note '20.0% S' and '1.00 x 25.00 each'. At the bottom, a summary table shows the subtotal (25.00), tax (5.00), and total (£30.00). A blue link 'X Get signature' is at the very bottom.

ESTIMATE #10005	
Status: Pending	04/06/2020
Expires: 05/06/2020	
1 ITEM	
Football Coaching	25.00
20.0% S	
1.00 x 25.00 each	
Subtotal	25.00
Tax is exclusive	
VAT @ 20% on 25.00	5.00
Total	£30.00
<a href="#">X Get signature</a>	



# How to create an invoice (from estimates)

If you have already created an estimate:

- Select Menu.
- Select All at the top.
- Scroll down to Estimates.
- Open the relevant estimate and Convert to Invoice.
- Enter an Invoice Number or the next sequential number will automatically be added.

Estimate  
Lynda Higgs >  
**£30**

**Convert to invoice >**

ESTIMATE #10005  
Status: Pending  
Expires: 05/06/2020

1 ITEM

<b>Football Coaching</b>	<b>25.00</b>
20.0% S 1.00 x 25.00 each	

<b>Subtotal</b>	<b>25.00</b>
Tax is exclusive VAT @ 20% on 25.00	5.00
<b>Total</b>	<b>£30.00</b>

[X Get signature](#)

NOTES & ATTACHMENTS

[Add notes or attachments](#)

ACTIVITY ▾

Cancel New invoice Save

Lynda Higgs >

Inv. no. Enter or let us assign

Date 5 June 2020

Terms Net 30

Due on 5 July 2020

<b>Football Coaching</b>	<b>25.00</b>
1.00 x 25.00 each 20.0% S	

[Add product or service](#)



<b>Subtotal</b>	<b>£25.00</b>
<b>Tax</b>	<b>Tax is exclusive</b>
VAT @ 20% on 25.00	5.00
<b>Total</b>	<b>£30.00</b>
<b>Balance due</b>	<b>£30.00</b>


Message to customer



# How to create an invoice (from estimates)

- Confirm your payment terms and details.
- Save in the top right-hand corner.
- Review or delete your invoice by clicking on the 3 dots in the top right-hand corner.
- Send Invoice to send the invoice to your client via email (optional).

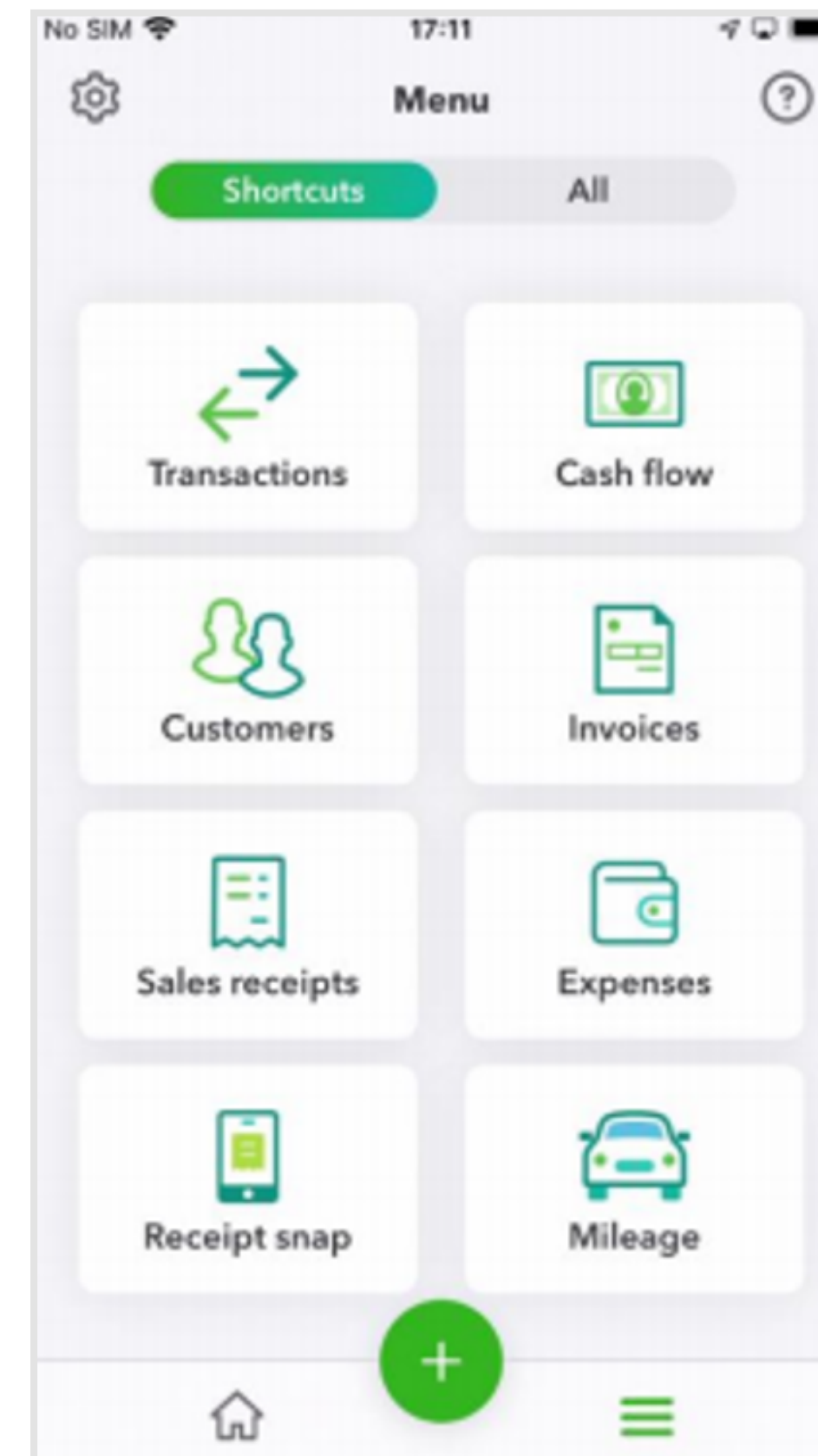
Cancel	New invoice	Save
Lynda Higgs		>
Inv. no.	Enter or let us assign	
Date	5 June 2020	
Terms	Net 30	
Due on	5 July 2020	
	Football Coaching 1.00 x 25.00 each	25.00 20.0% S
	Add product or service	
Subtotal		£25.00
Tax		Tax is exclusive
VAT @ 20% on 25.00		5.00
Total		£30.00
Balance due		£30.00
Message to customer		

Cancel	Send Invoice	Send
To: higgs_l@example.co.uk		
Subject: Invoice 10006 from Jacob's Coaching		
Here's your invoice! We appreciate your prompt payment.  Thanks for your business! Jacob's Coaching		
Want to add a few finishing touches? <a href="#">Customise how your invoices look</a>		



# How to create an invoice (from scratch)

- Choose Invoice
- Select Customer or Project at the top
- Select an existing customer or tap (+) to create a new customer
- To change or remove a customer, tap on the customer name
- Enter an Invoice Number or the next sequential number will automatically be added.
- Choose the date and terms of the invoice



Cancel	New Invoice	Save
Lynda Higgs >		
Inv. no.	Enter or let us assign	
Date	5 June 2020	
Terms	Net 30	
Due on	5 July 2020	
<div><div></div>Football Coaching25.00 1.00 x 25.00 each20.0% S</div>		
<div><div></div>Add product or service</div>		
Subtotal	£25.00	
Tax	Tax is exclusive	
VAT @ 20% on 25.00	5.00	
Total	£30.00	
Balance due	£30.00	
Message to customer		



# How to create an invoice (from scratch)

- Select Product or Service to add an existing product or service or tap (+) to create a new one
- Select Add in the top right-hand corner.
- Add a customer message (optional) if sending via email.
- Save in the top right-hand corner.
- Review or delete the invoice by selecting the 3 dots in the top right-hand corner
- Send Invoice to your client via email (if status is NOT accepted).

Cancel	New Invoice	Save
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Lynda Higgs >


Inv. no. Enter or let us assign

Date 5 June 2020

Terms Net 30

Due on 5 July 2020

	<b>Football Coaching</b>	<b>25.00</b>
	1.00 x 25.00 each	20.0% S

 Add product or service

Subtotal £25.00

Tax Tax is exclusive


VAT @ 20% on 25.00 5.00

**Total £30.00**

**Balance due £30.00**

Message to customer

Cancel	Send Invoice	Send
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To: higgs\_l@example.co.uk 

Subject: Invoice 10006 from Jacob's Coaching

Here's your invoice! We appreciate your prompt payment.

Thanks for your business!  
Jacob's Coaching

Want to add a few finishing touches?  
[Customise how your invoices look](#)



# Receiving a payment

- Open the app and select (+)
- Choose Add Invoice Payment
- Select an existing customer or (+) in the bottom-right corner to create a new customer.
- To change or remove a customer, tap on the customer name.
- Select the date, payment method, reference number (optional) and where the money is being deposited/has been deposited.
- Select the relevant invoice to reconcile this payment against it.
- Save



## INVOICING ON THE GO

For further help, contact your accountant or our free support line on 0808 168 8175 (8AM – 7PM Monday to Friday) or contact a QuickBooks expert using chat messaging by clicking the help button in QuickBooks (8AM - 10PM Monday to Friday, and 8AM - 6PM Saturday and Sunday).



# HANCOCK — AND — HASTINGS ACCOUNTANTS

Hancock & Hastings Limited

<http://hancockandhastings.co.uk>

01582 758844

4 Carlisle Close, Dunstable, Beds, LU6 3PH, United Kingdom