

QUICKBOOKS ONLINE

4

Working with Customers

Learning Objectives

- Set up customers and sub-customers
- Edit sales settings and preferences
- Create estimates, invoices and sales receipts
- Receive payments and record bank deposits
- Create advanced customer transactions and reports
- Process credits and refunds

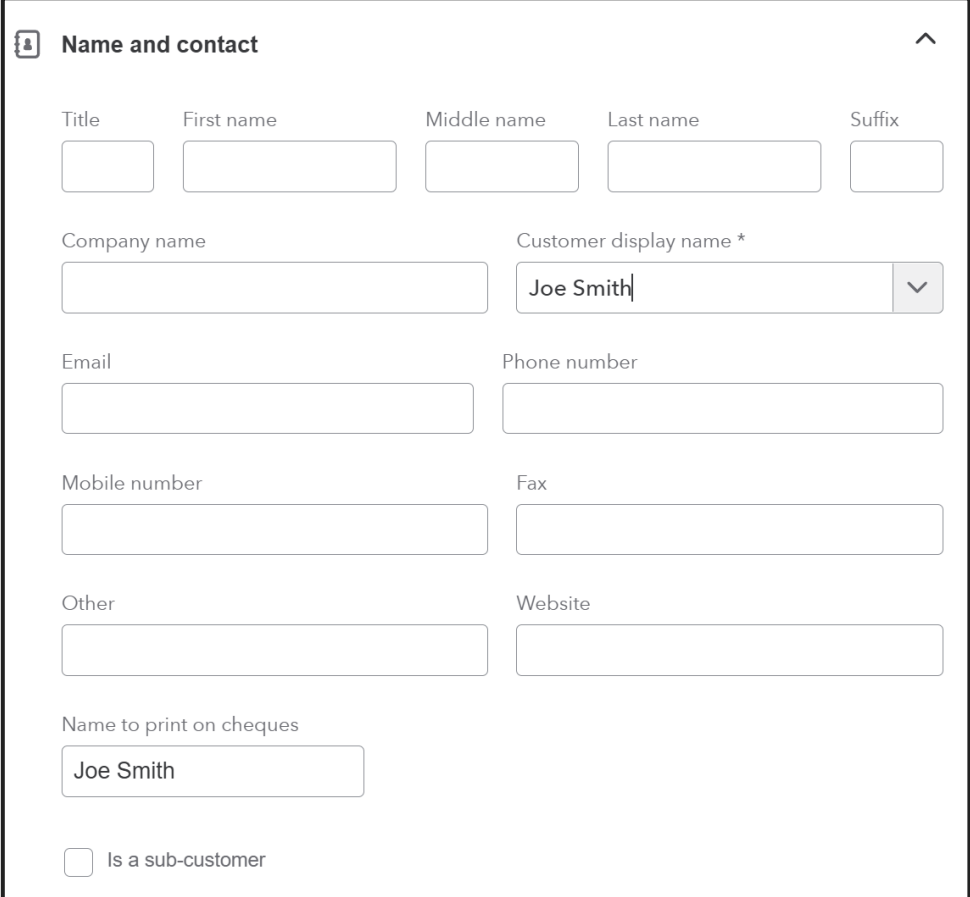
Customer Hub App

This app stores customer information and transactions

Search    						
☐	NAME ↑	COMPANY NAME ⇅	PHONE	CURRENCY	OPEN BALANCE ⇅	ACTION
☐	Abercrombie International Group	Abercrombie International Group		USD	\$0.00	Create invoice ▼
☐	Adwin Ko	Ko International Ltd	604 999-9998	CAD	\$1,695.00	Receive payment ▼
☐	Alex Blakey	Blakey Group		USD	\$0.00	Create invoice ▼
☐	Andre Prefontaine	Andre's Bakeries		HKD	HK\$0.00	Create invoice ▼
☐	Anilkumar Pillai	International Investment Advisors		CAD	\$4,407.00	Receive payment ▼
☐	Benjamin Yeung	Yeung's Architects	809 809-7777	CAD	\$8,249.00	Receive payment ▼

Customer Hub App (cont.)

- Create customers and sub-customers
 - Enter as much info as possible
 - Edit, merge or inactivate customers
- Import a customer list
 - Excel (.xlsx)
 - CSV
 - Google Sheet (in some cases)



The screenshot shows a form titled "Name and contact" with a back arrow icon in the top right corner. The form contains the following fields:

- Title, First name, Middle name, Last name, and Suffix (all as individual text input boxes).
- Company name (text input box).
- Customer display name * (text input box containing "Joe Smith" and a dropdown arrow icon).
- Email (text input box).
- Phone number (text input box).
- Mobile number (text input box).
- Fax (text input box).
- Other (text input box).
- Website (text input box).
- Name to print on cheques (text input box containing "Joe Smith").
- Is a sub-customer (checkbox).

Sales & Get Paid App

- Two ways to record sales transactions:
 - Sales receipt at time of purchase
 - Invoice billed after the sale (usually with terms)
- Other types of customer transactions:
 - Posting (impacts ledger accounts)
 - Non-posting (information only)
- You can customize your Invoice, Sales Receipt and Estimate forms
- “Bottom bar” of transactions (cancel, revert, print, preview, make recurring, the More menu and customize)

Sales & Get Paid App (cont.)

INVOICE

Balance due (hidden): **\$0.00**

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5100 Spectrum Way
Cooksville ON L4W 5S2
[Edit company](#)

donotreply@intuit.com
(905)555-1234



Add Customer

Invoice no.

1017

Terms

Net 30

Invoice date

01/02/2026

Due date

03/03/2026

Invoice amounts are (hidden)

Exclusive of Tax

Product or service

	#	Product/service	Description	Qty	Rate	Amount	Sales tax	Class (hidden)		
	1									

Add product or service

Clear all lines

Customer payment options [Edit](#)



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

Subtotal

Discount 0%

Invoice total

\$0.00

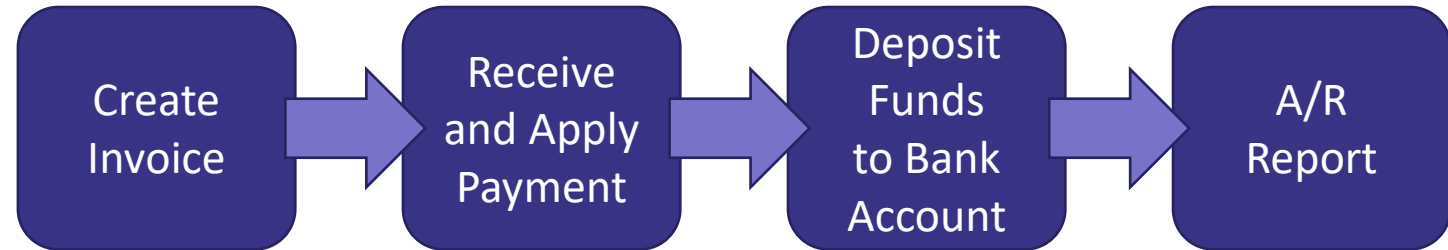
\$0.00

\$0.00

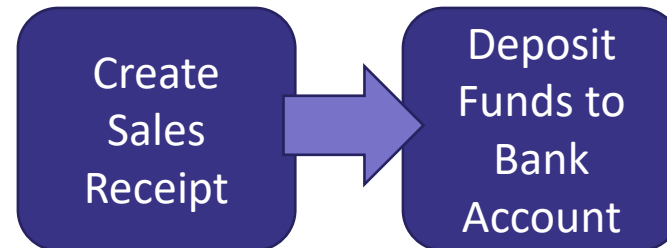
An Invoice form

Sales & Get Paid App (cont.)

Process for invoices



Process for sales receipts



Sales & Get Paid App (cont.)

- Estimates are non-posting sales transactions
 - Used to quote on future jobs or jobs that will use progress invoicing
 - When the customer accepts the estimate, convert it to an invoice that shows on a ledger account
- The Undeposited Funds account holds payments received until allocated to a specific asset account
 - Payments deposited to Undeposited Funds will be seen when completing a bank deposit

Other Customer Transactions

- You can create unique price rules related to:
 - Customer types
 - Product/service types
 - Date ranges
- Credit memos reduce the amount of an unpaid invoice
- Refund receipts give a physical refund to a customer who has already paid
- Delayed charges and credits
 - Non-posting reminders
 - Amounts you want to apply against a future sales transaction

Creating Customer and Sales Reports

Some reports have summary and detail versions to accommodate different needs.

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CUSTOMER BALANCE SUMMARY	
All Dates	
	TOTAL
Anilkumar Pillai	4,407.00
Benjamin Yeung	8,249.00
▼ Edward Bruce	
20th Anniversary Party	565.00
Total Edward Bruce	565.00
Hazel Robinson	-974.63
Jordan Burgess	339.00
Kari Steblay	7,288.50
Kim Christian	2,034.00
Lew Plumbing	-454.83
TOTAL	\$21,453.04

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Customer Balance Detail						
All Dates						
DATE	TRANSACTION TYPE	#	DUE DATE	AMOUNT	OPEN BALANCE	BALANCE
▼ Anilkumar Pillai						
11/01/2025	Invoice	1016	10/02/2025	4,407.00	4,407.00	4,407.00
Total for Anilkumar Pillai				\$4,407.00	\$4,407.00	
▼ Benjamin Yeung						
27/10/2024	Invoice	1008	26/11/2024	904.00	904.00	904.00
27/10/2024	Invoice	1009	26/11/2024	7,345.00	7,345.00	8,249.00
Total for Benjamin Yeung				\$8,249.00	\$8,249.00	
▼ Edward Bruce						
▼ 20th Anniversary Party						
01/09/2029	Invoice	5011	01/10/2029	565.00	565.00	565.00
Total for 20th Anniversary Party				\$565.00	\$565.00	
Total for Edward Bruce				\$565.00	\$565.00	
▼ Hazel Robinson						
05/11/2024	Payment		05/11/2024	-9,415.73	-974.63	-974.63

Projects

- You can track projects by customer vs. using sub-customers as jobs
- Requires a QBO Plus subscription

