

While entering Sale Receipts the time may come that you need to add a Product/Service. The Moose only use **SERVICE** as an option. Product/Service list will have most of what any Unit will need already.


The screenshot shows the 'Sales Receipt #77' form in QuickBooks Online. The form includes fields for Customer, Email, Billing address, Sales Receipt date, Tags, Payment method, Reference no., and Deposit to. A table with columns #, PRODUCT/SERVICE, DESCRIPTION, QTY, RATE, AMOUNT, and TAX is visible. A dropdown menu is open under the 'PRODUCT/SERVICE' column, showing options like '1005 - NSF Checks', '1030 - Credit Card Clearing', etc. Two yellow arrows point to the 'PRODUCT/SERVICE' header and the dropdown menu. The total amount is \$0.00.


Product Service is the old “Items” in Quickbooks Desktop. Example “1005 – Checking” or “4005 – Dues” Placing your cursor into the box will bring up a list to choose from


Add New – at the top of the drop down to add a new item.

Another Window opens. **Always choose Service.**

Product/Service information ✕

 **Non-inventory**
Products you buy and/or sell but don't need to (or can't) track quantities of, for example, nuts and bolts used in an installation.

 **Service**
Services that you provide to customers, for example, landscaping or tax preparation services.

 **Bundle**
A collection of products and/or services that you sell together, for example, a gift basket of fruit, cheese, and wine.



Product/Service information

Service [Change type](#)

Name*

SKU **IGNORE**

Category **IGNORE**

Description

Sales price/rate **IGNORE**

Income account Services

Sales tax category?

Taxable - standard rate

NAME - First 4 digits of Chart of Account number, space, dash space, name. i.e., 1005 – Checking or 4005 – Dues Income

SKU – DO NOT USE

CATEGORY – DO NOT USE

DESCRIPTION – UNCHECK “I sell this product/service to my customers.”

DESCRIPTION BOX – Enter a description to describe the item, maybe longer name than NAME.

SALES PRICE/RATE – DO NOT USE

INCOME ACCOUNT - Choose one from the drop-down arrow.

The account number should match the Name from above. i.e.,

1005 – Checking matches to 1005.00 General Checking.

Sales price/rate

Income account **Services**

+ Add new

1000.00 Cash	Bank
1005.00 Checking - Citizen Bus 3640	Sub-account of Cash
1007.00 Citizen Business Tax Acct.	Sub-account of Cash
1009.00 Wells Fargo Primary Checking	Sub-account of Cash
1011.00 Co Com Hi Yeild 2952	Sub-account of Cash
1015.00 Co Com. Bus. cert.9153	Sub-account of Cash
1025.00 Petty Cash	Sub-account of Cash
1030.00 Credit Card Clearing	Sub-account of Cash

Sales tax category ?

Taxable - standard rate

Taxable - standard rate

Nontaxable

Choose a special category

MOST UNITS WILL CHOOSE NON-TAXABLE

SALES TAX CATEGORY – Most chapters will choose Nontaxable. Only those Units who have already set up Quickbooks to track and pay their sales tax will chose Taxable when necessary.

Purchasing information

I purchase this product/service from a vendor.

IGNORE

PURCHASING INFORMATION – DO NOT USE

SAVE AND NEW – If adding another Product/Service

SAVE AND CLOSE – If this is the last Product/Service

Save and new

Save and close

Save and send