

## SALES OVERVIEW

In Quickbooks you can enter your sales by creating a sales receipt or an invoice. Quickbooks states that a sales receipt is a transaction you would enter when you receive full payment for services at the time of the sale. This transaction shows that you have received all funds from a customer. At the same time, the recorder must issue an Official Women of the Moose receipt and give it to the customer.

An invoice is used for when sales are made and are NOT paid for at the time of service. **NOTE:** We as Women of the Moose will never use an invoice since all our customers pay at the time of service.

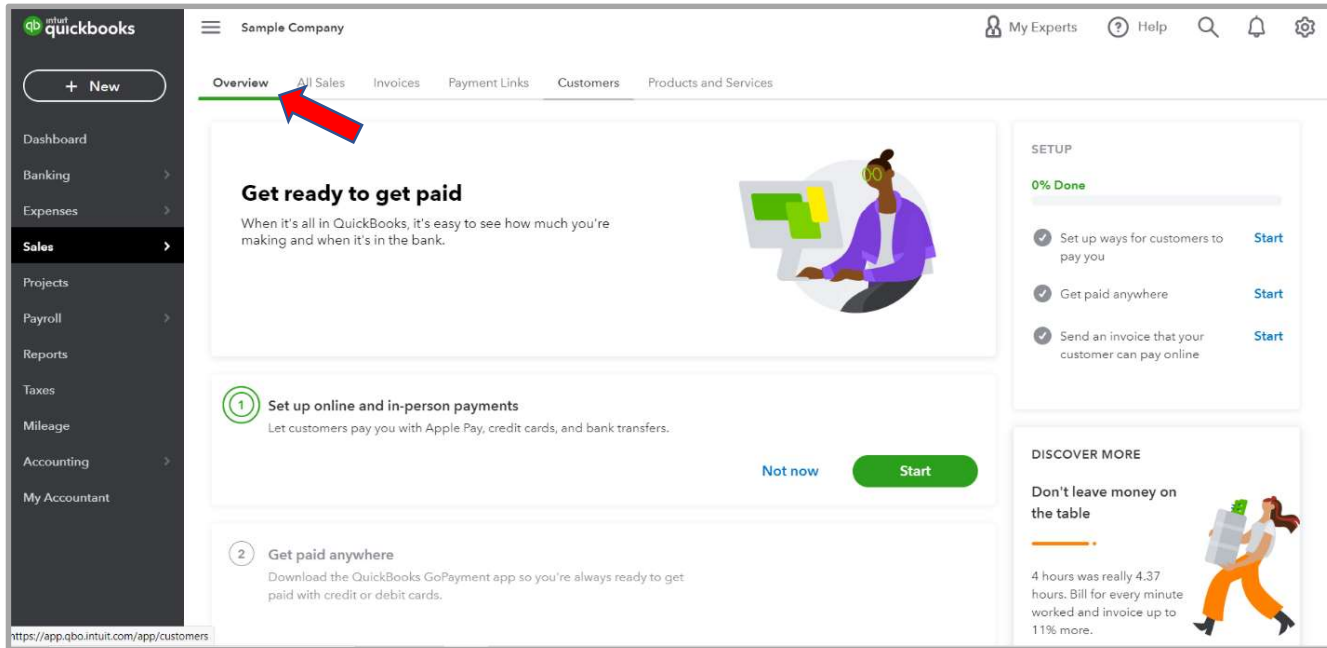
In the sales portion of Quickbooks, we are going to be looking at the various areas located in the sales function located in the Dashboard as seen below.

The screenshot displays the QuickBooks Online interface for a company named 'Sample Company'. The user is logged in as 'My Experts'. The dashboard is for 'Craig's Design and Landscaping Services'. A red arrow points to the 'Sales' menu item in the left-hand navigation pane. The main content area shows a 'SETUP GUIDE' for getting things done, with a progress indicator showing several steps completed. Below the setup guide are shortcuts for adding customers, estimates, invoices, and receiving payments. On the right, there is a 'BANK ACCOUNTS' section with a table showing account balances and update times.

Account Type	Bank balance	In QuickBooks	Review Status
Checking	-\$3,621.93	\$1,201.00	25 to review Updated moments ago
	\$200.00	\$800.00	1 to review Updated moments ago

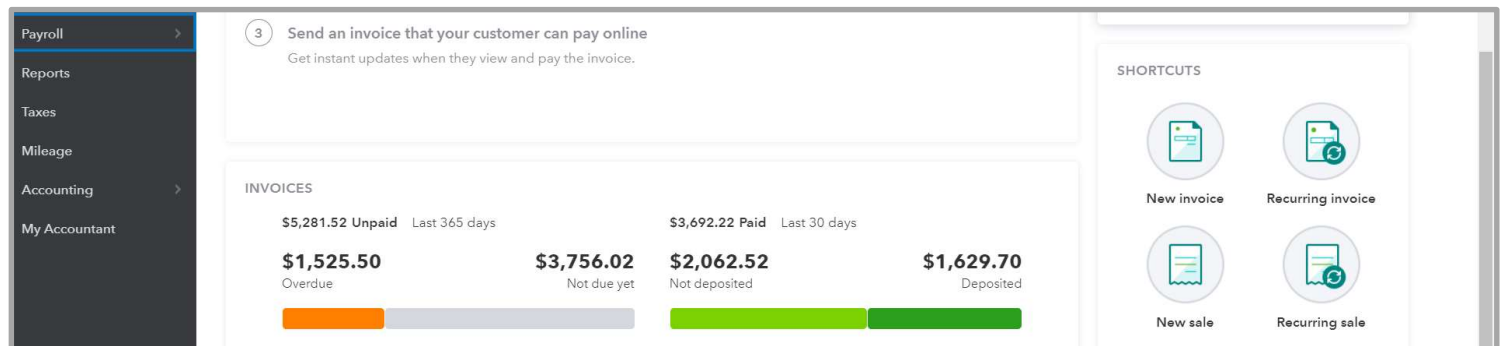
In the first tab you will see the Overview. This overview provides information on getting paid for the invoice part of Quickbooks. This area will allow you to set up how you are going to be paid. There are many ways for you to receive your payment. You can get paid by wire-transfers through the bank, automatic payments between bank accounts, credit card, and mobile payments.

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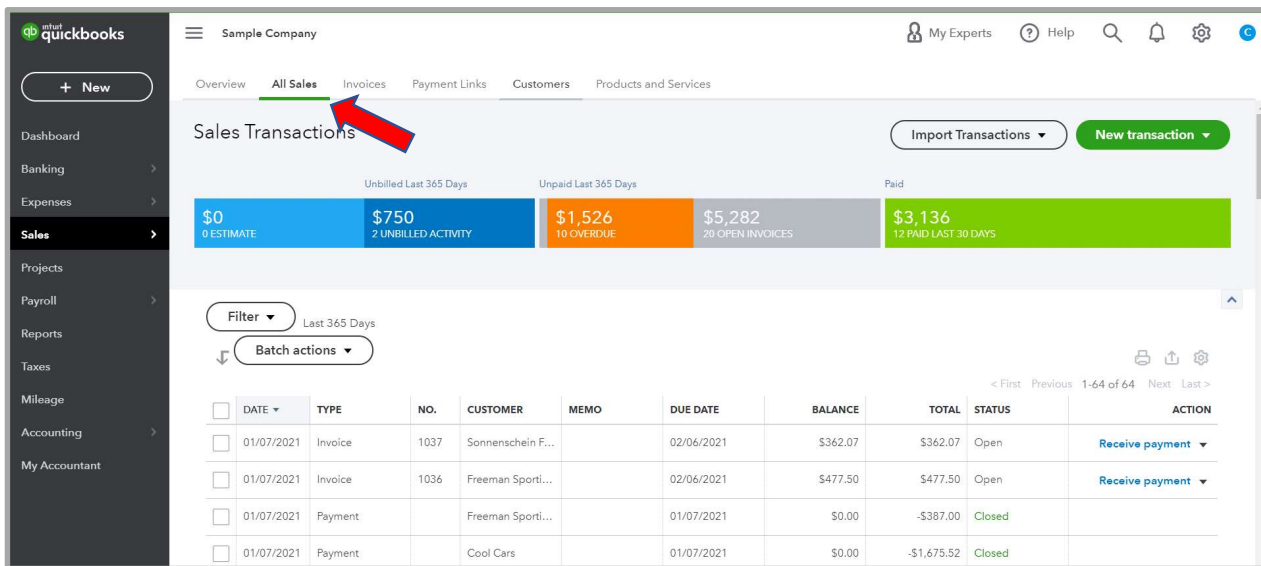
It will also give you information on the unpaid invoices, funds received but not deposited and those funds which have been deposited.

The next tab is the All Sales. In this screen you will see all the information for a business. The first column will be for estimates, the next column will be



for unbilled activity, then how much money is overdue, how many invoices haven't been paid, and finally how much has been paid. Since the Moose do very little in this area, we probably would never utilize this function of Quickbooks.

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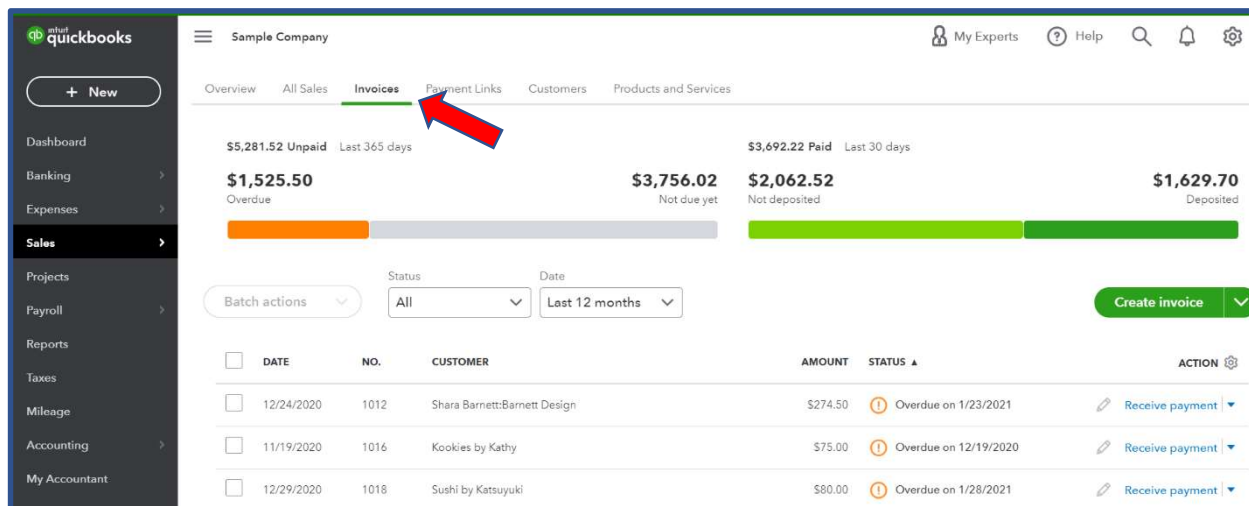


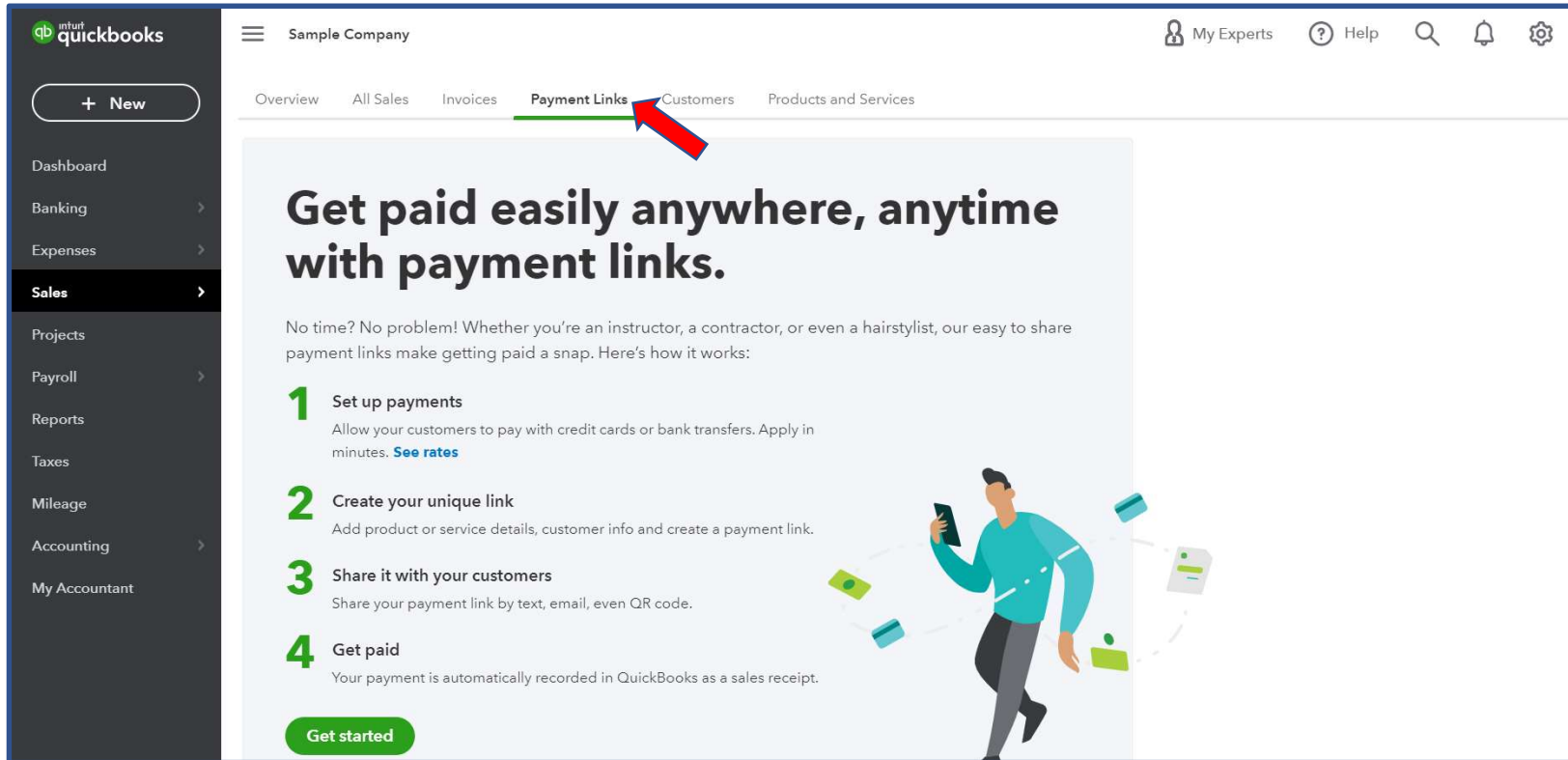
The next area we are going to look at is the Invoice Tab. As stated previously, we do not invoice our members. Therefore, we will never use an invoice but we wanted to make you aware of them.

In the screen above you will notice a listing of invoices. That is to say who owes you money and the action of how you receive their payment.

If we used Invoices, to create a new invoice you would need to click on the create invoice and fill in the invoice. We are not going to spend a lot of time on this since we do not use invoices.

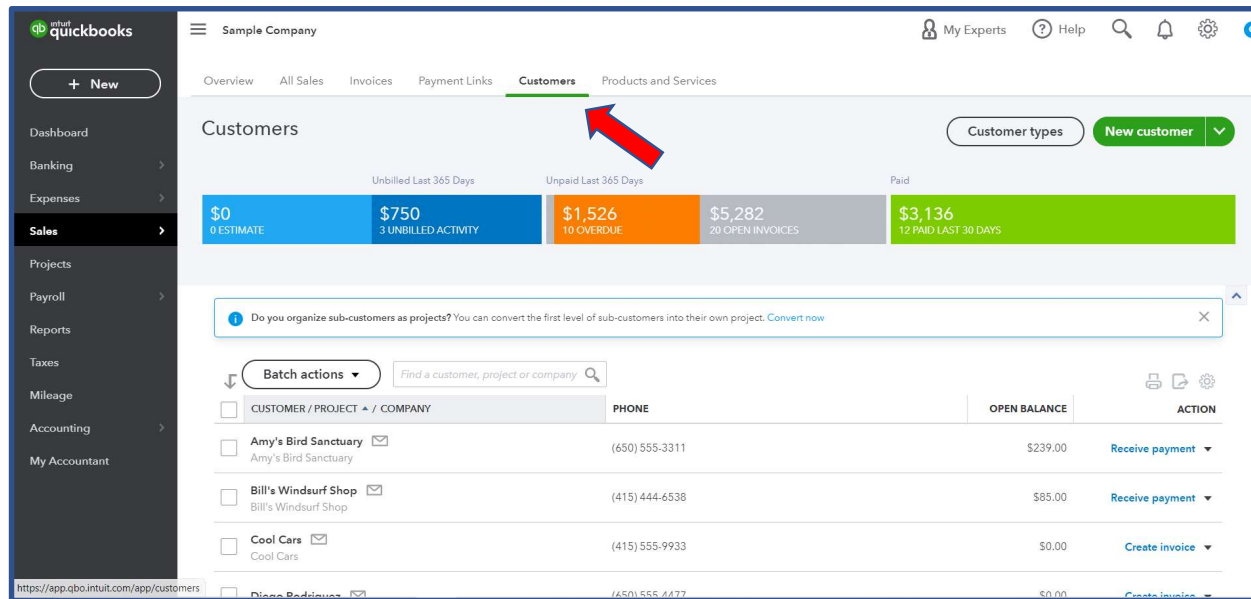
The next tab is the Payment Links.





With Payment Links, you can set up your payment through you phone or tablet. It is very similar to Venmo. You will have to set up the payment application. Determine if you want to use a credit card, debit card, bank transfer, etc. You will create a unique link for your service and then share it with your customers. When you get paid it will automatically create a sales receipt and you will have to make the deposit.

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Under the Customers Tab you will see all the customers you have a list of all your customers, who you need to receive payments from along with who you need to create invoices for. It once again shows you, estimates, the unbilled activity, overdue, how many open invoices you have and how much money you have received in the last 30 days.

The last tab is the Products and Services. In this screen it shows you what your products are, what the SKU is, the quantity on hand, and if you need to reorder. Very similar to an inventory program. We as Women of the Moose do not use invoices, therefore most of what we have shown you here will not be used.

