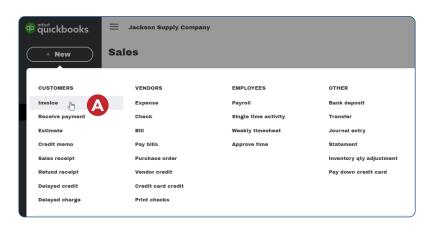# Make a Credit Sale

The Invoice window is used to process and record a sale when payment is expected in the future. After entering information and saving the completed Invoice window, the following has occurred:

Transactions	DR	CR	Subsidiary Records Updated	General Ledger Updated
Accounts Receivable	$		✓	✓
Cost of Goods Sold*	$			✓ *
Sales Revenue		$		✓
Inventory*		$	✓ *	✓ *
Sales Taxes Payable		$		✓

*Applies only to sales of inventory, not services.

Quick Reference Table

Step	Box or Other Location	Procedure
A	**QBO** Home Page	Click the **+ New button** → **Invoice** (in the **Customers category**) to open the **Invoice window**.
B	**Customer**	Select a customer from the drop-down list or add new.
C	**Terms**	Accept the default terms or select different terms from the drop-down list.
D	**Invoice date**	Accept the default date or change.
E	**Invoice no.**	Accept the invoice number or change.
F	**Product/Service**	For the first item sold, select the item from the drop-down list or add new.
G	**Description**	Accept the default description or edit.
H	**Qty**	Enter the quantity ordered by the customer.
I	**Rate**	Accept the default price or edit.
J	**Various**	Repeat steps F-I for each inventory item sold.
K	**Balance Due**	Verify that the balance due is correct.
L	**Invoice window**	Review the information to verify that it is correct.
M	**Save options**	Save the invoice and close the window.

Make a Credit Sale
QBO windows