

Applying Customer Payments in QuickBooks Online

- 1. Click on the **quick create (plus sign)** in the upper right corner of the screen.
- 2. Click on **receive payment** under the column called members.
- 3. Enter the details:
 - a. Customer name
 - b. Payment date
 - c. Payment method
 - d. Reference number (check number if paid by check)
 - e. Deposit to the checking account where the funds are going
 - f. Amount received (how much was paid, not how much was owed)
 - g. Check the boxes for the invoices that were paid
 - h. Enter the payment amount that was paid toward each invoice
 - i. Click save and new (or save and close) in the lower right corner



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1. Click on the **quick create (plus sign)** in the upper right corner of the screen.



2. Click on **receive payment** under the column called customers.

Create				
Customers	Vendors Employees		Other	
Invoice	Expense	Payroll 🎓	Bank Deposit	
Receive Payment	Check	Single Time Activity	Transfer	
Estimate	Bill	Weekly Timesheet	Journal Entry	
Credit Memo	Pay Bills		Statement	
Sales Receipt	Purchase Order		Inventory Qty	
Refund Receipt	Vendor Credit		Adjustment	
Delayed Credit	Credit Card Credit			
Delayed Charge	Print Checks			

- 3. Enter the details:
 - a. Customer name
 - b. Payment date
 - c. Payment method
 - d. Reference number (check number if paid by check)
 - e. Deposit to undeposited funds
 - f. Amount received (how much was paid, not how much was owed)
 - g. Check the boxes for the invoices that were paid
 - h. Enter the payment amount that was paid toward each invoice
 - i. Click save and new (or save and close) in the lower right corner

(b) Receive Payment				(?) Help X
Contrart Any's Bird Senctury Find by invoice no.				\$0.00
Figurent data 12/11/2019 Figurent method Conse accesses method C			г	Amount received
Outstanding Transactions Prod becars Via Fiber All				
DESCRIPTION	DUE DATE	ORIGINAL AMOUNT	OPEN BALANCE	PAYMENT
Invoice # 1021 (12/25/2018)	01/24/2019	459.00	239.00	
			< First Previous 1-14	f1 Next Last>
			Amount to Apply	\$0.00
			Amount to Credit	\$0.00
				Clear Payment
Carcel Clear Print				Save and new 🔹