



## Breakthrough Solutions, LLC

*Providing solutions to help your business succeed!*

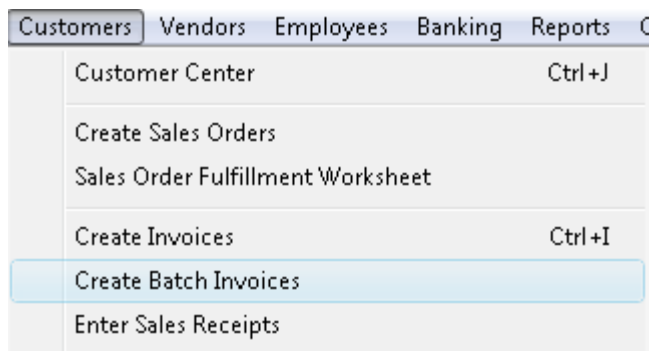
### QuickBooks® Tip—Two Ways to Automate Sending Invoices

Looking for a way to send a monthly invoice to the same client? The easiest way is to create that invoice is to use a generic description like “Monthly Rent” instead of “January Rent”. Then either right click on your mouse or go to the Edit menu and select “Memorize Transaction”. See our tip on Memorizing Transactions for detail on setting up the Memorized Transaction.

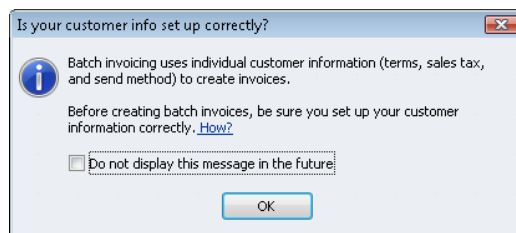
Looking for a way to send an invoice to multiple customers all using the same item, description and amount? Starting with QuickBooks 2011 you don't need to create a separate invoice for each customer. Instead, you can create a single batch.

**\*Important:** Before you begin, make sure you've set up the terms, sales tax rate, and send method for each customer you want to include in the batch.

To start the process, go to the Customer menu and select Create Batch Invoices



Once you select Create Batch Invoices the following screen will ask you if your Customers are set up correctly



The screen below is what you will see if you click on the [How?](#) On the screen above.

**How do I enter the terms, sales tax rate, and send method?**

QuickBooks uses the terms, sales tax rate, and send method you set up for each customer to create each invoice in a batch. You can view or change these settings from the Customer Center.

**To do this task**

1. Go to the [Customer Center](#).
2. Right-click the customer name and then click **Edit Customer**.
 

**Note:** If you're emailing an invoice to a customer, be sure the email address is correct on the **Address Info** tab and [verify your QuickBooks send method preferences](#).

[Find out more about changing preferences for sending forms.](#)
3. Open the **Additional Info** tab to view or change your selections.

Once you are comfortable with processing batch invoice you can select the box that reads "Do not display this message in the future"

The next screen, Step 1 of 3, allows you to select the customers for a specific Billing Group. If you don't have a Billing Group you will need to add one in the Billing Group box.

Once the Group is setup select the customer (one at a time) to Add to the Group. When you are finished adding customers for this Billing Group, make sure that you click on the Save Group. Click Next to go to step 2.

**Batch Invoice**

Step 1 of 3: Select a billing group or choose customers and click Next.

Search for:  in  All Fields

Search Results

Name	Balance	Terms
Adam's Candy Shop	40.00	
Andres, Cristina	0.00	2% 1...
Babal, Mike	180.00	Net 30
301 Main St	180.00	Net 30
Presidential	0.00	Net 30
Blackwell, Edward	1,125.00	Net 30
Chapman, Natalie	0.00	Net 15
Chelms, Benjamin	0.00	Net 30
Corcoran, Carol	0.00	Net 30
Croschaw, Bob	1,591.03	Net 30
Crider, Gray	0.00	Net 30
DVS Computers	0.00	Net 60
Ecker Design	3,170.56	Net 30
Golfday Sporting Goods	2,704.19	1% 1...
150 Wilks Blvd	200.00	1% 1...
75 Sunset Rd.	2,404.19	1% 1...
Gregory, Dru	784.16	2% 1...

Billing Group: Test

Customers in This Group: Chapman, Natalie

Buttons: Add >, < Remove, Save Group, Back, Next, Help, Cancel

The next screen, Step 2 of 3, has you select the Quantity, Item Code, Description, Price Each, Class Code (providing that you are using class codes).

**Batch Invoice**

Step 2 of 3: Choose the line items for the batch invoice and click Next.

Date: 12/15/2015 | Template: Intuit Product Inv...

Quantity	Item Code	Description	Price Each	Class	Amount	Tax
1	Gardening	Weekly gardening services	40.00	Maintenanc	40.00	Non
					Total	40.00

Customer Message:

Buttons: Back, Next, Help, Cancel

Once you have completed this process click on Next to go to step 3.

Step 3 of 3 shows you the customers you have selected and what will show up on their invoice. Once you have reviewed the information click on Create Invoices.

Select	Customer	Terms	Send Method	Amount	Tax Code	Tax Rate	Tax	Total	Status
<input checked="" type="checkbox"/>	Chapman, Na...	Net 15	None	40.00	Tax	6.5%	0.00	40.00	OK

From the Batch Invoices Summary screen, you can print or email your invoices based on whatever preferred send method you've selected for each customer. The send method is easily changed by editing the customer going to the Additional Info tab to see your options

You can print or send the invoices now or later through the File Menu, Print Forms, or Send Forms.