

One Invoice for Multiple Estimates

You can't send one invoice for multiple estimates in QuickBooks, but there's a workaround. You can convert the estimates to sales orders and create an invoice for multiple sales orders.

Converting an Estimate to a Sales Order

Open one of the estimates you want to include on your invoice. Click the arrow to the right of the Invoice icon and select Sales Order. QuickBooks displays a message telling you it has copied all the items on the estimate to a sales order template.

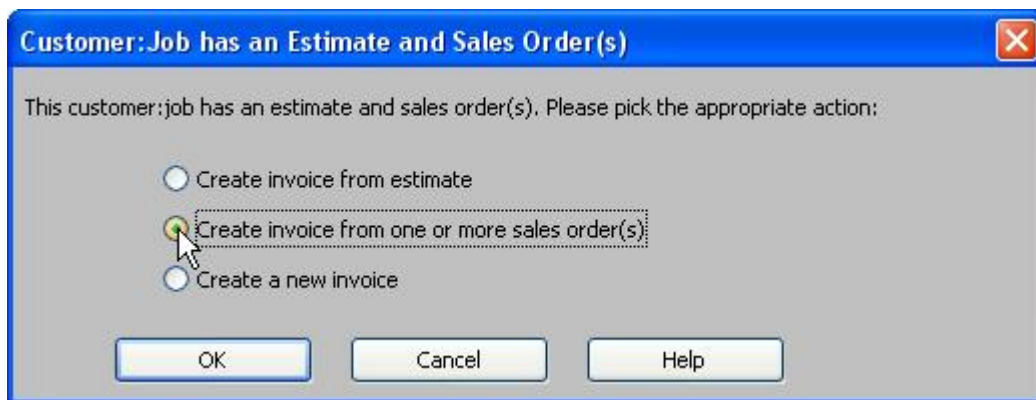


When you click OK, the new sales order opens so you can save it (and you can make changes before you save it). Notice that the memo field for the sales order displays the original estimate number.

Repeat the process for the additional estimates you want to include on a single invoice.

Creating an Invoice for Multiple Sales Orders

Open the Create Invoices window (Ctrl+I). When you enter the customer or job name QuickBooks asks if you want to create the invoice from an estimate or from sales orders.



Select the option to create the invoice from one or more sales order(s) and click OK. QuickBooks displays a list of the existing sales orders for this customer/job. Select the multiple sales orders you created from estimates.

QuickBooks asks whether you want to create the invoice using all of the items on the sales orders you selected, or only for specific items. (Usually, when you're creating an invoice from estimates that were converted to sales orders, the work is finished and ready to be invoiced, so you select all of the sales order items.)



Click OK to create the invoice, then save the invoice and send it to the customer.

TIP: It's a good idea to open the estimates you converted to sales orders and then to invoices and deselect the "Active" status. This keeps those estimates out of reports on active estimates.
