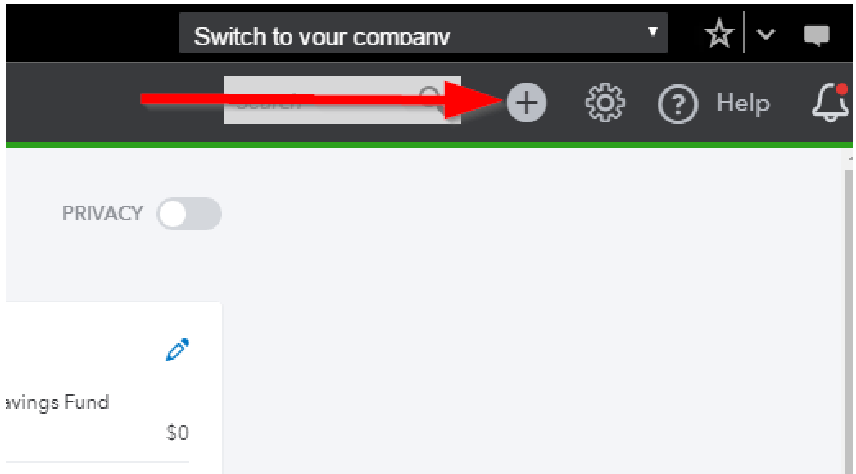
Instructions for Entering Checks in QuickBooks Online

PROCESS/PROCEDURE

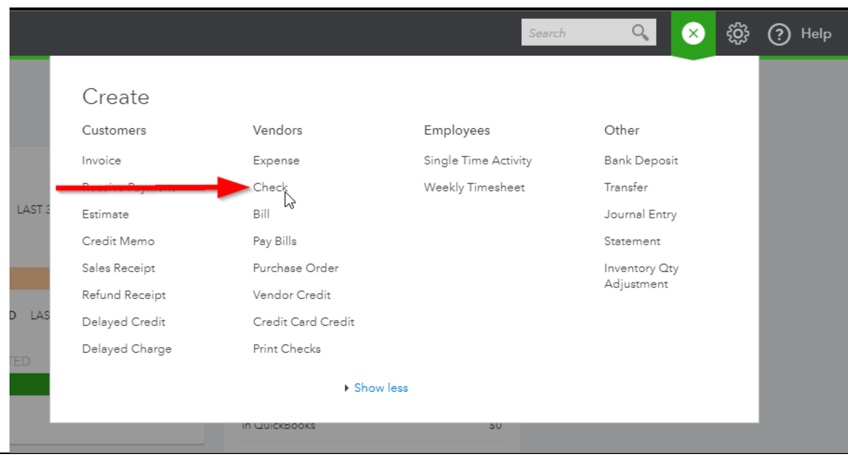
Instructions for Entering Checks in QuickBooks Online

INSTRUCTIONS

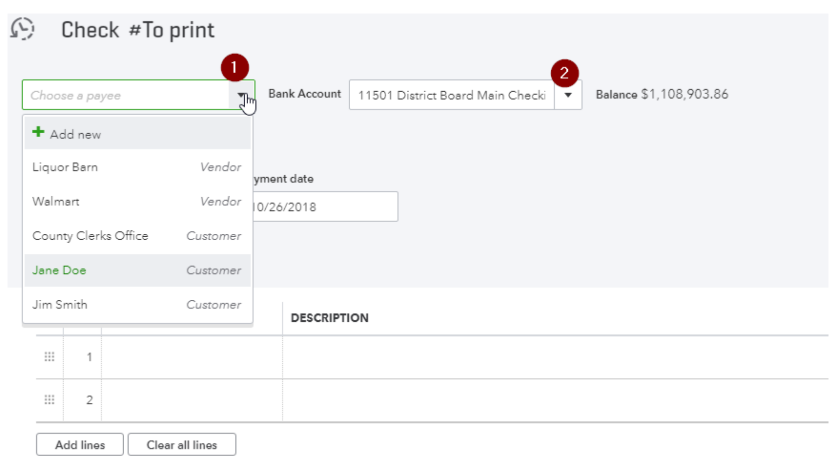
1. Select the **Dashboard** click **the Plus icon (+)** at the top right-hand corner of the screen.



2. Under the **Vendors** section, Choose **Check.**



3. Choose payee and the bank account where the money will be withdrawn.
   - Make sure to choose the correct bank account.



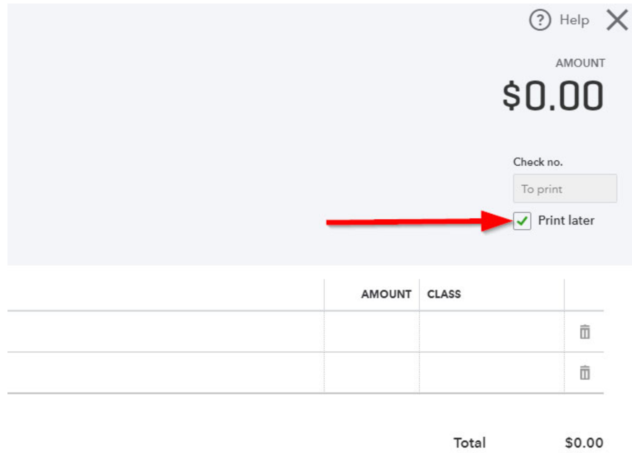
Updated: 1/22/2019

Instructions for Entering Checks in QuickBooks Online

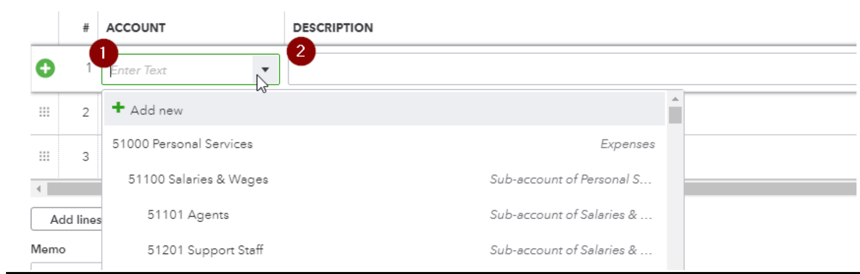
4. Select **Print Later** if you want to print the check.

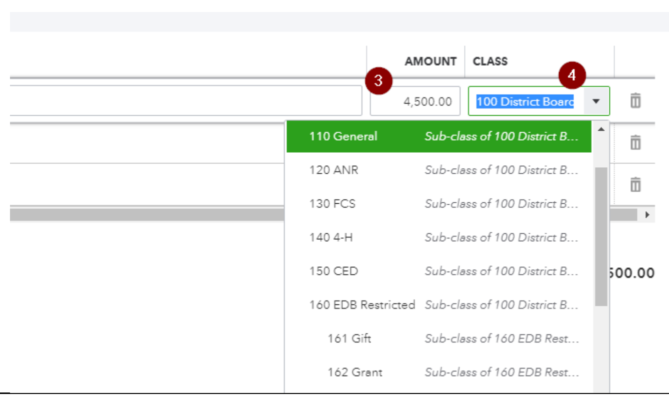
- Leave the Check number blank

Note: If checks are being <u>hand written</u>, enter the check number here and make sure that the “print later” box is **<u>NOT CHECKED.</u>**



5. Complete the check fields.
- Select the Expense Account the charge will be recorded in. (i.e. Board Expense)
- Type a brief description of each charge.
- Enter the Amount of each charge
- Choose a Class this charge will be categorized as.





6. Use the **Memo** field for any notations you would like to make appear on the check.
- In the **Attachments** field, upload a scanned copy or a picture of the invoice and payment voucher.

Updated: 1/22/2019

Instructions for Entering Checks in QuickBooks Online

7. Select **Save and Close** (or **Save and New** to write another check).

TIPS & TRICKS

-

CONTACT INFO

Contact District Support Staff or the Extension Financial Operations team, with any questions or issues.

Updated: 1/22/2019