Use Notes & Attachments QuickBooks Online to Create Expense Entries

1. Using the desktop version of Qbo (not in the app version) Click the Gear Cog on the right hand side of top of your tool bar

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			Search	Q	⊕ [‡]	(?) н	
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Your Company	Lists	Tools		Profile			
Account and Settings	All Lists	Import Data		User Profile			
Manage Users	Products and Services	Export Data		Feedback			
Custom Form Styles	Recurring Transactions	Reconcile		Privacy			
Chart of Accounts	Attachments	Budgeting		Switch Compa	iny		
QuickBooks Labs		Audit Log					
		SmartLook		🔂 Sign Out			
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- 2. From the list that comes up, click Attachments with your mouse
- 3. A list of all the attachments that have been added to your QBO will then open.

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	THUMBNAIL TYPE	NAME	SIZE	UPLOADED	LINKS	NOTE	ACTION
	And the second s	qbmlmg_1570170747011	76.52 KB	04/10/20		staff purchases	Download 🔻

- 4. From the list of your attachments that appears click with your mouse the one you want to use and then click the drop-down arrow in the Action column (it is tiny and is next to the word Download)
- 5. Select Create Expanse from the options list that opens

 Download

 Edit
 Delete
 Create invoice
 Create expense

You can now fill out the details of the expense.

You will see that attachment you selected is now included.

If you want to look it it you can click Show Ex	isting and you can preview it to get the details
from it if required:	
ℜ Expense	
Payee Payment account () Drakes • How did you pay? •	A\$12.44

Payee Drake Payment date Ref no. vith? 👻 04/10/2019 Amounts are Exclusive of Tax 🔻 # CATEGORY (?) AMOUNT GST DESCRIPTIO 0 1 Meals and entertainme 💌 🕅 12.44 GST free purchase 💌 🗊 Ô • 4 Add lines Clear all lines Subtotal A\$12.44 GST @ 0% on 12.44 0.00 Total A\$12.44 Attachments 76.5 kb) >

Save your transaction and your done

Cheers,

Kerry Casanova, CPA



Ki Casanova Exact Accounting © 2019