Make sure your invoices import correctly

1. Your CSV file must include columns for Invoice Number, Customer, Invoice Date, Due Date, and Item Amount.
In the example shown below, the **required columns** are ***'d.** You can **download a sample CSV file** to use as a guide.

2. Want your own invoice numbers to be imported?
Turn on "Custom transaction numbers" in Accounts and Settings or your invoice numbers will be replaced by standard QuickBooks invoice numbers.

3. In the Taxable column, enter "Y" if the item is taxable or "N" if it's not.
If you have taxable items, include a Tax Rate column and enter the tax rate name or percentage.

4. Your CSV file can have no more than 1,000 rows.
If you have more than 1,000 rows, split your CSV up into multiple files. Then import each CSV file separately.

Example CSV file

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
	*InvoiceNo	*Customer	*InvoiceDate	*DueDate	Terms	Location	Memo	Item (Product/Service)	Item Descrip	Item Qty	Item Rate	*ItemAmount	Taxable	Tax Rate	Currency	Shipping Address	Ship Via	Ship Date	Tracking No.	Shipping Charge	Service Date
2	1001	Chris Smith	1/16/18	2/15/18	Net 30		My Memo	Blueprint		1	7	7	Y	8%	USD	1234 Main St., Mountain View, CA, 94043, USA	USPS	2/12/18	12232223UIO	3.98	
3	1001							Design	New Garden Design	12	71	852	N								1/14/18
4	1001							Fence		5	111	555	Y				Deliver	5/30/18			
5	1002	K R																		23.98	

Invoice #1081

⚙ ⑦ Help ✕

*Customer ▾

Email (Separate emails with a comma)

☐ Send later   Cc/Bcc

Online payments Get set up

☑ Cards   VISA · mastercard · DISCOVER · Apple Pay

☑ Free bank transfer BANK

BALANCE DUE
$0.00

Billing address

Terms
Net 30 ▾

*Invoice date
mm/dd/yyyy

*Due date
mm/dd/yyyy

#	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	*AMOUNT	TAX	
⠿ 1						☑	🗑
⠿ 2						☐	🗑

[Add lines] [Clear all lines] [Add subtotal]

Subtotal $0.00

Message to be displayed on invoice

Thank you for your business and have a great day!

Taxable subtotal $0.00

⇅ California ▾ 8% 0.00

Discount percent ▾ [ ] $0.00

Total $0.00

Message displayed on statement

Balance due $0.00

📎 **Attachments**   Maximum size: 20MB

Drag/Drop files here or click the icon

Show existing

[Cancel]   Print or preview | Make recurring | Customize   [Save ▾]