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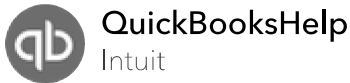
Copy an estimate to a purchase order in QuickBooks Online

by Intuit • 👍 25 • 🕐 Updated 3 weeks ago

Learn how to copy an estimate onto a purchase order in QuickBooks Online.

To streamline your process once a customer approves your estimate you can easily copy it to a purchase order. In this article, we'll show you how.

> **Note**
> : This option isn't available yet for the new estimate and invoice layout.
> Find out which layout you have   .

Step 1: Turn on the purchase order feature

1. Go to **Settings** ⚙, then select **Account and settings**.

2. Go to **Expenses**.

3. Select the **pencil** ✏ icon in the **Purchase orders** section.

4. Turn on the **Use purchase orders** switch.

5. Select **Save**, then **Done**.

Step 2: Copy estimate to a purchase order

1. Select **+ New**.

Find the right fit for your business

Choose from plans and features to fit your business needs with QuickBooks Online.

select **Save**.

4. A dropdown choice of **Create invoice** or **Copy to purchase order** will appear next to the amount.

5. Select **Copy to purchase order**.

6. Select a **Vendor**.

7. In the Item details section, select the same customer mentioned on the purchase order.

8. Select **Save and close**.

Why didn't some of my items copy over to the purchase order?

Only items marked as purchased from vendors get copied over to purchase orders. Verify that your products or services are marked accordingly.

1. Go to **Settings** ⚙, then select **Products & services** (Take me there).

2. Find the product or service. Then select **Edit**.

3. In the **Purchasing information** section, select the **I purchase this product/service from a vendor** checkbox.

4. Select **Save and close**.

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