



QuickBooks POS Training Checklist

Big Hairy Dog Information Systems

PLEASE COMPLETE INFORMATION BELOW

Trainee: _____ Trainer: _____

Company: _____ QB POS Version: QB POS v18

6-10 hrs training time

FAX: 916-368-1411

Training #1: Installation, Setup Interview, Departments and Inventory Entry

Intro

- a) Identify Sysop _____
- b) Identify Hardware _____
- c) Keyboard Tour _____
- d) Tour Big Hair Dog Website _____
- e) Show our Videos _____

Setup Interview

- a) Store Codes/Assignments _____
- b) Preferences _____
- c) Users _____
- d) Price Levels _____
- e) Navigation screen includes all modules _____

Licensing (can't be done without license number and product code)

- a) Call and Register Software _____

Maintenance

- a) Daily backups – Reminder (testing to follow) _____
- b) Virus Scan/Disk Maintenance _____

Inventory Entry

- a) Multiple Windows New Feature _____
- b) Department List _____
- c) Vendor List _____
- d) Item View _____
- e) Style View _____
- f) Mobile Sync with iPad, iPhone, or Android _____
- g) Function Keys (F1 – Help) _____
- h) Tag Printer – Set up and test _____
- i) Searching: Filter View vs Search Box _____
- j) Entering Non-Inventory items _____
- k) REPORT: Summaries: Inventory On Hand _____
- l) Price Manager _____
- m) Physical Inventory _____
 - (a) Enter new physical inventory information _____
 - (b) Edit physical inventory information _____
- n) Inventory Errors - Conflicting Items, duplicates _____

Initial: _____ Date: _____



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Training #2: Inventory Review, Purchasing, Receiving & Memos

- a) Inventory Follow-up/Review _____
- b) Purchase Orders _____
- c) Receiving From a PO _____
- d) Maintaining clean PO file _____
- e) Former Vouchers _____
- f) Receiving Without a PO _____
- g) Return Vouchers _____
- h) PO/Voucher – Test Print _____
- i) Inventory>Adjustments _____
- j) Adjustment Situations _____
- k) REPORTS: Purchasing, Receiving, Adjustments _____

Initial: _____ Date: _____

Training #3: Point of Sale, Reports

- a) Receipts
 - Regular>Returns _____
 - Discounts- Item vs. Global _____
 - Customers _____
 - Customer Loyalty _____
 - Tendering (Gift included) _____
 - Selling Misc. Item _____
 - Adding New Item _____
 - Tax/Shipping _____
 - Item Search _____
- b) Former Receipts _____
- c) Set Up for Credit Cards _____
- d) POS Situations _____
- e) End of Day Activities _____
- f) Receipts – Test Print _____
- g) Sales Reports _____
- h) Sales Charts _____
- i) Verify they have a copy of the Cashier and Back Office Guides _____
- j) Modified Reports will be lost with updates/upgrades _____

Initial: _____ Date: _____

I understand all the features and processes of QuickBooks Point of Sale.

Client Signature: _____ Date: _____

Trainer Signature: _____ Date: _____