



# *Q.A.T. Business Services*

*Extreme Competence Inspires Extreme Confidence™*

## **Module Outline** **QB022 - Selling**

This is module #22 of Q.A.T.'s QuickBooks® series. It covers sales transactions and accounts receivable in depth, including setting up customers, billing for time and disbursements, using quotes and sales orders, charging interest on overdue accounts, and generating customer statements.

### **Format:**

online presentation

### **Maximum Class Size:**

20

### **Duration:**

3 hours

### **Schedule:**

[qatBusinessServices.com/training/schedule.html](http://qatBusinessServices.com/training/schedule.html)

### **Intended Audience:**

This module is designed for the following people, but others are welcome to attend:

- bookkeepers

### **Instructor:**

*Warren Gaebel, B.A., B.C.S.* — Mr. Gaebel is a Certified QuickBooks ProAdvisor® and the General Manager of Q.A.T. Business Services. He taught at Learning Tree International, the University of Waterloo, and several colleges since the early 1980's.

### **Required Textbook(s) & Supplies:**

### **Prerequisites:**

For the benefit of all attendees, the following prerequisites should be observed:

- QB014 – Accounts Receivable Basics

### **Learning Objectives:**

Upon completion of this course, attendees will be able to:

- setup customers and jobs,
- use quotes and sales orders,
- create invoices and credit memos,
- invoice for time and disbursements,
- receive customer payments,
- use the sales order fulfillment worksheet,
- charge interest on overdue accounts, and
- generate customer statements.

### **Tuition:**

\$69 payable upon registration

### **How to Enroll:**

[enrol@qatBusinessServices.com](mailto:enrol@qatBusinessServices.com)  
or (519) 404-7904

none

***Outline:***

- 1 The Customer Centre
- 2 Creating/Editing Customers
- 3 Entering Invoices
- 4 Credit Notes
- 5 Receiving Payment
- 6 Customer Jobs
- 7 Workflow: Estimates -> Sales Orders -> Shipping -> Invoices
- 8 Terms
- 9 Sales Receipts vs. Invoices
- 10 Charging Interest on Unpaid Accounts
- 11 Producing Statements
- 12 Resolving Issues
- 13 The Aging Schedule
- 14 Q&A

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