



LESSON 1 Introduction to Point of Sale certification

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Lesson objectives

In this lesson, you'll learn about the certification process for QuickBooks Point of Sale.

After completing this lesson, you'll be able to do the following:

- Access the lesson materials available to support the certification process
- Understand the differences between the live and recorded webinars
- Register for live webinar sessions
- Understand and follow the suggested learning path for certification

QuickBooks Point of Sale certification

Thank you for your interest in becoming certified in QuickBooks® Point of Sale (POS) 6.0. This document contains the information you need to know to start the certification process.

This online, self-study certification course is for accounting professionals who are already familiar with QuickBooks financial software and would like to advise small retailers on whether QuickBooks Point of Sale is “right for them” or plan to provide on-site point of sale setup or training services to retail clients.

The purpose of the certification process is to not only educate you in the features and functionality of QuickBooks Point of Sale, but also to provide you with information that enhances your consulting knowledge and your ability to work successfully with retail clients.

Note: In order to become a Certified QuickBooks Point of Sale ProAdvisor, you must first become a Certified QuickBooks ProAdvisor. For more information about becoming a Certified QuickBooks ProAdvisor, see <http://accountant.intuit.com/>.

The information included in this lesson describes more about each of the training materials designed to help you become proficient in the use of the software and its application for retailers and to become certified in QuickBooks Point of Sale.

Using the certification learning materials

In order to assist you in the certification process, Intuit has developed a variety of learning materials to help you learn the software and prepare for the certification exam. Learning sessions include live, interactive web-based sessions (“webinars”) led by instructors who are seasoned Certified QuickBooks POS ProAdvisors; recorded webinars that can be referenced and reviewed on your own schedule; and a learning guide that supplements these online courses.

This section describes each of the learning tools available to you.

Learning guide

Use the *QuickBooks Point of Sale Version 6 Learning Guide* as the study aid and hands-on course workbook to help you work in the software and prepare for the certification exam.

Each learning guide lesson provides conceptual and procedural information related to using QuickBooks Point of Sale. Each lesson also provides a reference to the live or recorded webinars and other materials that are related to the lesson content. Once you have worked through the learning guide lesson, watch the related webinar(s) to expand upon the material in the learning guide.

We recommend you download, print, and review the Learning Guide before attending the QuickBooks POS 6.0 webinars.

On your own exercises

Each lesson includes several hands-on exercises that give you the opportunity to practice what you’ve learned using sample company data. We encourage you to try these exercises as a way to reinforce the information you’re learning as you go through the course. Instructions for using the Practice Mode feature of QuickBooks Point of Sale are provided in each lesson.

Review questions

At the end of each lesson is a set of review questions that provides a way to verify you’ve understood the major concepts of the lesson. The answers to each question are also included. Use the questions and the feedback provided to prepare for the exam and to confirm your understanding of the materials and the software.

Notes

Also included in each lesson is a section where you can write down any questions that you have as you are working through the lesson. Keep the notes page nearby when you attend the live webinar sessions so you can direct your questions to the instructor.

Learning Center

The Learning Center is available in the QuickBooks Point of Sale software. It provides a way for you to learn, or to train your clients, in the basics of Point of Sale by watching and/or reading a series of tutorial presentations. The Learning Center displays when you start Point of Sale (you can disable the automatic display, if desired) and also is available at any time from the Help menu.

Each lesson in the certification learning guide provides a reference to the related Learning Center tutorials in the “Learning Resources” section.

If you are new to QuickBooks POS, we recommend that you review the tutorials in the Learning Center to learn the basic functionality of the software.

Webinars

Webinars are online seminars you watch and listen to from your web browser. These webinars provide additional opportunities for learning more about Point of Sale and preparing for the exam.

The online sessions are led by accountants who have years of experience working with both QuickBooks Point of Sale and QuickBooks financial software. They provide not only information related directly to QuickBooks POS certification, but also a consultant’s perspective on QuickBooks POS that can help you to be a better QuickBooks Point of Sale ProAdvisor to your clients.

There are two types of webinars in QuickBooks POS certification: live and recorded.

Live webinars

Live webinars provide the opportunity to interact with a certified QuickBooks Point of Sale ProAdvisor.

The live webinars include:

- **Overview**—This live webinar will provide you with a basic overview of QuickBooks POS 6.0, such as the Point of Sale workflow, Point of Sale hardware options, and an introduction to QuickBooks Point of Sale reports
- **Employees, Security, & Wrap-up**—In this live webinar, you will learn about setting up users and security groups, determining security levels, and setting up sales commissions.

Each live session includes a Q&A session at the end during which you have the opportunity to ask the instructor questions related to any of the certification learning materials or the POS software itself.

Note: You may attend the live webinars as often as you wish.

Recorded webinars

In addition to the two live webinar sessions, nine recorded webinars are available online. The recorded webinars follow the same format as the live webinars, but do not have a Q&A session at the end. You can view these webinars in any order and pause and rewind as needed.

The recorded webinars include:

- **What's new in QuickBooks Point of Sale 6.0**—discusses and demonstrates new and enhanced features in this version
- **Installing and setting up**—installing QuickBooks Point of Sale, completing the Setup Interview, and setting preferences
- **Setting up inventory**—entering items into inventory, importing data from QuickBooks Financial software or other sources, printing price tags, working with sales tax
- **Maintaining inventory**—purchasing and receiving inventory, making adjustments, and using the Price Manager
- **Daily Point of Sale operations**—entering sales, applying discounts, recording payments
- **Running End of Day procedures**—running the X/Z-out reports, performing a manual media count, backing up POS data
- **Reporting and customizing**—using the Report Center, memorizing reports, customizing the Dashboard and toolbars, modifying preferences, designing and printing documents
- **Supporting multi-store environments**—installing and setting up, transferring merchandise between stores, and exchanging information
- **Exchanging data with QuickBooks financial software**—connecting the two programs, mapping accounts, and reviewing and editing imported data

Remember to write down any questions you have while taking these courses for discussion in the live sessions. It is helpful to have your learning guide nearby for reference.

Registering for a live webinar

To register for a live webinar, go to <http://accountant.intuit.com>, go to the QuickBooks Point of Sale certification page, and click the Register button. Follow the instructions to register for the session and download the WebEx viewer software, which allows you to participate in the webinar session.

Reference materials

In addition to the learning guide and webinars mentioned above, there are two reference documents that may be of assistance as you learn about QuickBooks POS 6.0.

- **QuickBooks POS 6.0 User's Guide**—This is a comprehensive guide to using the daily retail management features of Point of Sale.
- **QuickBooks POS 6.0 QuickStart Guide**—This document includes installation and configuration instructions for new users and upgraders.

Following the suggested learning path

We suggest that you use the materials we've provided and follow the learning path described here for the best learning experience.

- 1** Download and print the learning and reference materials from the QuickBooks Point of Sale Certification web site.
- 2** Install QuickBooks Point of Sale 6.0 software.
- 3** Review the learning guide lesson entitled "Overview."
- 4** Register for and attend the QuickBooks POS 6.0 "Overview" live webinar.
- 5** Review the materials in the remaining learning guide lessons and view the related recorded webinar sessions.

Be sure to take advantage of the "On Your Own" exercises, which provide guided, hands-on practice with the software and the review questions, which can help you prepare for the exam.

- 6** Register for and attend the QuickBooks POS 6.0 "Employees, Security, and Wrap-Up" live webinar.
- 7** Complete the QuickBooks POS 6.0 Certification Exam, which you access through your course locker.

You must pass the required Certification Exam with a grade of at least 85% to be recognized as certified in QuickBooks Point of Sale 6.0.

Note: Because QuickBooks POS certification includes an open-book exam, it is not eligible for CPE credits.

Also, members must have successfully completed certification in QuickBooks financial software version 2005 or higher to be recognized as a Certified QuickBooks Point of Sale ProAdvisor and to be listed on the Certified QuickBooks ProAdvisor Referral website.

Learning more about certification

If you need help throughout the certification process, contact QuickBooks ProAdvisor Customer Service at 1-888-250-7279 or send an e-mail to proadvisors@intuit.com.