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HISABONLINE / PROFESSIONAL TRAINING

QuickBooks Point of Sale 18.0

Course Outline

A practical learning path for retail teams
From first-time navigation to operational control

01	02	03
Foundations	Daily operations	Management

12 focused modules | Guided exercises | Final practical review

HisabOnline.com | Curriculum version 1

01 / PROGRAMME OVERVIEW

Build practical retail skills

Designed for cashiers, store supervisors, inventory staff, business owners and accounting support teams.

Course purpose

Learn to navigate POS 18.0, maintain accurate retail records and follow a controlled daily workflow. The programme combines demonstrations, supervised practice and a final retail scenario. This is a HisabOnline-designed curriculum, not an Intuit certification programme.

LEARNING STAGE	MODULES	PAGE
Foundations: navigation, setup and master data	01-03	03
Daily operations: sales, customers and purchasing	04-06	04
Management: stock, reporting and close	07-09	05
Advanced: integration, multi-store and continuity	10-12	06
Assessment, delivery scope and references	Final review	07

Before you begin

Basic Windows, mouse and keyboard skills are sufficient. Use a working, appropriately POS18.0 installation and an approved training file. Have sample items, customers and supplier records ready. Administrator access is reserved for authorised configuration tasks.

Practice uses fictitious details and simulated payments. Back up approved training data before exercises that change records or connections.

Legacy product context

POS 18.0 is a legacy release. Intuit has discontinued Desktop POS and connected services.

02 / FOUNDATIONS

Get comfortable with the system

Start with orientation and disciplined setup before recording transactions.

MODULE 01 Introduction and interface navigation

Topics: POS versus accounting; Home, Navigator, menus, lists and open tasks.

Practical task: Find a sample item and customer, then return to Home.

Outcome: Recognise the main work areas and explain where a task belongs.

MODULE 02 Company setup and user responsibilities

Topics: Setup Interview; receipt details; preferences; employee access; hardware readiness.

Practical task: Review a sample receipt and prepare a configuration checklist.

Outcome: Distinguish routine user actions from changes requiring approval.

MODULE 03 Items, departments and master data

Topics: Item organisation; departments; vendors; prices; tax settings; import preparation.

Practical task: Prepare a clean sample item sheet and check it for duplicates.

Outcome: Build a consistent data-entry plan before adding records.

Foundation checkpoint

Explain your item naming rules, identify the correct company data, and show how you would request approval for a setup change. Tax exercises use trainer-supplied examples; they do not constitute tax advice.

03 / DAILY RETAIL OPERATIONS

Handle everyday activity

Practise a complete retail cycle with clear checks at each stage.

MODULE 04

Sales, receipts and corrections

Topics: Make a Sale; item selection; quantities; discounts; payment recording; receipt review; returns.

Practical task: Complete a simulated sale and an approved return scenario.

Outcome: Check the selected item, totals and customer before finalising activity.

MODULE 05

Customer records and order handling

Topics: Customer information; purchase history; sales orders; layaways where available.

Practical task: Create a fictional customer and map a sample order from request to collection.

Outcome: Maintain useful customer records and explain how incomplete orders are monitored.

MODULE 06

Purchasing and receiving

Topics: Vendor records; purchase orders; receiving vouchers; quantity and cost checks.

Practical task: Compare a sample order, supplier delivery and receiving record.

Outcome: Identify shortages or cost differences before accepting a receipt.

Daily-operations checkpoint

Demonstrate a sale, explain a return and identify a receiving discrepancy. Card payments are simulated or recorded under an independently approved arrangement. Discontinued Intuit processing is not part of the course. [2]

04 / STORE MANAGEMENT

Control stock and review results

Turn routine records into useful checks for the retail team.

MODULE 07

Inventory control and pricing review

Topics: Stock movements; physical counts; discrepancies; approved adjustments; reorder planning.

Practical task: Compare sample physical counts with recorded quantities and prepare an exception list.

Outcome: Investigate a stock difference before proposing an authorised correction.

MODULE 08

Reports and business interpretation

Topics: Sales and inventory reports; date ranges; filters; customer and item performance.

Practical task: Review a sample period and explain three findings to a store manager.

Outcome: Separate an observed result from an assumption and propose a sensible follow-up.

MODULE 09

End-of-day review and operating controls

Topics: Cash-drawer close; tender reconciliation; exception logs; staff handover.

Practical task: Reconcile a sample day against cash counts and independent payment records.

Outcome: Document a difference, assign a reviewer and complete a clear handover.

Management checkpoint

Produce a short retail review: sales summary, stock exceptions, unresolved payment differences and actions with named owners. Reliable controls matter more than simply printing reports.

05 / ADVANCED & ADMINISTRATOR TOPICS

Connect, protect and maintain

These modules are selected according to the installed edition, permissions and agreed training scope.

MODULE 10

QuickBooks Desktop Financial Exchange

Topics: POS/accounting responsibilities; compatible versions; account mapping; exchange review.

Practical task: Observe a controlled test exchange and compare agreed totals.

Outcome: Recognise a successful exchange and escalate exceptions without duplicating entries.

MODULE 11

Multi-Store operations

Topics: Headquarters and remote-store roles; transfers; Store Exchange; consolidated review.

Practical task: Map a sample stock transfer and identify the records each store must check.

Outcome: Explain multi-location responsibilities. Requires the Multi-Store edition; otherwise taught conceptually.

MODULE 12

Data protection and support readiness

Topics: Backup and restore planning; safe imports; access review; issue capture; legacy dependencies.

Practical task: Create a recovery checklist and prepare a sample support request.

Outcome: Describe the problem clearly and preserve data before an approved change.

Advanced scope note

Historical connected services are discussed for awareness only. Installation, activation, operating-system compatibility, hardware troubleshooting and accounting integration require separate validation. No live-data migration or production repair is assumed.

06 / ASSESSMENT & COURSE SCOPE

Demonstrate the full workflow

The final review tests practical understanding using a fictional retail business.

Final practical scenario

Prepare sample records, receive stock, record a sale and a return, review remaining stock, and reconcile the sample day. Present the key reports and explain any exceptions. Where included, describe the accounting exchange and backup checks.

ASSESSMENT AREA	EVIDENCE OF LEARNING
Navigation and data quality	Locate the correct record and avoid duplicate entries.
Transaction accuracy	Check quantities, totals and supporting documents.
Operational controls	Identify discrepancies and follow approval rules.
Reporting and handover	Explain findings and document next actions.

Delivery and completion

Teaching combines explanation, demonstration, supervised exercises and review. Session count, duration, delivery mode, fees and any completion document are agreed in the training proposal. The trainer adapts advanced topics to the available edition and the learner’s role. No vendor certification or examination credit is implied.

Curriculum references and boundaries

[1] Intuit - QuickBooks Desktop Point of Sale 18.0 User Guide

Historical product reference for navigation, setup and operational topic selection. Exercises, learning outcomes and assessments are designed by HisabOnline. Feature availability varies by edition and release.

[2] Intuit - QuickBooks Desktop POS discontinuation

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