

Section: Sales  
Lesson: Sales Cycle and Lists

THIS SECTION: SALES

THIS LESSON...

**SALES CYCLE AND LISTS**



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A Restaurant...

- ~ Doesn't usually use QB to record each sale
- ~ They use a Point of Sale system (POS)
- ~ Then prepare sales information into one daily sales entry



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A Bookkeeping Service...

- ~ May use QB to record invoices for service
- ~ Send those invoices to customers



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**A Construction Company...**

- ~ May use QB to prepare Estimates
- ~ Later convert the Estimate to an Invoice
- ~ Bill for a deposit or the entire job

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**Recording Sales into QB...**

- ~ Most basic methodō Record a Deposit  
*(Will cover in an upcoming lesson)*
- ~ Later convert the Estimate to an Invoice
- ~ Bill for a deposit or the entire job

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**Recording Sales into QB...**

- ~ Has recurring customers
- ~ Some pay when services are rendered
- ~ Most pay within 30 days of server
- ~ Covered in this sectionō
- ~ **Normal Cycle of Serviceō**
  - Customer requests service
  - Company provides service
  - Invoice is prepared and sent
  - Customer sends payment
  - Payment is received, recorded and deposited



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### Recording Sales into QB..

Also going to coverō

- ~ Customer paying right away
- ~ Issuing a Credit to customer



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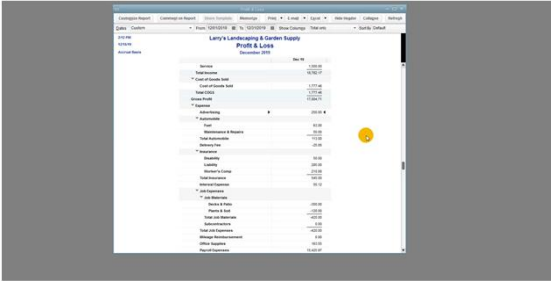

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### Quick Zoom or Drilling Down

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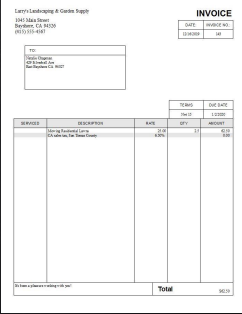

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### LET'S TALK ABOUT LISTS...

- ~ Databases are built with lists
- ~ Transactions are recorded using items from different lists
- ~ From an Invoiceō
  - Customer List
  - Sales Item List
  - The Terms List
  - The Payment Method List
  - Sales Rep List
  - Shipping Method List
  - Sales Tax List
  - Moreō

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COMING UP NEXT...

The Next Lesson:  
" The Customer List

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