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[QuickBooks Point of Sale: 6 Smart Practices You Should Learn](#)



Realizing Profitable Potential through Change

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## QuickBooks Point of Sale: 6 Smart Practices You Should Learn

*These tips for QuickBooks Point of Sale 10.0 and higher will make your employees and customers happier.*

You know that accuracy is the most important element of any retail transaction, but speed is right up there, too. The faster you can enter process the items, the more time you have to exchange pleasantries with your current customer and serve the rest faster. Here are some suggestions for accelerating the sales process and using QuickBooks POS optimally.

- **Customize navigational buttons.** Right-click on the vertical navigation pane on the left and click **Customize buttons**. Use the < > arrows to move options between **Available Fields** and **Selected Fields**, then click **Finish**. Displaying buttons for the most often-used functions will save time.
- **Use Quick Picks.** Do you sell the same items frequently? Stock oddly-shaped merchandise that is hard to tag? Go to **File | Preferences | Company** and highlight **Inventory**. Click **Add** next to **Inventory Quick Pick Groups**. Name your group and click **Save**. Open the editing screen for each item that should be included and select your new group name from the drop-down menu next to **Quick Pick Group** in the left vertical pane. When you process a sale, click the **Quick Pick Items** button and choose the one you want.



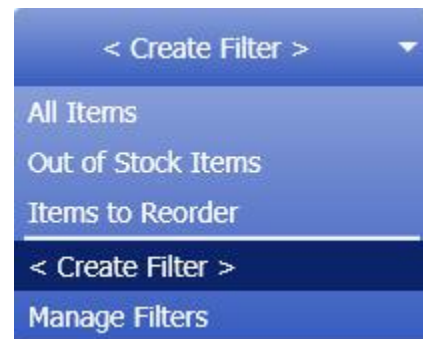
Figure 1: Set up **Quick Picks** for frequently-sold or hard-to-tag items.

- **Shut down the computer running POS every night.** This will let the system refresh itself and help avoid error messages.
- **Invest in a bar code scanner.** The accuracy you'll ensure and the time you'll save make it worth the hardware cost. QuickBooks POS can scan numbers from three fields: **UPS**, **Item Numbers** and **Alternate Lookups** (It's critical that you scan the right numbers for labels; let us help you set this up). The program prints barcoded labels that can be attached to items and scanned at the register. You can also create customer ID cards to use in **Rewards Programs**, for example.
- **Reward your best customers.** It's easier and cheaper to retain existing customers than to find new ones. Run the **Customer Sales** report to identify your best customers and offer them an additional discount or hold a private sale for them.
- **Use filters to isolate related groups.** QuickBooks POS offers powerful filtering options. You can select from pre-defined parameters in some data areas or build your own using an exceptionally flexible custom tool. Look in the upper right corner of **Customer**, **Item**, **Sales History** or **Receiving History** screens to locate the **Search** and buttons. When you select other views like the **Vendor List**, your filter commands will appear in the window's upper left.

Figure 2: You can choose from pre-defined filters or build your own to find data that share common characteristics.

You might, for example, find:

- All customers who haven't made a purchase in the last three months
- Every sweatshirt in the store available in size 2XL **OR** 3XL
- Orders that were received within a date range **AND** which came from two different vendors.



**Receiving Vouchers**, which you would be searching for in this last example, are complex. Instructions for creating them can vary depending on multiple factors. Contact us when you get started with these -- or if you're looking for other tips on learning the best ways to use QuickBooks Point of Sale.

