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THE EMBROIDERY COACH

Setting Up and Using QuickBooks for Your Order Entry Checklist

- Organize all of your Expense and Income receipts
- Create Price lists for each area of your business
- Create a list of all of your Customers
- Create a list of all of your Vendors or Suppliers
- Create a list of all of the services your offer
- Install QuickBooks
- Set up your Chart of Accounts including a Liability Account for Customer Deposits
- Import all of your Lists of information into QuickBooks
- Change the name of the Estimate Form to Work Order
- Start adding your Orders into QuickBooks as soon as to finish taking the physical order from the customer using the Estimate Form that you have changed to a Work Order
- Create Sales Receipts for Customer Deposits
- Add each job to your Scheduling System
- Create a report at the end of the day listing all of the Outstanding Orders which will be the Estimates (Work Orders) that have not been completed
- Check the report with your scheduler to see if they coincide with each other – Make any adjustments necessary
- When job is completed, pull up the Estimate (Work Order) check to see if everything is correct. – Make adjustments if needed – Make sure deposit is listed on the Estimate (Work Order)
- Convert Estimate (Work Order) into an Invoice
- Email Invoice to Customer
- Deliver your job and collect your money
- Deposit your money into the Bank Account