LearnKey

Domain 2 Lesson Plan

Domain 2 - Sales and Money-In [approximately 4 hours of videos, labs, and projects]				
Lesson	**Lesson Topic and Subtopics**	**Objectives**	**Exercise Labs**	**Workbook Projects and Files**
Pre-Assessment Assessment time - 00:30:00	Sales and Money In: Pre-Assessment			
Lesson 1 Video time - 00:08:19 Exercise Lab time - 00:4:00 Workbook time - 00:35:00	**Set Up Customers** Importance of the Display Name Field Billing and Shipping Addresses Use of Customer Payment Terms Taxable and Non-Taxable Customers Sub-Customers	2.1 Set Up Customers 2.1.1 Identify the importance of the Display Name field 2.1.2 Differentiate between billing and shipping addresses 2.1.3 Define and describe the use of customer payment terms 2.1.4 Identify taxable and non-taxable customers 2.1.5 Define and describe the correct use of sub-customers	Creating a Customer	Display Names, Billing Addresses, and Shipping Addresses – pg. 29 N/A Payment Terms and Tax Exemptions – pg. 30 N/A Parent Customers and Sub-Customers – pg. 31 N/A
Lesson 2 Video time - 00:07:26 Exercise Lab time - 00:00:00 Workbook time - 00:20:00	**Set Up Products and Services** Products and Services Inventory and Non-Inventory Products	2.2 Set Up Products and Services 2.2.1 Describe and differentiate between products and services 2.2.2 Identify and differentiate between products and services 2.2.3 Describe reasons for setting up products or services 2.2.4 Contrast inventory products and non-inventory products	N/A	Products and Services Lists – pg. 33 N/A Non-Inventory Products– pg. 34 N/A
4Lesson 3 Video time - 00:06:55 Exercise Lab time - 00:04:00 Workbook time - 00:15:00	**Manage Sales Settings** Sales Forms Email Message Forms Activating Customer Discounts QuickBooks Payments vs. Traditional Payments	2.3 Manage Sales Settings 2.3.1 Customize sales forms 2.3.2 Customize email message forms 2.3.3 Describe the purpose of activating customer discounts 2.3.4 Describe the QuickBooks Payments feature and how it differs from traditional payments	Custom Sales Receipts	Sales Forms and Email Message Forms – pg. 36 N/A Customer Discounts – pg. 37 N/A Online Payments – pg. 38 N/A
Lesson 4 Video time - 00:15:04 Exercise Lab time - 00:04:00 Workbook time - 00:15:00	**Record Basic Money-In Transactions** Money-In Transaction Workflow Invoices and Sales Re Manage Payments, Undeposited Funds, and Deposits Refund Receipts Credit Memos	2.4 Record Basic Money-In Transactions 2.4.1 Describe the money-in transaction workflow 2.4.2 Record and manage invoices and sales receipts 2.4.3 Receive, record, and manage payments, undeposited funds, and deposits 2.4.4 Record credit memos and refund receipts	Creating a Credit Memo	Money-In Transaction Workflow – pg. 40 N/A Manage Payments – pg. 41 N/A Refund Receipts and Credit Memos – pg. 42 N/A
Post-Assessment Assessment time - 01:00:00	Sales and Money In: Post-Assessment			