Update Report for QuickBooks Online

Chapter 3

Academic Year 2025–2026

Last updated October 9, 2025

If you're an ebook user, these edits are already included there. If you're using the print book, we recommend you print this report for easy reference as you work through the course.

Edits for print version 10 9 8 7 6 5 4 3 2 1 (check your copyright page)

IMPORTANT! As you may know, Intuit has been rolling out a new QuickBooks Online interface but up to this point has been allowing users to revert to the classic user interface. **On 10/01/25, Intuit stopped supporting the classic user interface. This means any user who has opted out of the new user interface will automatically be opted back in.**

Labyrinth Learning's textbook was written using the classic user interface, but we are calling for the following edits to ensure students using our QuickBooks Online materials have the best experience possible.

If you encounter problems following a step, we recommend you use the search feature in QBO to locate the feature you are looking for.

GLOBAL CHANGES

In all instances where students are told to click the + New button, we changed the name to "+ New *or* + Create." 100125

In all instances where students are told to return to the Home Dashboard, we start by splitting the instructions as follows to includes steps for users in the new experience: 100125

> **12.** Return to the Home Dashboard *or* Dashboard.
> - *Classic user interface:* Choose **Dashboards→Home**.
> - *New experience:* Click **Dashboard**.

As the book progresses, we shorten this as follows:

> **6.** Return to the Home Dashboard *or* Dashboard.

p49 **The Ch. 3 Opener page—We added some text reflecting the new experience.** 100125

> Your customers are the people and businesses that you sell products and services to. In this chapter, you will learn the features of the Sales center (which are called the *Sales & Get Paid app* and *Customer Hub* in the new experience) that will assist

p50 **"The Sales Center"—We renamed the section "The Sales Center or Sales & Get Paid App" and added an entirely new section titled "NEW! The New QuickBooks Online Experience." This section can be downloaded here.** 100125

P50 **AFTER THE NEW TEXT ABOVE, WE INSERTED THE FOLLOWING HEADING AND ADDED SOME TEXT REFLECTING THE NEW EXPERIENCE:** 100125

The Sales Center in the Classic User Interface

The Sales center (classic user interface) provides information about all of your customers and their transactions in a single place. It also allows you to perform customer-related tasks such as searching for customers, adding customers, importing lists of customers, editing and merging customer information, and making customers inactive.

The Sales center (classic user interface) contains nine tabs: Overview, All Sales, Invoices, Estimates, Sales Orders, Recurring Payments, Payment Links, Customers, and Products and Services. These allow the user easy access to these features and functions in one place. The Customers List within the Sales center (classic user interface) *or* Customer Hub (new experience) contains a multi-colored Money bar that gives you a quick snapshot of Accounts Receivable. You can click Money bar sections to access more detailed information about unbilled, unpaid, and paid invoices.

P51 **TIP UNDER "ADDING CUSTOMERS AND SUBCUSTOMERS"—WE ADDED SOME TEXT REFLECTING THE NEW EXPERIENCE.** 100125

TIP!

Using the Sales center *or* Customer Hub is not the only way to add customers. You can also add new customers and sub-customers from within a Sales form and by choosing + New *or* + Create→Customers→Add Customer.

P51 **DYS 3-1 #1—WE REPLACED STEP #1 WITH THE FOLLOWING:** 100125

1. Open the Customers List.
   - *Classic user interface:* Open the **Sales** center from the Navigation bar and click the **Customers** tab.
   - *New experience:* Choose **My Apps→Customer Hub→Customers**.

P53 **DYS 3-1 #7—WE REPLACED STEP #7 WITH THE FOLLOWING:** 100925

7. Click **Save** and then open the Customers List.
   - *Classic user interface:* Open the **Sales** center from the Navigation bar and click the **Customers** tab.
   - *New experience:* Choose **My Apps→Customer Hub→Customers**.

P53 **"IMPORTING CUSTOMERS FROM AN EXCEL OR CSV FILE"—WE ADDED A PATHWAY REFLECTING THE NEW EXPERIENCE.** 100125

Classic user interface: **Gear→Tools→Import Data | Sales Center→Customers**

New experience: **Gear→Tools→Import Data | My Apps→Customer Hub→Customers**

P63 **DYS 3-6 #6—We modified substep F as follows:** 100125

F. Click **Save and Close~~Apply Rule~~**.

P63 **DYS 3-6 #8—We added the following sentence:** 100125

8. Create an invoice for Designs by Kim Christian for two Pest Control Services. If you get a pop-up asking if you wish to apply the price rule, select **Apply Price Rules**.

P63 **DYS 3-6—We added the following new last step:** 100125

9. Save and close the Invoice form.

P65 **"Creating Customer and Sales Reports"—We added the following text about the new experience:** 100125

In the classic user interface, ~~T~~the Reports center on the Navigation bar, which in the new experience is called the *Reports app*, ~~,~~contains numerous customer- and sales-related

P72 **Ch. 3 Self-Assessment** 100125

#14 ("You made a sale for which…")—We replaced "+ New" with "+ New or + Create."

P73 **RYS 3-1 #1—We replaced step #1 with the following:** 100125

1. From the Navigation bar, choose **+ New** *or* **+ Create~~Sales~~→Customers** *or* **Clients~~and then click~~→Add Customer** *or* **Add Client~~Manually~~**.

P77 **AYS 3-3 #3—We added a step for the new experience and replaced the image with the following:** 100125

3. Set and apply a price rule.
   - *Classic user interface:* Choose **Sales→Products and Services→More→Price Rules→Create a Rule**, make these settings, and then click **Save and Close**.
   - *New experience:* Choose **My Apps→Sales & Get Paid→Products and Services→More→Price Rules→Create a Rule**, make these settings, and then click **Save and Close**.