

Update Report for QuickBooks Online

Chapter 9

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.

P195 CHAPTER OPENER—IN THE LAST SENTENCE, WE ADDED THE FOLLOWING TEXT ABOUT THE NEW EXPERIENCE: 100125

confidential information. Finally, you will learn about applications *or* integrations you can use to extend your capabilities with QuickBooks Online.

P195 LEARNING OBJECTIVES—WE REPLACED THE 7TH LEARNING OBJECTIVE WITH THE FOLLOWING: 100125

► Search for QuickBooks apps *or* integrations

P196 CH. 9 "CUSTOMIZING REPORTS"—WE ADDED AN ENTIRELY NEW SECTION THAT CAN BE DOWNLOADED [HERE](#). 100125

QuickBooks users: Intuit may release updates to its cloud software, including adding or removing features, at any time. Your screen may not match your book or the updates shown here.

p197 DYS 9-1 #1—WE REPLACED STEP #1 WITH THE FOLLOWING: 100125

1. Open the **Reports** center *or* app and choose **Standard**→**Business Overview**→**Profit and Loss**.

p197 DYS 9-1 #3—WE ADDED THE FOLLOWING NOTE RELATED TO THE NEW EXPERIENCE: 100125

NOTE!

At the time of this writing, some of the customization features are not available in the new experience.

p200 “ENABLING PRIVACY MODE ON THE DASHBOARDS”—WE UPDATED THE HEADING AND ADDED THE FOLLOWING TEXT ABOUT THE NEW EXPERIENCE: 100125

Enabling Privacy Mode on the Dashboards *or* Dashboard

On the Home and Planner Dashboards *in the classic user interface and the Dashboard in the new experience*, bank and credit card balances, open accounts receivable and payable,

p200 DYS 9-3 #1–2—WE REPLACED STEPS #1–2 WITH THE FOLLOWING: 100125

1. Follow the step for your view.

- *Classic user interface*: On the Home Dashboard, slide the **Privacy** slider to the on position.



- *New experience*: On the Dashboard, click the **eyeball** icon to turn Privacy mode on.



All the financial information disappears from the Dashboards.

2. Follow the step for your view.

- *Classic user interface*: Slide the **Privacy** slider back to the off position.
- *New experience*: Click the **eyeball** icon again to turn Privacy mode off.

p201 “EXTENDING CAPABILITIES WITH APPS”—WE CHANGED THE HEADING TO “EXTENDING CAPABILITIES WITH APPS OR INTEGRATIONS” TO REFLECT THE NEW EXPERIENCE AND ADDED THE FOLLOWING NEW TEXT, 3RD PARAGRAPH, AND NOTE: 100125

QuickBooks Online is accounting software. It can't do everything. One of the distinctive features of QuickBooks Online being cloud- or web-based, however, is there's a robust system of third-party application plug-ins that extend QuickBooks Online capabilities and automatically sync data with QuickBooks Online. These plug-ins are called apps *or* integrations.

There are more than 300 third-party apps *or* integrations available that provide users with tools to manage their businesses and integrate with QuickBooks Online for financial reporting. By searching for or typing in a category, you can view the current apps *or* integrations for that category and even read reviews. For example, you can find apps *or* integrations for inventory management, customer relationship management (CRM), merchant processing, and billing. A mobile app for your smart phone and mobile devices allows you to create sales receipts and take credit card payments on the spot. You can also snap a picture of a receipt and upload it directly to QuickBooks Online.

You can access these third-party apps/integrations in the classic user interface by choosing Apps→Find Apps, in the new experience by choosing My Apps→Accounting→Integrations→Find Integrations, or by going to quickbooks.intuit.com/app/apps/home.

NEW!

In the most recent update to QuickBooks, Intuit has added some of its own apps. The Marketing widget links to Mailchimp, the Business Tax widget links to tax analysis feedback, and the Lending widget links to the loan marketplace, QuickBooks checking account, and QuickBooks Capital.

p201 “EXTENDING CAPABILITIES WITH APPS”—WE DELETED THE FOLLOWING PARAGRAPH: 100125

~~Also, be sure to explore the QuickBooks apps for Windows and Mac. They let you run QuickBooks Online on your desktop instead of in a browser. Some of the benefits of doing so are that you stay signed in, the page does not time out, pages load faster, it's easy to have multiple open windows, and there is a drop-down toolbar. You can access these apps via the Navigation bar or at: quickbooks.intuit.com/app/apps/home~~

p204–205 CH. 9 SELF-ASSESSMENT 100125

#4 (“How can you hide/collapse...”)—We deleted this question and renumbered the remaining questions.

#6B (“How can you adjust your sales form...”)—We replaced the answer option with “Customize the form by choosing Gear→Lists→Custom Fields→Add Field.”

#10 (“Where would you go in QuickBooks Online...”)—We deleted this question.

p206 RYS 9-1 #1—WE REPLACED STEP #1 WITH THE FOLLOWING: 100125

1. Open the **Reports** center *or* app and choose the **Profit and Loss** report.

P206 RYS 9-1 #6—WE REPLACED STEP #6 WITH THE FOLLOWING: 100125

6. Click the **Save Customization** (classic user interface) *or* **Save As** (new experience) button.

P206 RYS 9-2 #1—WE REPLACED STEP #1 WITH THE FOLLOWING: 100125

1. Click the **Custom Reports** tab in the Reports center *or app*.

P206 RYS 9-2 #2–3—WE REPLACED STEPS #2–3 WITH THE FOLLOWING: 100125

2. If you're working in the classic user interface, click the **Edit** link for the Cash Basis Income Statement.
This step doesn't apply to the new experience.
3. Follow the step for your view.
 - *Classic user interface:* Set the email schedule to **On**.
 - *New experience:* Select **Create a Schedule** from the Action options.

P207 RYS 9-3 #4—WE REPLACED STEP #4 WITH A NEW STEPS #4–5 AND RENUMBERED LAST STEP TO #6. 100925

4. If you're working in the new experience, select **Customer** under *Select Category*.
5. Place a check mark in the **Sales Receipt, Invoice, Estimate, Credit Memo,** and **Refund Receipt** boxes and then slide the corresponding **Print on Forms** sliders to the right (on position).
6. Click **Save**.
All sales forms will now show a custom field for the breed of dog.

P209 AYS 9-5 #1—WE REPLACED STEP #1 WITH THE FOLLOWING: 100125

1. Open the **Reports** center *or app* and choose **Custom Reports→Cash Basis Income Statement**.