

Update Report for QuickBooks Online

Chapter 9

Academic Year 2026–2027

Last updated July 27, 2026

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)

P213 “SENDING REPORTS”— AS SCHEDULING A REPORT TO BE SENT AT A LATER TIME IS NOW LONGER INCLUDED IN QUICKBOOKS ONLINE PLUS, WE REPLACED THE PARAGRAPH AND ITS NOTE! WITH THE FOLLOWING: 072726

You can send customized reports via email to yourself, your boss, shareholders, accountants, or others. All reports in QuickBooks Online can be exported to Excel or PDF format and shared via email. In QuickBooks Online Advanced, you can also schedule reports to be sent and export them to Google Sheets.

NOTE!

The ability to schedule when reports will automatically be sent is not currently available in the test drive/sample company.

- P220 RYS 9-2—As SCHEDULING A REPORT TO BE SENT AT A LATER TIME IS NOW LONGER INCLUDED IN QUICKBOOKS ONLINE PLUS, WE REPLACED THE ENTIRE EXERCISE WITH THE FOLLOWING ONE IN WHICH STUDENTS EMAIL A REPORT:** 072726

REINFORCE YOUR SKILLS 9-2

Email a Custom Report

In this exercise, you will email the new Cash Basis Income Statement to Sadie.

1. Click **Reports** on the Navigation bar and then click the **Custom Reports** tab.
2. Select the **Cash Basis Income Statement**.
3. Click the **Email** (envelope) icon in the upper-right corner of the report.
4. In the To field, enter: `Sadie@qbmail.net` (or enter your own email address)
5. Select your desired report file format.

You can select Excel, PDF, or CSV format. The selection you make has no effect on the outcome of this exercise.

6. In the Subject field, enter: `Weekly Income Statement`
7. In the Message field, enter: `Attached is the Cash Basis Income Statement.`

The Report field should autofill with the name of the report attached.

8. Click **Send Email**.

If you addressed the email to yourself, you will receive an email from Intuit E-Commerce Service.

- P215 “QUICKBOOKS PAYMENTS”—INTUIT HAS UPDATED THE NAME OF THEIR VIDEO FROM “HOW TO USE QUICKBOOKS PAYMENTS TO RECEIVE PAYMENTS FROM CUSTOMERS” TO “HOW TO USE QUICKBOOKS PAYMENTS TO RECEIVE PAYMENTS.”** 072726

- P216 “SETTING USER PERMISSIONS”—INTUIT HAS UPDATED THE NAME OF THEIR VIDEO FROM “HOW TO ADD AND MANAGE USERS IN QUICKBOOKS ONLINE” TO “HOW TO ADD & MANAGE USERS IN QUICKBOOKS ONLINE.”** 072726

- P219 “SELF-ASSESSMENT” #7—WE REPLACED “[COMMAND]” WITH “[CTRL].”** 072726