

Update Report for QuickBooks Online

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)

CLICK THE LINK TO GO TO A SPECIFIC CHAPTER'S UPDATES: [1](#), [2](#), [3](#), [4](#), [5](#), [6](#), [7](#), [8](#), [9](#), [10](#), [11](#), [12](#), Answer Keys, [Appendix B](#)

Chapter 1

P1 "LEARNING OBJECTIVES"—WE REMOVED "-RIGHT" FROM THE 4TH OBJECTIVE. 072726

P10 DYS 1-2 #8—WE REPLACED THIS STEP WITH THE FOLLOWING: 072726

8. Click **Save** and then click the **Close**  button at the upper-right corner of the form.

P10 DYS 1-3 #1—WE REPLACED "AT THE UPPER-END OF THE SCREEN" WITH ", WHICH IS LOCATED ON THE SEARCH BAR AT THE UPPER END OF THE SCREEN," 072726

P11 DYS 1-3 #4—WE REPLACED "LOWER END" WITH "LOWER-LEFT CORNER." 072726

PP10–11 “THE HELP MENU” AND DYS 1-4—WE REPLACED THIS ENTIRE SECTION AND DYS 1-4 WITH THE FOLLOWING: 072726

The Help Tool

The Help tool provides a robust directory of topics and tasks as well as access to dozens of videos and phone and text support. Help is accessed via the Help  icon located on the task bar in the upper-right corner of the screen.

DEVELOP YOUR SKILLS 1-4

In this exercise, you will explore the Help tool.

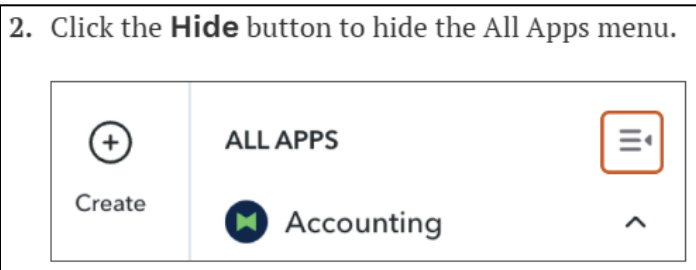
1. Click **Help** , type **training videos** in the Ask Anything box, and tap **Enter**.
Here, you will find AI-suggested links to short videos that explore the power of QuickBooks Online.
2. Enter **chart of accounts** in the Ask Anything box and tap **Enter**.
Feel free to scroll through the Help topics to learn more about the Chart of Accounts in QuickBooks Online.
3. Explore the Help tool by asking the AI-powered assistant other questions.
4. Close  the Help tool.

P15 IN THE TEXT AFTER DYS 1-5, WE REPLACED THE FIRST PARAGRAPH WITH THE FOLLOWING NEW SUBHEADING AND TEXT: 072726

Showing and Hiding the All Apps Menu

The All Apps menu can be hidden to provide more working space when working in transaction forms such as Invoice and Expense forms. The following image demonstrates how to show or hide the All Apps menu:

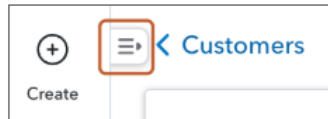
P17 DYS 1-6 #2—WE INSERTED “THE NAME” AFTER “CLICK” AND INSERTED THE FOLLOWING NEW STEP #2 BEFORE THIS ONE (RENUMBERING THIS AND THE REMAINING STEPS): 072726



P17 DYS 1-6 #4 (NOW #5)—WE REPLACED THE STEP WITH: “5. CLICK THE TRANSACTION LIST TAB AND, IF NECESSARY, SCROLL DOWN AND/OR TO THE RIGHT UNTIL YOU SEE THE ACTION ICONS.” 072726

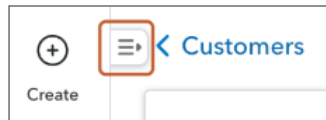
- P17 DYS 1-6 #6 (NOW #7)—WE INSERTED THE FOLLOWING NEW STEP #7 AFTER OLD STEP #5 (NOW 6) AND
RENUMBERED REMAINING: 072726

7. Click the All Apps menu's **Show** button to redisplay the menu.



- PP17-18 DYS 1-6—WE REPLACED STEPS #6-12 (NOW #7-13) WITH THE FOLLOWING: 072726

7. Click the All Apps menu's **Show** button to redisplay the menu.



8. Choose **Expenses & Bills**→**Vendors** from the All Apps menu.

Explore the Money bar by clicking the Purchase Order, Overdue, and other sections.

9. Click **Open Bills** and then click the **Bob's Burger Joint** vendor name to open the vendor record.

10. Click the **Edit** button and then add this phone number to the vendor record: 800-555-1112

11. Save the vendor record and return to the Home page.

Chapter 3

- P56 DYS 3-1 #7—WE UPDATED "CUSTOMER HUB→CUSTOMERS" TO "CUSTOMER HUB→CUSTOMERS & LEADS." 072726

- P62 "RECORDING SALES TRANSACTIONS"—INTUIT HAS UPDATED THE NAME OF THEIR VIDEO FROM "HOW TO CREATE AND CUSTOMIZE AN INVOICE IN QUICKBOOKS ONLINE" TO "HOW TO CREATE, CUSTOMIZE, AND SEND AN INVOICE IN QUICKBOOKS ONLINE." 072726

- P74 DYS 3-10 #6—WE REPLACED THE STEP WITH: "CLICK < BACK TO STANDARD REPORTS AND THEN CHOOSE SALES AND CUSTOMERS→SALES BY CUSTOMER SUMMARY" 072726

Chapter 4

- P90 "ADDING VENDORS"—INTUIT HAS UPDATED THE NAME OF THEIR VIDEO FROM "HOW TO ADD VENDORS IN QUICKBOOKS ONLINE" TO "HOW TO ADD YOUR VENDORS TO QUICKBOOKS ONLINE." 072726

- P96 "CUSTOMIZING EXPENSE FORM SETTINGS"—IN THE 3RD/LAST PARAGRAPH, WE DELETED "AND DONE" FROM THE END OF THE SENTENCE. 072726

Chapter 5

P115 “SETTING UP AND USING BANK FEEDS/TRANSACTIONS”—INTUIT HAS UPDATED THE NAME OF THEIR VIDEO FROM “HOW TO CATEGORIZE TRANSACTIONS IN QUICKBOOKS ONLINE” TO “HOW TO CATEGORIZE TRANSACTIONS IN QUICKBOOKS ONLINE FOR YOUR BUSINESS.” ⁰⁷²⁷²⁶

P116 **DYS 5-1 #5**—WE REPLACED THE 2ND PARAGRAPH OF THE COMMENT WITH “NOTICE THAT THE OTHER A RENTAL TRANSACTIONS NOW SUGGEST EQUIPMENT RENTAL AS THE CATEGORY. QUICKBOOKS ONLINE AI “LEARNS” TO SUGGEST CATEGORIES FOR LIKE TRANSACTIONS.” ⁰⁷²⁷²⁶

P131 “TACKLE THE TASKS”—WE REPLACED THE 3RD ROW WITH THE FOLLOWING TWO NEW ROWS: ⁰⁷²⁷²⁶

Match More Transactions	• Post the three transactions that have a Rule (if still not added). • Determine the correct transactions for the three that have 2 Suggested Matches Found and match the remaining.
Add the Transaction	Hicks Hardware; Supplies (<i>Ignore the Books by Bessie future-dated transaction.</i>)

P137 **AYS 5-2**—WE REPLACED THE EXERCISE STEPS WITH THE FOLLOWING: ⁰⁷²⁷²⁶

1. Choose **Gear→Tools→Import Data**.
2. Click the **Select Record Type** drop-down menu and select **Bank Data**.
3. Click **Import**.
4. Click **Upload from This Device**, navigate to your **Chapter 05** folder, and open the **CH05 Los Angeles City Bank Transactions.csv** file.
5. Click the **Select a QuickBooks Account for the Bank File You Want to Upload** drop-down menu, select **Los Angeles City Bank**, and click **Continue**.
6. Click **Continue** on the Step 2 screen.
7. Insert check marks to the left of all transactions by clicking the top check box to the left of the DATE heading and then click **Continue**.
8. Click **Yes** when asked if you want to import the ten transactions using the fields you chose.
9. Click **Done**.

Chapter 7

P167 **DYS 7-10 #7**—WE REPLACED “WATCH BOTH VIDEOS AND THEN CLICK” WITH “CLICK.” ⁰⁷²⁷²⁶

P178 **RYS 7-5**—THIS IS NO LONGER A QUICK GRADER EXERCISE IN WHICH STUDENTS SUBMIT A REPORT, SO WE HAVE DELETED THE [QG] ICON. ⁰⁷²⁷²⁶

Chapter 9

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

Chapter 10

P235 **DYS 10-3 #5**—WE DELETED **“CLICK DONE.”** ⁰⁷²⁷²⁶

Chapter 11

P254 **DYS 11-6 #12**—WE REPLACED **"SEND THE REPORT PACKAGE TO YOURSELF OR EXPORT IT"** WITH **"EXPORT THE REPORT"** ⁰⁷²⁷²⁶

Appendix B: The QBOCU Exam Objectives and This Text

P285 **2.1.1, 2.4.2, AND 2.4.3**—WE UPDATED THE **DYS EXERCISE NUMBER** TO **“3-9.”** ⁰⁷²⁷²⁶

P285 **2.1.3**—WE UPDATED THE VIDEO NAME TO **"HOW TO CUSTOMIZE, CREATE, AND SEND IN INVOICE IN QUICKBOOKS ONLINE"** ⁰⁷²⁷²⁶

P285 **2.3.1**—WE UPDATED THE **DYS EXERCISE NUMBER** TO **“3-5.”** ⁰⁷²⁷²⁶

P285 **2.3.2**—WE UPDATED THE **DYS EXERCISE NUMBER** TO **“3-6.”** ⁰⁷²⁷²⁶

P286 **5.1.2**—WE UPDATED THE **DYS EXERCISE NUMBER** TO **“3-10.”** ⁰⁷²⁷²⁶