

Chapter 12

Certification, Apps, and Updates

Scenario: Chapter 12 focuses on these areas:

- QuickBooks Online Certification chart includes exam objectives and chapter map.
- QB App store.
- Blog and updates.

To review what you do in Chapter 12, read the objectives.

OBJECTIVES

1. Learn about QuickBooks Online User Certification and the textbook chapters that coordinate with the certification test.
2. Go online to the App store, the QuickBooks blog, and learn about updates.
3. Complete Check Your Progress.
4. Review and complete the QuickBooks Resources and Activities.
5. Complete Exercises 12-1, 12-2, 12-3, and Certification Q&A practice test.

QUICKBOOKS ONLINE USER CERTIFICATION

Students confirm their QuickBooks Online knowledge by passing the QuickBooks Online Certified User test. The QuickBooks Online User Certification test is managed by Certiport, www.certiport.com. The certification test is administered by a third-party vendor which includes pricing for the test and practice tests.

For a detailed list of the exam objectives, go online to Additional Student Resources > Certification Info > open the QBO Certified User_Exam Objectives.pdf file. Connect's Certification Q&A practice tests include example questions for test preparation.

	OBJECTIVES AND CHAPTERS	WHAT STUDENTS SHOULD KNOW
1.	QuickBooks Online Administration	1.1 Setup QuickBooks Online 1.2 Manage QuickBooks Online settings for a company.
	Chapters 1 through 12 Case Problems 1, 2	1.3 Manage lists. 1.4 Manage recurring transactions. 1.5 Manage Journal entries. 1.6 Connect to QuickBooks Online apps.
2.	Sales and Money In	2.1 Set up customers. 2.2 Set up products and services.
	Chapters 1, 4, 5, 6, 8, 9, 10 CP 1, 2	2.3 Manage sales settings. 2.4 Record basic money-in transactions.
3.	Vendors and Money Out	3.1 Manage vendors records. 3.2 Manage expense settings.
	Chapters 1, 4, 6, 8, 9, 10 CP 1, 2	3.3 Record and manage basic money-out transactions.
4.	Bank Accounts, Transaction Rules, and Receipts	4.1 Implement financial account connections. 4.2 Manage bank feeds. 4.3 Manage receipts.

	OBJECTIVES AND CHAPTERS	WHAT STUDENTS SHOULD KNOW
5.	Basic Reports and Views	5.1 Describe the content and purpose of reports.
	Chapters 1 through 12 CP 1, 2	5.2 Customize and deliver standard reports. 5.3 Access other reports and views.

GETTING STARTED

1. Go online to <http://qbo.intuit.com>.
2. Sign in to your QBO account.

QUICKBOOKS APP STORE

Expand the capabilities of QuickBooks Online with apps. Apps are included for every business type.

1. In the browser's address field, click (+) to another website. Go to <https://quickbooks.intuit.com/app/apps/home/>.

As of this writing, Figure 12-1 show the App store website. Observe the App store website includes:

- a. Find the right apps for your business: Search by app name, keyword, job, or category.
- b. APP COLLECTIONS and CATEGORIES are listed.
- c. Popular apps are shown. These change as new ones become popular.

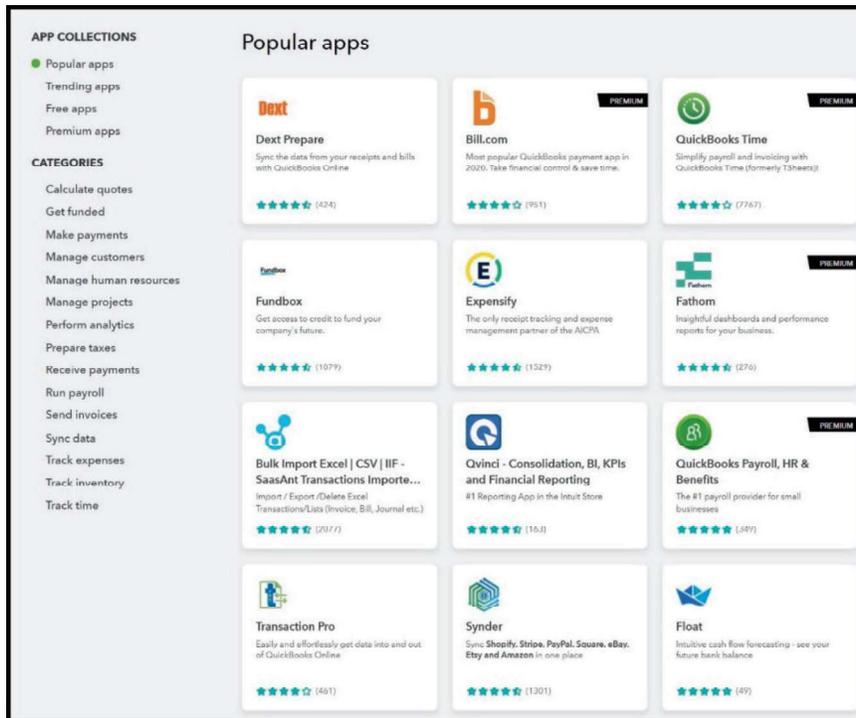


Figure 12-1: App store

2. Within the APP COLLECTIONS list, select Free apps. As of this writing, here's a partial image of what's free.

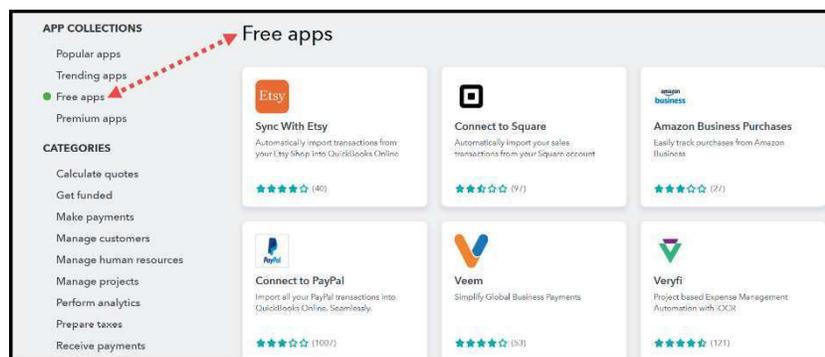


Figure 12-2: Free apps

Make some selections to read more.

3. In the Categories list, select Perform analytics. Make some to learn more. Figure 12-3 shows a partial image.

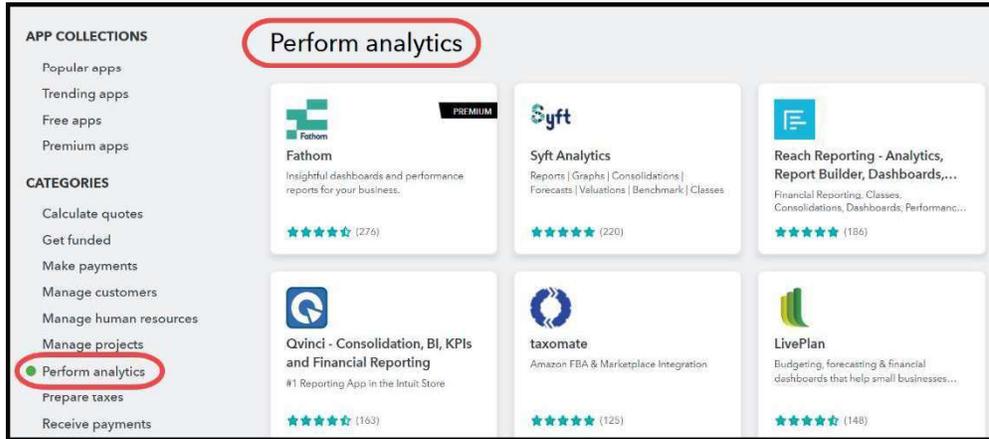


Figure 12-3: Perform analytics

MOBILE APPS

Instantly access QuickBooks data on your mobile device. The QBO mobile app is free with a subscription to QuickBooks Online. Each app is optimized for touch interaction and essential on-the-go workflows. Get business done on the spot.

Install the Android app via Google Play. Install the iPhone, iPad, and Apple Watch app via the iTunes App store. For example, for the iPhone, go to the App store > type **QuickBooks Online** to download the app. There's also a video at Additional Student Resources > Student Edition > QBO Videos > QBO Video Chapter 12. Links to videos are also included on the Chapter 12 Narrated PowerPoints.

Why migrate to the cloud?

The cloud represents an ideal combination of increased productivity, streamlined human resources, automated accounting, hassle-free security, and customizable *scalability* for small businesses.

Work Anywhere

Use your mobile device to enter transactions, record expenses, invoice customers, and send reports anywhere. QBO automatically backs up your data to the cloud and syncs across all your devices.

Access Accounting Reports on the Go

Run a profit and loss report or access a balance sheet on your QuickBooks mobile app.

Accept Mobile Payments

Process credit cards in QBO. Use Intuit's mobile card reader to swipe a credit card and the payment is taken care of, the transaction is recorded, and you can automatically send money to your bank account.

Email Invoices to Customers

Create an invoice in the QuickBooks app and email your customers a copy in no time. If you have an Android, you can also send invoices via WhatsApp. When a customer views or pays an invoice, you'll receive an instant notification.

Attach Receipts to Invoices

The QuickBooks app turns your phone's camera into a receipt scanner. First, snap a photo of your receipt. Once you've approved the transaction on the web, we'll record the billable expense in your books. Add your expense to the invoice and attach the receipt to get reimbursed or track tax deductions.

Track Expenses on Your Phone

Connect QuickBooks to your bank account, credit card, and other accounts and apps, and we'll automatically import and track expenses for you. It syncs across all your devices, making it easy to track business expenses anytime.

Provide estimates

Create professional estimates right on your mobile device. Attach plans, contracts, or photos so customers have the info they need. Email a copy from the app or let customers accept and sign right on your phone.

Stay on Top of Receipts, Anywhere

Use the mobile app to snap photos of receipts when you're on the go. QuickBooks pulls info like date, vendor, amount, and payment method, right from your receipt. Then we'll match your receipts to existing expenses or create new expenses for you.

UPDATES AND THE QUICKBOOKS BLOG

Updates include various user interface elements, accounting features, and user functions. Sometimes changes are done for specific users or companies so that

feedback can be collected. If users like the update, it is changed. When using QBO, be flexible. Updates are inevitable.

QuickBooks Online updates automatically. When you sign in, you are using the most recent version. Sometimes when you select a feature, information about an update appears.

The blog includes the latest information about QuickBooks Online. Information is shared on recent happenings and future developments. The QuickBooks Blog includes News, Thought Leadership, What's New in QBO, Innovation, Account Advice, and Customer Profiles.

1. If necessary, click + within the address field to add another website. Go to this website <https://quickbooks.intuit.com/blog/> > What's New in QBO.

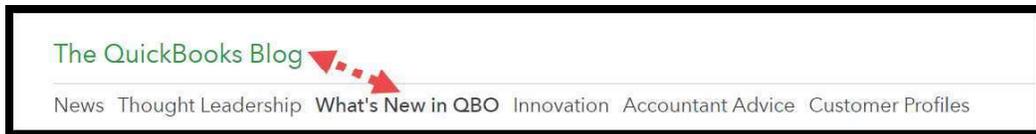


Figure 12-4: QBO Blog

2. The What's New in QBO page includes links to QBO features, articles, and multiple pages. As of this writing, there are 29 pages.

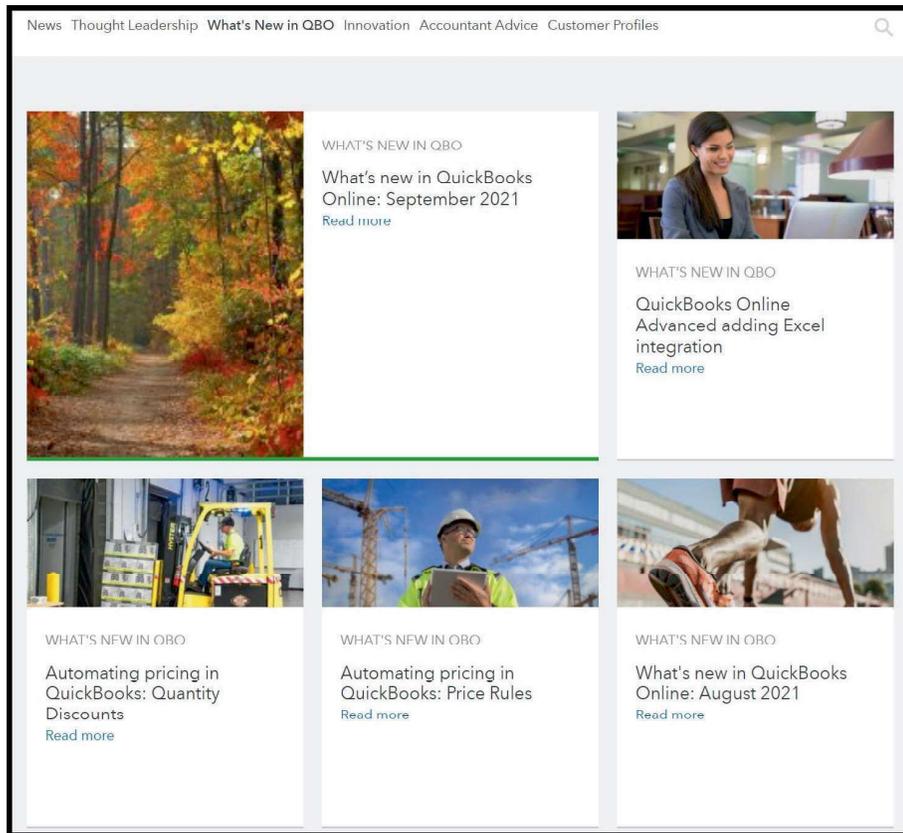


Figure 12-5: What's new in QBO

3. Explore the QuickBooks Blog. Observe that the tabs include News, Thought Leadership, What's New in QBO, Innovation, Accountant Advice, Customer Profiles, and Search.
4. Close the QBO blog tab.

CHECK YOUR PROGRESS

1. What third-party vendor manages the QBO certification test?

2. What is the website address of the company that manages QBO certification?

3. What PDF file includes detailed information about the certification test?

4. What website is used for the QuickBooks App store?

5. Why use mobile apps?

QUICKBOOKS RESOURCES AND ACTIVITIES

If your professor requires **Connect**, the following resources may be assigned for grading.

1. Multiple-choice and true or false questions.
2. Analysis question(s).
3. Check Your Progress.

4. Chapter work and end-of-chapter exercises.
5. Problem Solving.
6. Certification Q&A.
7. Test bank.
8. OLC activities.

Additional Student Resources (ASR)

The following resources can be found on the Additional Student Resources (ASR) page in Connect's eBook. If you are not using Connect, your instructor can provide you with an ASR page document that contains *URLs* to access these resources:

1. Narrated PowerPoints. The PowerPoints include links to the videos.
2. QBO Videos: QuickBooks Online Mobile App.
3. Text updates.

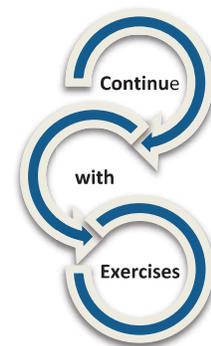
SIGN OUT or continue.

Exercise 12-1: Complete Exercise 12-1:

1. Sales and Money includes these tasks.
2. Vendors and Money out includes these tasks.
3. Basic reports and views include these tasks.

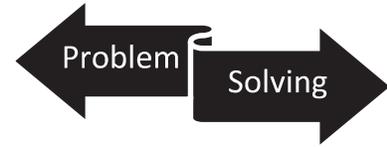
Exercise 12-2: Complete Exercise 12-2:

1. Go to the App Store's website at <https://quickbooks.intuit.com/app/apps/home>
2. List four App Collections.
3. List five App Categories.



Exercise 12-3: Problem Solving

Exercise 12-3 is available within Connect and includes comparing two certification exam objectives:



Compare Sales and Money-in tasks to Vendor and Money-out tasks.

Certification Q&A Practice Test

Certification Q&A multiple-choice questions are available within Connect.

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