

## Homework Assignment

## Project 2 – QuickBooks Online™ Setup

This Project’s Homework Assignment focuses on navigating QBO and understanding where information is organized. Later assignments will include entering data and associated activities.

Homework Assignments will only review materials you have already learned, but they may cover materials from earlier Projects along with current content.

Remember that you can always go back to earlier Projects if you need help.

Step	Directions / Question	Answer
1	Access the QBO Test Drive company at <a href="https://qbo.intuit.com/redirect/testdrive">https://qbo.intuit.com/redirect/testdrive</a>	
2	Extend the “Log Out” time <ul style="list-style-type: none"> <li>• Click the Settings <b>Gear</b> (top right)</li> <li>• Select <b>Account and Settings &gt; Advanced</b> tab</li> <li>• In the <b>Other Preferences</b> section, click the <b>pencil icon</b> to edit</li> <li>• Change the “<b>Sign me out if inactive for</b>” time to <b>3 hours</b></li> <li>• Click <b>Save</b> and <b>Done</b></li> <li>• Return to the <b>Dashboard</b></li> </ul>	
3	Open the <b>All Lists</b> window from the Settings <b>Gear</b> .  Not counting <b>Product Categories</b> , how many lists are included? List them.	
4	In the <b>Taxes</b> option in the <b>Navigation</b> menu (left column), what are the three sub-menu options?	
5	What are the sub-menu options listed under <b>Transactions</b> in the <b>Navigation</b> menu?	
6	From the <b>Dashboard</b> , change the time frame in the <b>Expenses</b> block to <i>This Year To Date</i> . What is the total amount of <i>Maintenance and Repair</i> so far this year? (hover your cursor)	
7	From the <b>Bank Accounts</b> block on the same page, how many items are there in the <b>Checking</b> account that <i>need to be reviewed</i> ?	

8	<p>For the next steps, you will be making changes to the basic setup of the company file. To access these changes, you will be working in the <b>Account and Settings</b> options under the settings <b>Gear</b>. Open that window.</p> <ul style="list-style-type: none"> <li>• In the <b>Contact Info</b> section of the <b>Company</b> tab, <ul style="list-style-type: none"> <li>○ Change the <b>Customer-facing email</b> to <a href="mailto:CustomerNoReply@quickbooks.com">CustomerNoReply@quickbooks.com</a></li> <li>○ Change the <b>Company phone</b> to 916-555-1212</li> <li>○ Change the <b>Website</b> to <a href="http://www.bsnsAtlas.com">www.bsnsAtlas.com</a></li> </ul> </li> </ul>
9	<p>What is the <b>Company Address</b> for the Test Drive company?</p>
10	<p>Still in the <b>Account and Settings</b> window,</p> <ul style="list-style-type: none"> <li>• In the <b>Advanced</b> tab, turn on the <i>Enable account numbers</i> in the <b>Chart of Accounts</b> section. Make sure <i>Show account numbers</i> is also turned on.</li> </ul>
11	<p>On this same page but in different sections, what is the first month of the fiscal year?</p>
12	<p>Also, in a different section, what income account is the <i>Billable expense income account</i> set to?</p>
13	<p>Still in the <b>Account and Settings</b> window, under the <b>Sales</b> tab, is <i>Tags</i> turned On or Off?</p>
14	<p>From the <b>Dashboard</b>, select <b>Customers</b> under the <b>Sales</b> menu item.</p> <ul style="list-style-type: none"> <li>• Click on the Customer <i>Jeff's Jalopies</i></li> <li>• Select <b>View/Edit</b> in the pull-down menu (on the far right side of the screen) on <i>Invoice #1022</i></li> <li>• At the bottom, click on <b>Print or Preview</b> and a view of the <b>Invoice</b> will open up</li> </ul> <p>Either print or save the image to compare with the <i>Answer Sheet</i> provided at the end of the <i>Homework Assignment</i>. When finished, close out of the invoice and return to the Dashboard. Label it as: <b>Project 02 – Step 45 – Invoice</b></p>
15	<p>From the <b>Navigation menu on the left</b>, select <b>Reports</b>.</p> <ul style="list-style-type: none"> <li>• In the search window at the top, search for the report named <i>Account List</i> and open it.</li> <li>• Click on <b>Export/Print</b> button at the top of the report and <b>Print/Save as PDF</b>.</li> </ul> <p>Either print or save the image to compare with the <i>Answer Sheet</i> provided at the end of the <i>Homework Assignment</i>. Label it as: <b>Project 02 – Step 15 – Account List</b></p>

\* As of 4/10/2024

**IMPORTANT NOTE:** Because you are working with a “live” company Test Drive file, Intuit may change answers without notice. If you have questions or need assistance, reach out to the [bsnsAtlas.com](http://bsnsAtlas.com) team in our private Facebook group at:

[www.facebook.com/groups/bsnsAtlas](http://www.facebook.com/groups/bsnsAtlas)