

## Homework Assignment

## Project 8 – Customization / Saving Time

This Project's Homework Assignment focuses on many of the ways a user can customize QBO and tools available to save time when working, including how to set up multiple **Locations**, **Classes**, **Recurring Transactions**, as well as how to **Customize** forms and manage **Receipt** uploads.

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	After opening the Test Drive company: <ul style="list-style-type: none"> <li>Extend the <i>Log Out</i> time to <b>3 hours</b></li> </ul>	
3	From the <b>Dashboard</b> , Open the <b>GEAR</b> and then select <i>Additional Information</i> to show the <i>Keyboard Shortcuts</i>	
4	What is your Company ID?	
5	When working on a Main Page, what do you press to open the window to record a payment that's been received?	
6	In the Settings Gear, Open the <b>Advanced</b> tab in the <b>Account and Settings</b> and <ul style="list-style-type: none"> <li>Turn On the <b>Track Locations</b> option in the <b>Categories</b> section</li> <li>Change the name of the <i>Location label</i> to <b>Store</b></li> </ul> Open <b>All Lists</b> menu and select <b>Properties</b> – (You may need to refresh your screen to see <i>Properties</i> instead of <i>Locations</i> .) Create two new Stores with the following information: <ul style="list-style-type: none"> <li><b>Name:</b> Waterfall Drive <ul style="list-style-type: none"> <li><b>Different company name...</b> Craig's on Waterfall</li> <li><b>Different address...</b> 456 Waterfall Drive, San Pablo, CA 87998</li> </ul> </li> <li><b>Name:</b> Thurwell Avenue <ul style="list-style-type: none"> <li><b>Different company name...</b> Craig's on Thurwell</li> <li><b>Different address...</b> 987 Thurwell Avenue, San Pablo, CA 87997</li> </ul> </li> </ul>	

7	<p>Open <b>All Lists</b> menu under the <b>Gear</b> and select <b>Custom Form Styles</b> and edit the <b>Standard</b> form with the following information in the <b>Content</b> section:</p> <p>In the <b>Header</b> section:</p> <ul style="list-style-type: none"> <li>• Turn On the checkbox for <i>Shipping</i></li> </ul> <p>In the <b>Account Summary</b> section:</p> <ul style="list-style-type: none"> <li>• Turn On the checkbox for <i>Include Quantity and Rate</i> under the <i>Description</i> box</li> <li>• And make sure the individual boxes for <i>Quantity</i> and <i>Rate</i> no longer have checks</li> </ul> <p>In the <b>Footer</b> section:</p> <ul style="list-style-type: none"> <li>• Change the <i>Message to customer on Invoices and other sales forms</i> to “<i>Thanks for all your support and business!</i>”</li> <li>• Set the font size for that message box to be <b>12pt</b></li> </ul>
8	<p>Create a new <b>Invoice</b> with the following information:</p> <ul style="list-style-type: none"> <li>• <b>Customer:</b> Amy’s Bird Sanctuary</li> <li>• <b>Date:</b> Today’s date</li> <li>• <b>Store:</b> Thurwell Avenue</li> <li>• <b>Ship via:</b> UPS</li> <li>• <b>Shipping date:</b> Tomorrow’s date</li> <li>• <b>Tracking number:</b> 08513672256</li> <li>• <b>Product/Service:</b> Rocks</li> <li>• <b>Qty:</b> 20</li> <li>• <b>Rate:</b> \$11.56 (<i>taxable in California at 8%</i>)</li> <li>• <b>Discount:</b> 11%</li> <li>• <b>NOTE:</b> Ignore any <b>Billable Time</b> information that may pop up in the right column</li> </ul> <p><b>SAVE</b> the invoice and then either print or save the image to compare with the <i>Answer Sheet</i> provided at the end of the <i>Homework Assignment</i>.</p> <p>When finished, select <b>Save and Close</b>. Label it as: <b>Project 08 – Step 08 – Invoice</b></p>
9	<p>What is the total amount of <i>Rocks</i> after the <b>Discount</b> but before <b>Sales Tax</b>?</p>
10	<p>Create a new <b>Bill</b> with the following information:</p> <ul style="list-style-type: none"> <li>• <b>Vendor:</b> Cigna Health Care</li> <li>• <b>Bill Date:</b> Today’s date</li> <li>• <b>Store:</b> Waterfall Drive</li> <li>• <b>Category:</b> Workers Compensation</li> <li>• <b>Description:</b> Annual W/C insurance</li> <li>• <b>Amount:</b> \$1,756.09 (<i>not Billable, not Taxable, no Customer name</i>)</li> </ul>

	<p>AFTER saving the <b>Bill</b> (but keep it open), make the <b>Bill</b> recurring by adding the following information to the new fields:</p> <ul style="list-style-type: none"> <li>• <b>Template Name:</b> Cigna Health Care – Annual</li> <li>• <b>Type:</b> Reminder (<i>30 days before the transaction date</i>)</li> <li>• <b>Interval:</b> Yearly on March 15<sup>th</sup> beginning NEXT year (<i>no End date</i>)</li> </ul> <p>When finished, select <b>Save Template</b></p>	
11	<p>From the <b>Reports</b> menu, Open a <i>Recurring Template List</i>.</p> <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, select <b>Save and Close</b>.</p> <p>Label it as: <b>Project 08 – Step 11 – Recurring Template List</b></p>	
12	How many recurring items are <i>Scheduled</i> in the list?	
13	What is the total amount of <i>Scheduled</i> items?	
14	What is the total amount of <i>Reminder</i> items?	
15	From <b>Bank Account</b> section of your <b>Dashboard</b> , what is the amount difference between the balance your QuickBooks™ is showing, and the balance your Bank is showing?	

\* As of 04/10/2024

**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](https://www.bsnsAtlas.com) team in our private Facebook group at:

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