# Gmetrix QuickBooks Certified User (QBCU) Online Practice Exam (Sample)

## Study Guide

BY EXAMZIFY

**Everything you need from our exam experts!**

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# Table of Contents

Copyright ........ 1
Table of Contents ........ 2
Introduction ........ 3
How to Use This Guide ........ 4
Questions ........ 5
Answers ........ 8
Explanations ........ 10
Next Steps ........ 15

# Introduction

**Preparing for a certification exam can feel overwhelming, but with the right tools, it becomes an opportunity to build confidence, sharpen your skills, and move one step closer to your goals. At Examzify, we believe that effective exam preparation isn't just about memorization, it's about understanding the material, identifying knowledge gaps, and building the test-taking strategies that lead to success.**

**This guide was designed to help you do exactly that.**

**Whether you're preparing for a licensing exam, professional certification, or entry-level qualification, this book offers structured practice to reinforce key concepts. You'll find a wide range of multiple-choice questions, each followed by clear explanations to help you understand not just the right answer, but why it's correct.**

**The content in this guide is based on real-world exam objectives and aligned with the types of questions and topics commonly found on official tests. It's ideal for learners who want to:**

- **Practice answering questions under realistic conditions,**
- **Improve accuracy and speed,**
- **Review explanations to strengthen weak areas, and**
- **Approach the exam with greater confidence.**

**We recommend using this book not as a stand-alone study tool, but alongside other resources like flashcards, textbooks, or hands-on training. For best results, we recommend working through each question, reflecting on the explanation provided, and revisiting the topics that challenge you most.**

**Remember: successful test preparation isn't about getting every question right the first time, it's about learning from your mistakes and improving over time. Stay focused, trust the process, and know that every page you turn brings you closer to success.**

**Let's begin.**

# How to Use This Guide

**This guide is designed to help you study more effectively and approach your exam with confidence. Whether you're reviewing for the first time or doing a final refresh, here’s how to get the most out of your Examzify study guide:**

## 1. Start with a Diagnostic Review

**Skim through the questions to get a sense of what you know and what you need to focus on. Your goal is to identify knowledge gaps early.**

## 2. Study in Short, Focused Sessions

**Break your study time into manageable blocks (e.g. 30 – 45 minutes). Review a handful of questions, reflect on the explanations.**

## 3. Learn from the Explanations

**After answering a question, always read the explanation, even if you got it right. It reinforces key points, corrects misunderstandings, and teaches subtle distinctions between similar answers.**

## 4. Track Your Progress

**Use bookmarks or notes (if reading digitally) to mark difficult questions. Revisit these regularly and track improvements over time.**

## 5. Simulate the Real Exam

**Once you're comfortable, try taking a full set of questions without pausing. Set a timer and simulate test-day conditions to build confidence and time management skills.**

## 6. Repeat and Review

**Don’t just study once, repetition builds retention. Re-attempt questions after a few days and revisit explanations to reinforce learning. Pair this guide with other Examzify tools like flashcards, and digital practice tests to strengthen your preparation across formats.**

**There’s no single right way to study, but consistent, thoughtful effort always wins. Use this guide flexibly, adapt the tips above to fit your pace and learning style. You've got this!**

# Questions

1. **Where do you enable Time Tracking in QuickBooks Online?**
   - A. Settings > Advanced.
   - B. Settings > Company.
   - C. Time > Preferences.
   - D. Tools > Time Tracking.

2. **What is the best practice for making an EFT?**
   - A. Use a separate EFT entry in the bank feed
   - B. Create a vendor bill and mark as EFT
   - C. Send money through a credit card payment
   - D. Record a check or expense and label it as an EFT

3. **How do you reconcile a credit balance or overpayment from a customer?**
   - A. Apply the credit via Receive Payment or issue a Refund Receipt if a customer has overpaid.
   - B. Delete the payment.
   - C. Create a Journal Entry.
   - D. Create a new invoice.

4. **What is the correct sequence to create a journal entry in QuickBooks Online?**
   - A. +New > Journal Entry; enter date, debit and credit lines, and Save.
   - B. +New > Invoice; enter date, line items, and Save.
   - C. Settings > Custom Form Styles > Edit Invoice; modify fields, logo, colors, and Save.
   - D. Reports > Export; select data and Save.

5. **Which file format can be imported into QuickBooks Online after exporting a report?**
   - A. PDF
   - B. Word
   - C. Excel
   - D. CSV

6. Which option describes the proper steps to export a report to PDF and view it afterward?
    A. Click Export drop-down button - Click Export to PDF - Click Save as PDF - Click the PDF link at the bottom of the screen
    B. Click Export drop-down button - Click Export to PDF - Click Save as PDF - Click the PDF link at the bottom of the screen
    C. Click the PDF link at the bottom of the screen
    D. Print the report

7. How do you set up sales tax in QuickBooks Online?
    A. Taxes > Sales Tax > Add tax rate; define jurisdiction and rate, and assign to items or customers as needed.
    B. Accounting > Tax Settings > Enable tax.
    C. Sales > Tax Center > Create Tax.
    D. Invoicing > Tax Rules > New.

8. Which sequence correctly exports the current report to PDF and opens it after saving?
    A. Click Export drop-down button - Click Export to PDF - Click Save as PDF - Click the PDF link at the bottom of the screen
    B. Click Print - Save as PDF
    C. Use Share > Export
    D. Download as CSV

9. Which action would you take to locate CRM apps to connect to your company?
    A. Apps link in the Navigation pane
    B. Contacts > CRM
    C. Reports > CRM
    D. Help > CRM

10. If you need to track a specific job for a customer to monitor profitability, which two items could you use?
    A. Job and Project
    B. Customer and Vendor
    C. Department and Class
    D. Invoice and Receipt

# Answers

1. A
2. D
3. A
4. A
5. C
6. B
7. A
8. A
9. A
10. A

# Explanations

## 1. Where do you enable Time Tracking in QuickBooks Online?

**A. Settings > Advanced.**

B. Settings > Company.

C. Time > Preferences.

D. Tools > Time Tracking.

Time tracking in QuickBooks Online is controlled from the Settings area, specifically in the Advanced section. This is where you enable the feature and set its defaults, which then allows timesheets and hourly entries to be captured for employees or contractors and used for billing or payroll. The other locations—Settings > Company, Time > Preferences, or Tools > Time Tracking—do not configure time-tracking functionality in the Online version, or are not used for enabling it. By turning on time tracking in Advanced, you ensure the time data can be collected, reported, and applied to invoices or payroll as needed.

## 2. What is the best practice for making an EFT?

A. Use a separate EFT entry in the bank feed

B. Create a vendor bill and mark as EFT

C. Send money through a credit card payment

**D. Record a check or expense and label it as an EFT**

When you make an EFT, you want the QuickBooks entry to mirror the actual bank transfer and tie to the expense or liability you're paying. The best practice is to record the payment as a check or expense and set the payment method to EFT. This creates a single, clear transaction that links the payment to the vendor's bill or the expense being paid, making reconciliation with your bank statement straightforward. It avoids creating a separate EFT line that might not align with the bank's record, and it captures the transfer in the same way you actually moved funds. Using a credit card isn't an EFT, and while paying a bill by EFT is valid, recording the payment as a check/expense with EFT as the method provides a consistent, reconciliable record for most EFT payments.

## 3. How do you reconcile a credit balance or overpayment from a customer?

**A. Apply the credit via Receive Payment or issue a Refund Receipt if a customer has overpaid.**

B. Delete the payment.

C. Create a Journal Entry.

D. Create a new invoice.

When a customer has a credit balance or overpayment, you clear it by handling the credit through the customer records rather than altering transactions arbitrarily. In practice, you apply the credit to any open invoice using Receive Payment and selecting the available credit to apply to that invoice. If there are no outstanding invoices, you issue a refund receipt to return the funds to the customer. This keeps Accounts Receivable accurate and reflects the actual cash movement.  Deleting the payment would remove the transaction history and leave the customer balance unresolved. Creating a Journal Entry would bypass the customer-level record and could misalign AR with cash accounts. Creating a new invoice doesn't address the overpayment and would create more confusion about what's owed.

## 4. What is the correct sequence to create a journal entry in QuickBooks Online?

A. +New > Journal Entry; enter date, debit and credit lines, and Save.

B. +New > Invoice; enter date, line items, and Save.

C. Settings > Custom Form Styles > Edit Invoice; modify fields, logo, colors, and Save.

D. Reports > Export; select data and Save.

To create a journal entry in QuickBooks Online, you start from the +New menu and choose Journal Entry. Then you set the date and add debit and credit lines by selecting the appropriate accounts and entering amounts (you can add multiple lines with either debits or credits). The key is that total debits must equal total credits, and when you're finished you save the entry. The other options aren't for journal entries: an Invoice is for billing customers, Settings > Custom Form Styles is for adjusting how forms look, and Reports > Export is for extracting data.

## 5. Which file format can be imported into QuickBooks Online after exporting a report?

A. PDF

B. Word

C. Excel

D. CSV

The main idea is that QuickBooks Online can bring data back in from a file you export, using a format that preserves structure for easy re-upload. Excel is the best choice here because QuickBooks Online supports importing data from Excel workbooks and reports exported to Excel keep the column layout intact, which makes mapping fields to QuickBooks lists and transactions straightforward. PDF is a fixed, read-only document, so it isn't suitable for importing data. Word is a word-processing format, not used for data imports. CSV can be used in some import scenarios, but Excel is the standard, more robust option for re-importing data from a report into QuickBooks Online.

## 6. Which option describes the proper steps to export a report to PDF and view it afterward?

A. Click Export drop-down button - Click Export to PDF - Click Save as PDF - Click the PDF link at the bottom of the screen

B. Click Export drop-down button - Click Export to PDF - Click Save as PDF - Click the PDF link at the bottom of the screen

C. Click the PDF link at the bottom of the screen

D. Print the report

Exporting a report to PDF and then viewing it requires two actions: generate the PDF via the export option, then open the resulting file. Start by using the Export menu and choose Export to PDF, which creates the PDF. After the export completes, click the PDF link at the bottom of the screen to view it. This sequence ensures you actually produce and can access the PDF file. Merely clicking a PDF link without exporting won't create the file, and printing the report skips the PDF creation entirely. The workflow that includes both exporting to PDF and then viewing via the bottom-link is the correct one.

## 7. How do you set up sales tax in QuickBooks Online?

A. Taxes > Sales Tax > Add tax rate; define jurisdiction and rate, and assign to items or customers as needed.

B. Accounting > Tax Settings > Enable tax.

C. Sales > Tax Center > Create Tax.

D. Invoicing > Tax Rules > New.

**Setting up sales tax in QuickBooks Online starts in the Taxes area. You create a tax rate by going to Taxes, then Sales Tax, and selecting Add tax rate. Here you define the jurisdiction (where the tax applies) and the tax rate, and you can then assign that tax to items or customers as needed. This workflow matches how QBO handles sales tax: establish the rate and where it applies, then attach it to the appropriate products/services or customer profiles so the correct tax is collected automatically on invoices and sales receipts. The other paths don't reflect QuickBooks Online's actual navigation for sales tax setup, such as options that aren't part of QBO's tax workflow or menu structure.**

## 8. Which sequence correctly exports the current report to PDF and opens it after saving?

A. Click Export drop-down button - Click Export to PDF - Click Save as PDF - Click the PDF link at the bottom of the screen

B. Click Print - Save as PDF

C. Use Share > Export

D. Download as CSV

**To export a current report to PDF and open it after saving, follow the built-in PDF export workflow. Start by using the Export option on the report and choose Export to PDF. Then save the file as a PDF on your device. QuickBooks typically provides a link at the bottom of the screen after saving that you can click to open the newly created PDF right away. This sequence—Export to PDF, Save as PDF, then open via the bottom-screen PDF link—directly accomplishes exporting to PDF and opening it immediately. Other options don't fit because they either bypass the dedicated PDF export path (for example, printing and then saving as PDF can work but isn't the same explicit export workflow), or export to a non-PDF format (such as CSV), or use a menu path that isn't the standard PDF export route.**

## 9. Which action would you take to locate CRM apps to connect to your company?

A. Apps link in the Navigation pane

B. Contacts > CRM

C. Reports > CRM

D. Help > CRM

**To connect a CRM app to your company, look in the Apps section. The Apps link in the left navigation pane is the hub for browsing, installing, and connecting third-party applications, including CRM tools, to your QuickBooks file. By opening Apps, you can search for CRM apps, review details, and connect them to your company data. The other paths aren't designed for app connections—they're for managing contacts, generating reports, or accessing help topics.**

## 10. If you need to track a specific job for a customer to monitor profitability, which two items could you use?

A. Job and Project

B. Customer and Vendor

C. Department and Class

D. Invoice and Receipt

**To monitor profitability for a specific customer job, you group all related work under a distinct Job within the customer or use the Project feature. Creating a Job lets you route invoices, estimates, expenses, and time to that exact job, so you can see income and costs tied to that job and generate profitability reports. The Project approach, available in QuickBooks Online, tracks time, costs, expenses, and revenue by project, providing the same focused profitability view across the work done for a customer. The other options don’t offer this per-job profitability focus: Customer and Vendor are broad contact records, Department and Class are internal categorization, and Invoice and Receipt are transaction documents rather than a way to aggregate all job-related activity for profitability.**

# Next Steps

**Congratulations on reaching the final section of this guide. You've taken a meaningful step toward passing your certification exam and advancing your career.**

**As you continue preparing, remember that consistent practice, review, and self-reflection are key to success. Make time to revisit difficult topics, simulate exam conditions, and track your progress along the way.**

**If you need help, have suggestions, or want to share feedback, we'd love to hear from you. Reach out to our team at hello@examzify.com.**

**Or visit your dedicated course page for more study tools and resources:**

**https://gmetrixqbcu.examzify.com**

**We wish you the very best on your exam journey. You've got this!**