

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

## Study Guide



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

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# 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

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- 1. In the invoicing workflow, what is the purpose of the Record Deposits step?**
  - A. It records the funds deposited in the bank.**
  - B. It notifies customers of the deposit.**
  - C. It posts a service charge.**
  - D. It cancels the invoice.**
  
- 2. Which button do you click to change a field in a customized form?**
  - A. Memorize**
  - B. Formatting tab**
  - C. Customize Design**
  - D. Customize Data Layout**
  
- 3. Which of the following is given as an example of a QuickBooks preference?**
  - A. Using enter vs tab for moving through a form**
  - B. Creating a new customer**
  - C. Printing reports**
  - D. Deleting a transaction**
  
- 4. Where is the Customize Report button located in a report window?**
  - A. In the Display tab**
  - B. Right side toolbar labeled Customize**
  - C. Top left corner named Customize Report**
  - D. In the Memorized Reports List**
  
- 5. How do you create a recurring transaction (invoice or estimate) for a monthly client?**
  - A. Create the transaction, choose Recurring Template, configure schedule, target customer, and items; save.**
  - B. Create a one-time transaction and set a reminder.**
  - C. Use the Memorized Report feature.**
  - D. Set up a bank rule to auto-issue.**

- 6. What is the correct first step to start the Payroll Setup in QuickBooks?**
- A. Home Page > Payroll Setup**
  - B. File > Payroll**
  - C. Employees > Payroll Setup**
  - D. Edit > Preferences**
- 7. Which steps are used to pay sales tax in QuickBooks?**
- A. Write a check at the bank**
  - B. Enter Bills > Pay Bills**
  - C. Use a separate tax form**
  - D. Manage Sales Tax > Pay Sales Tax**
- 8. What is a best practice when setting up a new bank feed connection in QuickBooks Online?**
- A. Use the default settings without reviewing connection details.**
  - B. Re-enter credentials only if the connection fails.**
  - C. Download all previous transactions every time.**
  - D. Verify and store credentials securely, enable multi-factor if available, and test the connection before relying on it.**
- 9. After completing the payroll setup interview, which option is used to add a new employee?**
- A. Vendors tab**
  - B. Employees tab on the home page**
  - C. Reports tab**
  - D. Payroll Center**
- 10. When recording a customer refund, which document should you use if the refund is paid in cash?**
- A. Credit Memo**
  - B. Invoice**
  - C. Sales Receipt**
  - D. Refund Receipt**

## Answers

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

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## **Explanations**

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**1. In the invoicing workflow, what is the purpose of the Record Deposits step?**

- A. It records the funds deposited in the bank.**
- B. It notifies customers of the deposit.**
- C. It posts a service charge.**
- D. It cancels the invoice.**

Recording the actual funds into the bank is the purpose of the Record Deposits step. After you've received payments for invoices, you use this step to enter those funds as deposited to the correct bank account, often grouping several payments into one deposit for easier reconciliation. It ties the payments to the invoices they settle and keeps your books aligned with your bank statement, simplifying the reconciliation process. This step doesn't notify customers, add service charges, or cancel invoices—those actions occur elsewhere in the workflow.

**2. Which button do you click to change a field in a customized form?**

- A. Memorize**
- B. Formatting tab**
- C. Customize Design**
- D. Customize Data Layout**

When you want to modify which data appears on a customized form, you work with the data layout controls. The option to Customize Data Layout opens the area where you can add or remove fields, rearrange their order, and adjust which data elements show up on the form. This is the right place to change a field because it directly governs the fields themselves, not just the form's look. For example, you can toggle fields like customer phone or ship-to address and move them to a different position within the layout there. The other options serve different purposes: memorizing saves the current form as a reusable template; the Formatting tab handles fonts, sizes, and basic alignment; Customize Design focuses on the overall appearance and visual styling of the form rather than which fields are included. Hence, to change a field, Customize Data Layout is the correct choice.

**3. Which of the following is given as an example of a QuickBooks preference?**

- A. Using enter vs tab for moving through a form**
- B. Creating a new customer**
- C. Printing reports**
- D. Deleting a transaction**

QuickBooks preferences are settings that control how the software behaves during use, shaping your data-entry experience rather than performing a specific task. The example shown—how the Enter key works while moving through a form—is a typical preference because it changes how you navigate data entry, not the act of entering or saving the data itself. You can adjust this in the Preferences area (usually Edit > Preferences > General) by choosing whether pressing Enter moves to the next field. The other options—creating a new customer, printing reports, or deleting a transaction—are actions you perform or features you access, not settings that alter program behavior.

**4. Where is the Customize Report button located in a report window?**

- A. In the Display tab**
- B. Right side toolbar labeled Customize**
- C. Top left corner named Customize Report**
- D. In the Memorized Reports List**

The button to tailor what you're seeing on a report sits at the top left corner of the report window and is labeled Customize Report. Clicking it opens the Modify Report dialog where you can adjust filters, columns, sorting, and how the report is displayed, including header and footer options. The Display tab you might see is within that dialog, not in the report window itself. The Memorized Reports List is a separate feature for saving and reusing predefined reports, not for modifying the current one. So the key takeaway is: customize actions start from the top-left corner of the report window with the button labeled Customize Report.

**5. How do you create a recurring transaction (invoice or estimate) for a monthly client?**

- A. Create the transaction, choose Recurring Template, configure schedule, target customer, and items; save.**
- B. Create a one-time transaction and set a reminder.**
- C. Use the Memorized Report feature.**
- D. Set up a bank rule to auto-issue.**

The idea is to automate monthly billing by turning a prepared invoice (or estimate) into a recurring template and scheduling it. Start with the actual transaction, then choose Recurring Template, set the schedule to monthly, specify the target customer and the items so the same details appear each cycle, and save. From there, QuickBooks will generate the invoice every month (and you can enable automatic emailing if desired). The other options don't automate recurring invoicing: a one-time transaction with a reminder remains manual; memorized reports are for viewing data, not creating invoices; bank rules automate bank entries, not customer invoices.

**6. What is the correct first step to start the Payroll Setup in QuickBooks?**

- A. Home Page > Payroll Setup**
- B. File > Payroll**
- C. Employees > Payroll Setup**
- D. Edit > Preferences**

To begin configuring payroll, you access payroll setup through the Employees menu. This placement makes sense because payroll settings relate to how employees are paid, so the setup flow lives under the Employees section. Selecting Payroll Setup from that menu launches the guided wizard that covers key steps like wage items, tax settings, and direct deposit, helping you configure payroll before running paychecks. Other paths don't start the payroll configuration process: using a Home Page path or File menu doesn't initiate the payroll setup flow, and Edit > Preferences leads to general settings rather than the step-by-step payroll setup.

## 7. Which steps are used to pay sales tax in QuickBooks?

- A. Write a check at the bank
- B. Enter Bills > Pay Bills
- C. Use a separate tax form
- D. Manage Sales Tax > Pay Sales Tax**

Sales tax is tracked as a payable liability in QuickBooks, and remitting it is done through the built-in payment flow rather than outside the program. The correct path is to go to Manage Sales Tax and choose Pay Sales Tax. In that screen you select the tax agency, review the amount due, and record the payment. QuickBooks then reduces the Sales Tax Payable liability and records the cash outflow from your bank, keeping everything aligned with the actual remittance. Writing a check at the bank, or using Enter Bills > Pay Bills, handles other parts of your accounts (vendor bills and external checks) and doesn't update the sales tax payable in QuickBooks in the same controlled way. While some forms may accompany tax filings, the payment itself is correctly recorded through Pay Sales Tax within the software.

## 8. What is a best practice when setting up a new bank feed connection in QuickBooks Online?

- A. Use the default settings without reviewing connection details.
- B. Re-enter credentials only if the connection fails.
- C. Download all previous transactions every time.
- D. Verify and store credentials securely, enable multi-factor if available, and test the connection before relying on it.**

When you set up a bank feed in QuickBooks Online, security and testing come first. Verifying and securely storing your credentials helps ensure only authorized access to the bank data, which protects sensitive information. If available, enable multi-factor authentication to add an extra layer of protection, making it harder for someone to use stolen credentials. Before you rely on the feed, test the connection to confirm that QuickBooks can reach the bank, download transactions, and map them to the correct accounts. This verification helps prevent issues like missing data or misclassified transactions once you start importing regularly. Choosing default settings without review can lead to misconfigurations or security gaps. Re-entering credentials only after a failure leaves room for unnoticed changes or compromises. Downloading all previous transactions every time is unnecessary and can cause duplicates and performance issues.

**9. After completing the payroll setup interview, which option is used to add a new employee?**

- A. Vendors tab**
- B. Employees tab on the home page**
- C. Reports tab**
- D. Payroll Center**

After finishing the payroll setup, you add a new employee by creating their profile in the Employees area. The Employees tab on the home page is the place to start a new entry (Add employee) and input essential details like name, address, tax information, and pay setup. Once saved, the employee is ready for payroll processing. The other tabs serve different purposes: the Vendors tab handles supplier records, not people who are paid. The Reports tab shows payroll data and results, not entry of new staff. The Payroll Center is used for running and managing payroll tasks and viewing payroll outputs, but it relies on existing employee records created in the Employees area.

**10. When recording a customer refund, which document should you use if the refund is paid in cash?**

- A. Credit Memo**
- B. Invoice**
- C. Sales Receipt**
- D. Refund Receipt**

When a customer is refunded in cash, you document it with a refund receipt. This type of record specifically captures the cash outflow to the customer and adjusts the customer's balance accordingly, effectively reversing the original sale in your books. A credit memo is used to credit a customer's account for returns or allowances that may apply to future purchases or outstanding balances, not to issue immediate cash refunds. An invoice is a request for payment from the customer, not a record of returning cash. A sales receipt tracks a cash sale and increases revenue, which isn't appropriate for recording a refund.

## 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](mailto:hello@examzify.com).**

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

**<https://qbcu.examzify.com>**

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

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