

## Changes in QBO (2020/21 Academic Year)

Intuit makes periodic changes to the displays/features in QBO. These can include:

- Wording changes
- Order changes
- Tab changes

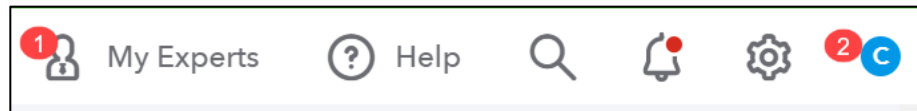
Usually, these are fairly easy to spot and to manage. This list includes changes since Fall of 2020. None of them affect any of the assignments.

### Navigation bar (Figure 1.4)

- **Workers** is now titled **Payroll**.
- There's a new **Cash Flow** link. Connection to a bank account is required to use the cash flow planner so this is not available for use in the homework assignments.
- Intuit is now offering small business loans and insurance products through the new **Capital** and **Insurance** links. These products are not covered in this textbook.

### Icon bar (Figure 1.5)

- Two additions to the icon bar:



- 1. You can use the **My Experts** link to invite your instructor in as your *accountant*.
- 2. There's also a new sign out tool.

### Dashboard (Figure 1.4)

- There are now two tabs on the **Dashboard**.



- Graphs are included on the **Business overview** tab.
- Shortcuts to transaction forms are included on the **Get things done** tab.
- When you first set up your homework company file, you may see your email address appear in the **Dashboard**. This is temporary. Once you move around in QBO, your actual company name will replace your email address.



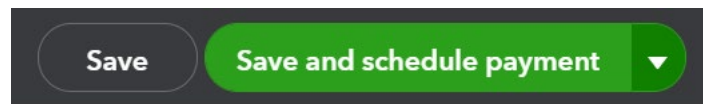
## Menu (Figure 1.6)

- In the **TOOLS** column, there's a new **Import desktop data** link, and the **Order Checks** tool is now listed at the top of that menu.
- Switching between **Business View** and **Accountant View** can now be done on this menu.



## Bill form

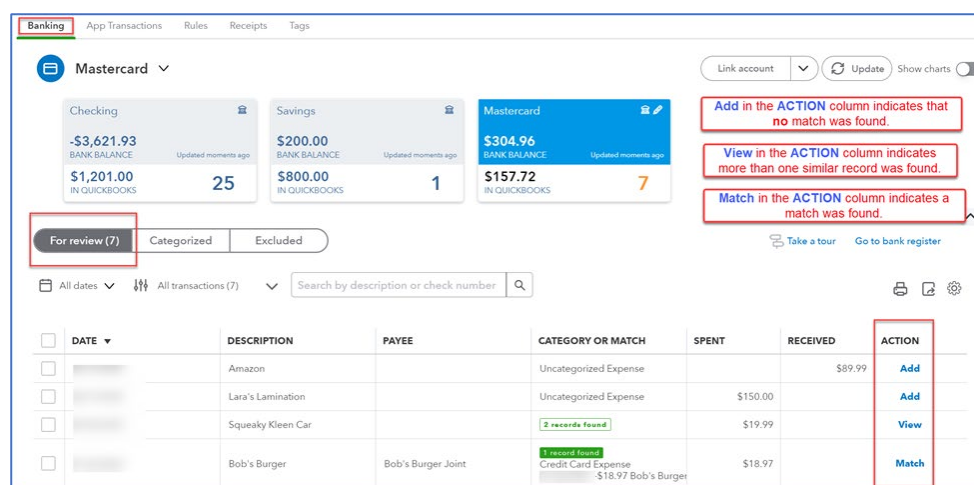
- There's a new **Save and Schedule Payment** option on **Bill** forms (Figure 4.17).



- This is linked to online bill payment options offered by Intuit. In your homework, you should continue to select **Save and close** or **Save and new**.
- Some of you **may** see **Mark as Paid** as a replacement for **Make Payment** in the **ACTION** column on the Expenses and Vendor Center screens. This change has not been widely distributed.

## For review tab in Banking

- On the **For Review** tab of the **Banking** screen, **Match**, not **Add**, is now used to identify uploaded transactions that have been matched to recorded transactions in QBO. **Add** is only used for unmatched transactions. An additional option (**View**) is also available. **View** indicates that more than one similar record has been located.



- Before the change, **Add** was used for all uploaded transactions. (See Figure 8.36 in the book) The color in the **CATEGORY OR MATCH** field indicated whether or not a match was found. (Green for matched; black for unmatched)

**NOTE:** Any significant software changes will be communicated directly to your instructor. You will be provided additional instructions for managing those changes if necessary.