

Intuit QuickBooks Certified User Online Certification

1. QuickBooks Online Administration

1.1 Set up QuickBooks Online

- 1.1.1 Recognize features and benefits of QuickBooks Online Plus
- 1.1.2 Describe licensing requirements for setting up an entity in QuickBooks Online
- 1.1.3 Describe the process of migrating a company to QuickBooks Online
- 1.1.4 Describe the access of each default user role

1.2 Manage QuickBooks Online settings for a company

- 1.2.1 Identify the company information that you can and can't edit
- 1.2.2 Recognize the benefits of the Close the Books feature
- 1.2.3 Compare and contrast the cash and accrual accounting methods
- 1.2.4 Identify the purposes of project tracking, class tracking, and locations
- 1.2.5 Describe how to activate project tracking, class tracking, and locations
- 1.2.6 Identify the tasks performed by automation

1.3 1.3. Manage lists

- 1.3.1 Identify the lists that you can import
- 1.3.2 Identify the content of various lists
- 1.3.3 Identify the appropriate lists for different purposes
- 1.3.4 Identify when and how to add, edit, delete, and merge list items
- 1.3.5 Manage the Chart of Accounts

1.4 Manage recurring transactions

- 1.4.1 Describe reasons for making transactions recurring
- 1.4.2 Define types of recurrence
- 1.4.3 Describe how to implement recurring transactions

1.5 Manage journal entries

- 1.5.1 Identify the information required for journal entries
- 1.5.2 Describe how to implement journal entries

1.6 Connect QuickBooks Online to apps

- 1.6.1 Identify the purpose of apps
- 1.6.2 Identify where to get apps
- 1.6.3 Identify the risks and benefits of extending functionality through apps

2. Sales and Money In

2.1 Set up customers

- 2.1.1 Identify the importance of the Display Name field
- 2.1.2 Differentiate between billing and shipping addresses
- 2.1.3 Define and describe the use of customer payment terms
- 2.1.4 Identify taxable and non-taxable customers
- 2.1.5 Define and describe the correct use of sub-customers

2.2 Set up products and services

- 2.2.1 Describe and differentiate between products and services
- 2.2.2 Identify the information required to set up products or services
- 2.2.3 Describe reasons for setting up products or services
- 2.2.4 Contrast inventory products and non-inventory products

2.3 2.3. Manage sales settings

- 2.3.1 Customize sales forms
- 2.3.2 Customize email message forms
- 2.3.3 Describe the purpose of activating customer discounts
- 2.3.4 Describe the QuickBooks Payments feature and how it differs from traditional payments

2.4 Record basic money-in transactions

- 2.4.1 Describe the money-in transaction workflow
- 2.4.2 Record and manage invoices and sales receipts
- 2.4.3 Receive, record, and manage payments, undeposited funds, and deposits
- 2.4.4 Record credit memos and refund receipts

3. Vendors and Money Out

3.1 Manage vendor records

- 3.1.1 Describe how to identify existing customers as vendors
- 3.1.2 Describe when and how to merge vendor accounts
- 3.1.3 Describe how to add or change vendor payment terms
- 3.1.4 Describe how and why to identify vendors as 1099 contractors

3.2 Manage expense settings

- 3.2.1 Describe how and why to activate expense tracking by customer
- 3.2.2 Describe when and how to make expenses and items billable
- 3.2.3 Describe how to identify unbilled billable expenses

3.3 Record and manage basic money-out transactions

- 3.3.1 Describe the money-out transaction workflow
- 3.3.2 Identify types of money-out transactions
- 3.3.3 Compare and describe the appropriate use of checks and bill payments
- 3.3.4 Describe the effects of recording bills, checks, and credit card transactions
- 3.3.5 Differentiate between expense transactions and bank feed transactions
- 3.3.6 Describe how to record check, credit card, and debit card expense transactions
- 3.3.7 Describe the use and effects of vendor credits and refunds
- 3.3.8 Describe why and how to void, delete, and edit money-out transactions and the impact thereof

4. Bank Accounts, Transaction Rules, and Receipts

4.1 Implement financial account connections

- 4.1.1 Identify the types of financial accounts QuickBooks Online can connect to
- 4.1.2 Describe the benefits of connecting QuickBooks Online to accounts

4.2 Manage bank feeds

- 4.2.1 Process bank feed transactions
- 4.2.2 Define and describe the use of bank rules

4.3 Manage receipts

4.3.1 Identify methods of uploading receipts

4.3.2 Describe how to record transactions from uploaded receipts

5. Basic Reports and Views

5.1 Describe the content and purpose of reports

5.1.1 Describe the content and purpose of financial reports

5.1.2 Describe the content and purpose of money-in reports

5.1.3 Describe the content and purpose of money-out reports

5.2 Customize and deliver standard reports

5.2.1 Customize standard reports

5.2.2 Identify report delivery formats

5.3 Access other reports and views

5.3.1 Describe the content of the Audit Log

5.3.2 Describe the content and functionality of the dashboards

EXAM OBJECTIVES



PROFESSIONAL COMMUNICATION

The Professional Communication certification is intended for use primarily in academic settings including secondary and post-secondary, but could also be used for candidates who need to upskill to enter the workforce. These candidates may be in government or development institutions and programs, or they may be individuals looking to become more employable on their own.

An individual earning this certification has approximately 150 hours of instruction and hands-on experience. Individuals who have earned the Professional Communication certification have demonstrated expertise of the following skills.

1. DESCRIBE BASIC COMMUNICATION PRINCIPLES

1.1 Identify professional communication skills

May include differentiating between professional and unprofessional behaviors; recognizing a professional email address; cultivating an appropriate social media presence including profile information, posts, photos, and videos; describing professional time-management skills including punctuality, attendance, and notification.

1.2 Identify effective verbal, nonverbal, and listening skills

May include basic delivery standards such as facing the audience or speaker and making eye contact; communicating a message or feedback through nonverbal methods; moderating intonation, rate, tone, volume, and enunciation; keeping your attention on the message; deferring judgment.

2. PLAN FOR EFFECTIVE COMMUNICATION

2.1 Analyze the effect of the audience on a message

May include identifying the audience data required to craft an effective message; analyzing audience demographics such as age, education, gender, marital status, race, religion, and other statistical factors by which population is measured.

2.2 Analyze the effect of the environment on a message

May include in-person vs. remote, audience size, room size, available equipment.

2.3 Given a communication scenario, identify the specific purpose

May include identifying the primary message you need to deliver; distinguishing between informative, persuasive, and motivational messages, differentiating between ethical, emotional, and logical persuasion.

2.4 Given a communication scenario, address ethical and legal issues

May include defining and identifying issues related to accessibility, attribution, bias-free communication, confidentiality, copyright, trademark, and plagiarism; responding to requests for data, identifying biased communication terminology, ensuring that presentations and documents comply with accessibility standards, removing personal information from presentations and documents.

2.5 Given a business scenario, select the most appropriate communication medium

May include verbal messages such as face-to-face discussions, phone calls, and voice messages; written messages such as emails, text messages, business letters, job applications, resumes, and meeting agendas and minutes; visual messages such as PowerPoint presentations and videos; business-related social media messages using services such as Facebook, Instagram, LinkedIn, and Twitter.

2.6 Effectively outline and summarize your message

May include creating a complete and concise outline; outlining messages; summarizing your planned message.

3. APPLY BEST PRACTICES FOR CREATING BUSINESS DELIVERABLES

3.1 Assemble accurate business communication deliverables

May include creating business communications such as business letters, meeting agendas, meeting minutes, and resumes from components; analyzing the effectiveness of different forms of business communications; using spelling and grammar tools.

3.2 Apply visual design standards to business communications

May include identifying design principles of business communications such as balance, proximity, alignment, repetition, contrast, space, rule of thirds, font choice, color choice, and white space; distinguishing among effective and ineffective visual designs for common forms of business communications such as presentation slides, email messages, and documents.

3.3 Identify effective uses of data visualization to present complex information

May include types of data visualization such as graphs, charts, plots, and infographics; accurate visual representation of data; interpreting the message of a data visualization graphic.

4. DELIVER YOUR MESSAGE

4.1 Describe the variables involved in delivering an effective message

May include personal presentation such as attire and hygiene; environmental variables such as location, physical space, technology, and formality; and issues such as regional language variations, imprecise language, jargon, context, and perceptions.

4.2 Identify methods of adapting a message based on audience feedback

May include direct feedback; indirect feedback such as body language.

5. RECEIVE COMMUNICATIONS

5.1 Given a business communication, restate the key points of the message

May include identifying the primary goal of a specific communication; summarizing verbal or written messages.

5.2 Given a message, identify appropriate responses or clarifying questions

May include responding to and clarifying messages.

6. ANALYZE COMMUNICATION SCENARIOS

6.1 Analyze important factors of obtaining employment

May include identifying common mistakes made by interviewers and applicants, distinguishing between appropriate and inappropriate job application documents.

6.2 Analyze expressions of and responses to feedback

May include giving constructive criticism, receiving constructive and destructive criticism, seeking feedback, setting and clarifying expectations, and modeling correct behavior as a feedback method.

6.3 Analyze communication etiquette within a business hierarchy

May include communications with supervisors, peers, and subordinates; collaborating with a group.

6.4 Given a customer service request, identify the problem, solution, and appropriate action

May include identifying and restating the problem, identifying the customer's desired solution and the available solutions, and interfacing with team members and customers.

MOS Excel 2013

Objective Domain

1.0 Create and Manage Worksheets and Workbooks

1.1 Create Worksheets and Workbooks

This objective may include but is not limited to: creating new blank workbooks, creating new workbooks using templates, importing files, opening non-native files directly in Excel, adding worksheets to existing workbooks, copying and moving worksheets

1.2 Navigate through Worksheets and Workbooks

This objective may include but is not limited to: searching for data within a workbook, inserting hyperlinks, changing worksheet order, using Go To, using Name Box

1.3 Format Worksheets and Workbooks

This objective may include but is not limited to: changing worksheet tab color, modifying page setup, inserting and deleting columns and rows, changing workbook themes, adjusting row height and column width, inserting watermarks, inserting headers and footers, setting data validation

1.4 Customize Options and Views for Worksheets and Workbooks

This objective may include but is not limited to: hiding worksheets, hiding columns and rows, customizing the Quick Access toolbar, customizing the Ribbon, managing macro security, changing workbook views, recording simple macros, adding values to workbook properties, using zoom, displaying formulas, freezing panes, assigning shortcut keys, splitting the window

1.5 Configure Worksheets and Workbooks to Print or Save

This objective may include but is not limited to: setting a print area, saving workbooks in alternate file formats, printing individual worksheets, setting print scaling, repeating headers and footers, maintaining backward compatibility, configuring workbooks to print, saving files to remote locations

2.0 Create Cells and Ranges

2.1 Insert Data in Cells and Ranges

This objective may include but is not limited to: appending data to worksheets, finding and replacing data, copying and pasting data, using AutoFill tool, expanding data across columns, inserting and deleting cells

2.2 Format Cells and Ranges

This objective may include but is not limited to: merging cells, modifying cell alignment and indentation, changing font and font styles, using Format Painter, wrapping text within cells, applying Number formats, applying highlighting, applying cell styles, changing text to WordArt

2.3 Order and Group Cells and Ranges

This objective may include but is not limited to: applying conditional formatting, inserting sparklines, transposing columns and rows, creating named ranges, creating outlines, collapsing groups of data in outlines, inserting subtotals

3.0 Create Tables

3.1 Create a Table

This objective may include but is not limited to: moving between tables and ranges, adding and removing cells within tables, defining titles

3.2 Modify a Table

This objective may include but is not limited to: applying styles to tables, banding rows and columns, inserting total rows, removing styles from tables

3.3 Filter and Sort a Table

This objective may include but is not limited to: filtering records, sorting data on multiple columns, changing sort order, removing duplicates

4.0 Apply Formulas and Functions

4.1 Utilize Cell Ranges and References in Formulas and Functions

This objective may include but is not limited to: utilizing references (relative, mixed, absolute), defining order of operations, referencing cell ranges in formulas

4.2 Summarize Data with Functions

This objective may include but is not limited to: utilizing the SUM function, utilizing the MIN and MAX functions, utilizing the COUNT function, utilizing the AVERAGE function

4.3 Utilize Conditional Logic in Functions

This objective may include but is not limited to: utilizing the SUMIF function, utilizing the AVERAGEIF function, utilizing the COUNTIF function

4.4 Format and Modify Text with Functions

This objective may include but is not limited to: utilizing the RIGHT, LEFT and MID functions, utilizing the TRIM function, utilizing the UPPER and LOWER functions, utilizing the CONCATENATE function

Create Charts and Objects

5.1 Create a Chart

This objective may include but is not limited to: creating charts and graphs, adding additional data series, switching between rows and columns in source data, using Quick Analysis

5.2 Format a Chart

This objective may include but is not limited to: adding legends, resizing charts and graphs, modifying chart and graph parameters, applying chart layouts and styles, positioning charts and graphs

5.3 Insert and Format an Object

This objective may include but is not limited to: inserting text boxes, inserting SmartArt, inserting images, adding borders to objects, adding styles and effects to objects, changing object colors, modifying object properties, positioning objects

MOS Word 2013

Objective Domain

1.0 Create and Manage Documents

1.1 Create a Document

This objective may include but is not limited to: creating new blank documents, creating new documents using templates, opening non-native files directly in Word, opening a PDF in Word for editing

1.2 Navigate through a Document

This objective may include but is not limited to: searching for text within document, inserting hyperlinks, creating bookmarks, using Go To

1.3 Format a Document

This objective may include but is not limited to: modifying page setup, changing document themes, changing document style sets, inserting simple headers and footers, inserting watermarks, inserting page numbers

1.4 Customize Options and Views for Documents

This objective may include but is not limited to: changing document views, using zoom, customizing the Quick Access toolbar, customizing the Ribbon, splitting the window, adding values to document properties, using Show/Hide, recording simple macros, assigning shortcut keys, managing macro security

1.5 Configure Documents to Print or Save

This objective may include but is not limited to: configuring documents to print, saving documents in alternate file formats, printing document sections, saving files to remote locations, protecting documents with passwords, setting print scaling, maintaining backward compatibility

2.0 Format Text, Paragraphs, and Sections

2.1 Insert Text and Paragraphs

This objective may include but is not limited to: adding text to documents, finding and replacing text, copying and pasting text, inserting text via AutoCorrect, removing blank paragraphs, inserting built-in fields, inserting special characters (©, ™, £)

2.2 Format Text and Paragraphs

This objective may include but is not limited to: changing font attributes, using Find and Replace to format text, using Format Painter, setting paragraph spacing, setting line spacing, clearing existing formatting, setting indentation, highlighting text selections, adding styles to text, changing text to WordArt, modifying existing style attributes

2.3 Order and Group Text and Paragraphs

This objective may include but is not limited to: preventing paragraph orphans, inserting breaks to create sections, using multiple columns to organize content, using headings to organize content (outline), forcing page breaks

3.0 Create Tables and Lists

3.1 Create a Table

This objective may include but is not limited to: converting text to tables, converting tables to text, defining table dimensions, setting AutoFit options, using Quick Tables, using headings for table rows and columns

3.2 Modify a Table

This objective may include but is not limited to: applying styles to tables, modifying fonts within tables, sorting table data, configuring cell margins, using formulas, modifying table dimensions, merging cells

3.3 Create and Modify a List

This objective may include but is not limited to: adding numbering or bullets, creating custom bullets, modifying list indentation, modifying line spacing, increasing and decreasing list levels, modifying numbering

4.0 Apply References

4.1 Create Endnotes, Footnotes, and Citations

This objective may include but is not limited to: inserting endnotes, managing footnote locations, configuring endnote formats, modifying footnote numbering, inserting citation placeholders, inserting citations, inserting bibliography, changing citation styles

4.2 Create Captions

This objective may include but is not limited to: adding captions, setting caption positions, changing caption formats, changing caption labels, excluding labels from captions

5.0 Insert and Format Objects

5.1 Insert and Format Building Blocks

This objective may include but is not limited to: inserting Quick Parts, inserting textboxes, utilizing Building Blocks Organizer, customizing building blocks

5.2 Insert and Format Shapes and SmartArt

This objective may include but is not limited to: inserting simple shapes, inserting SmartArt, modifying SmartArt properties (color, size, shape), wrapping text around shapes, positioning shapes

5.3 Insert and Format Images

This objective may include but is not limited to: inserting images, applying artistic effects, applying picture effects, modifying image properties (color, size, shape), adding Quick Styles to images, wrapping text around images, positioning images

MOS Outlook 2013

Objective Domain

1.0 Manage the Outlook Environment

1.1 Customize Outlook Settings

This objective may include but is not limited to: including original messages with all reply messages, changing text formats for all outgoing messages, customizing the Navigation Pane, blocking specific addresses, configuring views, managing multiple accounts, setting Outlook options

1.2 Automate Outlook

This objective may include but is not limited to: changing quoted text colors, creating and assigning signatures, using Quick Steps, creating and managing rules, creating auto-replies

1.3 Print and Save Information in Outlook

This objective may include but is not limited to: printing messages, printing calendars, saving message attachments, previewing attachments, printing contacts, printing tasks, saving messages in alternate formats, creating data files

1.4 Search in Outlook

This objective may include but is not limited to: creating new search folders, searching for messages, searching for tasks, searching for contacts, searching calendars, using advanced find, using Search by Location

2.0 Manage Messages

2.1 Create a Message

This objective may include but is not limited to: creating messages, forwarding messages, deleting messages, adding/removing message attachments, adding cc and bcc to messages, adding voting options to messages, replying to all, replying to sender

only, prioritizing messages, marking as private, requesting delivery/read receipt, redirecting replies, delegating access

2.2 Format a Message

This objective may include but is not limited to: formatting text, inserting hyperlinks, applying themes and styles, inserting images, adding a signature to specific messages, formatting signatures, creating and using Quick Parts

2.3 Organize and Manage Messages

This objective may include but is not limited to: sorting messages, moving messages between folders, adding new local folders, applying categories, configuring junk e-mail settings, cleaning up messages, marking as read/unread, flagging messages, ignoring messages, sorting by conversation, setting attachment reminder options

3.0 Manage Schedules

3.1 Create and Manage Calendars

This objective may include but is not limited to: adjusting viewing details for calendars, modifying calendar time zones, deleting calendars, setting calendar work times, using multiple calendars, managing calendar groups, overlaying calendars, sharing calendars

3.2 Create Appointments, Meetings and Events

This objective may include but is not limited to: creating calendar items, creating recurring calendar items, cancelling calendar items, creating calendar items from messages, setting calendar item times, categorizing calendar items, using the scheduling assistant, changing availability status, scheduling resources, utilizing Room Finder

3.3 Organize and Manage Appointments, Meetings, and Events

This objective may include but is not limited to: setting calendar item importance, forwarding calendar items, configuring reminders, adding participants, responding to invitations, updating calendar items, sharing meeting notes

3.4 Create and Manage Notes, Tasks, and Journals

This objective may include but is not limited to: creating and managing tasks, creating and managing notes, attaching notes to contacts, creating journal entries, updating task status

4.0 Manage Contacts and Groups

4.1 Create and Manage Contacts

This objective may include but is not limited to: creating new contacts, deleting contacts, importing contacts from external sources, editing contact information, attaching an image to contacts, adding tags to contacts, sharing contacts, managing multiple address books

4.2 Create and Manage Groups

This objective may include but is not limited to: creating new contact groups, adding contacts to existing groups, adding notes to a group, updating contacts within groups, deleting groups, deleting group members