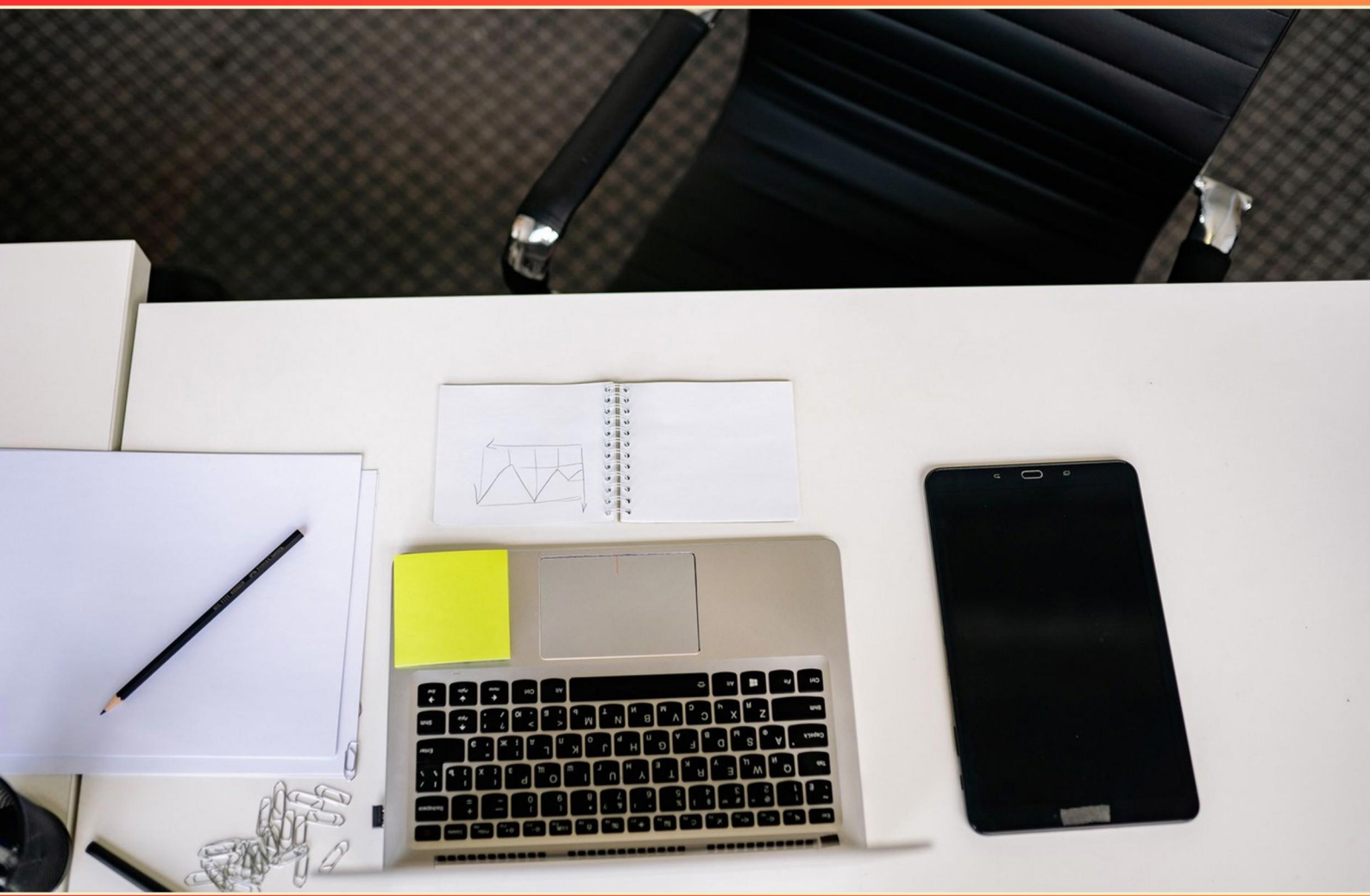
PROADVISOR CERTIFICATION PRACTICE TEST (SAMPLE)

STUDY GUIDE



SAMPLE STUDY GUIDE WITH LIMITED QUESTIONS

VISIT US ONLINE FOR THE FULL VERSION STUDY GUIDE

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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.

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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!

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Questions

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1. Which three items do NOT convert to QuickBooks Online using the built-in or standalone conversion tool?

A. Profit and Loss budgets

B. Balance sheet budgets

C. Audit trail

D. Closing date password

2. Where in QuickBooks Online Accountant would a client find the link to upgrade their subscription level?

A. Client account settings section

B. Subscriptions and billing section, Client-billed subscriptions tab

C. Billing history section

D. Client management section

3. If a customer refuses to pay an invoice that has sales tax on it, what is the best way to deal with it for a cash-basis client?

A. Write off the invoice immediately

B. Leave the invoice as is

C. Adjust the invoice amount

D. Refund the sales tax

4. Which of the following statements about running reports with tags is true?

A. Only the primary user can create tag-based reports

B. All subscribers of QuickBooks Online can create tag-based reports

C. Reports can only show tags individually

D. Tags do not affect reporting capabilities

5. Which item type would you assign to a gift basket of beauty products in QuickBooks Online?

A. Service

B. Product

C. Bundle

D. Package

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6. When adding a new vendor, which field should almost always be left blank?

A. Company

B. Address

C. Website address

D. Opening balance

7. How does organizing properties as sub-customers help a handyman manage tasks?

A. It allows for group invoicing

B. It simplifies tracking of specific job expenses

C. It increases the number of billed transactions

D. It enables bulk discounts for clients

8. Which chart type is not available in the Performance center visualization options?

A. Pie chart

B. Histogram

C. Line chart

D. Stacked bars

9. What should be checked when dealing with unreconciled accounts?

A. Whether transactions have been accidentally deleted

B. If the bank statement and records match

C. How often the reconciliation process is performed

D. If all transactions are recorded in the correct time frame

10. Which four visualization options can be found in the Performance center?

A. Vertical bars

B. Circular chart

C. Histogram

D. Stacked bars

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Answers

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

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Explanations

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1. Which three items do NOT convert to QuickBooks Online using the built-in or standalone conversion tool?

A. Profit and Loss budgets

B. Balance sheet budgets

C. Audit trail

D. Closing date password

The selected answer regarding Profit and Loss budgets not being converted to QuickBooks Online is indeed relevant when discussing the specifics of what the conversion tools can handle. When transitioning to QuickBooks Online, the built-in or standalone conversion tools have limitations on certain features and data types. Profit and Loss budgets are typically related to specific settings and configurations in the accounting system. QuickBooks Online, while robust in functionality, does not preserve some of the intricate budget settings from QuickBooks Desktop, making it necessary for users to set up their Profit and Loss budgets anew in the online environment. In this scenario, it's important to understand the implications of data migration in accounting software. Various budget types have unique structures and methods of handling that may not directly transfer over from one platform to another, often leading to some data needing to be manually recreated or reconfigured to align with the new system's framework. Considering other items mentioned, while Balance sheet budgets, Audit trails, and Closing date passwords are indeed key elements of financial management and security, they have differing levels of compatibility and retention within the conversion process. Each has its own handling mechanism, resulting in varying experiences for users migrating to QuickBooks Online. Thus, identifying specific types of budgets that are not carried over, such as

2. Where in QuickBooks Online Accountant would a client find the link to upgrade their subscription level?

A. Client account settings section

B. Subscriptions and billing section, Client-billed subscriptions tab

C. Billing history section

D. Client management section

The link to upgrade their subscription level in QuickBooks Online Accountant is located in the subscriptions and billing section, specifically within the client-billed subscriptions tab. This area is designed to provide clients with comprehensive information about their subscription plan, including options to manage billing and upgrade their services as needed. By accessing this section, clients can review their current subscription details and seamlessly initiate an upgrade to a higher tier that meets their business needs. The other options do not offer the same level of direct access to subscription management. For instance, the client account settings section typically pertains to personal information and account modifications rather than billing specifics. The billing history section focuses on past transactions and payments, which wouldn't facilitate an upgrade process. The client management section is more concerned with overall client administration instead of financial or subscription details. Hence, the most relevant and direct way for clients to find the subscription upgrade link is through the specified subscriptions and billing area.

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3. If a customer refuses to pay an invoice that has sales tax on it, what is the best way to deal with it for a cash-basis client?

A. Write off the invoice immediately

B. Leave the invoice as is

C. Adjust the invoice amount

D. Refund the sales tax

For a cash-basis client, the best approach when a customer refuses to pay an invoice that includes sales tax is to write off the invoice immediately. This method accurately reflects the reality of the client's accounting situation. Cash-basis accounting recognizes income and expenses only when cash is exchanged. Therefore, if the customer is refusing to pay, the business has not received that income, and keeping the invoice on the books could misrepresent the financial state of the business. Writing off the invoice removes it from the accounts receivable balance and acknowledges that no cash was ultimately received from that transaction. This action helps maintain accurate financial reporting, ensuring the business's books reflect only actual income received. Choosing to leave the invoice as is could lead to inaccuracies in financial reporting, as it would suggest that the amount is still potentially collectible. Adjusting the invoice amount could have complications, particularly regarding tax records and compliance, as the original tax liability must be accounted for correctly. Refunding the sales tax does not address the issue of the unpaid invoice itself and may not be appropriate if the customer refuses to pay the entire invoice. In summary, writing off the invoice is the most straightforward and compliant method to address this situation within cash-basis accounting.

4. Which of the following statements about running reports with tags is true?

A. Only the primary user can create tag-based reports

B. All subscribers of QuickBooks Online can create tag-based reports

C. Reports can only show tags individually

D. Tags do not affect reporting capabilities

The correct statement is that all subscribers of QuickBooks Online can create tag-based reports. This indicates that anyone with a subscription, regardless of their user role, has the capability to utilize tags in their reporting features. Tags are a flexible tool in QuickBooks Online that help organize and categorize transactions, allowing users to create customized reports based on various tags. This capability enhances reporting by providing more granular insights into financial data, which can be crucial for managing business operations effectively. It's also important to note that all users can access these functionalities, promoting a collaborative environment where different team members can interact with the data meaningfully. The other statements do not hold true in this context. Limitations concerning who can create reports or how tags can be applied would unnecessarily restrict reporting capabilities and diminish the usability of the QuickBooks Online platform. Instead, the actual design empowers all users to leverage tags for comprehensive reporting, thereby enhancing analytical capabilities.

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5. Which item type would you assign to a gift basket of beauty products in QuickBooks Online?

A. Service

B. Product

C. Bundle

D. Package

The correct choice of assigning a gift basket of beauty products as a Bundle in QuickBooks Online is due to the nature of the item itself. A Bundle is a collection of multiple individual items that are sold together as a single package. In this case, a gift basket contains various beauty products, and it makes logical sense to group these items into one saleable unit. This allows for easier inventory management and streamlined sales processing, as you can sell the assortment of items at once rather than tracking each product individually. Choosing a Bundle also allows you to set a specific price for the entire package, which can be more appealing for customers looking to purchase a gift. This approach simplifies accounting and reporting as the sales of that Bundle could be easily tracked under a single item, thus facilitating better financial management. Other types like Service, Product, and Package do not fully capture the essence of what a gift basket represents in this scenario. A Service might typically refer to labor or non-tangible offerings, while a Product would refer to a single item rather than a collection. A Package is not a standard term used in QuickBooks Online for categorizing items in this context, making Bundle the most fitting choice.

6. When adding a new vendor, which field should almost always be left blank?

A. Company

B. Address

C. Website address

D. Opening balance

When adding a new vendor, the field for opening balance should almost always be left blank because it typically reflects amounts that are due to the vendor or amounts that the vendor owes. This field is particularly relevant when transitioning from another accounting system where historical balances might be imported. However, for most new vendor setups, there is no historical data related to the opening balance since the vendor relationship is just starting. Leaving the opening balance field blank helps avoid potential confusion or inaccuracies in financial reporting, especially if there is no pre-existing balance that needs to be accounted for. In contrast, the company name, address, and website address are foundational details that help identify and communicate with the vendor, making them essential for any new vendor entry. Therefore, the opening balance is the field most commonly left blank when establishing a new vendor profile.

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7. How does organizing properties as sub-customers help a handyman manage tasks?

A. It allows for group invoicing

B. It simplifies tracking of specific job expenses

C. It increases the number of billed transactions

D. It enables bulk discounts for clients

Organizing properties as sub-customers is advantageous for a handyman because it simplifies the tracking of specific job expenses. When properties are set up as sub-customers, each property can maintain its own distinct records, making it easier to monitor expenses associated with each job. This organization helps ensure that all costs related to a specific property or project are accurately recorded and can be assessed individually, which can be crucial for budgeting, invoicing, and profitability analysis. By enabling better tracking of expenses for each job, the handyman can more effectively manage their finances and assess the overall performance of their work on each property. This level of detail can also assist in providing clients with detailed invoices that reflect precisely how their money is being spent, fostering transparency and trust. The other options, while potentially beneficial in different contexts, do not directly relate to how organizing properties helps in managing task-related expenses. Group invoicing focuses on billing methods rather than expense management, increasing billed transactions does not necessarily relate to effective organization of customer data, and bulk discounts are more about pricing strategies than expense tracking.

8. Which chart type is not available in the Performance center visualization options?

A. Pie chart

B. Histogram

C. Line chart

D. Stacked bars

The line chart is not available in the Performance Center visualization options. The Performance Center typically focuses on presenting data in ways that emphasize comparisons and distributions rather than trends over time. Pie charts effectively show proportions, histograms display frequency distributions, and stacked bars highlight cumulative values across categories, making them more suitable for the kind of analysis expected within that context. By contrast, while line charts are excellent for visualizing trends across time series data, they do not align with the primary objectives of the Performance Center, which centers on understanding performance metrics at a glance. Therefore, line charts are intentionally excluded to ensure the visualizations provided are relevant and tailored for performance analysis.

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9. What should be checked when dealing with unreconciled accounts?

A. Whether transactions have been accidentally deleted

B. If the bank statement and records match

C. How often the reconciliation process is performed

D. If all transactions are recorded in the correct time frame

When dealing with unreconciled accounts, it is essential to check if the bank statement and records match. This process is fundamental to the reconciliation procedure, which involves ensuring that the transactions recorded in the accounting software align with those presented in the bank statement. Discrepancies may indicate errors, missing transactions, or even fraudulent activity, making this step critical in identifying issues and maintaining accurate financial records. Focusing on this aspect helps prevent mistakes that can arise from unrecognized or unreconciled differences between internal records and actual bank transactions. It sets the foundation for resolving issues that contribute to the unreconciled status of accounts, ultimately ensuring the integrity of the financial data. Checking the alignment of bank statements with transaction records is a best practice for promoting accuracy in financial management.

10. Which four visualization options can be found in the Performance center?

A. Vertical bars

B. Circular chart

C. Histogram

D. Stacked bars

The Performance Center provides users with various visualization options to help interpret and analyze financial data effectively. Among the options, vertical bars serve as a fundamental visualization tool, enabling users to display and compare categories of data clearly. Vertical bar charts are particularly useful for showing changes over time or comparing different groups, making data interpretation straightforward and intuitive. It's important to recognize that the other options, such as circular charts, histograms, and stacked bars, may also be valuable graphical representations in different contexts, depending on the nature of the data being analyzed. However, the primary focus in this instance is on the capabilities of the Performance Center specifically regarding vertical bars. This visualization is commonly used for straightforward comparisons while maintaining clarity in presentation, which is why it is included among the effective options in that context.

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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:

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

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