

# QuickBooks®

SMALL BUSINESS ACCOUNTING

## Quick Start Guide

### What to know before you start

#### First time installing QuickBooks?

- Relax—it's easy!
- We'll help you each step of the way.

#### Upgrading from a previous version of QuickBooks?

- Don't worry—installing WON'T affect your company file.
- You will be prompted to update your company file **after** installation.

#### Have questions about setting up or upgrading QuickBooks for multiple users?

- Check out the included multi-user checklist.

### 1 Start installation



Put the QuickBooks CD in your CD drive

#### If the installer doesn't start automatically:

- Click **Start** from your Windows menu (bottom left of your screen)
- Choose **Run**
- Type **D:\setup.exe** (where D is your CD drive)
- Click **OK**

We'll ask you some questions to help you install QuickBooks. The next steps highlight some of your key choices.

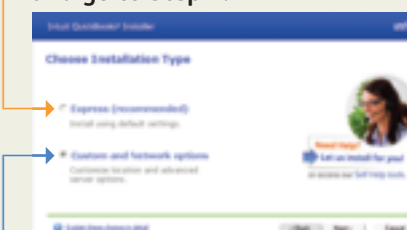
### 2 Choose installation type



Let the Installer make all the right choices for you

We recommend most users choose this option.

If you choose this option, click **Next** and go to Step 4.



**Custom and Network Options:**

Customize the install options and location.

If you choose this option, go to Step 3.

### 3 Make multi-user choices

#### Custom and Network Options



#### Which option should I select?

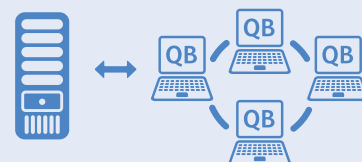
If **you** use QuickBooks on this computer and this computer DOES NOT share company files with other computers (This can be changed later.)

**Choose:** I'll be using QuickBooks on this computer.



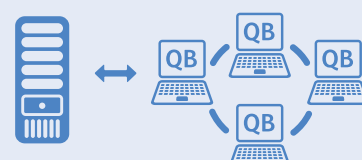
If **you** use QuickBooks on this computer and this computer DOES share company files so other users on the network can open them (This can be changed later.)

**Choose:** I'll be using QuickBooks on this computer, AND I'll be storing our company file here so it can be shared over our network.



If no one uses QuickBooks on this computer and it only stores company files that other users open across the network, this will install the QuickBooks Database Manager only and does not require a license.

**Choose:** I will NOT be using QuickBooks on this computer. I'll be storing our company file here so it can be shared over our network.



### 4 Choose where to install

#### Choose installation folder



#### We recommend that

##### New users

Accept the suggested folder to install QuickBooks

##### Upgraders

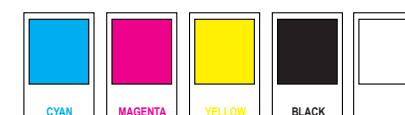
Replace your previous version of QuickBooks unless you need to have more than one version installed. This will NOT overwrite your company file.

**Note:** The installer will select one of the options, based on existing versions of QuickBooks found on the computer.

##### Accountants

**Choose the first option, accept the default folder** and DO NOT overwrite your previous version if you need to use multiple versions.

Turn over for next steps



## Next steps for new users



### Start QuickBooks

Double-click the **QuickBooks** icon on your desktop.

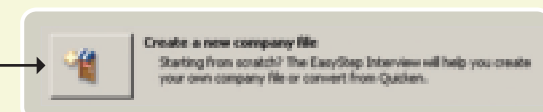
### Create your company file

Creating your company file and setting it up for your business takes about 30 minutes.

**Tip:** Gather this information before you create your company file:

- Company name and address
- Federal Tax ID number
- Most recent bank and credit card statements

Click **Create a new company file**



Click **Start Interview and answer the questions**



### Learn & use QuickBooks

Check out the interactive tutorials and documentation to learn how to use QuickBooks



Get started with step-by-step coaching tips



New User Setup makes importing your contacts easy and helps you get started with your first tasks.

## Frequently Asked Questions

### I may need help. How do I get it?

For help getting QuickBooks installed, visit our online Installation and Upgrade Center at [www.usequickbooks.com/getstartedright](http://www.usequickbooks.com/getstartedright)

If you need further help and want to talk to a trained QuickBooks expert, personalized assistance is available for a fee. Go to:

[www.quickbooks.com/contactsupport](http://www.quickbooks.com/contactsupport)

Accountants go to: [www.accountant.intuit.com/helpme](http://www.accountant.intuit.com/helpme)

To get answers to questions about using the product, you can ask the Intuit Community, which consists of experts and users, or use the in-product help.

### How do I get hands-on help setting up or customizing QuickBooks?

Use a local Certified QuickBooks expert to help you customize QuickBooks for your unique needs and help you get the most out of the software (fees apply). Find a local expert at [www.findaproadvisor.com](http://www.findaproadvisor.com)

### Are there any resources available to me?

Yes. You can take advantage of Intuit's wide range of free resources for small businesses—including the Intuit Community.

Visit us at [www.community.intuit.com](http://www.community.intuit.com) to:

- Get help with Intuit products
- Start and grow your business
- Get help for Accountants

Accountants visit [intuitaccountants.com](http://intuitaccountants.com) to connect with other accounting professionals about accounting, tax topics and product questions

### How do I add additional users to QuickBooks?

You can buy additional QuickBooks licenses in three ways:

- In QuickBooks, go to the **Help** menu, click **Manage My License** and click **Buy Additional User License**
- Call Intuit Sales at **1-800-316-1370**
- Accountants call Intuit Sales at: **1-800-267-8379**

## Next steps for upgraders



### Start QuickBooks

Double-click the QuickBooks icon on your desktop.

### Open your current company file

QuickBooks automatically opens your existing company file and prompts you to back up. Then, your company file is updated to the latest version of QuickBooks.

If it doesn't open, click **Open an existing company file**



Updating your company file takes about 15 minutes.

### Learn about new QuickBooks features

Go to the Learning Center to learn about new features in QuickBooks



## Frequently Asked Questions

### I may need help. How do I get it?

For help getting QuickBooks installed, visit our online Installation Center at [www.usequickbooks.com/getstartedright](http://www.usequickbooks.com/getstartedright)  
Accountants go to: [www.accountant.intuit.com/helpme](http://www.accountant.intuit.com/helpme)

To get answers to questions about using the product, you can ask the Intuit Community, which consists of experts and users, or use the in-product help.

Visit the QuickBooks Support Website at [www.quickbooks.com/support](http://www.quickbooks.com/support) to search or browse thousands of detailed support topics and frequently asked questions.

### My password isn't working. What should I do?

- Log in using Admin as your login name
- Click OK without using a password
- Enter your password with the Caps Lock key ON; then OFF
- Repeat previous steps with the Num Lock key ON; then OFF
- Enter password variations, using mixed upper- and lower-case characters
- Enter a space before or after the actual password

If you still can't access your file, visit the Password Recovery website:

[www.quickbooks.com/passwordreset](http://www.quickbooks.com/passwordreset)

### How do I move my company file from one computer to another?

- Go to the **Help** menu in your QuickBooks software and click **QuickBooks Help**.
- Enter "move a company file" in the search field.
- In the search results, click **Use a portable company file** to e-mail or move a company file.

### How do I add additional users to QuickBooks?

- In QuickBooks, go to the **Help** menu, click **Manage My License** and click **Buy Additional User License**
- Call Intuit Sales at **1-800-316-1370**
- Accountants: Call Intuit Sales at **1-800-267-8379**

