

intuit®

QuickBooks®

SMALL BUSINESS ACCOUNTING

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**Installation and  
Setup Guide**



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**My QuickBooks License Number:** \_\_\_\_\_

**My QuickBooks Product Number:** \_\_\_\_\_



### Welcome

Welcome to QuickBooks. Whether you've been running your business for years or are just starting out, having an organized, efficient way to manage your business can save you time, money, and a lot of frustration.

Use this *Installation and Setup Guide* to get up and running as fast as possible.

**Note:** Since this guide covers multiple editions of QuickBooks, the name "QuickBooks" is used to refer to any of these editions. When information in this guide applies to a specific edition of QuickBooks, the specific edition name will be used.

### What's in this guide:

#### Page

2	Hardware and software requirements
4	QuickBooks installation
4	Registering QuickBooks
5	Upgraders: update your company file
7	New users: create your company file
8	Converting data from other applications
9	Reviewing and completing your company setup
12	Frequently Asked Questions

## Hardware and Software Requirements

The following is an overview of the minimum system requirements for QuickBooks. For the most accurate and up to date list of requirements, visit [www.quickbooks.com/installation](http://www.quickbooks.com/installation).

### Processor, memory, and disk space for QuickBooks Pro and Premier on Windows 7, Vista, or XP

- At least 2.0GHz processor (2.4GHz recommended)
- At least 1GB of RAM for a single user
- At least 2GB of RAM for multiple, concurrent users
- 2.5GB of disk space (additional space required for data files)

### Disk space requirements for additional software

- 250MB for Microsoft .NET 4.0 Runtime, provided on the QuickBooks CD

### Additional hardware and software

- Operating systems supported (U.S. versions with Regional Language set to U.S. English recommended):
  - Windows 7 (including 64-bit)
  - Windows XP (SP3 or later)
  - Windows Vista (SP1 including 64-bit)
- 4x CD-ROM drive required for CD installations
- 1024x768 or higher screen resolution is required

### Database server requirements

- Microsoft Windows XP (SP3 or later), Vista (SP1 w/UAC on), 7 (w/UAC on), Windows Server 2003 (SP2), Windows Server 2008, Small Business Server 2008
- Linux is supported for Enterprise Solutions only (Fedora 15)

### File server only requirements

Novell Small Business server or Linux file servers can be used with advanced configuration; performance will be impacted on networks running less than 100Mbps.

## Installation and Setup Guide

### Integration/compatibility requirements

QuickBooks is capable of integrating with hundreds of 3rd party applications (see [www.marketplace.intuit.com](http://www.marketplace.intuit.com) for the most up-to-date list) in addition to the following standard integrations provided with QuickBooks:

- Preparing letters requires Microsoft® Word 2003, 2007 or 2010 (including 64-bit)
- Exporting reports requires Microsoft® Excel 2003, 2007 or 2010 (including 64-bit)
- Contact Synchronization with Microsoft® Outlook requires Outlook 2003, 2007, or 2010 (including 64-bit), and QuickBooks Contact Sync for Outlook (downloadable for free from: [www.quickbooks.com/contact\\_sync](http://www.quickbooks.com/contact_sync))
- Compatible with QuickBooks Point of Sale v7.0 and later

### Using firewall or anti-virus software

If firewall software is running while you install QuickBooks, you may be prompted to allow QuickBooks components to have access to the network. For QuickBooks to operate properly (especially in a multi-user environment) these components must be allowed to access the network.

For more information see: <http://support.quickbooks.intuit.com/support/Articles/SLN41458>

### Multi-user installation requirements

QuickBooks Premier enables up to five users to access company files on a network at the same time (QuickBooks Pro allows three). In a multi-user environment, QuickBooks (or the QuickBooks Database Server Manager) must be installed on the computer on which the company file is stored. Each user must:

- Have a valid License Number and Product Number.
- Install the same version year of QuickBooks. For example, all users must have QuickBooks 2012.
- Have read/write access and create/delete rights to the directory where the company file is stored.

To enable other users to work in the company file, the company file must be stored on a computer on your network (or dedicated server), and you need to complete additional steps on the computer where the company file is stored.

**Note:** *You are allowed to install a single license of QuickBooks on a user's computer as well as the included QuickBooks Database Server Manager on a dedicated server (where the company file is stored). During installation on a dedicated server, choose Custom and Network Options. Select I will NOT be using QuickBooks on this computer.*

## QuickBooks Installation

This section explains how to install QuickBooks and how to begin using the program.

### To install and start QuickBooks:

- 1 Close all running programs, including anti-virus programs.
- 2 If you have the QuickBooks installation CD:
  - Insert it to get started. If the installer doesn't start automatically:
    - Click the Windows **Start** button (bottom left of your screen).
    - Choose **Run**.
    - Type `D:\setup.exe` (where D is your CD drive).
    - Click **OK**.

If you downloaded QuickBooks, launch the QuickBooks setup file.

- 3 Follow the onscreen instructions.
- 4 To start QuickBooks, double-click the QuickBooks icon  on the desktop or click the Windows Start button and then click QuickBooks from the Programs group.

**Note:** If you encounter problems when installing QuickBooks or have specific installation questions, refer to *Frequently Asked Questions* on page 12. You can also visit the QuickBooks Install Center at <http://www.quickbooks.com/installation>.

## Registering QuickBooks

You can use QuickBooks for 30 days without registering. After 30 days, you must register.

Go to the **Help** menu and click **Register QuickBooks**. If web registration is not successful, you can register by phone. The QuickBooks registration line is available from 5:00 a.m. to 6:00 p.m. (Pacific Standard Time), 7 days a week. Within the U.S. call toll free 1-800-316-1068. Outside the U.S., call 1-520-901-3220.

If you add additional users to your license, you can update your license information by going to the Help menu, clicking **Manage My License**, and then clicking **Sync License Data Online**.

**Note:** If you choose to install QuickBooks on a second computer, or if you need to move your installation to another computer, you will need to re-register QuickBooks.

### What's next?

If you already have a QuickBooks company file, see page 5 for instructions on updating your company file. If you don't have a QuickBooks company file, you need to set up your QuickBooks company file using the instructions on page 7. If you are converting from Quicken, Peachtree or Microsoft Small Business/Office Accounting, convert your data file into a QuickBooks company file using the instructions on page 8.

### Upgraders: Update Your Company File

This section describes how to update a company file created in a previous version of QuickBooks for Windows.

Back up your data before opening it in a new version of QuickBooks.

**Caution** Once you update an existing company file to QuickBooks 2012, you can't read or use that file in an older version of QuickBooks software.

#### To update your QuickBooks file:

- 1 In QuickBooks 2012, open the company file you used with your previous version of QuickBooks.
- 2 If prompted, enter the Administrator password.
- 3 When prompted, select the "I understand that my company file will be updated to this new version of QuickBooks" checkbox and then click **Update Now**.
- 4 When prompted to back up your data, click **OK**.
- 5 In the Create Backup window, follow the onscreen instructions to back up your company file.  
**Important:** This backup should create a new backup file. Do not overwrite existing backups.
- 6 When prompted to confirm that you want to update your file, click **Yes**.

#### Did You Know?

##### *Back up your previous accounting system*

If you have an existing business, make sure that you've backed up your financial records from your previous accounting system. The IRS requires you to keep this information for 10 years. You should also keep any software and hardware that your previous accounting system used, or have printouts of all the information and accounting reports.

##### *Troubleshoot error messages*

If you receive an error message during installation, and restarting your system does not resolve the problem, you can search for information about the error message at: [www.quickbooks.com/installation](http://www.quickbooks.com/installation).

### If an update problem occurs

If the update fails, you must perform steps in your previous version of QuickBooks to fix the problem. If you removed your previous version of QuickBooks, reinstall it to a new directory and do not uninstall QuickBooks 2012.

#### In QuickBooks 2012:

- 1 Choose **File > Utilities > Restore Backup For Earlier QuickBooks Version**.
- 2 Click the  button next to the **Backup filename** field.
- 3 Find and select the QuickBooks backup made during the update process and then click **Open**. The default location is where you last selected to save backup company files.
- 4 Click the  button next to the **Restored filename** field.
- 5 In the **Save in list**, select the folder where you want to save the restored company file.  
For convenience, save the restored file to your Windows desktop.
- 6 Enter a unique name for the restored file in the **File name** field (you don't want to overwrite an existing company file), and then click **Save**.
- 7 Click **OK**.

#### In your previous version of QuickBooks:

- 8 Open your previous version of QuickBooks, select **File > Open or Restore Company**, then choose **Open a company file**. Navigate to the file you just restored to your Desktop and open it.
- 9 Choose **File > Utilities > Rebuild Data** and follow the onscreen instructions.

**Caution** The Rebuild Data Utility forces you to create another backup. Enter a new file name (for example pre-update2012.qbb). Do not overwrite any existing backups.

- 10 After the Rebuild is complete (which might take a long time depending on the size of your company file), exit your previous version of QuickBooks.
- 11 Start QuickBooks 2012.
- 12 Go to the **File** menu and click **Open or Restore Company**.
- 13 Select the newly rebuilt Company file on your Desktop and click **OK**.

The update should take place normally. If you still experience update problems, visit [www.quickbooks.com/installation](http://www.quickbooks.com/installation).

### New Users: Create Your Company File

**Note:** If you are converting financial data from Quicken, Peachtree, or Microsoft Small Business/Office Accounting, see page 8.

The first thing you need to do in QuickBooks is create a **company file** for your business.

Creating a company file is quick and easy to complete.

#### To create your company file:

- 1 Start QuickBooks by double-clicking the QuickBooks icon  on the desktop or clicking the Windows **Start** button and then clicking **QuickBooks** from the **Programs** group.
- 2 Click **Create a new company**, or go to the **File** menu and click **New Company**.
- 3 Click the **Express Start** button.

**Note:** For a more fine-tuned setup process, click **Guided Start**. *Guided Start* collects more information to help customize QuickBooks to better suit your needs. You can easily turn on available features you need and turn off features you don't need.

- 4 Follow the onscreen instructions.

#### Did You Know?

##### **Company file**

The company file is the data file that QuickBooks uses to store and manage all the information and financial transactions for your business. QuickBooks company files have the extension **.qbw**.

##### **Choosing where to store your company file in a multi-user environment**

Choose a location for your company file where all the computers that need to use QuickBooks can access the file. If you don't have a dedicated server, consider putting the company file on the computer of the person who most frequently uses QuickBooks. This enables that person to have the fastest access to the company file.

##### **Improving performance in multi-user mode**

To improve QuickBooks performance in multi-user mode, consider these tips:

- Store company files on a dedicated server or the fastest computer in your office.
- Run reports during off-peak hours.
- Close other programs or windows when not in use.

## Converting data from other applications

If you are converting financial data from another application, refer to the instructions below for the appropriate application.

### Quicken

Converting a Quicken file is easy, but may require some preparation or post-conversion steps. Detailed instructions about converting Quicken files to QuickBooks files are provided online. Visit <http://support.quickbooks.intuit.com/support/Articles/HOW12609>.

**Note:** You can't create a new QuickBooks company file and then import your Quicken data into it.

**To convert your Quicken file to QuickBooks:**

- 1 Go to the **File** menu, click **Utilities > Convert > From Quicken**.
- 2 Click the **Convert** button and follow the onscreen instructions.

### Peachtree

To convert from Peachtree to QuickBooks, you need to download and run a separate conversion tool.

**Note:** QuickBooks must be installed on your computer before you run the conversion tool.

**To convert from Peachtree to QuickBooks:**

- 1 Go to the **File** menu, click **Utilities > Convert > From Peachtree**. Click **Yes** to download the QuickBooks Conversion Tool.
- 2 Scroll down, complete the short form, and click **Submit**.
- 3 Click **Download**.
- 4 Run or open the downloaded file to install the Conversion Tool.
- 5 Open the QuickBooks Conversion Tool from the Windows Start menu or double-click the Desktop shortcut.
- 6 Follow the onscreen instructions to complete the conversion.

## Installation and Setup Guide

### Microsoft Small Business/Office Accounting

To convert from Microsoft Small Business/Office Accounting to QuickBooks, you need to download and run a separate conversion tool.

**Note:** QuickBooks must be installed on your computer before you run the conversion tool.

**To convert from Microsoft Small Business/Office Accounting to QuickBooks:**

- 1 Go to the **File** menu, click **Utilities > Convert > From Microsoft Small Business Accounting** or **From Microsoft Office Accounting**. Click **Yes** to download the QuickBooks Conversion Tool.
- 2 Scroll down, complete the short form, and click **Submit**.
- 3 Click **Download**.
- 4 Run or open the downloaded file to install the Conversion Tool.
- 5 Open the QuickBooks Conversion Tool from the Windows Start menu or double-click the Desktop shortcut.
- 6 Follow the onscreen instructions to complete the conversion.

### Reviewing and completing your company setup

Depending on your business, there may be a few additional tasks to complete. Review the information in this section to ensure your company file is properly set up and that your data is complete.

#### QuickBooks Setup

After you've created your company file, QuickBooks Setup steps you through adding critical information into QuickBooks, such as:

- The people you do business with (so you can invoice your customers, pay your vendors, and track your employees)
- The products and services you sell
- Your bank accounts

Follow the onscreen instructions and then click the **Start Working** button.

#### Quick Start Center

Use the Quick Start Center to complete common startup tasks. Create invoices or enter sales receipts to track money coming in. Enter bills or write checks to track money going out. You can also view customer and vendor account balances.

#### Review your Chart of Accounts

During the QuickBooks Setup process, QuickBooks created a chart of accounts based on your type of business. Review the chart of accounts to be sure it accurately reflects the accounts you need to run your business. You can change account names and edit, delete, or add accounts as necessary. For example, you may need to add any business-related bank, credit card, or loan accounts. To view your chart of accounts, go to the Lists menu and click Chart of Accounts.

## Enter historical transactions

If you want your reports to include information from the past, you'll need to enter historical information. Select a date in the past as your start date.

You'll need to enter past transactions from the start date to today. This ensures that your QuickBooks records are completely up-to-date and your reports are accurate.

Enter historical transactions in chronological order within each transaction type. For example, QuickBooks won't know how to apply a customer payment unless you've previously recorded the invoice to that customer. So, enter your past customer invoices in order from your start date to today's date.

**Note:** *Entering historical transactions is especially important if customers don't pay you at the time they receive goods or services. If you don't enter historical transactions, QuickBooks can't help you track and collect late customer payments for those past transactions.*

Intuit recommends that you enter your transactions in this order (verify with accountant):

- Invoices you've sent out since your start date
- Purchase orders you've issued since your start date that you haven't received in full
- Cash or checks you've received since your start date
- Deposits you made before your start date but that didn't appear on statements before your start date
- Bills you've received since your start date
- Bills you've paid since your start date
- Deposits you've made to any of your accounts since your start date
- Any other checks or payments you've made (for things other than bills) since your start date
- Checks or other charges that happened before your start date but didn't appear on statements before your start date (i.e., didn't clear)
- Bank charges and fees
- Interest paid on your accounts
- Employee year-to-date information paid from January 1 through your start date
- Payroll liabilities owed at the time of your start date (for manual payroll and tracking payroll transactions only)

**Note:** *If you don't have time to enter all your historical transactions right away, don't worry. You don't need to enter all your past transactions before you start using QuickBooks for new transactions. Enter new transactions as they occur. Then catch up with historical transactions when you can. Remember, though, that your account balances will be incorrect (and your reports may be wrong) until you enter all the past transactions.*

**Note:** *If you subscribe to a QuickBooks payroll service, you will be asked to add year-to-date payroll information during payroll setup. If you do not provide this information, your payroll tax information may not be accurate.*

Refer to the in-product Help for step-by-step instructions on how to enter these transactions to make your account registers accurate.

## Installation and Setup Guide

### Enter any optional adjustments

After you've created your company file, you might need to make a few adjustments as of your start date. Depending on your company, you might need to:

- Enter any sales tax liabilities
- Adjust the Uncategorized Income and Uncategorized Expense accounts (accrual basis only)
- Adjust for current income and expenses if your start date is not at the beginning of the fiscal year

Refer to the in-product Help for step-by-step instructions on how to enter these optional adjustments. If you are unsure whether you need to enter these optional adjustments, check with your accountant.

### Backing up your company file

The QuickBooks backup file is a compressed version of your QuickBooks company file that contains all transactions through the date the company backup was made. A backup file provides insurance against accidental data loss and can be used to restore your data. QuickBooks backups have a .qbb extension and cannot be opened directly.

To use one of the backup options, go to the **File** menu and click **Create Backup**.

To restore your backup, go to the **File** menu and click **Open or Restore Company**.

To learn more about backing up your company file, refer to the in-product Help.

### Did You Know?

#### *Historical transactions*

Any transactions between your start date and today. Historical transactions are entered to get complete financial information as of your start date and to get current uncollected or unpaid balances as of today. In QuickBooks, enter historical transactions such as:

- Estimates
- Invoices
- Sales receipts
- Customer payments
- Credit memos
- Purchase orders
- Bills
- Payments to vendors
- Credits with vendors
- Journal entries
- Payroll transactions

#### *E-mailing a company file*

The QuickBooks portable company file (\*.qbm) is a compact version of your company file. You can use the portable company file to move the company file to another computer or to e-mail the company file to another person, such as your accountant.

To learn more about the portable company file, refer to the in-product Help.

## Frequently Asked Questions

### What should I do if I have trouble installing QuickBooks?

- 1 Verify that your system meets the minimum system requirements, listed on page 2.
- 2 Restart your computer.
- 3 Close all open programs, including antivirus programs. Go to the Windows Task Manager, click the **Applications** tab, and close all open programs.
- 4 Try installing QuickBooks again.

If you need further installation assistance, visit [www.quickbooks.com/installation](http://www.quickbooks.com/installation).

### What should I do if I can't find my License Number or Product Number?

Look for the sticker on your QuickBooks CD folder. If you cannot find the QuickBooks CD folder but have QuickBooks installed on another computer, you can find your License Number and Product Number as follows:

- 1 Start QuickBooks on the other computer and open a company file.
- 2 Go to the **Help** menu and click **About QuickBooks**. Write down the numbers that appear on this screen. Use these numbers for the new installation.

If you are still unable to obtain your License Number and Product Number, you can request new numbers online:

- 1 Visit: <http://support.quickbooks.intuit.com/support/LicenseNumber/>

**Note:** QuickBooks no longer uses registration numbers. The only numbers you'll need are your product and license numbers.

### Can I install different versions of QuickBooks on the same computer?

**Yes.** You can install multiple versions of QuickBooks (for example QuickBooks 2012 and QuickBooks 2011) on the same computer.

### Can I revert to an earlier version of QuickBooks?

**Yes.** If you plan to use an earlier version of QuickBooks, do not uninstall QuickBooks 2012 until you restore the backup company file that was created when you updated your company file to QuickBooks 2012.

To restore your backup company file, follow the steps described in "If an update problem occurs" starting on page 6. If you uninstalled your previous version of QuickBooks, you'll need to reinstall it to complete the steps.

## Installation and Setup Guide

### Can I install QuickBooks on more than one computer?

The QuickBooks license agreement allows you to install QuickBooks on your primary computer and one additional computer as long as you are the only person using QuickBooks on both computers. For example, if you bought one copy of QuickBooks for your office, you can install it on your home PC or laptop as well. However, if multiple users will be accessing QuickBooks on multiple computers, then you must purchase an additional licensed copy for each user.

### What if I do not have Internet Explorer on my computer?

To use QuickBooks, you must have Microsoft Internet Explorer 7.0 or later installed. If you do not have any version of Microsoft Internet Explorer on your system, you can download the latest version from [www.microsoft.com](http://www.microsoft.com).

### What should I do if I get an error message during installation?

If you receive an error message during installation and restarting your computer does not resolve the problem, go to the QuickBooks Support Web site ([www.quickbooks.com/installation](http://www.quickbooks.com/installation)) to find solutions for common errors.

### What should I do if I get an error message when updating my company file?

If you receive an error message when updating your company file from a earlier version of QuickBooks, refer to the information in “If an update problem occurs” starting on page 6. You can also go to [www.quickbooks.com/installation](http://www.quickbooks.com/installation) for more assistance.

### What do I do if I have additional questions?

We've provided self-help resources to get your answers fast.

- **QuickBooks Learning Center:** The QuickBooks Learning Center<sup>1</sup> tutorials teach basic QuickBooks concepts and common tasks. Go to the **Help** menu and click **Learning Center Tutorials**.
- **In-product Help:** QuickBooks in-product Help provides context-sensitive Help as you work. Go to the **Help** menu and click **QuickBooks Help**, or just click **F1**. Then select a topic from the list, or search for a topic of interest.

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1. Internet access required for online services.

### Did You Know?

#### *Product Information window*

The **Product Information** window lists information about your software, including the number of entries you have in your lists, the size of your company file, which version of QuickBooks you are running, and the location of your company file. To open the **Product Information** window, open QuickBooks and press **F2** on your keyboard.

### How do I register my copy of QuickBooks?

Go to the **Help** menu and click **Register QuickBooks**. Follow the onscreen instructions.

### How do I purchase additional user licenses so I can add users to my QuickBooks?

You can add users to your QuickBooks in two ways:

- You can purchase additional copies of QuickBooks in a store or;
- You can buy additional user licenses by phone or web.

To add a license to your existing QuickBooks license by phone or web, go to the **Help** menu, click **Manage My License**, and then click **Buy additional user licenses**. Follow the onscreen instructions. For other QuickBooks purchasing questions, call **1-888-246-8848**.

### What should I do if I forget my password?

QuickBooks supports case-sensitive passwords. If you believe you are entering the correct password, but are still getting the message "The password you typed is incorrect," your password might include mixed-cased characters.

#### Try the following:

- Attempt to log in by entering the login name of `Admin` and then click **OK** without typing a password.
- Enter your password with Caps Lock or Num Lock turned on or off.
- Type the password in a text editor to confirm that your keyboard is functioning properly.
- Enter password variations, using mixed upper- and lower-case characters.
- Enter the password with a space before or after the actual password.

If you are still unable to access your file, click the "I forgot my password" link on the login screen and follow the steps.

**Note:** *Be sure to write down and save your administrator password in a secure place. Passwords not only protect your company data, but are also required to access your company file if you upgrade your version of QuickBooks.*

### How do I download and install an update or patch?

Periodically, Intuit provides updates to your current version of QuickBooks that you can download from the Internet. These updates can include a maintenance release (also known as a patch), a new service, or timely information that could be relevant to your business.

To download an update, go to the **Help** menu and click **Update QuickBooks**. Follow the onscreen instructions.

## Installation and Setup Guide

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

There are many ways to move a company file from one computer to another. However, we recommend using a USB Flash drive.

#### To move your company file:

- 1 Copy the company file to a USB Flash drive:
  - a. Go to the **File** menu and click **Open or Restore Company**.
  - b. Select **Open a company file**.
  - c. Click **Next**. QuickBooks opens the location of your company file.
  - d. Right-click your company file and click **Copy**.
  - e. Click **Cancel** to close the **Open a Company** window.
  - f. Insert a USB Flash drive into your computer.
  - g. Click the Windows Start button and select **Computer**.
  - h. Double-click to open your USB Flash drive.
  - i. Right-click inside this drive and click **Paste**.
- 2 Insert the USB Flash drive containing your company file into the other computer.
- 3 Copy the company file to the other computer:
  - a. Click the Windows Start button and select **Computer**.
  - b. Double-click to open your USB Flash drive.
  - c. Right-click your company file and click **Copy**.
  - d. Start QuickBooks.
  - e. Click the **File** menu and click **Open or Restore Company**.
  - f. Click **Open a company file**.
  - g. Click **Next**.
  - h. Right-click inside the **Open a Company** window and click **Paste**.
  - i. Select the company file and click **Open**.

### How often should I back up or restore my company file?

You should back up your QuickBooks company files daily. Backup copies are important insurance—if you should lose data for any reason, you can restore data from your backup copy. QuickBooks enables you to back up and restore your data in a number of ways.

To view detailed information about each backup and restore option, refer to the in-product Help.

#### To back up a company file:

- 1 Go to the **File** menu and click **Create Backup**.
- 2 Choose the backup option you want, click **Next**, and follow the onscreen instructions.

#### To restore a company file:

- 1 Go to the **File** menu and click **Open or Restore Company**.
- 2 Choose the restore option you want, click **Next**, and follow the onscreen instructions.

### How do I update my payroll to use the latest tax tables?

If you are a QuickBooks Payroll subscriber, you have two options for updating your tax tables. You can:

- Go to the **Employees** menu, click **Get Updates**, and then click **Get Payroll Updates**. Click **Update**.
- Turn on the Auto-update preference (**Help** menu > **Update QuickBooks**). When a new tax table is available, it will be downloaded automatically and you will be prompted to install.

Payroll updates may include compliance enhancements and updated payroll tax forms, as well as new tax tables. These payroll updates may become available throughout the year. We recommend that you check for updates at least every 45 days to make sure you have the most current tax table available.

Make sure that you download and install the latest payroll update before you pay employees for the first time.

### How do I add another company's EIN (Employer Identification Number) to an existing QuickBooks Payroll subscription?

**To add an EIN for another company:**

- 1 Go to the **File** menu, click **Open or Restore Company**, and then choose the company file you want to add.
- 2 Go to the **Employees** menu, click **Payroll Service Activities**, and then click **Use my existing Payroll service subscription**. When asked if you want help setting up payroll in QuickBooks, click **Yes**.
- 3 When asked to identify your subscription, follow the onscreen instructions.
- 4 Click **Add To Subscription** and then click **Next**.
- 5 Enter and confirm the new EIN to be associated with your existing subscription.
- 6 Click **Done**.

When you finish the onscreen instructions, QuickBooks will update your subscription in the new company file. You can run payroll immediately.

**Note:** QuickBooks Enhanced Payroll can process payroll for up to three businesses (EINs) on the same payroll subscription. QuickBooks Enhanced Payroll for Accountants can process payroll for up to 50 EINs on the same payroll subscription. (Fees apply for both payroll services and prices and service offerings are subject to change).

# Installing QuickBooks



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18

