intuit.

QuickBooks®
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
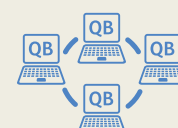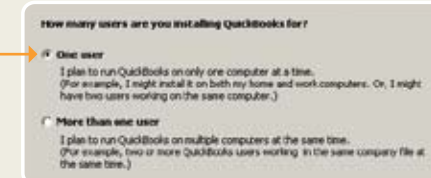
If the installer doesn't start automatically:
- Click **Start** from your Windows menu (bottom left of your screen)
- Choose **Run**
- Type **D:\setup.exe** (where D is your CD drive)
- Click **OK**

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

2 Choose number of users

One user: Most people choose this option
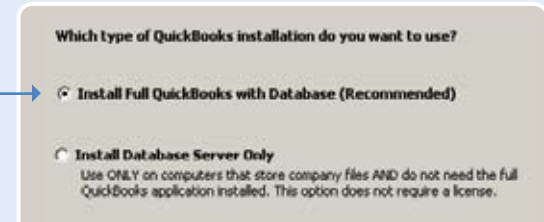If you choose this option, skip to Step 4.

> How many users are you installing QuickBooks for?
> - **One user**
>   I plan to run QuickBooks on only one computer at a time. (For example, I might install it on both my home and work computers. Or, I might have two users working on the same computer.)
> - **More than one user**
>   I plan to run QuickBooks on multiple computers at the same time. (For example, two or more QuickBooks users working in the same company file at the same time.)

More than one user: (on a network)
Install QuickBooks on multiple computers so more than one person can use it at the same time.

If you choose this option, go to Step 3.

Don't worry—you can change these settings later, if you like.
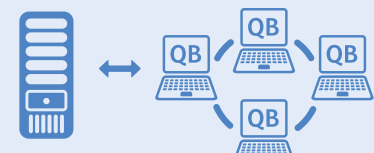
3 Make multi-user choices

Choose install type

> Which type of QuickBooks installation do you want to use?
> - **Install Full QuickBooks with Database (Recommended)**
> - **Install Database Server Only**
>   Use ONLY on computers that store company files AND do not need the full QuickBooks application installed. This option does not require a license.

More than one user: Most people choose Install Full QuickBooks with Database

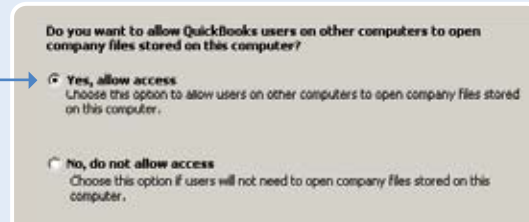**When should I choose Install Database Server Only?**
Use this advanced option only if you want your company file to be located on a separate database server where you will not run QuickBooks.

Users on your network run QuickBooks on their computers, but update the company file on the database server only.

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

Choose user access

> Do you want to allow QuickBooks users on other computers to open company files stored on this computer?
> - **Yes, allow access**
>   Choose this option to allow users on other computers to open company files stored on this computer.
> - **No, do not allow access**
>   Choose this option if users will not need to open company files stored on this computer.

Select Yes, allow access if you want to store QuickBooks company files on this computer **AND** want to share them with others in your network.

Select No, do not allow access if you don't want users on other computers in your network to share the QuickBooks company files on this computer.

4 Choose where to install

Choose installation folder

We recommend that

New users
Accept the suggested folder to install QuickBooks.

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

Accountants
Accept the suggested folder and DO NOT overwrite your previous version if you need to use multiple versions.

Turn over for next steps

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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
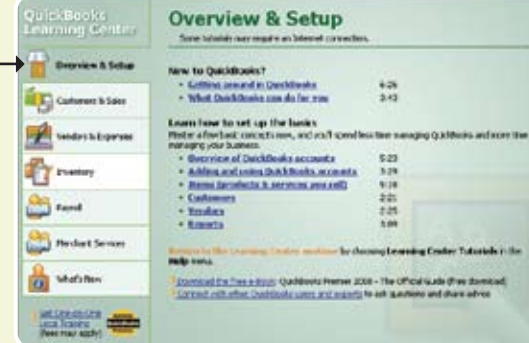
Click Create a new company file

Click Start Interview and answer the questions

Learn & use QuickBooks

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

Dive in and start working

Add your customers, vendors, items, and services, and start entering business transactions using the flows on the Home page.

Frequently Asked Questions

I may need help. How do I get it?
For help getting QuickBooks installed and working properly, visit our online Installation and Upgrade Center at **www.quickbooks.com/installation**

To get answers to questions about using the product, you can ask the QuickBooks Live 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 QuickBooks Set-up & Training Services for a "starter package" to get set-up and trained on QuickBooks, efficiently and accurately (fees apply). To learn more visit **www.quickbooks.com/getsetup**

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/qbstart2009**

I'm just starting my business. Are there any good resources for me?
Yes. You can take advantage of Intuit's wide range of free resources for small business—including our innovative JumpUp website.

Visit us at **www.jumpup.com** to learn about:
- Business planning, structure, and identity
- Smart marketing practices
- Managing customers profitably

How do I add additional users to QuickBooks?
You can buy additional QuickBooks licenses in two ways:
- In QuickBooks, go to the **Help** menu, click **Manage My License** and click **Buy Additional User License**
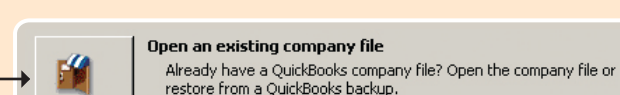- Call Intuit Sales at **1-800-316-1370**

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 2009

Frequently Asked Questions

I may need help. How do I get it?
For help getting QuickBooks installed and working properly, visit our online Installation and Upgrade Center at **www.quickbooks.com/installation**

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

Visit the QuickBooks Support Website at **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**

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**

Multi-user checklist for new users

If you're new to QuickBooks and have multiple users, use this checklist to set up your QuickBooks network.

☐ 1. Go to the computer where you want to store your QuickBooks company file (your data).

☐ 2. Do one of the following:

- If you plan to work in QuickBooks on this computer, install QuickBooks on it. Select **Full QuickBooks with Database** and select **Yes, allow access** to let others open the company file stored on this computer.

- If the computer will be used to store the company file only, install QuickBooks on it and select **Install Database Server Only**.

☐ 3. Use Windows Explorer to create a shared folder on the computer where your company file will be stored (the computer in step 1). Give everyone who needs to access the company file on it full control permissions.

☐ 4. Make a note of the computer name and shared folder so you can set up the other computers to access it.

☐ 5. Install QuickBooks on the other computers in your network and choose **Full QuickBooks with Database**.

☐ 6. Start QuickBooks on one of the computers and go through the Easy Step Interview to create your company file.

☐ 7. Move the company file to the shared folder you created in step 3.

☐ 8. Confirm each computer can access your company file: start QuickBooks on each computer, browse to the company file in the shared folder, and open it.

   Note: In the **Open a Company window**, click the **Open file in multi-user mode** checkbox at the bottom of the screen.

☐ 9. In QuickBooks, go to the **Company** menu and click **Set Up Users and Passwords** to set up your users and grant them permission to access the company file.

Multi-user checklist for upgraders

If you're an existing QuickBooks user, use this checklist to help you upgrade QuickBooks on your network.

If your company files are on a computer where QuickBooks is installed:

- [ ] 1. Install **Full QuickBooks with Database** on all computers you plan to use with QuickBooks.

- [ ] 2. To update your company file, open it in QuickBooks 2009 and follow the prompts to update the file.
  Note: Don't worry – QuickBooks will have you create a backup of your data as part of the update process.

- [ ] 3. To confirm that each computer can access your updated company file, open QuickBooks on each computer, browse to the company file, and open it.
  Note: In the Open a Company dialog, click the **Open file in multi-user mode** checkbox at the bottom of the screen.

  OR

If your company files are on a separate file server:

- [ ] 1. Go to the computer that contains only the QuickBooks database server and your QuickBooks company file.

- [ ] 2. Install QuickBooks 2009 on this computer and choose **Install Database Server Only**.

- [ ] 3. Install **Full QuickBooks with Database** on all the other computers.

- [ ] 4. Update your company file: Don't worry. QuickBooks creates a backup of your data as part of the update process.
  4.1 Move your company file to a computer where you installed Full QuickBooks with Database.
  4.2 Open the file in QuickBooks 2009 and follow the prompts to update your company file to work with your new version of QuickBooks.
  4.3 Move the updated company file back to the server.

- [ ] 5. Confirm that each computer can access your updated company file:
  - Open QuickBooks on each computer, browse to the company file on the server, and open it.
  - In the Open a Company dialog, click the **Open file in multi-user mode** checkbox at the bottom of the screen.