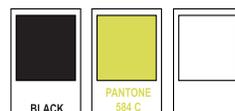# Multi-user checklist for new users

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. During installation choose **Custom and network options** and select one of the following choices:
   - Select **I'll be using QuickBooks on this computer** if you will run QuickBooks but don't need to share the company files from this computer.
   - Select **I'll be using QuickBooks on this computer, AND I'll be storing our company file here...** if you will run QuickBooks and share company files.
   - Select **I will NOT be using QuickBooks on this computer. I will be storing our company file here...** if files need to be shared but no one runs QuickBooks on this computer.

☐ 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 **Express** from the Installation Type choices.

☐ 6. Start QuickBooks on one of the computers and choose the **Express Start** option in the QuickBooks Setup Wizard to create your company file.

☐ 7. When asked to enter your business contact information, click the **Preview Your Settings** button and change the location of your 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 that you created in step 3, and open it.

☐ 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.

BLACK

PANTONE
584 C

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 using the **Express** option on all computers you plan to use with QuickBooks.

☐ 2. To update your company file, open it in QuickBooks 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.

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 using the **Custom** option and select, **I will NOT be using QuickBooks on this computer.**

☐ 3. Install using the **Express** option on all computers you plan to use with QuickBooks.

☐ 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 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.

 4.4 Turn hosting off on the computer that converted the file.

☐ 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.

Terms, conditions, pricing, features, service and support options are subject to change.