## intuit

# QuickBooks

SMALL BUSINESS ACCOUNTING

## **Quick Start Guide**

### Before you start

### **FIRST TIME installing QuickBooks?**

- Relax—it's easy! We'll help you each step of the way.
- Have your license and product numbers ready. Close all running programs, including anti-virus programs (don't worry, this is just a temporary step).

### **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 the installation.

### **HAVE QUESTIONS** about installing or upgrading QuickBooks for multiple users?

• Check out the Support article that helps you install QuickBooks for multiple users: http://support.quickbooks.intuit.com/Support/ networking/



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

- and select **Computer**
- Double click your disc drive
- Double click **setup.exe** to start the installation

QuickBooks.

**Tip:** If you encounter any problems, or have specific installation questions, visit the Install Center at www.quickbooks.com/installation.

### Start installation

### Put the QuickBooks CD

• Click **Start** from your Windows menu (bottom left of your screen)

Then we'll ask you some questions to help you install

### Choose installation type **Express - install using** default settings We recommend this for most users. Intuit QuickBooks\* Installer

Choose Installation Type

Express (recommended)

Cold: here characterized

Replace current version, use existing settings and copy preferences.

Custom and Network option

ustomize location, upgrade, and

### **Custom and Network options**

Customize the install options and location.

### Turn over to learn about setting up QuickBooks

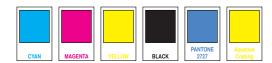


Let us install for your

or access our Self Help tools.

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### Getting started using QuickBooks: New Users

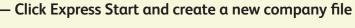
Start OuickBooks Double-click the QuickBooks icon 🔀 on your desktop.

#### Create your company file

Creating a company file and setting it up for your business usually takes about 10 minutes.

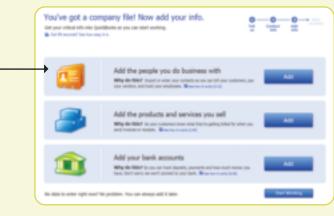
Tip: Gather this information before you create your company file:

- Company name and address
- Federal Employer ID or Social Security Number
- Most recent bank and credit card statements

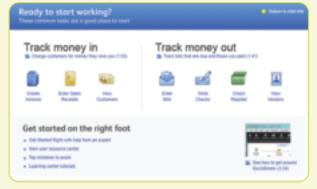


Let's get your business set up quickly!
Answer some basic questions and we'll do the rest. You can always make changes later. Express Start (Recommended for new users) in math how we'll to
Advanced Setup Give a more details and well guide you mp to step through the available options. (Hocommended P you want to fine-time you wintig)   Other Options: Open or convert your exeting like from Opcios, Frankform, Small Burnees Accounting, Office-Accounting or even-guidebala,
@head help? Size as a ad

#### Easily import or add contacts and other information<sup>1</sup>



Get started with our Quick Start **Center**. Return to this page any time from the Help menu.



### 1 Transfer data from Peachtree 2008–2011; Microsoft SBA 2006; and Microsoft Office Accounting 2007–2009 using free tool available at http://quickbooks.intuit.com. Transfer data directly from Quicken 2011-2013, QuickBooks 4.0 2012 and Microsoft Excel 2000–2010, as well as Web mail services such as Gmail, Yahool Mail and Hotmail.

### Getting started using QuickBooks: Upgraders

**1** Start QuickBooks

### **2** 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 your company file doesn't open, click Open existing company file

Updating your company file usually takes about 15 minutes.

### Need help?

Choose an option that suits you.

**Refer to the enclosed QuickBooks User Guide** and in-product Help and tutorials to get step-by-step instructions on everyday tasks. You can also download the User Guide here: www.quickbooks.com/manuals.

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

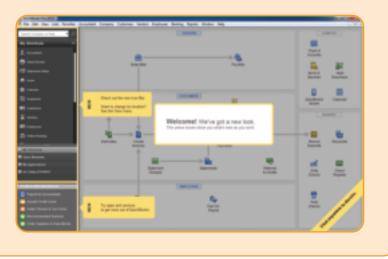


Don't worry, your data will be fine, and it should

**convert easily** (and you have a backup just in case).

### Find out what's new in QuickBooks

No need to guess what's changed. As you work in QuickBooks, we'll show you exactly what's new and different.



FAQs or contact an agent (fees may apply). Talk to a trained QuickBooks expert near you if you 3 need further help. Find one here: www.findaprodvisor.com. Hands-on, personalized

www.quickbooks.com/support to browse support topics,

assistance is available for a fee.

2 Visit the QuickBooks Support Website at