

intuit.

# QuickBooks®

SMALL BUSINESS ACCOUNTING

## Quick Start Guide

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### 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/>

## 2 Start installation



Put the QuickBooks CD  
in your disc drive

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

- Click **Start** from your Windows menu (*bottom left of your screen*) and select **Computer**
- Double click your disc drive
- Double click **setup.exe** to start the installation

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

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

## 3 Choose installation type



### Express - install using default settings

We recommend this for most users.



### Custom and Network options


Customize the install options and location.

Turn over to learn about  
setting up QuickBooks



# Getting started using QuickBooks: New Users

## 1 Start QuickBooks

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

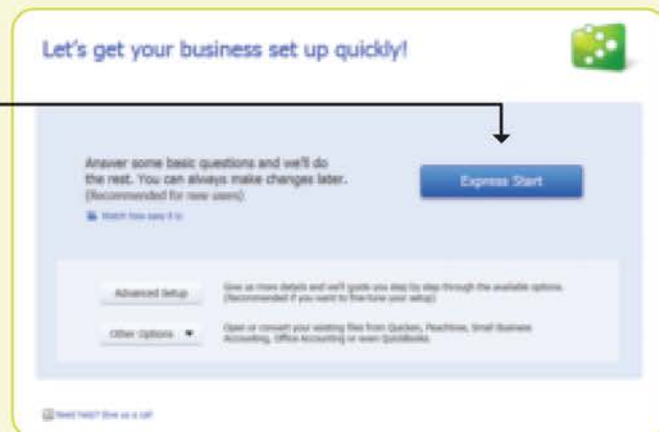
## 2 Create your company file

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

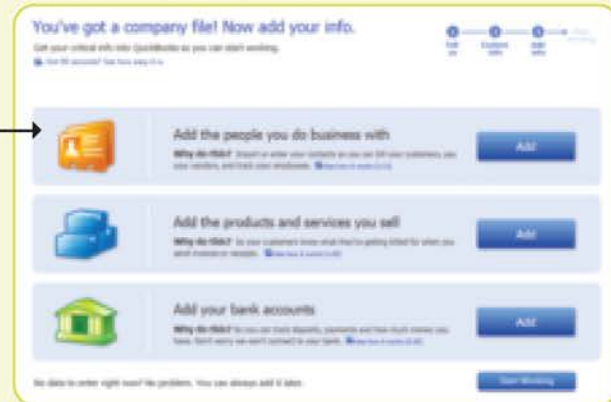
**Tip:** Gather this information before you create your company file:

- Company name and address
- Federal Employer ID or Social Security Number (Recommended for new users)
- Most recent bank and credit card statements

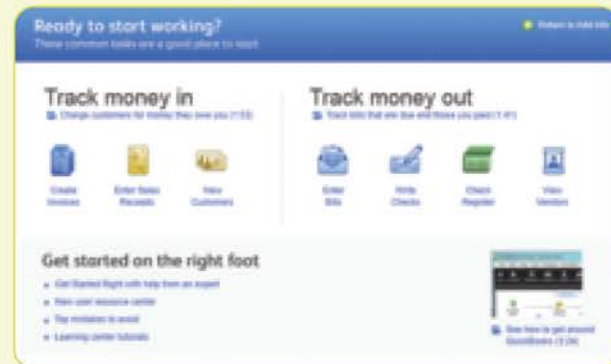
Click **Express Start** and create a new company file



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




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



<sup>1</sup> 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, Yahoo! Mail and Hotmail.

# Getting started using QuickBooks: Upgraders

## 1 Start QuickBooks

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

## 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.

**Don't worry, your data will be fine, and it should convert easily** (and you have a backup just in case).

## 3 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.



## Need help?

### Choose an option that suits you.

- 1 **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](http://www.quickbooks.com/manuals).

- 2 **Visit the QuickBooks Support Website** at [www.quickbooks.com/support](http://www.quickbooks.com/support) to browse support topics, FAQs or contact an agent (fees may apply).
- 3 **Talk to a trained QuickBooks expert near you** if you need further help. Find one here: [www.findaprovisor.com](http://www.findaprovisor.com). Hands-on, personalized assistance is available for a fee.