Getting Started

Quick tips to get you up and running

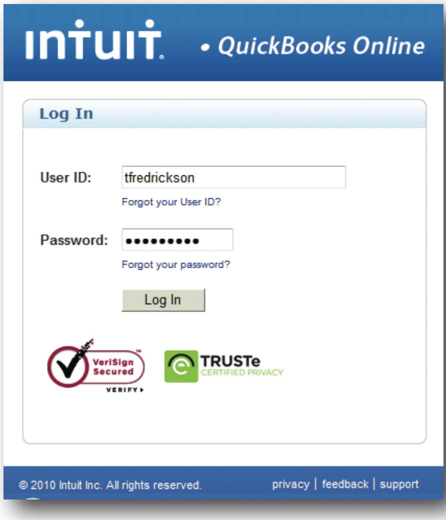
- Create and manage invoices
- Track expenses
- See how you're doing

QuickBooks Online Simple Start

See inside to learn how you can to get the most out of QuickBooks Online Simple Start

What's in this guide

Get started easily



Log in from anywhere, anytime

Go to QBO.intuit.com and simply enter your user ID and password to securely log in to your account.

Access your account from any PC or Mac with an internet connection whether you're at home, in the office, or at a client's site. It works on Internet Explorer, Firefox, Chrome for Mac and Windows, and Safari for Mac.*

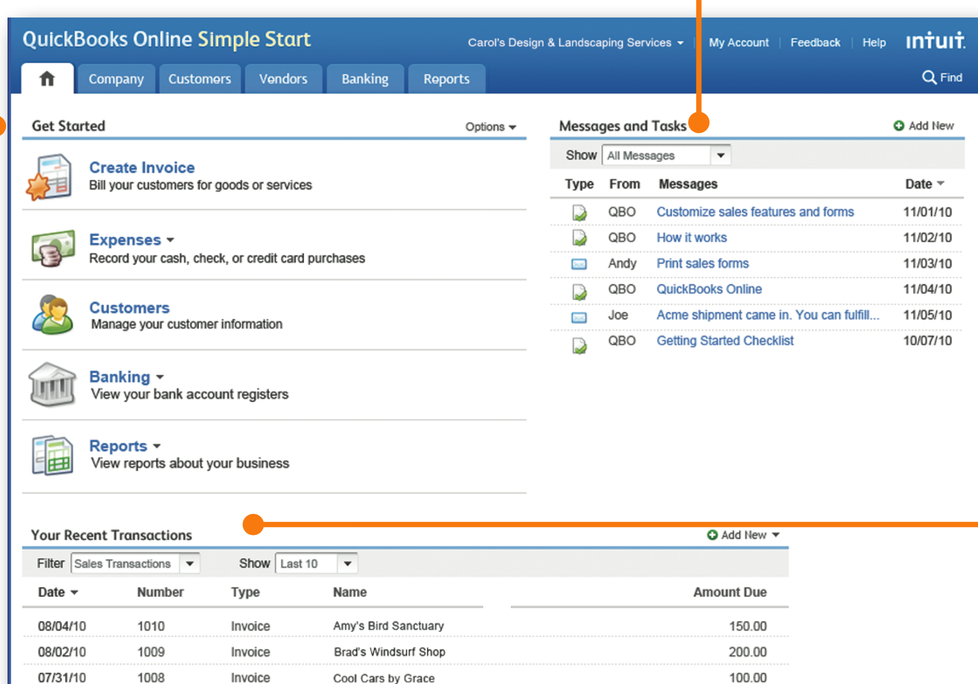
TIP! Add QBO.intuit.com to your browser bookmarks for faster access.

Stay organized with all your finances in one place

Your homepage puts all of your key tasks and information at your fingertips.

Get to work quickly with just a click

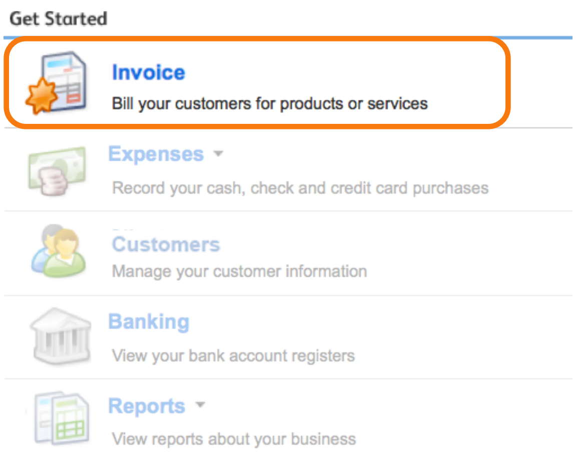
Set reminders to stay on top of everyday tasks



See your recent transactions at a glance

* QuickBooks Online Simple Start requires a computer with either Microsoft Windows (2000, XP, Vista or Windows 7) or Mac OS 10.4.4, an Internet connection (high-speed connection recommended), and at least Microsoft Internet Explorer 7, Firefox 3, Safari 3.1 for Mac, or Chrome 3 or later for Windows, or Chrome 4 or later for Mac. Works on iPhone, Android OS, and BlackBerry 5.x or later. Mobile devices sold separately. Data plan required. Not all features are available on mobile versions of QuickBooks Online Simple Start.

Create and manage invoices



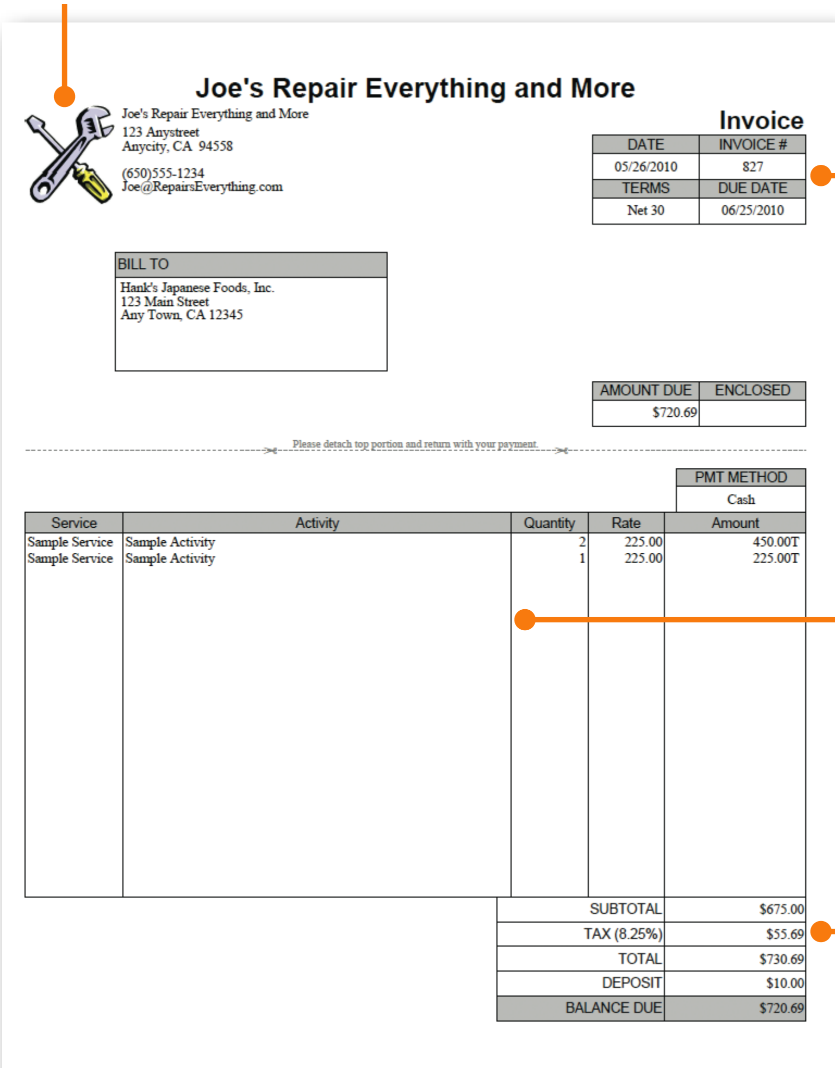
Easily create invoices and track payments

From your homepage, click "Invoice" to create your own professional-looking invoices.

Online Simple Start makes tracking payments easier than ever - with reports and the customer center.

TIP! Use Online Simple Start to automatically email invoices—with faster delivery you could get paid faster.

Add your logo for a custom look



Joe's Repair Everything and More

Joe's Repair Everything and More
123 Anystreet
Anycity, CA 94558

(650)555-1234
Joe@RepairsEverything.com

Invoice

DATE	INVOICE #
05/26/2010	827
TERMS	DUE DATE
Net 30	06/25/2010

BILL TO
Hank's Japanese Foods, Inc. 123 Main Street Any Town, CA 12345

AMOUNT DUE	ENCLOSED
$720.69	

Please detach top portion and return with your payment.

PMT METHOD
Cash

Service	Activity	Quantity	Rate	Amount
Sample Service	Sample Activity	2	225.00	450.00T
Sample Service	Sample Activity	1	225.00	225.00T

SUBTOTAL	$675.00
TAX (8.25%)	$55.69
TOTAL	$730.69
DEPOSIT	$10.00
BALANCE DUE	$720.69

See terms, due dates and invoice details clearly organized

Every invoice is automatically tracked, so you know who owes money and who has paid

Customize the details of your invoice based on your business

Sales tax and deposits are instantly calculated for you

Create and manage invoices

Create an invoice in a few easy steps

1. Select the **customer** you'd like to bill. If it's your first customer, you'll be guided step-by-step.
2. Choose your payments **terms**. This is the date you'd like to be paid. The default is net 30 days.
3. Enter the **product or service** you're selling (e.g., design services).
4. Enter a **description** of the service or product for your customer (e.g., Graphic design for Jane's website).
5. Enter the **rate** or how much you've charged the customer.
6. Choose an **income account** which categorizes your receivables (the money coming in to your business).

You can import your entire customer list automatically from:

- Microsoft Excel
- Microsoft Outlook

Click here to learn more about importing customers.

Customize your invoices to fit your business

You can easily customize our standard invoices to fit your business needs. Want to add discounts, show quantities, or automatically include sales tax on your invoices? No problem.

Just click the "customize" button on your invoice screen and discover how you can tailor the invoices to meet your specific needs.

Click "Customize" on the invoice form to tailor our standard invoices.

Add your logo for a professional look

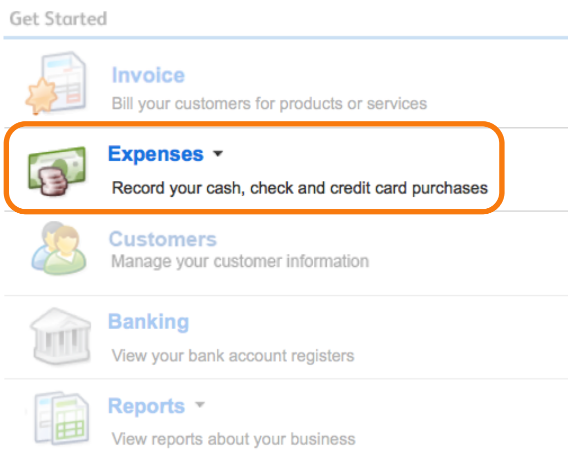
Adding a logo is easy and it makes a standard invoice look even more professional.

Here's how to add your logo:

1. From the **Company** tab, click on **Preferences.**
2. Select **Form Delivery** in the left hand navigation.
3. Then from the **Customize Forms** section, click on **Customize**.
4. Scroll down to the **Layout** section and select **"Use logo and upload your logo."**

Give your invoices a professional touch by adding your logo.

Track expenses



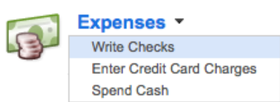
Know where you’re spending money

Online Simple Start will keep track of each check, credit card transaction, and cash purchase so you can keep tabs on where your money is going.

With everything in one place, you'll be able to access all past payments and bills for each vendor with just a few clicks.

TIP! You can easily customize the account categories to track what’s important to your business.

Entering your first expenses



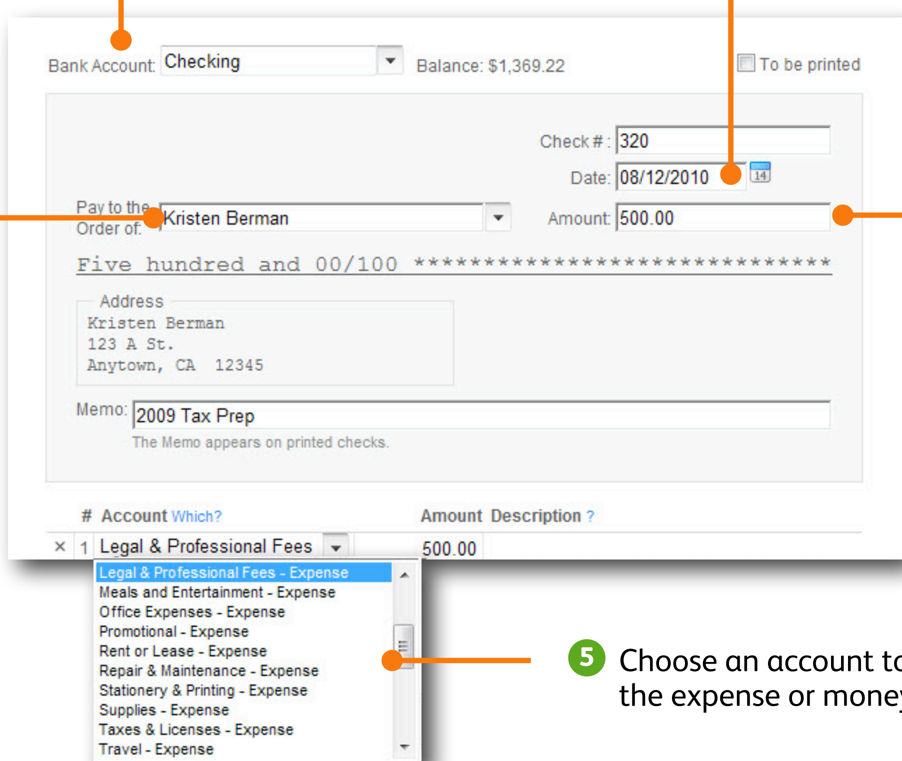
For your first expense, Online Simple Start will guide your through setting up your accounts (checking, credit cards and cash).

You’ll enter a balance for the date you want to start tracking your business. This date could be when you started your business, the first day of the year, or any other day your choose.

1. Choose the account for recording the expense

2. Enter the purchase date

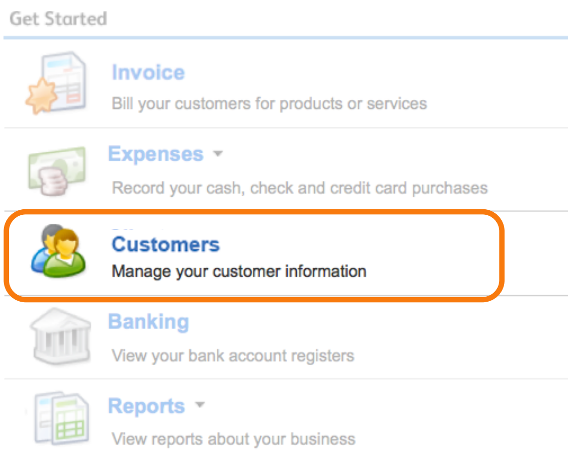
4. Select the name of the vendor



3. Enter the purchase amount

5. Choose an account to categorize the expense or money out

Manage customers



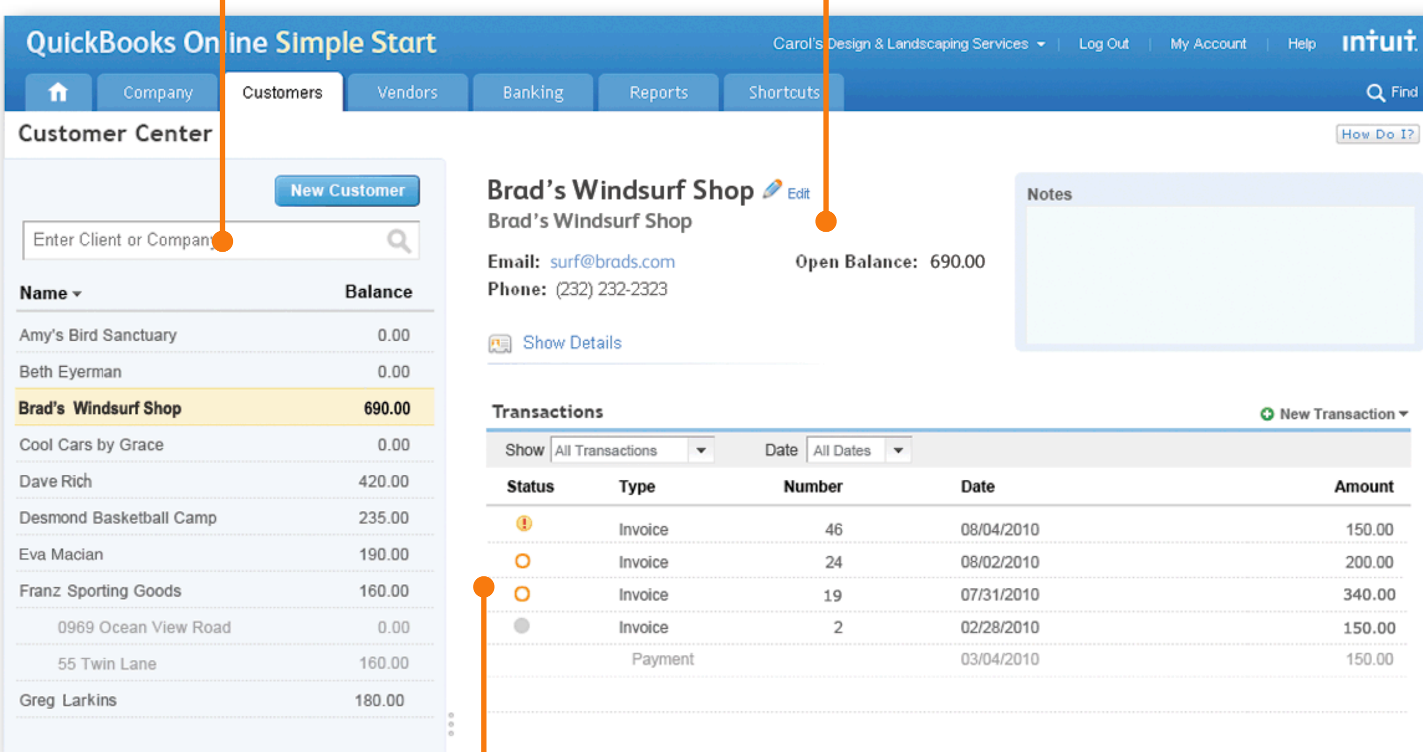
See all the details in one spot

The Customer Center makes it easy to see all of your client details in one, organized screen. See contact information, open invoices, and paid transactions at a glance.

TIP! Use the Notes box to enter any special instructions for each client.

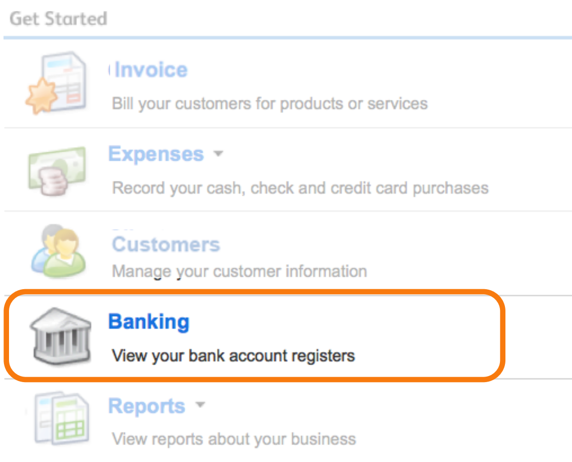
Select a client to see a complete profile

Instantly see contact information for each client



See open invoices and payments — click on any transaction to show the complete details

Manage your bank accounts



Staying on top of the details

The bank registers in Online Simple Start make it much easier to manage your bank account.

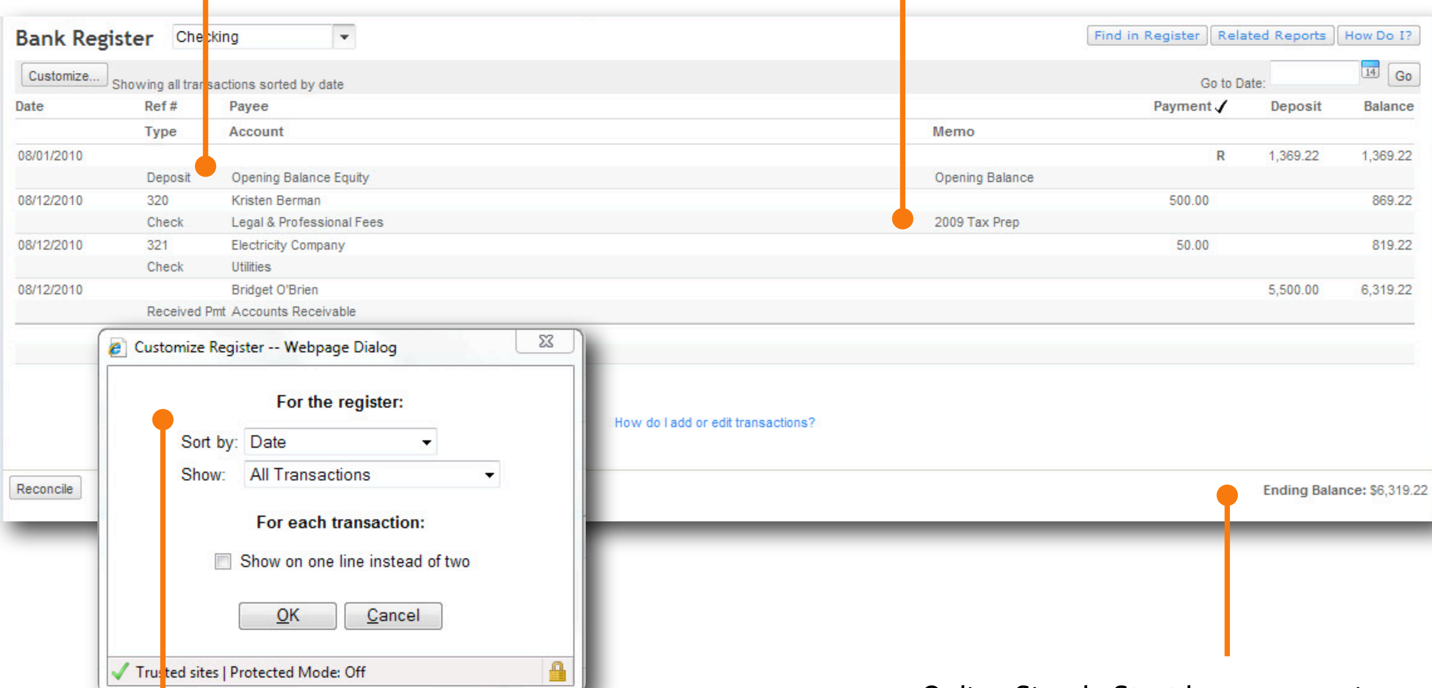
Enter a check and the register is updated—automatically. Accept a payment on an invoice… and the register is updated. It's that easy.

If you'd like to automatically connect to your bank accounts, consider QuickBooks Online Essentials. Just go to "My accounts" to see how you can upgrade.

TIP! Looking for a specific transaction? Click "Customize" to sort through transactions in seconds rather than hunting through paper check registers.

Your checks, payments, and transactions all in one spot

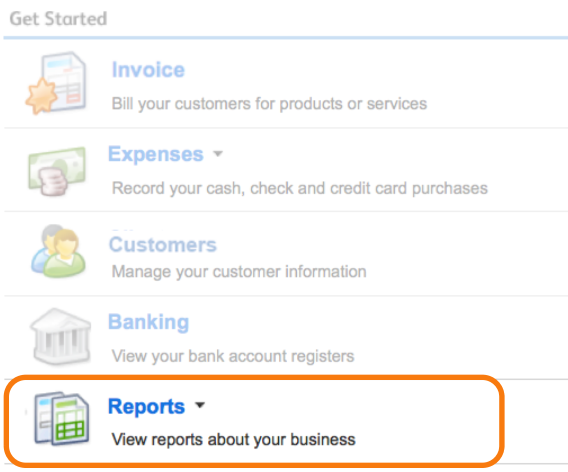
Write custom memos or notes on individual transactions



Online Simple Start keeps a running total—no math needed

Quickly find specific transactions by sorting the register

See how you're doing with instant reports



Be ready at tax time

Gain insights into your business with the pre-designed, customizable business reports.

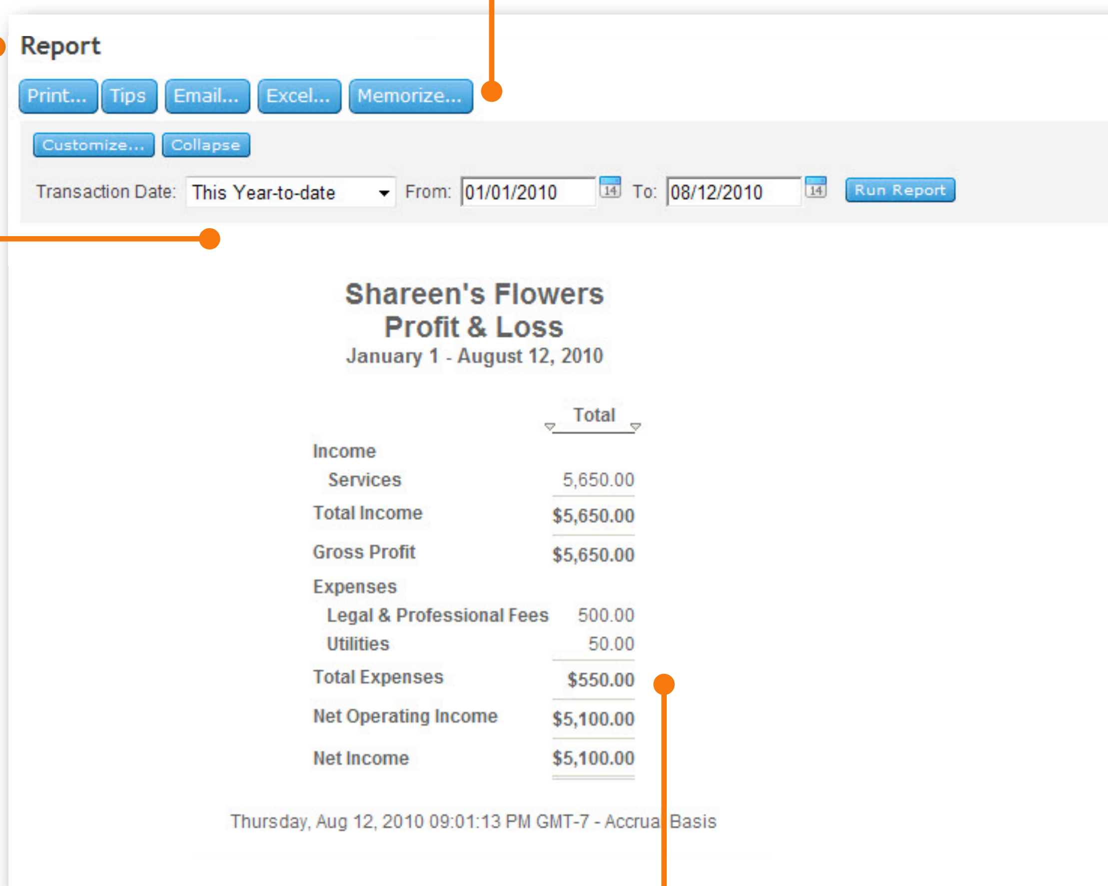
Online Simple Start organizes all the information you enter into easy-to-understand reports. You could save hours getting ready for tax returns with all your information in one place. Even better, your subscription includes free access for your accountant to make tax time easier.

TIP! One click on report totals let you drill down to see the detail behind the numbers.

Instant, pre-designed reports with your information in one-click

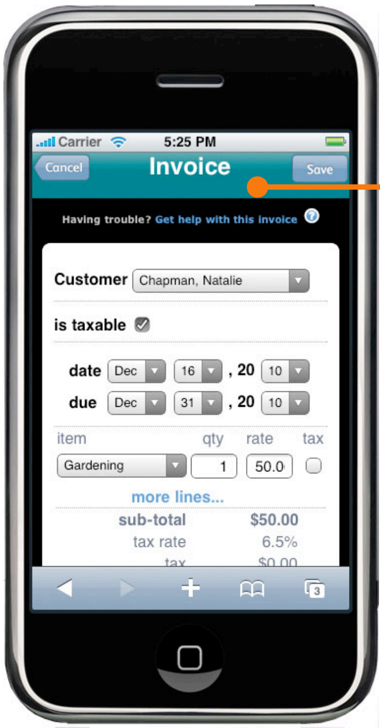
"Memorize" reports to have it automatically available for any given date range

Run reports for any date range including custom dates



Click on any amount to see the detail behind the number

Go mobile



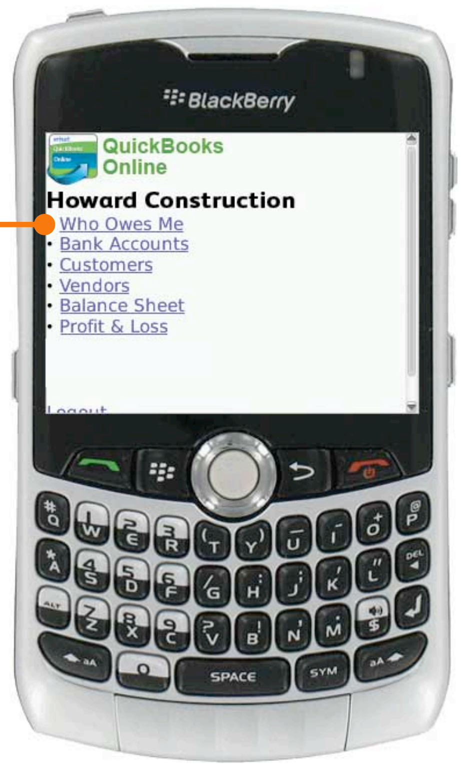
Send an invoice

iPhone™, Blackberry® & Android access

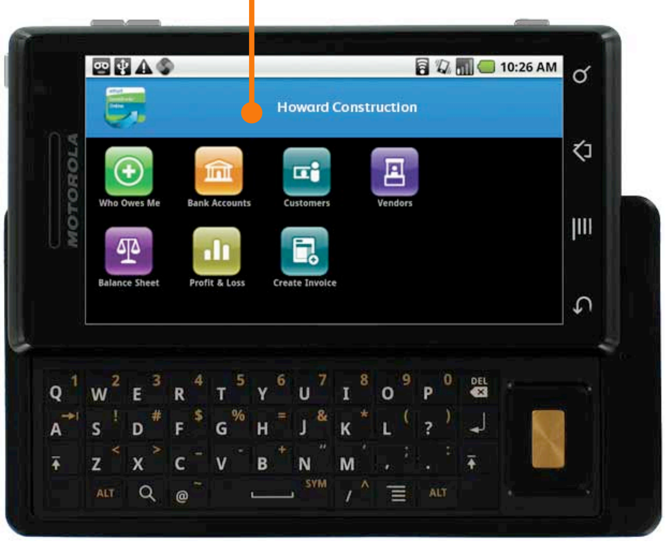
No matter where you are, you're never far from the data you need to run your business. Our mobile feature adds one-touch access to your iPhone™, BlackBerry® and Android-ready devices so you can see and track your receivables, bank balances, customer contact information and more.*

TIP! Open your mobile device's browser and visit https://qbo.intuit.com/ to get started.

Check who owes you money



Track bank balances, customer contact info, and more



Get more from Online Simple Start

Give your accountant access—for free

Online Simple Start makes it easy to work with your accountant...and you save on driving trips. You can add your accountant as a user for no extra charge.

Here’s how to add your accountant:

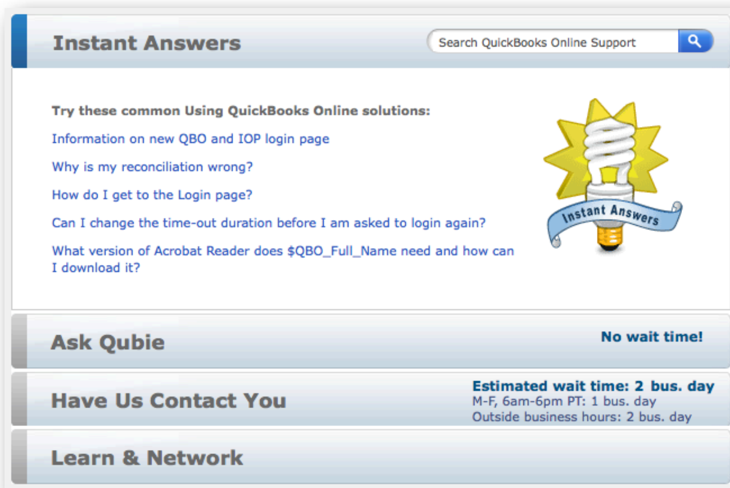
1. From the **Company** tab, select **User List.**
2. Click **New** button.
3. In the popup window, **check the box “This user is my accountant”.**

Save time by giving your accountant access. There’s no need to gather papers and compile year end reports when everything is in one spot.

We’re here for you every step of the way

With all the step-by-step help built-in to Online Simple Start, you may not need any help. But if you do, we’ve got you covered.

- **How Do I?** —From any screen in the product, click on “How Do I?” button in the top right hand corner and get targeted help for the task at hand.
- **Help menu**—See our instant answers, see Frequently Asked Questions and answers, and more with just a few clicks
- **Have us contact you**—Ask a question and it’s automatically sent to our support representatives who will respond with an answer via email (service time is 1 business day when asked during business hours and 2 business days outside of business hours).



Getting help is easy with Online Simple Start