Welcome to QuickBooks

We’re going to help you get paid, pay others, and see exactly how your business is doing. Use this guide to learn key tasks and get up and running as fast as possible.

Upgrading your version of QuickBooks? Turn to page 2 to see what’s new in QuickBooks®.


All kinds of help

Help from Intuit and the QuickBooks Community of users is built into QuickBooks. You can also access the Learning Center for video tutorials and articles via the Help menu.

Visit the QuickBooks Support Website at www.quickbooks.com/support to browse support topics, FAQs or contact an agent (fees may apply).

You can find a local QuickBooks expert by typing in your ZIP code here: www.findaproadvisor.com.

As your business grows, you may want to add additional users. You can easily do this from the Help menu by choosing Help > Manage My License.
What’s in this guide

Upgrading your version of QuickBooks?  

New to QuickBooks?  

Getting around  
- Using the Home page  
- Using centers  
- Using forms  

Everyday tasks  

Get paid:  
- Create sales receipts  
- Create invoices  
- Receive payments  
- Make deposits  

See how your business is doing:  
- Using the Reports Center  
- Company Snapshot  
- Profit and Loss  
- Balance Sheet  

Pay others:  
- Write checks  
- Enter bills  
- Pay bills
Upgrading your version of QuickBooks?

We’ve put a fresh coat of paint on QuickBooks 2013, and we’ve made key tasks even easier to find.

And you don’t need to guess what’s changed. As you work in QuickBooks, we’ll point out exactly what’s new and different.

The product tour opens up automatically when you upgrade to QuickBooks 2013.

Fees may apply for apps and services accessible via QuickBooks.
Getting started

Begin by creating your company file

A QuickBooks company file contains all the financial records for your business. It’s easy to create using the Setup window, which appears automatically after you install QuickBooks.

You can also reach this window from the menu by choosing File > New Company.

Next, add your business info

After you create your company file, add your business info: the people you do business with, your bank accounts, and your products or services. No data to enter or import right now? No problem! You can add it as you work in QuickBooks.

To come back to this window later, go to the Help menu and choose Quick Start Center, then click Return to Add Info.
Using the Home page to move around in QuickBooks

The Home page gives you a big picture of how your business tasks fit together. It opens automatically whenever you open a company file.

You can do all your tasks just using the menus. The menus contain the same tasks as the Home page, and more.

The Icon Bar includes shortcuts to many parts of QuickBooks. To create your own shortcuts, click Customize Shortcuts.

To customize the Home page, choose Edit > Preferences > Desktop View, and then click the Company Preferences tab.

You go directly to the centers by clicking on these icons.
Using centers

There are three main QuickBooks Centers, one each for customers, vendors, and employees. Use the centers to manage and view all of your customer, vendor, and employee information and transactions, without having to sift through multiple windows.

All of these centers work the same way. We’ll use the Customer Center to show you how they work.
Using forms

All of your everyday QuickBooks tasks, like invoicing, paying bills, and writing checks, are done on forms. You can reach every form in QuickBooks from the Home page or the menus. We’ll use an invoice to show you how forms work.

Use the arrows to move through a list of transactions.

Click the tabs on this ribbon to find everything you need to do on a form.

If you see an arrow, click it to select from a list. If you don’t see what you need, select Add New.

If you don’t see an arrow, enter the appropriate information.

Click here to save your work on a form.
Get paid: Create sales receipts

Use a sales receipt if customers pay you at the time of sale.

To start, go here: Customers > Sales Receipts.

1. Select a customer.
2. Tell QuickBooks what you’re selling.
3. Enter the quantity.
4. QuickBooks fills in the price you entered when you set up the item. You can change it here.
5. Enter the customer’s payment information.
6. Print or email the sales receipt.
Create invoices
Use an invoice when customers pay you after a sale.

To start, go here: Customers > Create Invoices.

1. Select a customer.
2. Tell QuickBooks what you’re selling.
3. Select the quantity.
4. QuickBooks fills in the price you entered when you set up the item. You can change it here.
5. Print or email the invoice.
Receive payments

When a customer pays you, use the Receive Payments form to apply it to the right invoice.

To start, go here: Customers > Receive Payments.

1. Select a customer.
2. Enter the amount the customer paid you.
3. Enter your customer’s payment information.
4. Select the unpaid invoices to apply the payment to.
5. Save the payment.
Make deposits

Once you’ve received a customer payment, you need to tell QuickBooks what bank account to deposit the money into. You do this on the Make Deposits form.

To start, go here: Banking > Make Deposits.

QuickBooks lists any payments you’ve received in the Payments to Deposit window. If this window doesn’t open automatically, you don’t currently have any payments to deposit. Continue with step 2.

1. Select the payments to deposit and click OK.
2. Select the bank account you want the money to go into.

3. Enter any additional payments to deposit.
4. Print a deposit slip or summary for your records.
5. Save the deposit.
Pay others:
In QuickBooks, you track purchases in the Write Checks, Enter Bills, or Enter Credit Card Charges windows.

- If you use your debit card or cash to buy something, use the Write Checks window to record the purchase.
- To track how much you owe, use Enter Bills. When you're ready to pay the bill, use the Pay Bills window (not the Write Checks window).

Write checks
Use the Write Checks windows if you handwrite or print a check. Don't use the Write Checks window to pay bills you entered or create paychecks.

To start, go here: Banking > Write Checks.
Enter bills

To track how much you owe, use the Enter Bills window. Entering and paying a bill is a two-step process:

- Enter the bill using **Vendors > Enter Bills**
- Pay the bill using **Vendors > Pay Bills**

Start by entering a bill.

1. Select the vendor you need to pay.
2. Enter the amount of the bill.
3. Enter the due date, and QuickBooks will remind you when the bill is due.
5. Save the bill.
Pay bills
When you’re ready to pay a bill, use the Pay Bills window.
To start, go here: Vendors > Pay Bills.

1. Select the bills you want to pay.
2. Change the date if needed.
3. Select the payment method and account.
4. QuickBooks shows you how much you have left in your account if you pay the selected bills.
5. Click here to pay the bills.
See how your business is doing:
Using the Reports Center

All of your QuickBooks information can be found, organized, and presented as a report. QuickBooks has more than 100 reports, and the Report Center makes it easy to find and understand the right report.

To start, go here: Report > Reports Center.

Choose a type of report.
View your memorized and favorite reports, along with reports contributed by other QuickBooks users.
Click these icons to change how QuickBooks displays the list of reports.
Run the report.
Read the question this report answers about your business.
Mark the report as a favorite.
Get more information about the report.
Company Snapshot

Use the Company Snapshot to get real-time company information and perform tasks from a single place.

To start, go here: Company > Company Snapshot.

This is a snapshot of the money going in and out of your business over time. Use this section to compare monthly income and expenses.

Click here to learn how to customize the Company Snapshot.

See what your customers owe you.

This section shows your top five customers based on sales for a given period of time.

Compare how much you spent this year to the same period last year.

Account balances include: all bank, accounts receivable, accounts payable, credit card, asset, liability, and equity accounts.
Profit and Loss

This report is also known as an income statement. It summarizes your income and expenses for a particular period, so you can tell whether you’re operating at a profit or a loss.

To start, go here: Reports > Company & Financial > Profit & Loss Standard.

Click here to customize your report.

If you’ve customized the report and want to use it again, click here to memorize the report.

This report shows subtotals for each income or expense account in your chart of accounts. Double-click the subtotal to see the transactions that make up that amount.

See your net income (or loss) for the period the report covers.
Balance Sheet

This report provides a financial snapshot of your company as of a specific date.

To start, go here: Reports > Company & Financial > Balance Sheet Standard.

This shows everything your business owns, including money owed to you.

This shows everything your business owes.

Equity is similar to an individual’s net worth. It’s what your company owns minus what it owes.
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