

# intuit. QuickBooks®

SMALL BUSINESS ACCOUNTING

## Quick Start Guide

### 1 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 (*this is just a temporary step*).

#### UPGRADING from a previous version of QuickBooks?

- 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:

##### For Windows Vista/7

- 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.

##### For Windows 8

- Move the cursor to the extreme bottom left corner of the desktop, and then right-click or touch and hold the screen
- Click or tap **File Explorer**
- Click or tap **Computer**
- Click or tap the disc drive
- Double-click or double-tap the **setup.exe** file (*if the User Account Control window displays during the installation, click or tap **Continue***).

**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).

#### No disc drive?

You can easily download a copy of QuickBooks by visiting the Install Center at [www.quickbooks.com/installation](http://www.quickbooks.com/installation). Then, follow the step-by-step instructions.

### 3 Choose installation type



#### Express - install using default settings

We recommend this for most users.



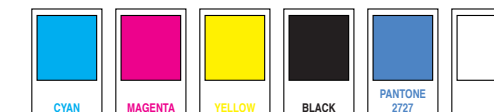
#### Custom and Network options

Customize the install options and location.


Turn over to learn about  
setting up QuickBooks



PN 504915



## Getting started using QuickBooks: New Users

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

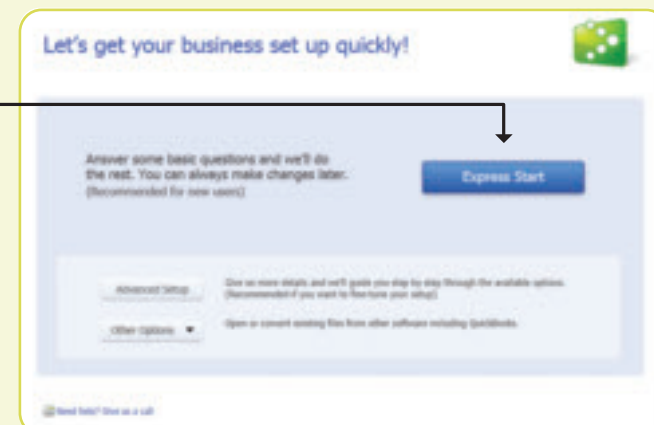
- 2 Create your company file**

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
- 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.

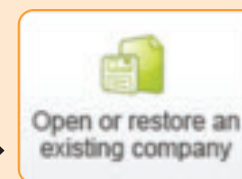


<sup>1</sup> Transfer data from Peachtree 2009–2011; Microsoft SBA 2006; and Microsoft Office Accounting 2007–2009 using free tool available at [www.quickbooks.com/support](http://www.quickbooks.com/support). Transfer data directly from Quicken 2012–2014, QuickBooks 4.0–2014 and Microsoft Excel 2003–2010, 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.

- 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.



## Have questions or 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.findaproadvisor.com](http://www.findaproadvisor.com). Hands-on, personalized assistance is available for a fee.

Terms, conditions, features, availability, pricing, fees, service and support options subject to change at any time without notice.  
© 2013 Intuit Inc. All rights reserved. Unauthorized duplication is a violation of applicable law. Intuit, the Intuit logo and QuickBooks are registered trademarks and/or registered service marks of Intuit Inc. Other parties' trademarks or service marks are the property of their respective owners.

