QUICKBOOKS WELCOME GUIDE

10 easy tasks to get started

Contents

Find your way around

Here's the quickest way to get where you're going in QuickBooks.

1. The navigation bar on the left shows a menu of items.

2. Click Transactions to see related sub-items (like Banking).

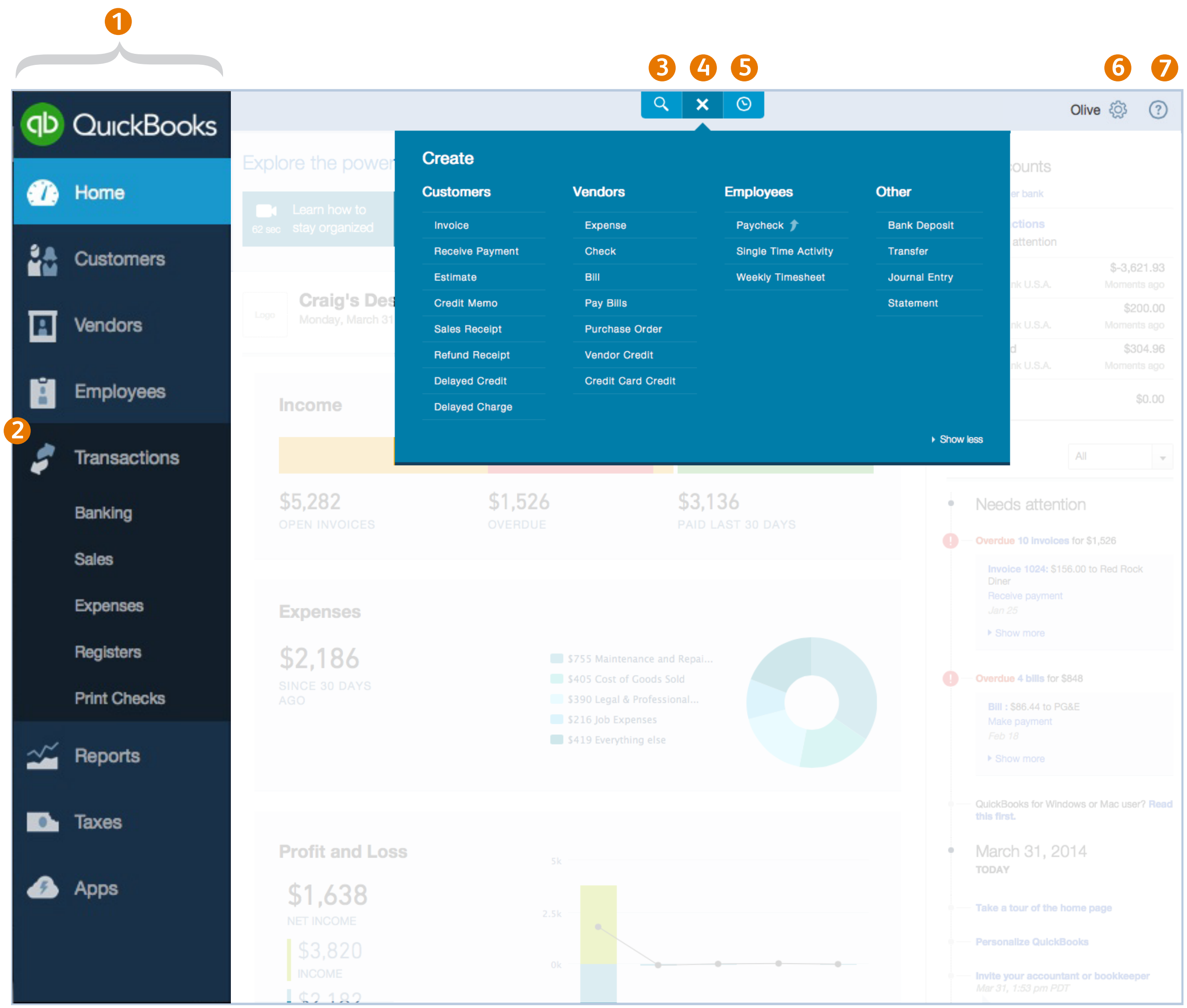
3. Click the magnifying glass to find past transactions.

4. Click the Create (+) icon to add any transaction.

5. View a list of recent transactions.

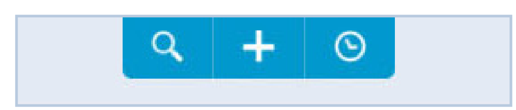
6. Click the Gear icon to manage your subscription, users, companies, and settings.

7. Click the Help (?) icon to get help information.



QUICK TIP

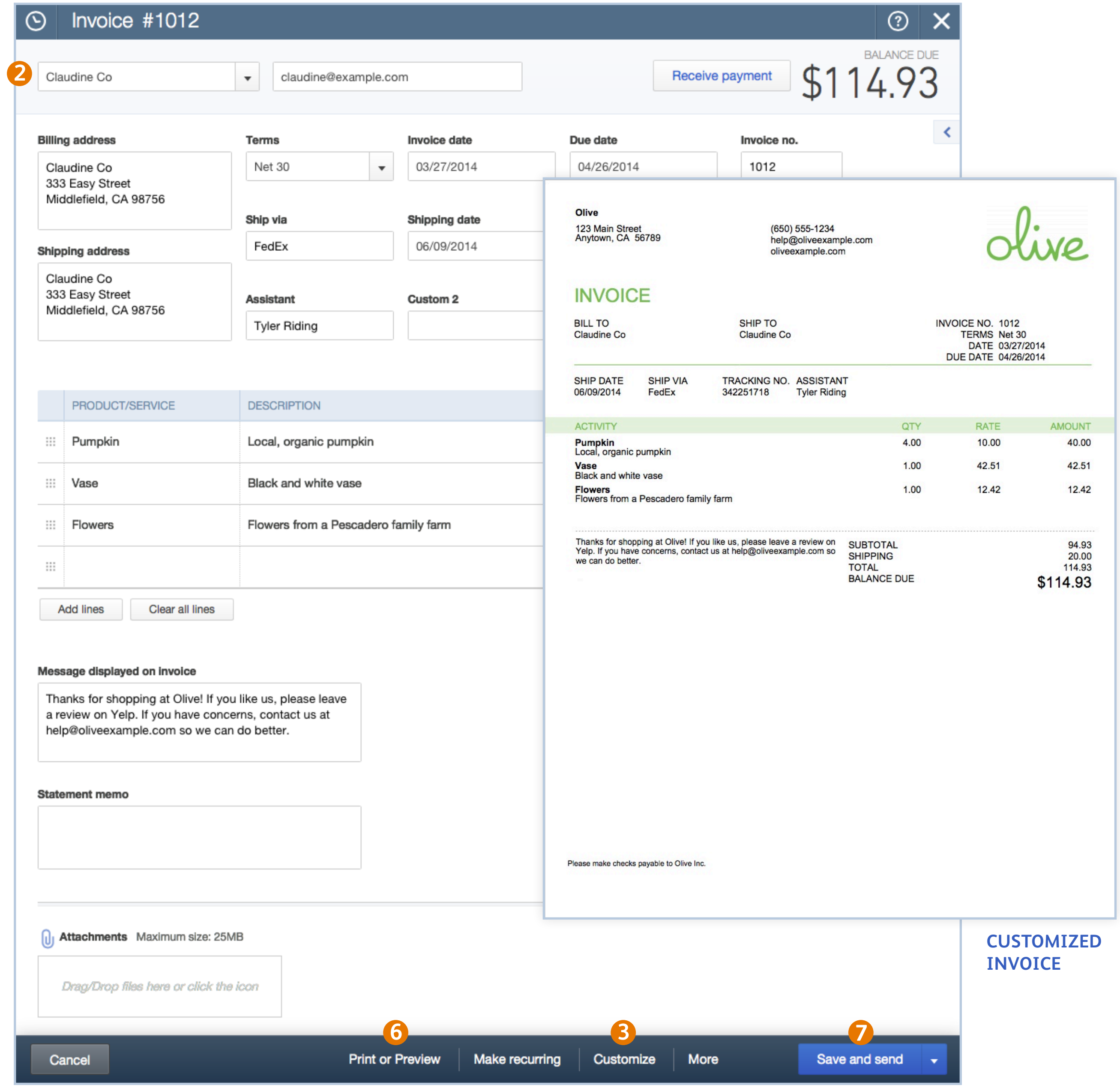
The Create icon initially appears as a (+), but spins to an (x) when you click it.



Customize and send an invoice

It's easy to create and customize beautiful invoices to send your customers.

1. Click the Create (+) icon and select Invoice.
2. Fill out the invoice form.
3. Click Customize at the bottom of the form to open the customize window.
4. Upload your logo and customize the look of your invoice.
5. Click Save to save your customizations.
6. Click Print or Preview to check how the invoice looks.
7. Click Save and send.



CUSTOMIZED INVOICE

CREATE (+) > INVOICE

Receive a payment

QuickBooks keeps you organized by helping you collect payments against customer invoices.

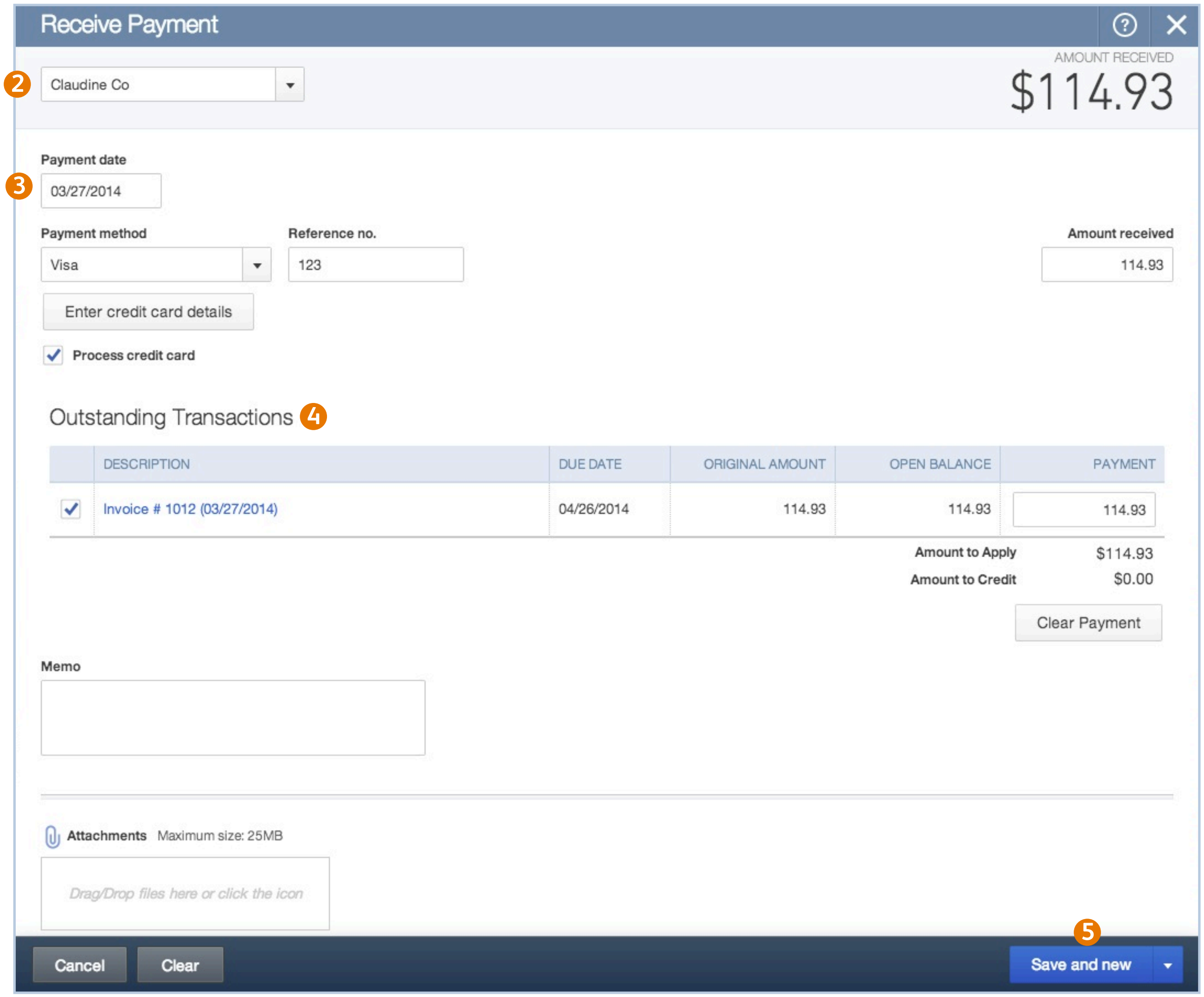
1. Click the Create (+) icon and select Receive Payment.

2. Select a customer from the list.

3. Fill out the rest of the Receive Payment form.

4. If the customer has outstanding invoices, they appear here so you can apply the payment to them.

5. Click Save and new.

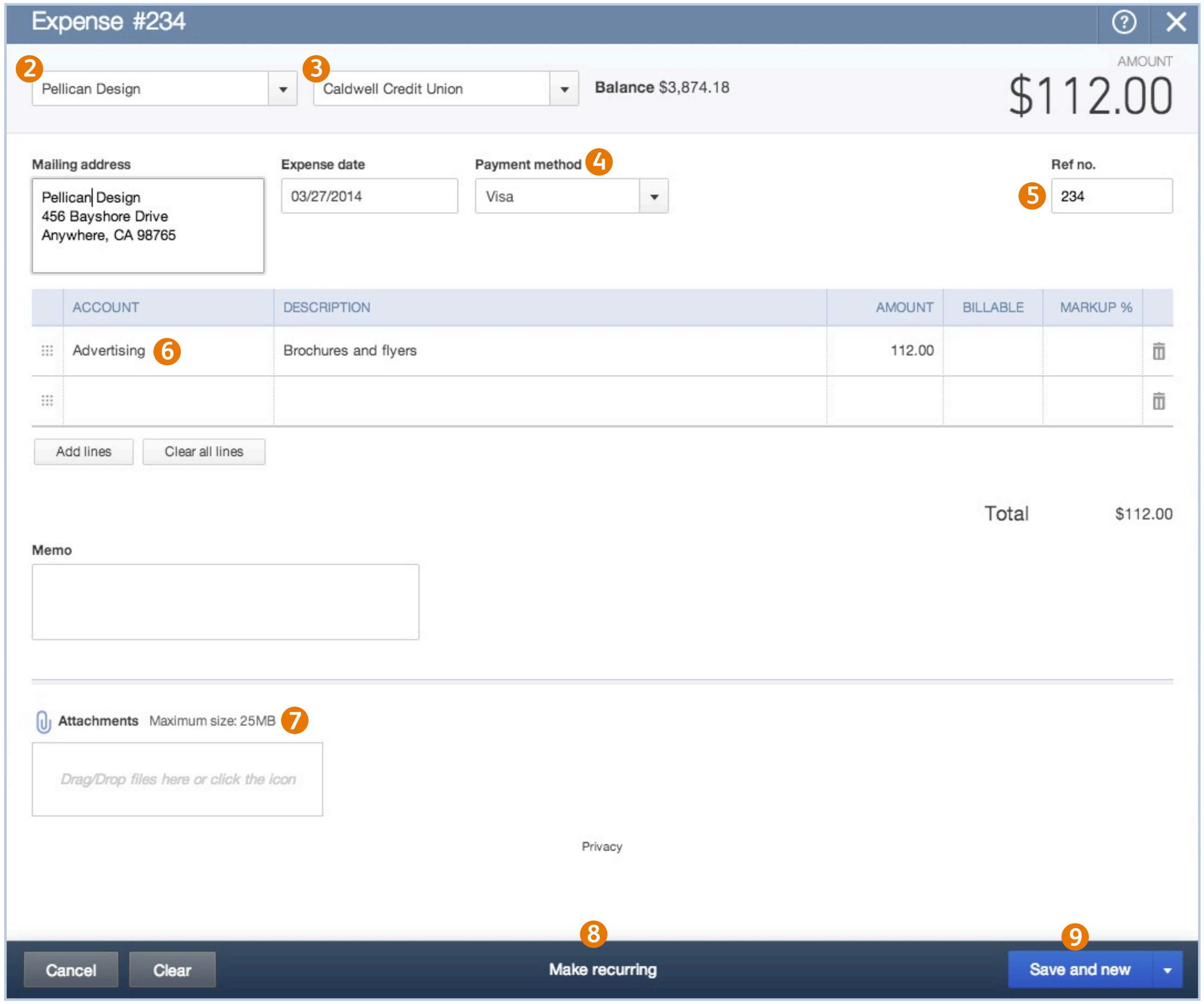


CREATE (+) > RECEIVE PAYMENT

Track expenses

Enter and categorize your business expenses for tax time.

1. Click the Create (+) icon and select Expense.
2. Fill out the Expense form.
3. Select the account where you're paying the expense from.
4. Optionally, choose a payment method.
5. Enter a reference number for easy lookup later.
6. Include the account to categorize each line item.
7. If you like, attach a document (like a receipt).
8. You can make this a recurring expense to save time later.
9. Click Save and new.

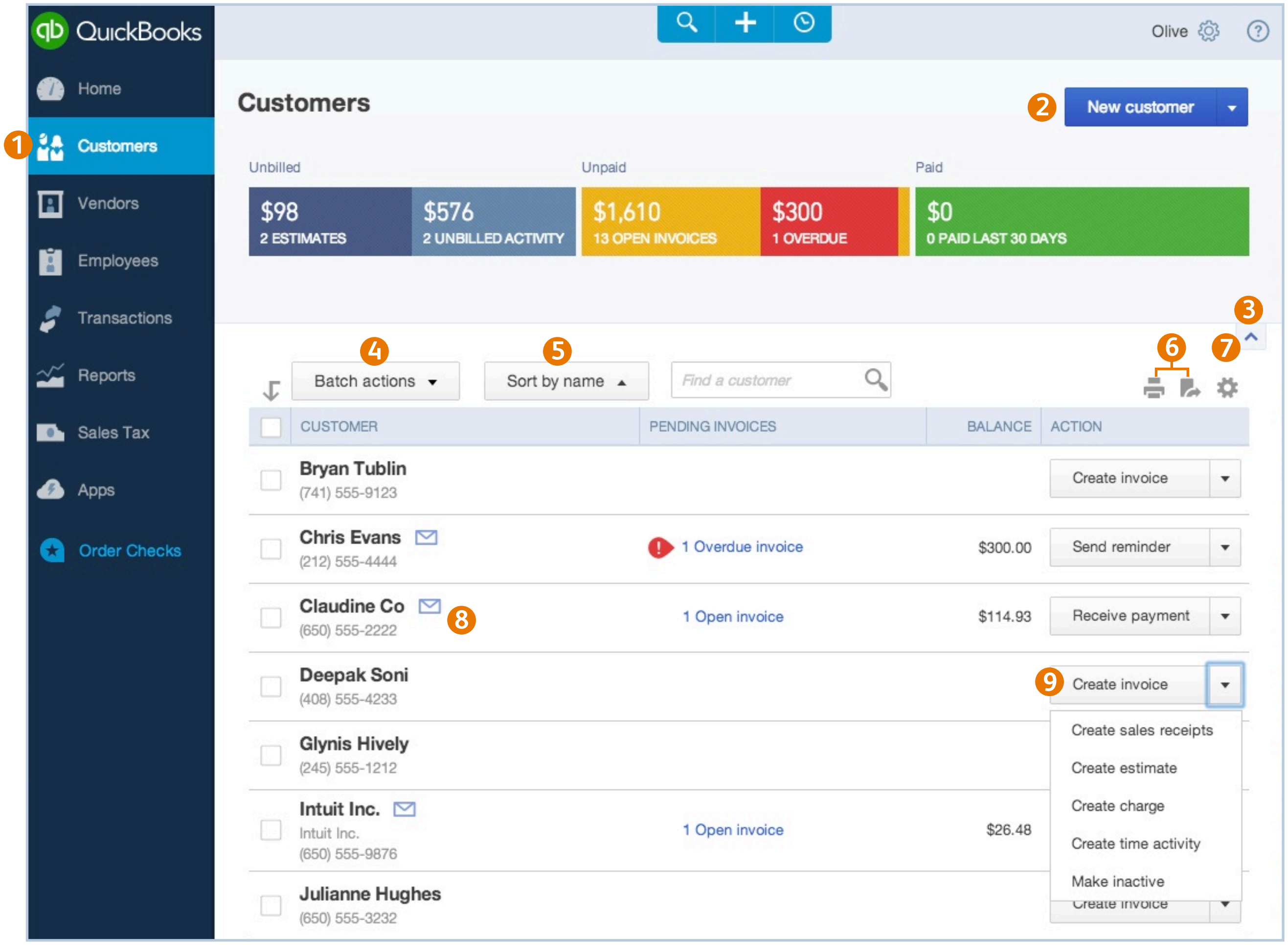


CREATE (+) > EXPENSE

Manage your contacts

Keep track of all the people important to your business, from customers to vendors to employees.

1. From the navigation bar, select Customers.
2. Add or import a customer.
3. Show or hide the Customer Money Bar.
4. Select multiple customers and apply a batch action (like Send statements) to all of them at once.
5. Sort the customer list by name, company, or balance.
6. Print or export the customer list.
7. Choose the columns you want to display.
8. Click a customer to see more details.
9. Create an invoice or other item for this customer.

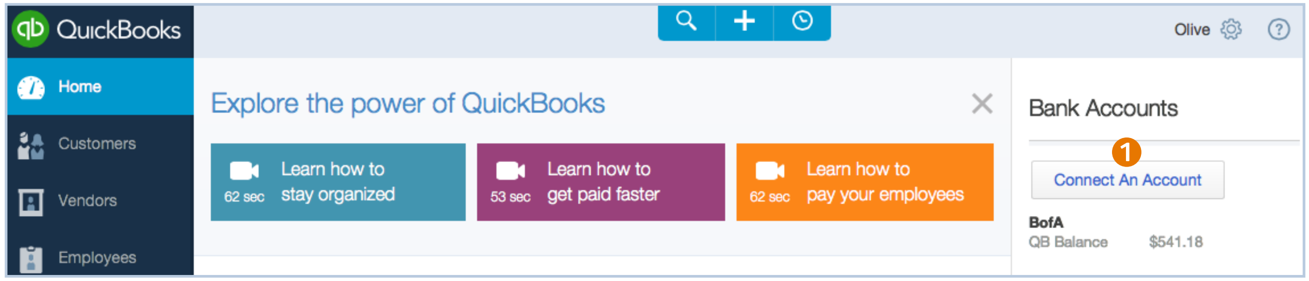


NAVIGATION BAR > CUSTOMERS

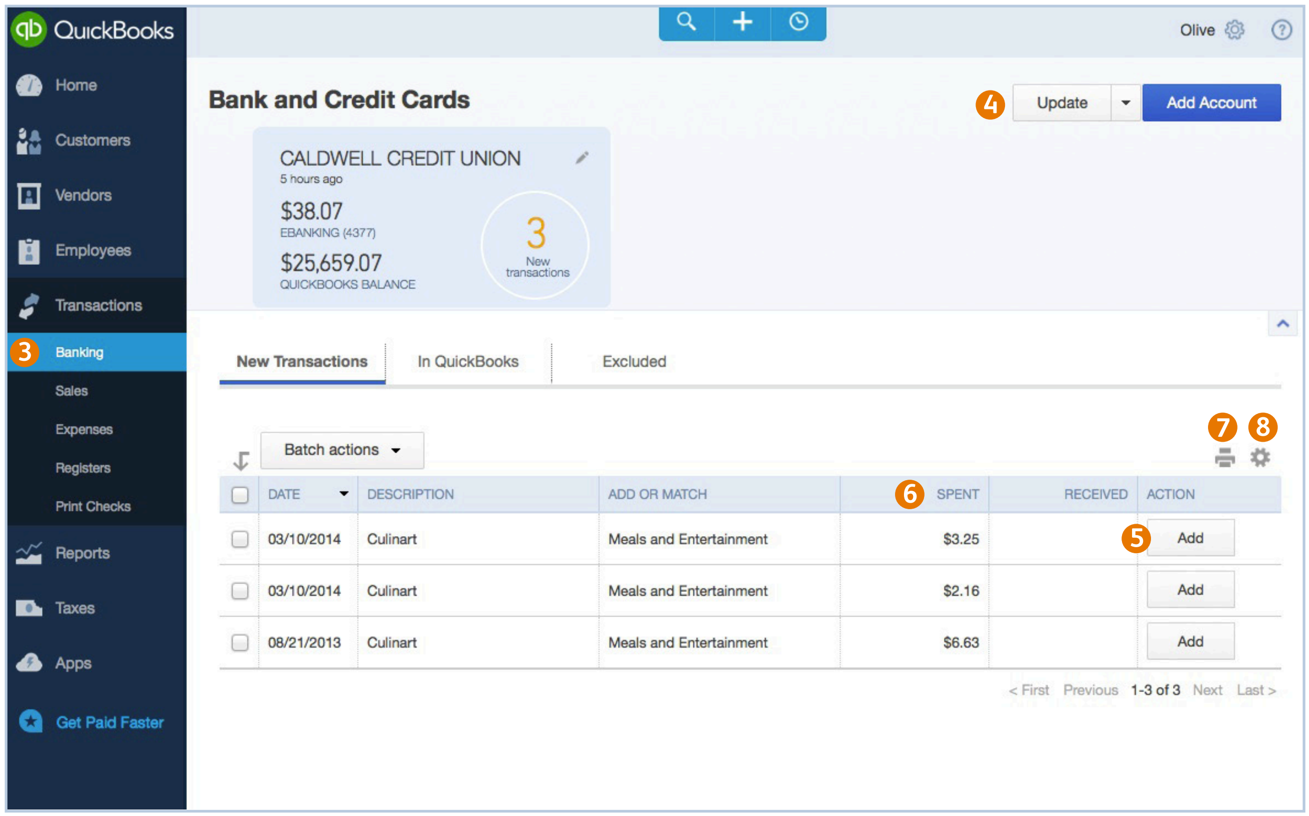
Connect your bank accounts

QuickBooks can automatically download and categorize your bank transactions, cutting down on data entry and errors.

1. From the home page, click Connect an account.
2. Follow the onscreen instructions to connect your account.
3. From the navigation bar, select Transactions > Banking.
4. Click Update to download the latest bank data.
5. Click Add to add the transaction to QuickBooks.
6. Click a column header to sort by that heading.
7. Print a page of transactions.
8. Change the number of rows to display.



HOME PAGE > CONNECT AN ACCOUNT

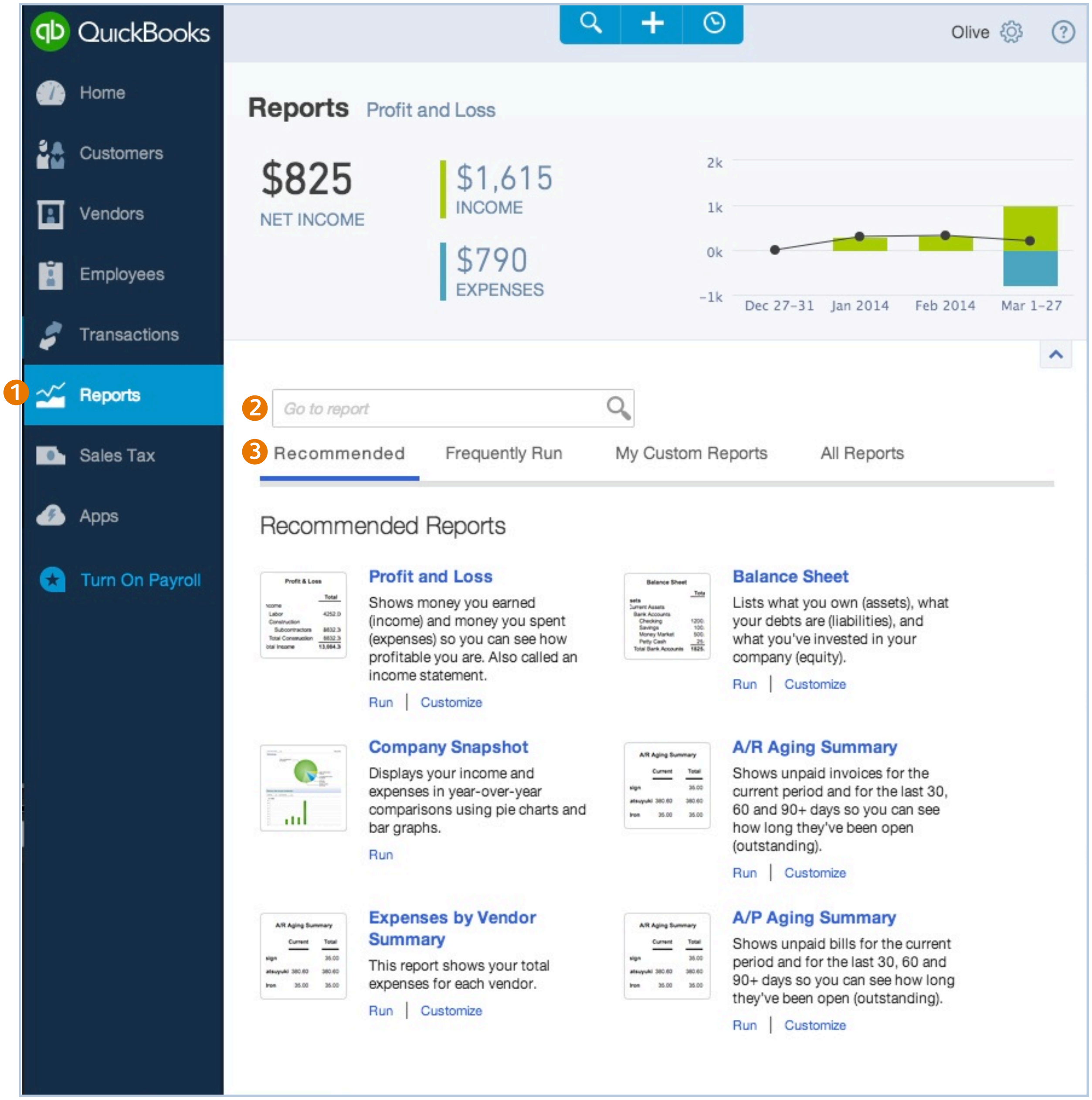


NAVIGATION BAR > TRANSACTIONS > BANKING

Gain insights with reports

How's business? Monitor your company financials with a variety of customizable reports.

1. From the navigation bar, click Reports.
2. Search for a specific report by name.
3. Click a recommended report, or choose another tab: Frequently Run, My Custom Reports, or All Reports.



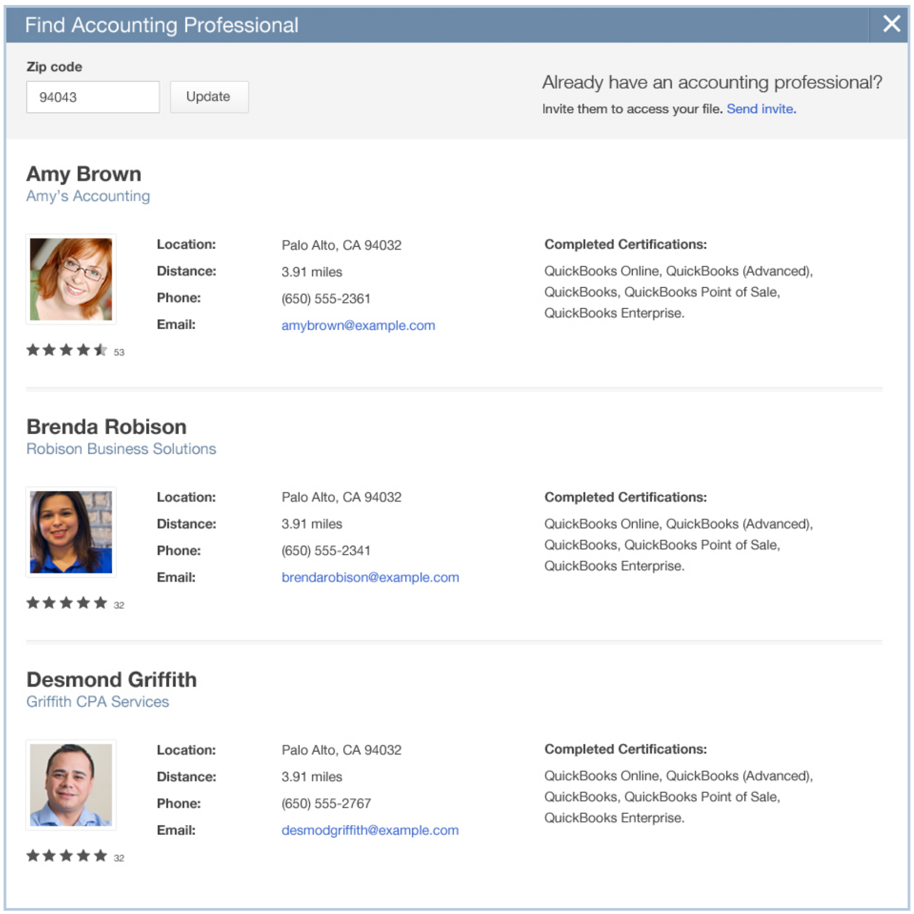
NAVIGATION BAR > REPORTS

Collaborate with others

Share QuickBooks with your accountant or one other accounting professional at no extra charge.

1. Click the Help (?) icon and select Add your accountant.

2. Or to find an accountant, click Find an accountant near you.



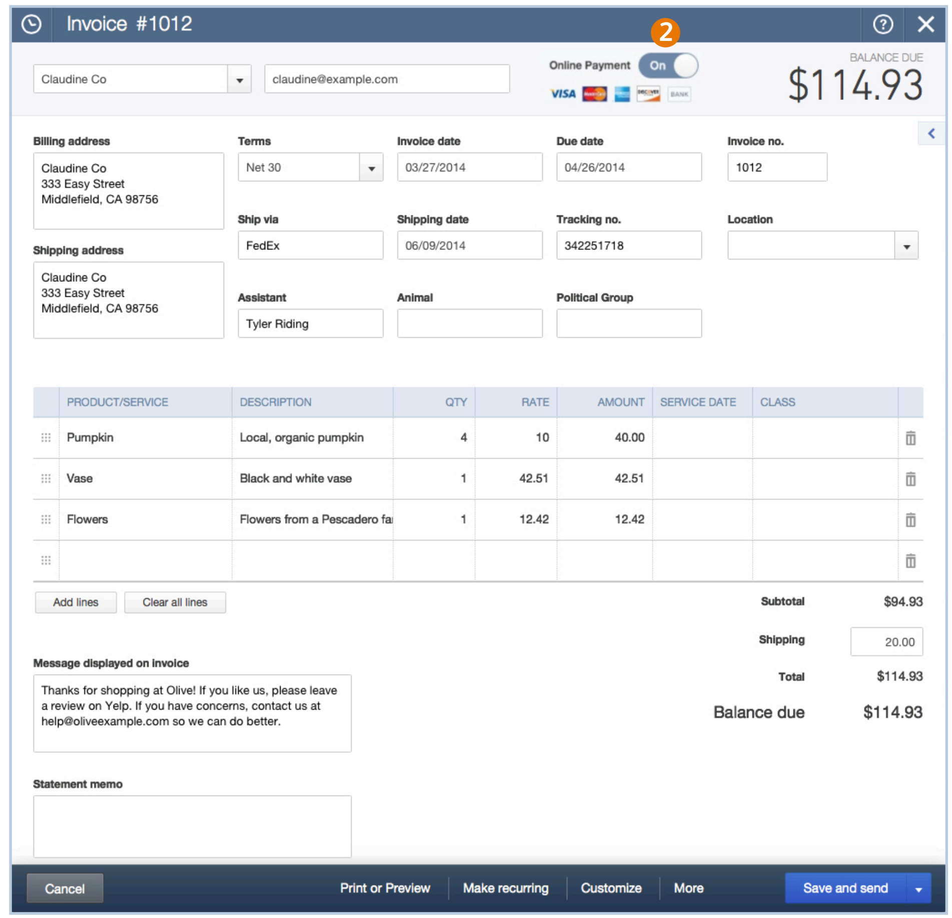
HELP (?) > FIND AN ACCOUNTANT NEAR YOU

Offer online payment

Offer your customers an easy, online way to pay their invoices. You'll get paid faster, too.

1. Click the Create (+) icon and select Invoice.

2. At the top of the page, switch on Online Payment.

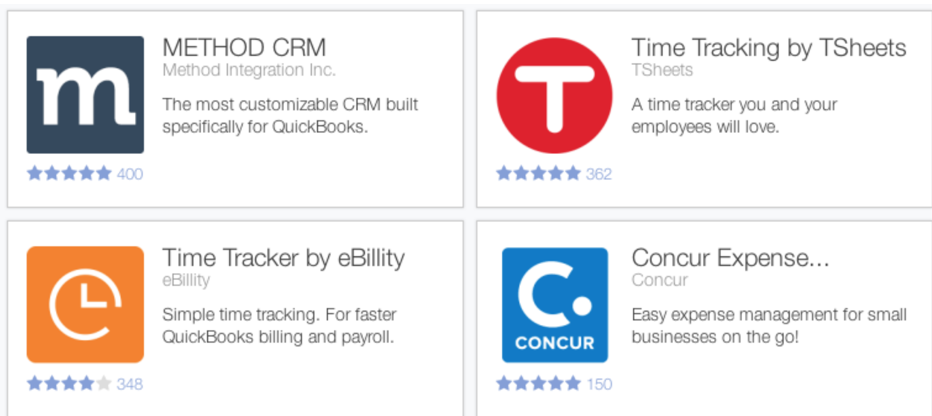


CREATE (+) > INVOICE > ONLINE PAYMENT

Do more with apps

Extend the power of QuickBooks with apps for time tracking, billing, and more. Try any app for free!

Go to: Navigation bar > Apps



Manage your business on the go

QuickBooks can help you manage your business wherever you are. Available on the web, iPhone, iPad, and Android.

Visit: quickbooks.intuit.com/mobile