

# SimpleStart **QuickBooks®**

## SIMPLESTART 2008 **SET-UP GUIDE**

Important information on how to:

- Install, activate and use SimpleStart
- Find answers to your questions

**It's never been so easy to start your business right. Right from the start.**

Thank you for choosing Intuit UK to help you manage your business. We're excited to provide you with QuickBooks SimpleStart, a breakthrough in simple bookkeeping for new and home-based business. Designed for first-time software users, SimpleStart makes it simple to get started with extremely easy, practical tools to manage essential business tasks. No confusing set up. No unnecessary features. Just common sense tools that are easy to set up and easy to use.

**With SimpleStart you'll be able to:**

- Invoice customers and pay bills.
- Track expenses.
- Do your cash based VAT Returns.
- Run your Profit and Loss report easily.

This Set Up Guide contains important information on how to install, activate and use SimpleStart.

We're here to help you get the best products and services to keep you on track and be as productive as possible. And most importantly, to help you spend more time making money than managing it! Plus, you'll never outgrow QuickBooks. Even if your business grows and your needs change, it's easy to upgrade to other QuickBooks products.

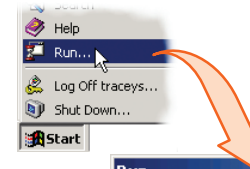
**QuickBooks SimpleStart. It's that easy.**

## Installing SimpleStart

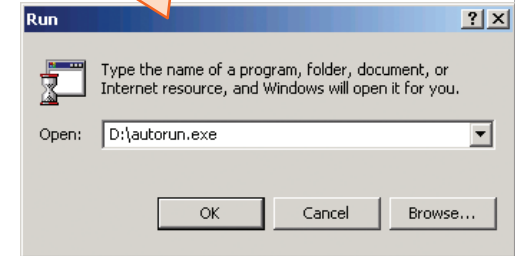
Welcome to QuickBooks SimpleStart, the simplest way to manage your sales, expenses and customers with ease. Follow these easy steps to install your new software and get started.

1. Shut down all programs that are open, including any virus protection software.
2. Insert the SimpleStart Installation CD in your CD-ROM drive. If the software does not start automatically, do the following:

Click the  (Start) button on the Windows taskbar and select **Run**.



Type the letter that is associated with your CD-ROM drive (in this example, it is D), then type :\`launch.exe`. Click **OK**.



3. When prompted to, enter your license number and product number.

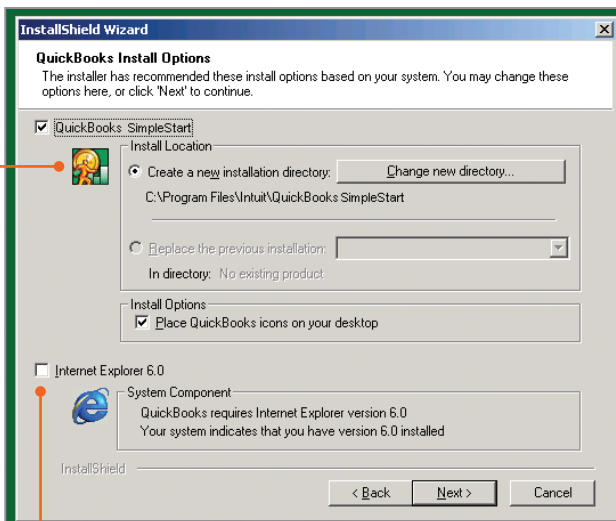
**Where can I find my license and product numbers?** Each copy of SimpleStart has two identification numbers which are needed to install the software. These are the License number and the Product number. Their location depend on how you purchased your software. Use the table below to help you locate your installation numbers. We highly recommend that you store your numbers in a safe place in case you need to reinstall the software. You can record your numbers on page 5.

<b>If you purchased SimpleStart...</b>	<b>then the numbers are provided...</b>
in a retail store	on the back of the CD sleeve
by calling Intuit directly	on the reverse side of the Intuit invoice that accompanied your software
as a downloadable version through our website	on the reverse side of the Intuit invoice



## Registering SimpleStart

4. At the Install Options screen, choose where you want SimpleStart to be installed.



If you want to install to the default directory, just click the **Next** button at the bottom of the screen.

To install to a different directory than the default, click the **Change new directory** button, then specify your new directory.

If the software detects that Internet Explorer (IE) version 6.0 is not installed on your computer, this checkbox is selected. Do not clear this checkbox if it is selected. IE 6.0 is needed for SimpleStart to run properly.

5. Follow the instructions until the software is installed, then restart your computer.

Once SimpleStart is installed on your computer, you must activate the software. Registration is a fast and easy process that validates you as the licensed user of SimpleStart.

**NOTE** If you use the Internet, make sure you are connected to it before you begin activation. Intuit respects your privacy. To view our privacy policy, visit [quickbooks.co.uk](http://quickbooks.co.uk) and click the "privacy" link.

1. Open QuickBooks SimpleStart. Click the QuickBooks SimpleStart icon on your desktop, or from the **Start** menu, go to **Programs** and select **QuickBooks**.
2. The Setup Interview opens automatically. Follow the onscreen instructions of the Setup Interview to create your company file. This takes only a few minutes.
3. Once your company file is created and SimpleStart is open, go to the File menu and select **Register QuickBooks**.

**If you choose to register your software at a later time, you will be asked to register each time you open your company file until the 10th use. After the 10th use, you cannot modify any data in your company file until you have registered.**

4. Click Begin Registration. SimpleStart will automatically try to register QuickBooks over the internet. If SimpleStart cannot connect to the internet, you will be able to register by phone.

- **Registering through the Internet** If you register through the Internet, the software sends your product information to Intuit and automatically registers your software for you. This is a safe and secure process.
- **Registering by phone** If you register QuickBooks SimpleStart by calling us, the QuickBooks representative will ask you for your **License number and Product number**. You can find this number on the same screen that prompted you to call us. The QuickBooks representative will give you a code which you must then enter in the **Validation Code** field, also located on the same screen.

When you have registered your software, you can see the details of your license information by going to the **Help** menu and selecting **My License Information**.

Write your QuickBooks SimpleStart codes here for your reference:

License number

Product number

Validation Code (if applicable)



## Getting around

### Getting Started



#### To open simpleStart

Click the **QuickBooks SimpleStart** icon on your desktop, or from the Start menu, go to Programs

and select **QuickBooks**. If you have no company file created, the Setup Interview starts automatically and takes only a few minutes to complete. (If you haven't activated, see **Activating SimpleStart** on page 5.)



#### To set up a bank account

You'll use it to track the cheques you write and deposits you make. On

the Home page in the Your Business area, move your mouse pointer over **Bank Accounts** and click **Register**. Use your latest bank statement to enter the opening balance and date so your records will be accurate.

**To use the tutorials** They're short, interactive, and you'll learn how easy it is to track your business activities. From the **Get Started Now** area on the Home page, click **Check Out the Tutorials**.

### Tracking the money coming in to your business



#### Start billing your customers

On the Home page in the Money In area, move your mouse pointer over **Invoices** or **Sales Receipts** and click **New** to fill out the appropriate sales form.



#### Record an invoice payment from a customer

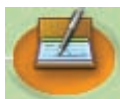
On the Home page in the Money In area, move your mouse pointer over **Receive Payments** and click **New**. Be sure to indicate whether the money is going directly in to your bank account or whether you are grouping it with other payments to deposit at a later time.



#### Make a bank deposit

On the Home page in the Money In area, move your mouse pointer over **Deposits** and click **New**. Select the payments that you will be taking to the bank for deposit.

### Tracking the money going out of your business



#### Write a cheque to pay a bill

On the Home page in the Money Out area, move your mouse pointer over **Write Cheques** and click **New**. Fill out the cheque just as you would fill out one in your cheque book. You can print the actual cheque or just track a handwritten one. If you are tracking VAT, make sure you enter an expense category and select the correct VAT code.



#### Record a cash or credit card expense

On the Home page in the Money Out area, move your mouse pointer over **Record Expenses**. Click **Cash** or **Credit Card** to enter the appropriate expense.

## Understanding SimpleStart terms

- **Customers** are the people to whom you sell your products or services, that is, the people who pay you for what you do. Some businesses might refer to a customer as a client or a member.
- **Suppliers** are any businesses or people from whom you buy things for your business – office supplies, phone or computer services, suppliers of the products that you sell. In SimpleStart, the VAT office is considered a supplier.
- **Items** are the products and/or services that you sell. You enter items on your invoices and sales receipts.
- **Transactions** are anything you record for Money In or Money Out of your business. Whenever you create an invoice, write a cheque, or make a deposit, you are recording a transaction in your company file.
- **Accounts** are used to track transactions related to your business income (e.g., sales) and expenses (e.g., travel).



# SimpleStart Home Page

**Menu Bar** If you don't see what you want to do on the Home page or in the activities listed on the left side of the SimpleStart window, you can find it on one of these menus.

**Toolbar** Click Back and Forward to move between forms. Click Home to return to this Home page view. Click Search to look for a specific invoice, sales receipt, or customer payment.

**Money In** Basic activities related to money coming in to your business. These activities are the same ones that you see in Money In on the Home page.

**Your Business** Enter or view information about your customers, suppliers, and bank accounts. Click Profit & Loss to see the financial state of your business.

**Money Out** Basic activities related to money going out of your business. These activities are the same ones that you see in Money Out on the Home page.

**Related Activities** These activities are relevant to your current activity. When you change to a different activity, the activities here change accordingly. These activities do not appear on the Home page or on the menus.

**Related Help** Relevant help topics for your current activity. When you change to a different activity, the topics here change accordingly. If you don't see the topic you need, type a question into the search box and click Ask. You can also use the Help index located on the Help menu.

**Need your questions answered?** Type your question in this box, then click Ask. Our search engine will search the online help and list all topics that are related to your question.

**Get Started Now** Click these links to help familiarise yourself with your software. Use the interactive tutorials to learn how to use SimpleStart. Then find out what to do next, and how to get help when you need it.

**Home Page** Your starting point for doing all your essential business activities – invoicing, creating sales receipts, recording customer payments, writing cheques for business expenses, and more. Move your mouse over an icon, then click the activity.

**Get Started Now**

- What Do I Do First?
- Check Out The Tutorials
- How Do I Get Help?
- Join QuickBooks Community

**Growing Your Business**

- Attract new customers using Google Marketing Tools
- Business startup advice
- Upgrade instantly to QuickBooks Pro

**Growing Your Business** Click these links for the Google Marketing Tools services, for business startup advice, or to upgrade to a different QuickBooks products when your business outgrows SimpleStart.

## Getting help

### Using the online help

- **Try the Related Help/Help Activities or the Help menu** On the Home page in the lower left-hand side of the window, you'll see a list of help topics that are related to the activity you are doing. For example, if you are filling out an invoice form, help topics related to the creation of invoices are displayed (e.g., filling out an invoice and creating items). You can also access our extensive help topics through the Help menu located on the Menu Bar.
- **Type your question – find an answer** You can search the QuickBooks help by typing your question into the search box on the Home page then clicking Ask. You can also open the search engine through the Help menu.
- **Help Index** View an index of all the help topics available to you. Go to the Help menu, and select Help Index.
- **Get up and running quickly using the Tutorials** These interactive tutorials teach you the basics and take only a few minutes to complete. You can get to them from the Home page under Get Started Now.

### Using SimpleStart online support

- **Quickbooks Knowledgebase** This online knowledgebase has hundreds of articles and Frequently Asked Questions. Visit [faq.quickbooks.co.uk](http://faq.quickbooks.co.uk)
- **Other QuickBooks Web sites** Below is a list of related Web sites where you can find up-to-date information about SimpleStart.
  - > **quickbooks.co.uk** general information on QuickBooks products and services
  - > **intuitshop.co.uk** to purchase Intuit products and services
  - > **quickbooksstationery.co.uk** information on QuickBooks business forms, cheques and stationery compatible with your software

## Contacting us

- **QuickBooks Support Plan** Support Plans can be purchased by calling us on 0845 606 2161. Customers with a valid plan are able to access information to enhance their business and interact with each other 24 hours a day, 7 days a week.
  - > **Unlimited Telephone Support** Available during office hours, 9:00am to 5:30pm Monday to Friday (except UK Bank Holidays).
  - > **Live Chat** With real time live chat, members can talk with each other about their business or any other subject.
  - > **Bulletin Boards** Members can post messages to each other on various topics.

If you would like to purchase a SimpleStart Support Plan or speak with one of our Support experts, please call 0845 606 2161.

- **Quickbooks ProAdvisors** QuickBooks ProAdvisors are a network of accountants across the UK who are experienced on the use of QuickBooks products. Visit [advisors.quickbooks.co.uk](http://advisors.quickbooks.co.uk) to find an advisor in your area.



- **Other key QuickBooks related contact numbers**
  - > **0845 606 2161** to purchase or inquire about QuickBooks products and services, to inquire about activation, or ask questions about your QuickBooks account
  - > **0800 279 5285** to purchase or inquire about Intuit stationery (cheques, business forms, and other stationery)
- **Address for product returns**

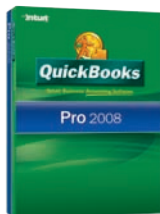
All product returns made under the 30 day money back guarantee must be sent via registered mail to:

**Intuit Limited Service Centre  
P.O. Box 4944  
Twyford, Reading RG10 9BF**

## Is it time to upgrade from SimpleStart?

Running a successful business can be challenging. Knowing what tools you'll need tomorrow is hard enough, let alone for months or even years down the road.

**QuickBooks products are designed to work together seamlessly. That makes it easy to change your accounting software as quickly as your business changes!**



### QuickBooks Pro

QuickBooks Pro includes the easy-to-use tools to help you manage routine accounting tasks, from tracking stock to job costing and more. Grow your business and stay on track – with QuickBooks Pro.



### QuickBooks Premier

Includes all of the features of QuickBooks Pro, plus advanced features to suit your complex business needs. QuickBooks Premier goes beyond the basics, including creating budgets and sales & expense forecasting.

### Do you have employees?

Pay your employees quickly with QuickBooks Payroll. Just add QuickBooks Payroll to QuickBooks Pro or Premier for easy, accurate payroll.

- Automatic tax table updates
- Print payslips for your employees

Call 0845 606 2161 to learn more about QuickBooks Payroll.

### Which one is right for you?



SIMPLESTART  
2008



PRO  
2008



PREMIER  
2008

	SIMPLESTART 2008	PRO 2008	PREMIER 2008
<b>SAVE TIME ON EVERY-DAY TASKS</b>			
Interview gets you up & running quickly	✓	✓	✓
Create invoices, print cheques and manage bills	✓	✓	✓
Monitor accounts payable		✓	✓
<b>MANAGE PRODUCTS &amp; SERVICES</b>			
<b>NEW</b> Store multiple delivery addresses per customer	✓	✓	✓
E-mail invoices & estimates as PDFs	✓	✓	✓
Track stock, set re-order points & create purchase orders		✓	✓
Automatically bill for & track employee time/job costs		✓	✓
Create sales orders & track back-orders			✓
<b>IMPROVED</b> Buy & sell stock in different units			✓
Set prices and determine discounts by customer/job			✓
Build and track inventory assemblies to finished goods			✓
<b>FLEXIBILITY TO WORK THE WAY YOU WANT</b>			
Customise report templates & graphs	14 basic reports	100+ reports	135+ reports
Audit Trail to detect errors and track changes	✓	IMPROVED	IMPROVED
Customise professional-looking templates	✓	IMPROVED	IMPROVED
Set password-protected closing dates		✓	✓
<b>IMPROVED</b> VAT management	Cash basis	✓	✓
Multiple-user access (with purchase of additional copies) <sup>2</sup>		Up to 5 <sup>2</sup>	Up to 5 <sup>2</sup>
Create budgets, business plans & forecasts			✓
Set flexible billing rates			✓
Access files from remote locations (additional fees may apply) <sup>3</sup>			1 year free

## Stationery

When money is on the line, it's important that your company always presents a professional image.

Now you can personalise your invoices and cheques – with the guarantee that everything will fit your software - and that's a money-back guarantee! As well as saving time managing both your business, you'll also benefit from seamless integration with your QuickBooks software.

### Invoices

#### Professional Invoices

Perfect for solicitors, consultants and professions that bill by the project, but also require space to list their specific services.

#### Service Invoices

Ideal for accountants, designers, plumbers, caterers and anyone who bills their services hourly.

### Cheques

The only cheques you can re-order from within QuickBooks. The perfect choice for professionals – both at work and at home.

#### Voucher Cheques

The clear, concise layout helps to improve efficiency, payment accuracy and cash flow – as well as making reconciliation easier too.

#### Standard Cheques

Helps to ensure prompt payment, reduce queries and improve your cash flow. Full bank approval is obtained on your behalf.



Call us on 0800 279 5285 to purchase or inquire about Intuit stationery

## Local QuickBooks help

Finding the business...doing the business... running the business. Often it's the last part that causes most problems and which may eventually lead to an unhappy failure.

Using the services of a professional advisor can help new and growing businesses to close the knowledge gaps that make them vulnerable. And the impartial, expert advice they offer could bring the wider perspective you need when it becomes difficult to see the wood for the trees.

As part of our support for the business community, we've created an on-line database of qualified accountants and IT consultants from all areas of the UK.

You have free access to the simple, map-based tool which helps you search quickly by region, by location or even by name.

See how easy it is  
[quickbooks.co.uk/findanadvisor](http://quickbooks.co.uk/findanadvisor)

*Our business is really starting to take off and I could certainly use some help with the admin...*

*To be more successful, I know that I have to look professional too*

*There seems to be plenty of business help around, but where do I start?*

*My skills are in catering not accountancy, so I need sound advice*

*I want someone local, someone who's readily available*

*In a rural location like this I could easily become very insular, so I want to hear other views, discuss options and share locally-based knowledge*





## SimpleStart help

### 30-days FREE support

We're here to help! New or upgrading customers receive free telephone assistance for 30 days from your product registration date. To take full advantage of this help, you must register your software within 90 days of purchase.

Call **0845 606 2161** or **+44 870 609 0601** from outside the UK for support. Phone lines are open from 9am to 5.30pm, Monday to Friday (except UK Bank Holidays).

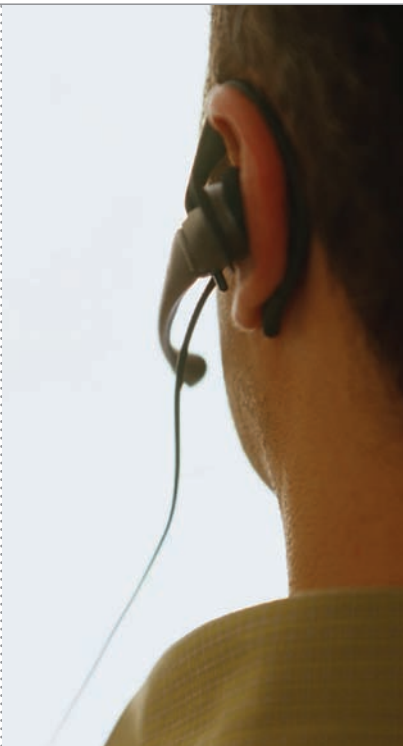
#### Questions?

Call us on 0845 606 2161 for answers about QuickBooks products and services, registration or your QuickBooks account.

#### Product returns

All product returns made under the 30-day money-back guarantee must be sent via registered mail to:

Intuit Limited  
PO. Box 2234  
Maidenhead, Berkshire SL6 1YW



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