

intuit®

QuickBooks® 2011

Getting Started Guide

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First printing, September 2010

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Welcome to QuickBooks

Congratulations. You are about to experience your business in a whole new way. Clear, organized, managed. Whether you're a seasoned entrepreneur or starting up your very first business, QuickBooks is your solution for efficient financial management. Save time. Save money. Do business better.

Intuit's online **Getting Started Center** – quickbooks.ca/getstarted – and this Getting Started Guide will walk you through some set-up essentials.

- **Install** QuickBooks & **Set up** your company file.
- **Perform** common QuickBooks activities.
- **Navigate** your QuickBooks with ease.
- **Support** options when you have questions.
- **Set up** your Payroll in QuickBooks.

Upgrading from a previous version?

Welcome back! You'll find all the upgrading information you need in the "Upgrade QuickBooks" section of this guide.

Support Options

3 easy ways to get help if you need it



Call us. You benefit from a **free session with a QuickBooks expert within 60 Days** of registering your software. **1-877-772-9158** (Monday to Friday, 8 a.m. to 8 p.m. EST).



Visit Intuit's **Getting Started Centre**. Your source for FAQs, how-to-videos, and tips and tricks to get you up and running. Visit quickbooks.ca/getstarted



Click the **Help Menu** to access in-product support. Access the Learning Centre's interactive tutorials, join the QuickBooks Live Community, and more.

Familiar with QuickBooks, but have a question?

Visit our Support site for extensive self-help guidance, including FAQs, user guides, or chat with a virtual agent 24/7.

Go to quickbook.ca/support

Install QuickBooks in 3 easy steps

To install QuickBooks:

1. Shut down all running programs, including antivirus programs. (Remember to turn them back on once installation is complete).
2. Insert the QuickBooks CD into your CD-ROM drive.



If installation does not start automatically,

- Click **Start** from your Windows menu (bottom left of your screen)
- Choose **Run**
- Type **D:\setup.exe** (Where “D” is your CD drive)
- Click **OK**

3. Follow the on-screen instructions



Where should I install QuickBooks?

We recommend that you accept the default folder location. Windows Vista and Windows 7 require program files to be installed in different locations than in previous operating systems. The new location is compatible with these new requirements.



To start QuickBooks, double-click the QuickBooks icon on your desktop, or click the Windows Start button and then click QuickBooks from the Programs group.

Register your copy of QuickBooks

Under the **Help** Menu, select **Register QuickBooks**. Registration must be made within **30 days** of product installation. It only takes a few minutes to activate your product and get you on board. By registering, you'll be able to use your free support call and will have access to other support resources.



Where can I find my License and Product Numbers?

If you purchased QuickBooks:

- From a retail store, your numbers are on the Getting Started folder.
- By calling Intuit directly:
 - Your numbers are on the packing slip,
 - In an email (if you gave one to the sales representative),
 - Or you may have received it over the phone.
- From our website, your numbers are on the Web receipt.



Setting up a multi-user environment

For instructions on how to set up a multi-user environment, or to add new users, visit quickbooks.ca/getstarted

Let's get started

Making the transition to QuickBooks is much easier when you have the knowledge you need to enter your information correctly. That's why we've provided valuable resources in this section that will help you get up and running quickly and accurately, then get right back to business.

Set up your company in QuickBooks

The first thing you need to do in QuickBooks is set up a company file for your business. Setting up your company file properly is the most important thing you can do to manage your business efficiently and with confidence.

As you set up your company file, QuickBooks prompts you for details about your business. Before you begin the setup process, gather the information in the **Getting Started Checklist** on the following two pages.

Getting Started Checklist

Company name and address

You will need both the legal name and the “doing business as” (dba) name for your company. The legal company name is the name you use when filing taxes for your business. The “doing business as” name appears on invoices, statements, reports, etc.

Business Number (BIN)

This is the 9-digit business number issued to you by the Canada Revenue Agency (CRA). Not all businesses need a BIN. You need one if you collect sales tax, have employees, or your business is incorporated. For more information on Business Numbers, visit the CRA website at <http://www.cra-arc.gc.ca>

Sales Tax Information

The sales taxes you pay and collect (GST, HST, PST, and/or QST), what you charge it on, and how much of each sales tax you owe as of your start date.

**Start Date**

QuickBooks requires a start date as the point at which you begin entering your business transactions. You must enter all historical transactions between your start date and today's date to ensure complete accounting records for your business.

Many businesses use the first day of their fiscal year, so that they can see transactions for the entire year. If this is not important to you, you can choose a different start date, such as today or the first of the month, quarter, or year.

**Bank Statements, Credit Card Accounts, and Outstanding Cheques**

You need your latest bank statement balances and information about any outstanding cheques, deposits, withdrawals, or charges applicable to all the accounts you want to set up and manage in QuickBooks. This includes credit cards, bank accounts, lines of credit, and loans.

**Optional Information**

Eventually, you will need to enter detailed information about your customers, vendors, and employees, as well as the products and services you sell, the products that you hold in inventory, and any additional assets.

After you have gathered the information listed in the Getting Started Checklist, you can set up your business in QuickBooks using the EasyStep Interview. The **EasyStep Interview** walks you through the setup process and helps you tailor QuickBooks for your business. The setup interview is divided into sections, so you can save your progress and return at a later time.

Start the EasyStep Interview

1. Start QuickBooks by double-clicking the QuickBooks icon on the desktop, or by choosing **QuickBooks** from the Programs group on the Windows Start menu.
2. Click **Create a New Company**, or from the File menu choose New Company.
3. Follow the on-screen instructions to complete the interview.

Enter historical transactions

If your start date is before today's date, you will need to enter past transactions that occurred between that date and today. This ensures that your QuickBooks records are completely up-to-date and reports are accurate.

Enter historical transactions in chronological order. For example, QuickBooks won't know how to credit a customer payment unless you've already entered the invoice applicable to that customer.



Note: Entering historical transactions is especially important if customers don't pay you at the time they receive goods or services. If you don't enter historical transactions early on, it's hard to track and collect late customer payments.

Intuit recommends that you enter your transactions in this order:

1. Invoices or statements you sent out since your start date
2. Purchase orders you issued since your start date that you haven't received in full
3. Cash or cheques you received since your start date
4. Bills you received since your start date
5. Bills you paid since your start date
6. Deposits made to any of your accounts since your start date
7. Any other cheques you wrote (for things other than bills) since your start date

Complete your bank account information

After you enter historical transactions, your account registers will reflect bills paid, cheques written, and deposits received.

To ensure your account registers are complete, you must also enter these transactions:

- Cheques or other charges that happened before your start date but didn't appear on statements before your start date (i.e., cheques or other charges that didn't clear)
- Other cheques you wrote after your start date that were not for bills or accounts payable (such as credit card payments)
- Deposits you made after your start date that were not from customers
- Deposits you made before your start date, but that didn't appear on statements before your start date
- Bank charges and fees
- Interest paid on your account

Refer to the **Help Menu** in QuickBooks for step-by-step instructions on how to enter these transactions to make your account registers accurate.

Common Tasks

Adding an Account

When you set up your company file, QuickBooks automatically creates several accounts for you. As your business grows and changes, you might need to add new accounts to your Chart of Accounts to better organize your finances.



Tip: For a video introduction to accounts (and other topics), visit quickbooks.ca/videos

To add an account:

1. Go to the **Lists** menu and click **Chart of Accounts**.
2. Click the **Account** menu button, then click **New**.
3. Select the type of account you want to create, then click **Continue**.
4. Enter information about the account:
 - In **Account Name**, enter the name of the account as you want it to appear on your financial statements.
 - Enter additional information about the account as needed based on the account type, such as the bank account number or a description.
 - If you need to enter an opening balance for a balance sheet account (such as for an existing bank account that you didn't set up during the EasyStep interview), click **Enter Opening Balance** and enter the balance as of the QuickBooks Start Date.
5. Click **OK**.

For a Brand New Account

When you create a brand new account that you didn't have as of the QuickBooks Start Date, leave the opening balance at zero. Its opening balance is created automatically when you transfer funds from another account.

What type of account should I use?

There are two main types of accounts:

- Balance sheet accounts
- Income and expense accounts

Balance Sheet Accounts

Use this account	To track
Bank	Chequing, savings, petty cash, and money market accounts. Add one bank account for every account your company has at a bank or other financial institution.
Accounts Receivable (A/R)	Transactions related to the customers that owe you money, including invoices, payments, deposits of payments, refunds, credit memos, and statements. Most companies have only one A/R account (except when using multiple currencies).
Other Current Asset	Assets that are likely to be converted to cash or used up within one year, such as notes receivable due within a year, prepaid expenses, and security deposits.

Fixed Asset

Depreciable assets your company owns that aren't likely to be converted into cash within a year, such as equipment, furniture or a building.

Other Asset

Any asset that is neither a current asset nor a fixed asset, such as long-term notes receivable.

Accounts Payable (A/P)

Transactions related to money you owe, including bills, bill payments, and any credit you have with vendors. See also current and long-term liability accounts.

Credit Card

Credit card purchases, bills, and payments.

Other Current Liability

Liabilities that are scheduled to be paid within one year, such as sales tax, payroll taxes, accrued or deferred salaries, and short-term loans.

Long-Term Liability

Liabilities such as loans or mortgages scheduled to be paid over periods longer than one year.

Equity

Owner's equity, including capital investment, owner's draws, and retained earnings.

Income and Expense Accounts

Income and expense accounts track the sources of your income and the purpose of each expense. When you record transactions in a balance sheet account, you usually assign the amount of the transaction to one or more income or expense account.

Use this account	To track
Income	The main source of money coming into your company.
Other income	Money received for something other than normal business operations, such as interest income.
Expense	Money that is leaving your company.
Other expenses	Money spent on something other than normal business operations, such as corporate taxes.
Cost of Goods Sold	The cost of items that you sell.

Add Customers

You can add, view, and manage customers from the **Customer Centre**. Customers are the people and companies to whom you sell your products and services. You can use the information you enter to personalize invoices for customers and quickly view the status of their accounts.

Tip: For a video introduction to customers (and other topics), visit quickbooks.ca/videos

To add a customer:

1. Open the Customer Centre (go to the **Customers** menu and click **Customer Centre**, or click **Customer Centre** on the toolbar).
2. Click **New Customer & Job**, then click **New Customer**.
3. In **Customer Name**, enter the name of the customer. If necessary, also enter an opening balance.
4. In the **Address Info** tab, enter customer information, including the full name, billing and shipping addresses, and additional contact information.
5. Enter details in the **Additional Info** and **Payment Info** tabs, as desired.
6. Click **OK** (or **Next** if you want to enter another customer).

Add Vendors

You can add, view, and manage vendors from the **Vendor Centre**. Vendors are the people and companies you buy goods and services from to run your business. This could include the phone company, office supplies vendor, or utility companies.

To add a vendor:

1. Open the Vendor Centre (go to the **Vendors** menu and click **Vendor Centre**, or click **Vendor Centre** on the toolbar).
2. Click **New Vendor**.
3. In **Vendor Name**, enter vendor name of the vendor. If you owe this vendor money as of the QuickBooks Start Date, also enter an opening balance.
4. In the **Address Info** tab, enter the vendor information including the full name, addresses, and additional contact information.
5. Enter details in the **Additional Info** and **Account Prefill** tabs, as desired.
6. Click **OK** (or **Next** if you want to enter another customer).

Add Items

In QuickBooks, an item is anything that your company buys, sells, or resells to run your business. Items are your products, services, and things such as shipping and handling charges, subtotals and discounts.



Tip: For a video introduction to items (and other topics), visit quickbooks.ca/videos

When you choose an item from the Item list on a sales form, QuickBooks fills in a description of the line item and calculates its amount for you.

QuickBooks provides several types of items. Some items, such as Service or Inventory Part items, help record the services and products your business sells. Other items, such as the Subtotal or Discount item, are used to perform calculations on the amounts in a sale.

To add an item:

1. Go to the **Lists** menu and click **Item List** (or, on the QuickBooks Home page, click **Items & Services**).
2. Click the **Item** menu button and then click **New**.
3. Click **Type**, then choose the type of item you want to create. (For a list of item types, see next page.)
4. In **Item Name/Number**, enter the item name as it should appear on purchase and sales forms.
5. In **Description**, enter a description that should appear on sales forms when you use the payment item.
6. Use the rest of the window to enter any other details appropriate for the item type.



Tips for entering details on items you buy or sell: If you track sales tax, make sure you select an appropriate code in the Tax Code and Purch Tax Code fields.

7. Click **OK** (or **Next** if you want to enter another item).

Which Item Type Should I Choose?

Item Type	Purpose
Services	Use for services you either charge for or purchase, like specialized labour, consulting hours, or professional fees.
Inventory part	Use for goods you purchase, track as inventory, or resell.
Inventory assembly	Use for goods that you assemble from parts you buy.
Non-inventory part	Use for goods you buy but don't track, like office supplies, or materials you buy for a specific job that you charge back to your customer.
Other charge	Use for miscellaneous labour, material, or part charges, such as delivery charges, setup fees, or service charges.
Subtotal	Use to total all items above it on a form, up to the previous subtotal. Useful when applying a percentage discount or surcharge to many items.

Group	Use to quickly enter a group of individual items on an invoice.
Discount	Use to subtract a percentage or fixed amount from a total or subtotal. Do not use this item type for an early payment discount. Instead, use Discount & Credits from the Receive Payments window.
Payment	Use to record a partial payment you received at the time of the sale. It reduces the amount owed on an invoice.

Setting up items in different units of measure

In QuickBooks Premier editions, such as Contractor Edition, you can stock items in your inventory in one unit of measure and sell them in another. For example, buying soft drinks in a case that holds 12 cans, then selling the cans individually.

For more information on setting up items, visit quickbooks.ca/getstarted

Upgrade QuickBooks

Upgrading from QuickBooks 2008 or later?

1. Install QuickBooks 2011
2. Open your old company file
3. You're ready to go!

If you're upgrading from QuickBooks Multicurrency edition or QuickBooks 2007 or earlier, this version of QuickBooks contains many new features and changes. The Upgrader's Guide section contains important information to get you working with your company file as quickly as possible.



Tip: For a video introduction on what to expect when upgrading, visit quickbooks.ca/videos.

What company files can be upgraded to QuickBooks 2011?

You can upgrade company files from all earlier versions of QuickBooks, **except for: QuickBooks Enterprise Solutions.**

If you're upgrading from version 2003 or earlier, you cannot upgrade directly to QuickBooks 2011. Instead you must upgrade in two steps. Go to our support site at quickbooks.ca/support and search "2003" for more details.

What should I do with my old version of QuickBooks?

If you have QuickBooks Multicurrency edition, QuickBooks 2007 or earlier, please **do NOT uninstall** your old version of QuickBooks, or more importantly, do not delete your old company file. You need it to create sales tax reports or to review transactions that took place before you upgraded your company file, as well as for audit or tax inspection purposes. During the upgrade process, QuickBooks knows the location of your old company file and prevents you from overwriting it.

Before you upgrade your company file

Find your last sales tax return(s): Locate the paper copies of the last GST/HST/QST and PST sales tax returns that you filed and have them with you when you start the upgrade process. You will need information from these returns to upgrade your company data.

Your payment details: Locate the payment or refund information for your last sales tax payment including how much was paid or received and the date for which it was paid. You might need to find this information from a GST slip or a cheque receipt.

Make a backup of your old company file(s): QuickBooks prevents you from overwriting your original company file during the upgrade process. However, for added safety, make a backup before you start. Set the backup process to perform a complete verification.

Starting the upgrade process

1. In **QuickBooks 2011**, open your old company file.
2. Verify you want to upgrade your file by clicking to select the checkbox, and then click **Update Now**.
3. Start going through the **Upgrade Wizard**.

The Upgrade Wizard takes you through the steps necessary to upgrade your company file.

To save time, before starting the upgrade process, the wizard asks for key information about your data file. We describe the most important questions in the sections below.



Tip: At any time in the Upgrade Wizard, click the blue links if you want more information.

Home currency

As you go through the Upgrade Wizard, you'll be asked if you use foreign currencies (the Multicurrency feature). If you do use foreign currencies, you'll also be asked to confirm your home currency. Make sure you choose the currency that corresponds to the home currency in your old company file.

Why isn't my home currency brought forward from the previous version?

The Multicurrency feature in previous versions allowed you to customize the name of the currency. QuickBooks needs to know which currency corresponds to your old home currency so it can download the correct exchange rates from the Internet.

Date of the last Sales Tax period

If you file sales tax (GST, HST, QST, or PST), you will be asked for the **end dates** of the periods for the last **GST/HST/QST** and **PST** sales tax returns that you sent to the government.



Important: It is vital that you enter the correct dates. Otherwise, the sales tax totals in your upgraded file will be incorrect!

Why do I need this information?

During the upgrade, QuickBooks reassesses your sales tax to the end date of your last return, to catch possible sales tax entry errors that might be present in your old company file.

We do this now because QuickBooks has a completely new sales tax system. The new sales tax system ensures that common user mistakes do not affect the accuracy of sales tax reports.

For example,

- Transactions that were entered or modified after sales tax was filed
- Transactions that contained sales tax, but didn't have a sales tax code associated with them



Important: If QuickBooks finds sales tax entry errors in your old company file, you might have a sales tax overpayment or underpayment. When the upgrade completes, resolve the overpayment or underpayment by downloading a new tool from the Upgrade Centre.

Business forms and reports in the new version

Near the end of the Upgrade Wizard, QuickBooks asks you to manually recreate your business forms and reports in the new version.

You don't have to do this right now. After the upgrade is finished, the Upgrade Centre lists the items you need to recreate and gives you the tools to do so.

Why do I have to recreate my business forms?

The way that sales tax is reported on business forms (like bills and invoices) is different in the new sales tax system. Sales tax is now reported only as a total on each form, instead of separate amounts for each line, resulting in a more accurate sales tax calculation. However, this change prevents us from upgrading your customized forms.



Tip: We've improved the Layout Designer (sometimes referred to as the Customization Feature) so it's even easier to recreate your business forms, and we have hundreds of templates you can download from the web. For more details, see quickbooks.ca/templates

Finishing the upgrade

When QuickBooks has enough information, it begins updating your company file. QuickBooks estimates how much time it will take based on the size of your file and displays a countdown timer.

After you upgrade your company file, QuickBooks displays the **Upgrade Centre**. From here, you can complete the remaining tasks necessary to finish upgrading your company file. Some are more critical than others to complete, such as Adjust for sales tax overpayment or underpayment. You can complete them at your convenience, just click **Add Reminder**.

Should you require additional upgrading support, take advantage of your one free technical support call. **Call 1-877-772-9158** (weekdays 8:00 a.m. to 8:00 p.m. EST). A QuickBooks expert will be happy to assist you.

Also visit our support site for extensive self help information that is available 24 hours a day. quickbooks.ca/support

QuickBooks Payroll

Paying employees is a big responsibility. You have to keep track of hours, salaries and wages, social insurance numbers, dates of birth, current tax rates and forms, vacation pay and sick time, and bonuses, as well as your liability payments to the government and benefit agencies.

The following section is only a brief introduction to QuickBooks Payroll setup. For more details (including a checklist of information you need about your employees), see the following resources:

- Access the **Help Menu** in QuickBooks for step-by-step instructions for completing Payroll tasks.
- Visit quickbooks.ca/getstarted
- For a video introduction to payroll (and other topics), visit www.quickbooks.ca/videos

What is QuickBooks Payroll Service?

With a subscription to QuickBooks Payroll, you have access to several features and services to help you process your payroll quickly and easily.

As a QuickBooks Payroll subscriber, you never have to stress about getting updated payroll tax information from the CRA or MRQ again. You will automatically receive updated payroll tax tables whenever the Federal or Provincial governments change the tax laws.

How do I subscribe to QuickBooks Payroll?

Subscribing to QuickBooks Payroll is easy. Go to the **Employees** menu, click **Payroll**, and choose **About Payroll Service** or call us at **1-888-829-8589**.

Payroll Setup

When setting up payroll for the first time, you must:

- **Set up Payroll Items** that can be added to an employee's pay cheque.
- **Set up employees** in the Employee Centre.
- **Set up YTD** (Year To Date) amounts for your employees. These are totals paid so far this calendar year to each employee before starting QuickBooks Payroll, including benefits and taxes withheld.
- **(Optional) Configure Payroll Schedules** to save time generating pay cheques in the future.

Adding Payroll Items

Add payroll items to pay cheques the same way you add items to invoices. Payroll items track amounts such as wages you pay and taxes you deduct from pay cheques. There are payroll items for compensation, taxes, other additions and deductions, and employer-paid expenses.

By default, QuickBooks creates common payroll items for you. However, you may need to add other payroll items for your own company, such as additional health benefits that your company provides. You'll need payroll items for hourly wages, salaries, commission, and bonuses; government taxes and deductions; employee deductions of any kind (such as RSP contributions); additions (such as an automobile allowance); and company-paid expenses (such as company-paid health insurance).

To create a payroll item:

1. Open the Payroll Centre (go to the **Employees** menu and click **Payroll Centre**).
2. In the Payroll Centre workflow window, click **Payroll Items**.

3. In the Payroll Item List, click the **Payroll Item** menu button and then click **New**.
4. Choose the type of payroll item you want to create:

Use this payroll item	To track
Wage	Money you pay to employees for salaries, hourly wages, and overtime.
Addition	Money you pay to an employee that is not a direct result of their work, such as a car allowance.
Deduction	Money you deduct from your employee other than taxes, such as union dues or employee purchases.
Company Contribution	Company-paid benefits for your employees, such as pension plans or dental benefits.
Other Tax	Miscellaneous taxes (company or employee paid) based on an employee's wages such as Provincial Health Tax.
Bonus	To track "Bonuses"
Commission	To track "Commissions"

5. Click **Next** and answer the questions on each screen.

Setting up Employees

To process pay cheques and prepare tax documents for your employees, you must enter several details about your employees.

To add an employee:

1. Open the Employee Centre (go to the **Employees** menu and click **Employee Centre**).
2. Click **New Employee**. The New/Edit Employee window opens.
3. Enter information about the employee as listed below.

To set up an employee's personal information:

1. In the New/Edit Employee window, go to the **Change tabs** list and select **Personal Info**.
2. In the **Personal** tab, enter the employee's personal details, including their name, Social Insurance Number (SIN), and date of birth.
3. In the **Address and Contact** tab, enter the employee's address and contact information.
4. In the **Additional Info** tab, define custom fields to store other information you want to track, such as the name of the employee's spouse.

To set up an employee's payroll information:

1. In the New/Edit Employee window, in the **Change tabs** list, select **Payroll and Compensation Info**.
2. In the **Earnings** section, set up the employee's wage information:
 - Under "Item Name", select a salary or hourly payroll item, then under "Hourly/Annual Rate" enter the amount you pay annually or hourly.
 - In **Pay Frequency**, select how often you pay this employee.

3. If you use QuickBooks to track your employee's time, and you pay employees based on this time, click **Use time data to create pay cheques**.
4. In the **Additions, Deductions, and Company Contributions** section, set up any employee benefits and other deductions (except for taxes) that you take from pay cheques.
5. Click the **Taxes** button to enter information from the employee's TD1 forms, and review the Income Tax, Canada Pension Plan/Quebec Pension Plan, Employment Insurance and other payroll taxes he or she might have to pay.
6. Click the **Accrual Hours** button to set up how much time an employee accrues, including how much he or she has accrued this year.
7. Click the **Vacation Pay** button to set up how much vacation pay the employee has available and how much he or she earns.
8. Click the **Direct Deposit** button to set up direct deposit information. (Note: This is a third-party service and fees do apply).

Set up Year-to-Date Amounts

In order for QuickBooks to calculate tax and other amounts during a payroll run, QuickBooks needs to know the amounts you already paid to employees before you started using QuickBooks Payroll, for this calendar year to date.

In order to enter YTD amounts, you'll need:

- The amount each employee earned (including former employees paid this year).

- How much was deducted from each employee's earnings, and for what purpose (income tax, EI, CPP, and so on). You must also include how much tax your company paid as a result of the employee's earnings (such as the employer's portion of EI).
- Vacation pay accrued by each employee (in total, not just this year).
- Amounts you have remitted so far this year for payroll liabilities.

To enter YTD amounts:

1. Open the Payroll Centre (go to the **Employees** menu and click **Payroll Centre**).
2. In the Payroll Centre workflow window, click **Set Up YTD Amounts**.
3. Follow the instructions in the wizard.

Running Payroll

Before you pay employees the first time, you might want to set up payroll schedules. Payroll schedules let you group together employees who have the same pay frequency so you can pay them on the same day. You can define how often you pay your employee (weekly, biweekly, and so on), the date their pay cheque is due, and on which day you run your payroll. QuickBooks then calculates your upcoming payroll schedule so that you can pay your employees on time.



Tip: For a video introduction to paying employees (and other topics), visit quickbooks.ca/videos

To set up a payroll schedule:

1. Open the Payroll Centre (go to the **Employees** menu and click **Payroll Centre**).
2. In the Payroll Centre workflow window, click **Payroll Schedules**.
3. In the **Payroll Schedule** list window, click the **Payroll Schedule** menu button and then click **New**.
4. Enter the requested information in the **New Payroll Schedule** window. Enter dates based on the next time you will pay employees. QuickBooks will calculate future payroll schedules based on those dates. Click **OK** when you're done.
5. When you want to pay employees, go to the Payroll Centre and click **Start Scheduled Payroll**.

To pay employees without using a payroll schedule:

1. When it is time to pay employees, open the Payroll Centre (go to the **Employees** menu and click **Payroll Centre**).
2. In the Payroll Centre workflow window, click **Unscheduled Payroll**.

Now you're on your way to discovering QuickBooks and managing your business with efficiency and ease.

We look forward to connecting with you at

quickbooks.ca/getstarted

Thank you,

The QuickBooks Team

Keyboard Shortcuts

Copy cheque transaction in register	Ctrl + O
Create new invoice	Ctrl + I
Delete cheque, invoice, transaction, or item from list	Ctrl + D
Find transaction	Ctrl + F
Go to register or transfer account	Ctrl + G
History of A/R or A/P transaction	Ctrl + H
Memorize transaction or report	Ctrl + M
New invoice, bill, cheque or list item in context	Ctrl + N
Open account list	Ctrl + A
Open Customer Center (Customers & Jobs list)	Ctrl + J
Open Help for active window	F1
Open list (for current drop-down menu)	Ctrl + L
Open memorized transaction list	Ctrl + T
Open split transaction window in register	Ctrl + S
Open transaction journal	Ctrl + Y
Paste copied transaction in register	Ctrl + V
Print	Ctrl + P
QuickReport on transaction or list item	Ctrl + Q
QuickZoom on report	Enter
Show list	Ctrl + S
Use list item	Ctrl + U
Write new cheque	Ctrl + W