

QuickBooks® **EasyStart™**

Set Up Guide

for New & Home-based business

Important information on how to

- **Install EasyStart**
- **Activate EasyStart**
- **Get around in EasyStart**
- **Find answers to your questions**

Installing EasyStart

Dear Customer,

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

Thank you for allowing Intuit Canada to help you manage your business. We're excited to provide you with QuickBooks EasyStart, a breakthrough in simple bookkeeping for new and home-based business. Designed for first-time software users, EasyStart 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 EasyStart you'll be able to:

- * Invoice customers and pay bills.
- * Track expenses.
- * View your bank account statements or run a quick Profit & Loss report.
- * Always be ready for year-end taxes... or meetings with your bookkeeper!

This Set Up Guide contains important information on how to install, activate and use EasyStart. And our customer service team is just a phone call away if you have any questions.

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 EasyStart. It's that easy.

Sincerely,

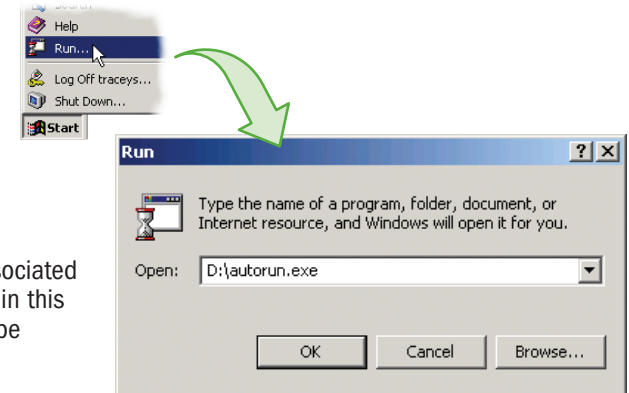


Yves Millette
President and CEO, Intuit Canada

Welcome to QuickBooks EasyStart, 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 EasyStart 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 `: \autorun.exe`. Click **OK**.

- 3 When prompted to, enter your installation key code.

WHERE CAN I FIND MY INSTALLATION KEY CODE (IKC)? Each copy of EasyStart has a unique number which is needed to install the software. This number is referred to as an Installation Key Code (IKC). The location of your IKC is different depending on how you purchased your software. Use the table below to help you locate your IKC. We highly recommend that you store your IKC in a safe place in case you need to reinstall your software. You can record your IKC on page 5.

If you purchased EasyStart...	then the IKC is provided...
in a retail store	on the Installation CD
by calling Intuit directly	over the phone, on the packing slip and by email (if you provided one to the sales representative)
from our Web site	on the Web receipt

Activating EasyStart

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

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 www.intuit.com/canada/privacy.shtml.

1 Open QuickBooks EasyStart. Click the QuickBooks EasyStart 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.

IMPORTANT When you enter your company name and address, make sure you select the province in which your business operates. This is important especially if you want to track sale tax.

3 Once your company file is created and EasyStart is open, go to the **File** menu and select **Activate QuickBooks**.

If you choose to activate your software at a later time, you will be asked to activate 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 activated.

4 Click Next and follow the onscreen instructions.

You will activate your software by phone or through the Internet.

* **ACTIVATING BY PHONE** If you activate QuickBooks EasyStart by calling us, the QuickBooks representative will ask you for your **Product Key** number. You can find this number on the same screen that prompted you to call us. The QuickBooks representative will give you a License Key number which you must then enter in the **License Key** field which is also located on the screen that provided your Product Key.

* **ACTIVATING THROUGH THE INTERNET** If you activate through the Internet, the software sends your product information to Intuit and automatically activates your software for you. This is a safe and secure process.

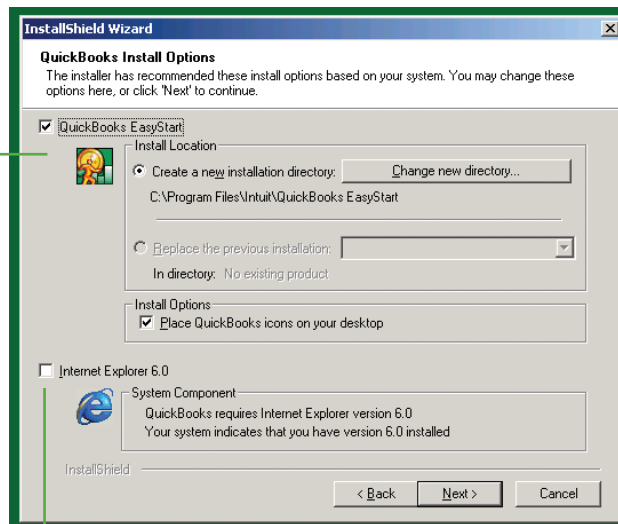
When you have activated your software, you can see the details of your license information by going to the **Help** menu and selecting **My License Information**.

Write your QuickBooks EasyStart account details here for your reference:

INSTALLATION KEY CODE

CUSTOMER NUMBER

4 At the Install Options screen, choose where you want EasyStart 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, and 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 EasyStart to run properly.

5 At the QuickBooks Anonymous Usage Survey screen, select whether you want QuickBooks to track the help topics that you go to while using your software.

By taking part in this survey, you are helping improve your software for the future. This survey does not track any information about your company, finances, computer, or personal matter.

To participate, keep the checkbox on this screen selected. You need not do anything more. It's that easy.

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

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 EasyStart window, you can find it on one of these menus.

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.

TOOLBAR Click Back and Forward to move between forms. Click Home to return to this Home page view. Click Find 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, vendors, 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.

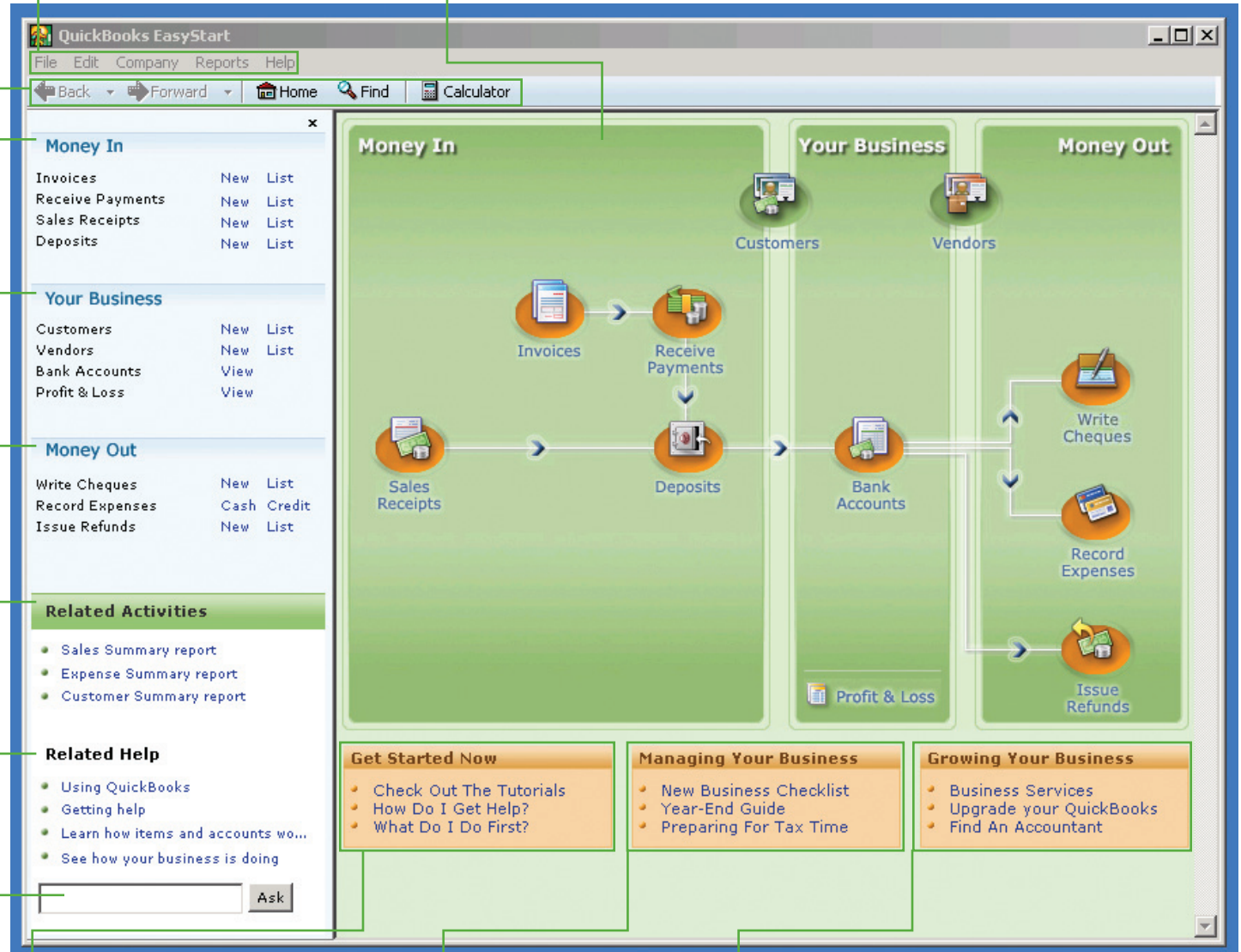
RELATED HELP Relevant help topics for your current activity. When you change to a different activity, the topics here change accordingly. If you don't see the topic you need, type a question into the search box and click Ask. You can also use the Help index located on the Help menu.

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 familiarize yourself with your software. Use the interactive tutorials to learn how to use EasyStart. Then find out what to do next, and how to get help when you need it.

MANAGING YOUR BUSINESS Click these links for business startup activities, year-end activities and assistance with your taxes.

GROWING YOUR BUSINESS Click these links for add-on services, to upgrade to a different QuickBooks product when your business outgrows EasyStart or to find an ProAdvisor. ProAdvisors are accountants that know how to use EasyStart and can help you set up your business in your new software.



Getting around

Getting Started



TO OPEN EASYSTART

Click the **QuickBooks EasyStart** 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 EasyStart** on page 5.)



TO SET UP A BANK ACCOUNT

You'll use it to track the cheques you write and deposits you make to a real chequing account at your bank. On the Home page in the Your Business area, move your mouse pointer over **Bank Accounts** and click **Register**. Use your latest chequing account 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 AN EXPENSE

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 GST, make sure you enter an expense category and select the correct tax you paid on the purchase.



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 EasyStart 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.
- * **VENDORS** 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, or tax agencies that you pay.
- * **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).



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**.

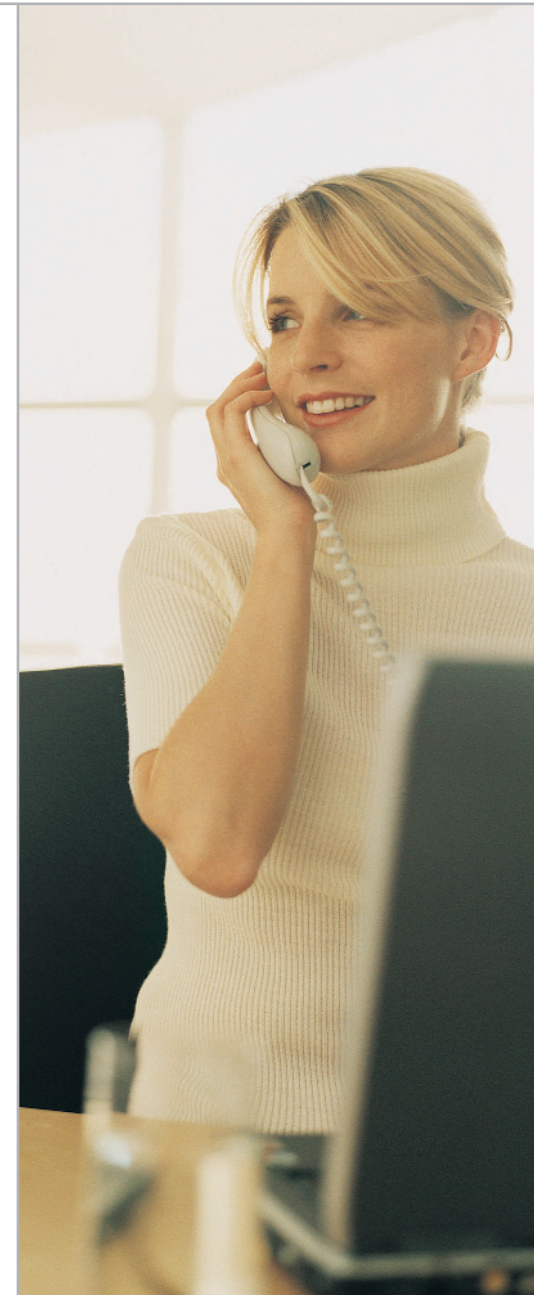
Using EasyStart online support

- * **QUICKBOOKS KNOWLEDGEBASE** This online knowledgebase has hundreds of articles and Frequently Asked Questions. Visit knowledgebase.quickbooks.ca
- * **OTHER QUICKBOOKS WEB SITES** Below is a list of related Web sites where you can find up-to-date information about EasyStart.
 - > support.intuit.ca/quicckbooks information on QuickBooks support and options
 - > www.intuit.ca to purchase Intuit products and services
 - > www.intuitsupplies.ca information on QuickBooks business forms, cheques and supplies compatible with your software

Contacting Us

Contact us for additional product or service information

- * **QUICKBOOKS RELATED CONTACT NUMBERS**
 - > **1-877-772-9158** to purchase or inquire about phone support with a QuickBooks expert.
 - > **1-888-333-8580** to purchase or inquire about QuickBooks products and services, to inquire about activation, or ask questions about your QuickBooks account
 - > **1-877-445-3233** to purchase or inquire about Intuit Supplies (cheques, business forms, and other supplies)
- * **QUICKBOOKS PROADVISORS** QuickBooks ProAdvisors are a network of accountants across Canada who are certified on the use of QuickBooks products. Visit <http://findaproadvisor.ca> to find an advisor in your area.



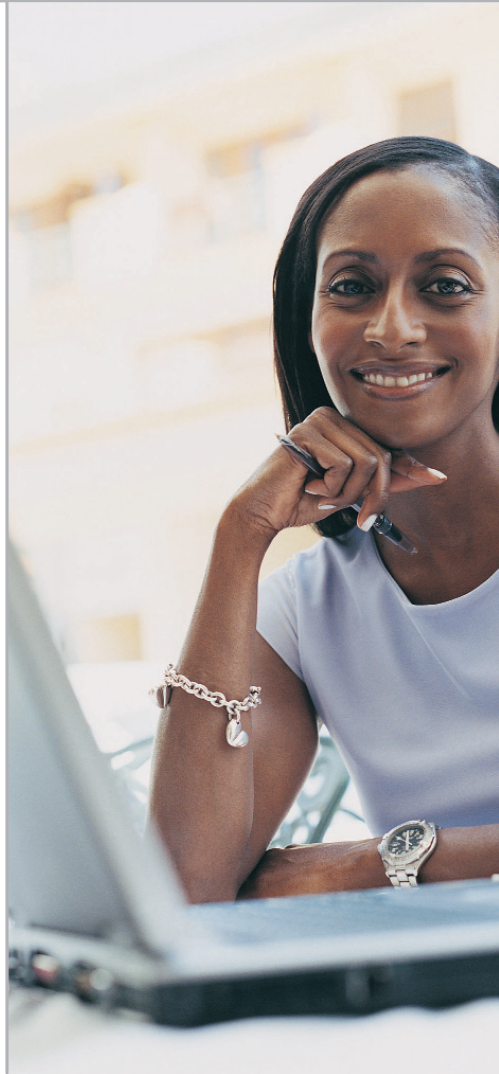
Let us know what you think

Your feedback is important to us!
Any comments you provide us will be reviewed by one of our consultants or engineers.

You can...

- * Report a potential problem or issue with EasyStart.
- * Tell us about an enhancement that would improve EasyStart for you.
- * Let us know how we could improve your experience with Intuit.

E-mail us at quickbooks_feedback@intuit.com to provide your feedback.



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