QuickBooks®

ACCOUNTING SOFTWARE FOR SMALL BUSINESS | 2004

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Read this
FIRST

QuickStart
CARD

Important information on how to...
Install QuickBooks
Activate QuickBooks
Find answers to your questions

Follow these instructions to install and activate your new copy of QuickBooks.

STEP 1 ▶ Install QuickBooks

1 Before installing QuickBooks, verify and back up your company file(s).

> **TO VERIFY** ▶ From the **File** menu, select **Utilities**, then **Verify Data**. Follow the onscreen instructions.
>
> **TO BACK UP** ▶ From the **File** menu, select **Back Up**. Back up to a different directory than where QuickBooks is installed. It's best to back up to a CD or off-site storage.
>
> If backing up to a CD, you'll first need to save the backup file (.QBB) to your hard drive, then burn the backup file to the CD with your CD writing software.

2 Shut down all programs that are open, including QuickBooks and virus protection software.

3 Insert the QuickBooks Installation CD into your CD-ROM drive.

If the installer doesn't start, you'll have to start it manually.

Click the **Start** button and select **Run**.

Type the letter associated with your CD-ROM drive, then type :\autorun.exe and click **OK**.

4 Enter your Installation Key Code (IKC), then click **Next**.

A unique IKC is attached to each QuickBooks Upgrade. You'll find your new IKC on the Service Plan Upgrade letter that came with your upgrade package. Locate this IKC now and enter it here. Store your letter somewhere safe as you will need the IKC from it if you need to reinstall QuickBooks.

We have also provided a space in Step 3 for you to record your IKC.

5 At the Install Options window, select where you want QuickBooks installed on your computer, then click **Next**.

Select this option to install the newer version of QuickBooks over top of the existing copy on your computer. Your company file is not affected in any way.

If the installer detects that Internet Explorer (IE) 6.0 is not installed on your computer, this checkbox is selected. Don't clear this checkbox if it's selected as IE 6.0 is needed for QuickBooks to run properly.
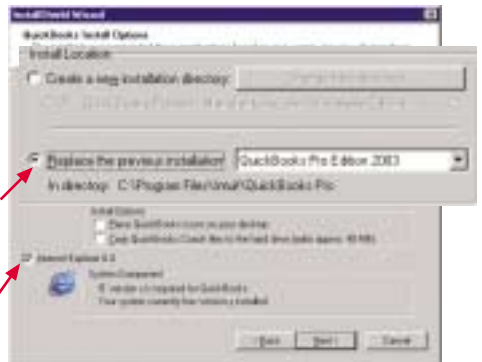
6 Follow the instructions on your screen until QuickBooks is installed, then restart your computer.

STEP 2 ▶ Update Company Files

Once you've installed QuickBooks, you need to update each company file you have so that your new version of QuickBooks can open them and read the data.

> You must be in single-user mode to update company files. If you're in multi-user mode, go to the **File** menu and select **Switch to Single-User Mode**.

1 Open your company file in QuickBooks.

> If you can't find your company file(s), select **Search** from the **Windows** ![Start] menu on your Task Bar. Search for a file with a .QBW extension by typing *.QBW in the search field, then click **Search Now**.

2 QuickBooks prompts you to update your company file. Type YES, then click **OK**.

3 Before the update process starts, you'll be asked to back up your file again. Back up your file to a different location than the location you backed up to in step 1.

Having more than one backup is a good idea in case one of the backup files becomes corrupt or the update process is interrupted in any way.

Click **OK** to back up your file. After QuickBooks backs up your company file, the update process begins. This process may take some time, especially if you have a large company file.

During this time, it may seem like QuickBooks is not responding or is "frozen". This is usually not the case. A good rule of thumb is if you see this cursor ![cursor] and/or the hard drive light on your computer is flickering, then QuickBooks is not frozen.

Do't attempt to close QuickBooks while it's updating your company file(s) as it could damage your company file!

4 When QuickBooks tells you that your file is updated, click **OK**.

> You may see some windows explaining the changes made to this version of QuickBooks. It's important that you read about these changes as they could affect the way in which you work in QuickBooks.

Now that your company file has been successfully updated, make sure it's protected against file damage by performing backups at regular intervals. We suggest you backup of your company file be done daily.

▶ Activate QuickBooks

Activation is new in QuickBooks this year. It is a fast and easy process that validates you as a licensed user of QuickBooks.

You must activate QuickBooks within the first 10 uses of the product. When you activate QuickBooks, you'll receive a License Key. The License Key ensures that all the features you purchased are available for you to use in QuickBooks.

The first time you open your company file, you'll be prompted to activate QuickBooks. Activating QuickBooks will only take a few moments. If you have a multi-user license, you'll need to activate QuickBooks on each computer where it is installed.

> If you use the Internet, make sure you are connected to it before you start activating QuickBooks.

1 When QuickBooks prompts you to activate, click **Next** to begin. Follow the instructions onscreen. You'll be prompted to activate by phone or through the Web.

> If you decide to activate at a later time, you can open the Activation wizard by clicking the **File** menu and selecting **Activate QuickBooks**. You can use QuickBooks 10 times before you must activate.

- **If you're prompted to activate through the Web,** you'll need to provide your Customer Number. You can find your Customer Number on your Service Plan upgrade letter. During Web activation, QuickBooks securely sends your Product Key to Intuit, then downloads your License Key automatically. That's all there is to it!
- **If you're prompted to activate by phone**, you'll be required to provide your Product Key number to the QuickBooks representative. You'll find this number on the same screen that prompted you to call Intuit. You may also be asked for your Customer Number which you can find on your Service Plan upgrade letter. The QuickBooks representative will provide a License Key which you must then enter in the License Key field.

> To see the details of your license information, go to the **Help** menu and select **My License Information**.

Write your QuickBooks Account Details here:

IKC:⎯⎯⎯⎯⎯⎯⎯⎯⎯⎯⎯⎯ Customer Number:⎯⎯⎯⎯⎯⎯⎯⎯⎯⎯
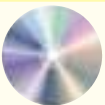
To learn more about installing, activating, or updating your company file(s), refer to Chapter 1 of the **Startup Guide** available on the **QuickBooks Learning CD**.

Also available on the QuickBooks Learning CD is the **Learning Guide**. The Learning Guide contains many easy-to-follow lessons to help train yourself and your employees on how to best use QuickBooks to manage your company.

What's New in QuickBooks 2004

Intuit is continually making it easier for you to manage your business. We've improved several features in QuickBooks 2004 and added tools that will save you time and effort. If you are upgrading from an earlier version, some of these changes may affect the way you currently work with QuickBooks. Take a moment now to learn how the improvements will affect you.

HERE'S HOW TO LEARN ABOUT WHAT'S NEW IN YOUR SOFTWARE. YOU CAN...

- **click What's New in the list of navigators.** The page of information that appears explains the features that have been added and improved. It also links you to more help on these features. Note: if you have a "Right for My Business" custom edition of QuickBooks Premier, scroll down past the tips on using QuickBooks to see this information.
- **refer to Chapter 9 of your QuickBooks Startup Guide, "Information for Upgraders".** This guide is located on the QuickBooks Learning CD that accompanied your QuickBooks CD. To read it, you must have Adobe Acrobat Reader 4.0 or later installed on your computer. Acrobat Reader is free and can be downloaded from **www.adobe.com** If you do not have an Internet connection, a second version of the manual in RTF format is located in the "RTF version" folder. You can open this file with Microsoft® Word and similar word-processing programs.

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 QuickBooks.

  Tell us about an enhancement that would improve QuickBooks 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.

How to get your QuickBooks questions answered

▶ Try the Help & Support Options in QuickBooks

THE MOST COMPREHENSIVE SUPPORT IS AVAILABLE RIGHT INSIDE QUICKBOOKS.

A **Type your question – find an answer:** You can search the QuickBooks help and support database by selecting the "Help" menu, then "Help & Support Centre". Just type in your question, click Ask, and we'll do the hunting for you. The AnswerWorks® search engine is also available on most windows.

B **Help Index:** View an index of all the help topics available to you. Select the "Help" menu, then "Help in QuickBooks Index." or simply hit "F1" on your keyboard while using QuickBooks.

C **Try the electronic Startup and Learning Guides:** The QuickBooks Learning CD contains two guides to help you get up and running with QuickBooks – the QuickBooks Startup Guide and the QuickBooks Learning Guide. These guides are located in separate directories (folders) on the Learning CD, and are saved as Printable Document Format (.pdf) files. To read them, you need the free Acrobat Reader, which can be downloaded from **www.adobe.com**. If you don't have an Internet connection, a second version of the guides in Rich Text format is located in the "Guides in RTF format" folder on the Learning CD. You can open this file format with Microsoft® Word and similar word-processing programs.

D **Explore the QuickBooks Coach:** This interactive tutorial lets you practice common tasks without affecting any data in your company file. Select "Help", then "QuickBooks Coach" to start the tutorial.

E **"How do I?" Buttons:** These buttons give you immediate access to common questions on a feature.

▶ QuickBooks Online Support

QUICKBOOKS OFFERS A NUMBER OF ONLINE SUPPORT OPTIONS TO ASSIST YOU.

A **QuickBooks Knowledgebase:** This online database has hundreds of articles and answers to FAQs (Frequently Asked Questions) Visit **http://knowledgebase.quickbooks.ca**

B **Auto-Reply email:** This e-mail address is directed to an automated response system that will reply with information on the most common QuickBooks 2004 known issues and workarounds. To use the auto-response system, send a completely BLANK e-mail to **quickbookshelp@intuit.com**. You will receive an automated response within two minutes.

C **Other QuickBooks Web sites:** Below is a list of QuickBooks related Web sites for your reference.
- **www.quickbooks.ca** – General information on QuickBooks products and services.
- **www.intuit.ca** – To purchase Intuit products and services.
- **www.intuitsupplies.ca** – Information on QuickBooks business forms, cheques and supplies.

▶ Live QuickBooks Support

IF YOU HAVE REVIEWED THE QUICKBOOKS IN-PRODUCT AND ONLINE SUPPORT, AND WOULD NOW LIKE TO SPEAK WITH A QUICKBOOKS EXPERT, TRY…

A **QuickBooks Support and Product consulting:** Sign up for a QuickBooks Support Plan, and receive unlimited product support and consulting all year round. You also receive all updates and upgrades that occur throughout the year and access to a member's only Web site with training videos and tips. Call 1-877-772-9158 to sign up and speak with a QuickBooks expert today (monthly support fees apply).

B **IntuitAdvisors:** Intuit Advisors are a network of accountants across Canada who are certified on the use of QuickBooks. Visit **http://findadvisor.intuitadvisor.ca** to find an advisor in your area.

C **Other key QuickBooks related contact numbers.**

1-888-333-8580 – To purchase or inquire about QuickBooks products and services
– Activation inquiries
– Questions regarding your QuickBooks account

1-877-445-3233 – To purchase or inquire about Intuit Supplies (QuickBooks cheques, business forms, and other supplies)