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Getting Started

QuickBooks Online Simple Start

Quick tips to get you
up and running

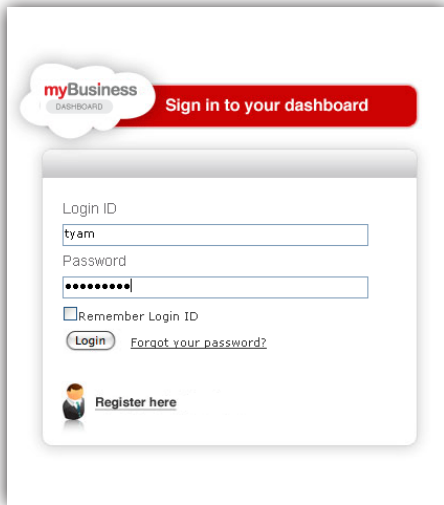
- Create and manage invoices
- Track expenses
- See how you're doing

See inside to learn how
to get the most out of
QuickBooks Online Simple Start

What's in this guide

- 1** Get started easily
- 2** Create and manage invoices
 - Create an invoice in a few easy steps
 - Customise your invoices
 - Add your logo
- 4** Track expenses
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 - Give your accountant access for free
 - Access your free support

Get started easily



Sign in from anywhere, anytime

Go to mybusiness.singtel.com, click the Dashboard Login button, and simply enter your user ID and password to securely sign in to your account.



Access your account from any PC or Mac with an Internet connection whether you're at home, in the office, or at a client's site. It works on Internet Explorer, FireFox, Chrome for Mac and Windows, and Safari for Mac.*

TIP! Add mybusiness.singtel.com, click the Dashboard Login button, to your browser bookmarks for faster access.

Stay organised with all your finances in one place

Your homepage puts all of your key tasks and information at your fingertips.

Action items appear in your To Do List right away

Get to work quickly with just a click

See your recent transactions at a glance

* QuickBooks Online requires a computer with either Microsoft Windows (XP, Vista, or Windows 7) or Mac OS 10.5 or later, an Internet connection (high-speed connection recommended), and at least Microsoft Internet Explorer 8, FireFox 4, Chrome, Safari 4.1.1 for Mac, or Safari 5.0.1 for Mac or Windows. Works on iPhone and Android OS. Mobile devices sold separately. Data plan required. Not all features are available on mobile versions of QuickBooks Online.

Create and manage invoices



Create an Invoice

Easily create invoices and track payments

From your homepage, click “Invoice” to create your own professional-looking invoices.

QuickBooks Online makes tracking payments easier than ever—with reports and the Customer Centre.

TIP! Use QuickBooks Online to automatically email invoices—with faster delivery you get paid faster.

Add your logo for a custom look

The screenshot shows a professional invoice with the following details:

- Company:** Repair Everything and More, 123 Bukit Timah Street, Singapore 250123, P:6123 4567 | M:9876 5432, joe@RepairEverything.com.sg
- Invoice Info:** DATE: 26/05/2010, INVOICE NO.: 827, TERMS: Net 30, DUE DATE: 25/06/2010
- Bill To:** Quality Gemstones, 12 Raffles Place, Singapore 01003
- Amounts:** AMOUNT DUE: S\$675.00, ENCLOSED: S\$675.00
- Table:**

Service	Activity	Quantity	Rate	Amount
Sample Service	Sample Activity	2	225.00	450.00
Sample Service	Sample Activity	1	225.00	225.00
TOTAL				S\$675.00

See terms, due dates and invoice details clearly organised



You can import your entire customer list automatically from:

- Microsoft Excel
- Microsoft Outlook
- Gmail
- Yahoo! Mail

[Click here](#) to learn more about importing customers.

Customise the details of your invoice based on your business

Every invoice is automatically tracked, so you know who owes money and who has paid

Create and manage invoices

Create an invoice in a few easy steps

1. Select the **customer** you'd like to invoice. If it's your first customer, you'll be guided step by step.
2. Choose your payment **terms**. This is the date you'd like to be paid. The default is net 30 days.
3. Enter the **product or service** you're selling (e.g., design services).
4. Enter a **description** of the service or product for your customer (e.g., Graphic design for Jane's website).
5. Enter the **rate** or how much you've charged the customer.
6. Choose an **income account** which categorises your receivables (the money coming in to your business).

TIP: You can import your entire Products & Services list from Microsoft Excel.

[Click here](#) to learn more.

Customise your invoices to fit your business

You can easily customise our standard invoices to fit your business needs. Want to add discounts or show quantities on your invoices? No problem.

Just click the "customise" button on your invoice screen and discover how you can tailor the invoices to meet your specific needs.

Customise

Click "Customise" on the invoice form to tailor our standard invoices.

Add your logo for a professional look

Adding a logo is easy and it makes a standard invoice look even more professional.

To add your logo, go to the **Customers** menu and select **Customise Printed Forms**.



Repair Everything and More
123 Bukit Timah Street
Singapore 250123

Give your invoices a professional touch by adding your logo.

Track expenses



Write a Cheque

Know where you're spending money

QuickBooks QuickBooks Online will keep track of each cheque, credit card transaction, and cash purchase so you can understand where your money is going.

With everything in one place, you'll be able to access all past payments and bills for each supplier with just a few clicks.

TIP! You can easily customise the account categories to track what's important to your business.

Entering your first expenses

For your first expense, QuickBooks QuickBooks Online will guide you through setting up your accounts (credit cards and cash).

You'll enter a balance for the date you want to start tracking your business. This date could be when you started your business, the first day of the year, or any other day you choose.

1 Choose the account for recording the expense

2 Enter the purchase date

4 Select the name of the supplier

3 Enter the purchase amount

The screenshot shows the 'Write a Cheque' form in QuickBooks Online. At the top, 'Bank Account' is set to 'Current' with a balance of '\$\$30,000.00'. The 'Cheque No.' is 320, and the 'Date' is 15/10/10. The 'Pay to the Order of' field is set to 'Cathy Quon', and the 'Amount' is 500.00. The amount is written in words as 'Five hundred and 00/100'. The address is 'Cathy Quon, Blk 35 Mandalay Road, #13-37 Mandalay Towers, Singapore 308215'. The memo is '2010 Tax Prep'. Below the form is a table with one row: '1 Legal & Professional Fees' with an amount of 500.00. A dropdown menu is open for the account, showing options like 'Legal & Professional Fees - Expense', 'Meals and Entertainment - Expense', etc.

No.	Account Which?	Amount	GST	Description ?
x 1	Legal & Professional Fees	500.00		

5 Choose an account to categorise the expense or money out

Manage customers



See all the details in one spot

The Customer Centre makes it easy to see all of your customer details in one organised screen. See contact information, open invoices, and paid transactions at a glance.

myBusiness

DASHBOARD LOGIN ▶

TIP! Use the Notes box to enter any special instructions for each customer.

Select a customer to see a complete profile

Instantly see contact information for each customer

QuickBooks Online Plus

Repair Everything and More | Log Out | Help | intuit.

Company Customers Suppliers Banking Reports

Customer Centre Sales Receipt Income List Invoice List New Invoice More

Feedback

Customer Centre

Import... New Customer

Show Deleted

Search for a Customer or Company

Name	Balance
Alex Blakey	-12.00
Class-A Air Conditioning	0.00
George Thomason	0.00
Golden Dragon Kitchen	561.25
Macheath's Quality Knives	1,410.00
Peter Harris	848.35
Tower Hotel	352.50

Golden Dragon Kitchen [Edit](#)

Email: malvern@goldendragonkitchen.com.sg Open Balance: 561.25
Phone: 0123 4567 Overdue Balance: 150.00

[Show Details](#)

Notes

Transactions [New Transaction](#)

Print Show All Transactions Date This Month

Status	Date	Type	No.	Memo	Amount
○	24/03/2012	Invoice	1011		411.25
	20/03/2012	Payment			235.00
●	03/03/2012	Invoice	1004		235.00
!	01/03/2012	Invoice	1003	Opening Balance	150.00

See open invoices and payments — click on any transaction to show the complete details

Manage your bank accounts



Staying on top of the details

The bank registers in QuickBooks QuickBooks Online make it much easier to manage your bank account.

Enter a cheque and the register is updated—automatically. Accept a payment on an invoice... and the register is updated. It's that easy.

TIP! Looking for a specific transaction? Click "Customise" to sort through transactions in seconds.

See your cheques, payments, and transactions all in one spot

Write custom memos or notes on individual transactions

The screenshot shows the "Bank Register" interface in QuickBooks Online. The interface includes a navigation bar with options like "Write Cheque", "Credit Card Expense", "Cash Expense", "Deposits", "Registers", "Transfers", "Reconcile", and "More". Below the navigation bar, there's a "Bank Register" section with a "Current" dropdown and buttons for "Find in Register", "Related Reports", and "How Do I?". A "Customise..." button is also present. The main area displays a table of transactions with columns for Date, Ref No., Payee, Type, Account, Memo, Payment, Deposit, and Balance. A "Reconcile" button is at the bottom left. A "Customise Register" dialog box is open, showing options for sorting and displaying transactions. The "Ending Balance" is shown as S\$30,164.50.

Date	Ref No.	Payee	Type	Account	Memo	Payment	Deposit	Balance
15/09/2010		Opening Balance Equity	Deposit		Opening Balance	R	30,000.00	30,000.00
27/09/2010	87	SingTel	Cheque	-Split-	Phone bill	35.50	-Split-	29,964.50
27/09/2010							200.00	30,164.50

Quickly find specific transactions by sorting the register

QuickBooks QuickBooks Online keeps a running total—no maths needed

See how you're doing with instant reports



Be ready at tax time

Gain insights into your business with the pre-designed, customisable business reports.

QuickBooks QuickBooks Online organises all the information you enter into easy-to-understand reports. You could save hours getting ready for tax returns with all your information in one place. Even better, your subscription includes free access for your accountant to make tax time easier.

TIP! One click on report totals lets you drill down to

see the detail behind the numbers.

View instant, pre-designed reports with your information in one click

Memorise reports to have them automatically available for any given date range

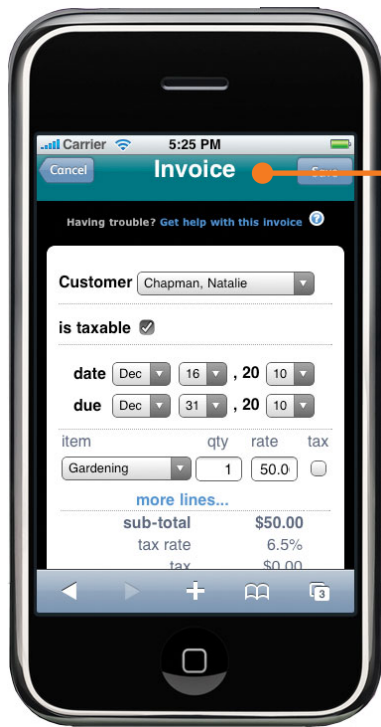
Run reports for any date range including custom dates

	Total
Income	
Sales	4,304.73
Total Income	\$4,304.73
Gross Profit	\$4,304.73
Expenses	
Utilities	35.50
Total Expenses	\$35.50
Net Operating Income	\$4,269.23
Net Income	\$4,269.23

Saturday, Oct 16, 2010 11:35:05 AM GMT+8 - Accrual Basis

Click on any amount to see the detail behind the number

Go mobile



Send an invoice, see who owes you money, and track balances

iPhone™ and Android access

No matter where you are, you're never far from the data you need to run your business. Our mobile feature adds one-touch access to your iPhone™ and Android devices so you can see and track your receivables, bank balances, customer contact information and more.*

You can:

- Send an invoice
- Check who owes you money
- Track bank balances, customer contact info
- and more!

TIP! Open your mobile device's browser and sign in to QuickBooks Online just as you would from a desktop computer.

Get more from QuickBooks Online

Give your accountant or colleague access—for free

QuickBooks Online makes it easy to work with your accountant and connect with your partners. You can add your accountant as a user for no extra charge.

Here's how to add your accountant:

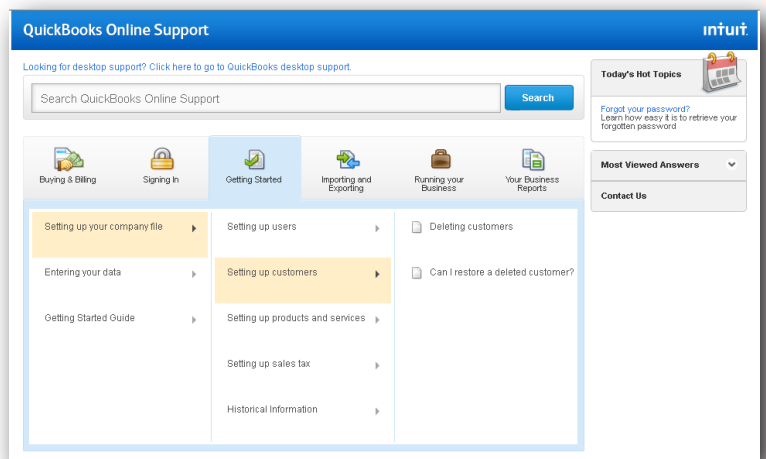
1. From the SingTel my Business Dashboard, on the left side of the screen, click **Users**.
2. In the top right corner of the Users window, click **Create New User**.

Save time by giving your accountant access. There's no need to gather papers and compile year end reports when everything is in one spot.

We're here for you every step of the way

With all the step-by-step help built in to QuickBooks QuickBooks Online, you may not need any help. But if you do, we've got you covered.

- **How Do I?**—From any screen in the product, click the **How Do I?** button in the top right corner and get targeted help for the task at hand.
- **Support Site**—From any screen, click the **Help** link at the top of the page to go to our support site. You can search our Frequently Asked Questions, or ask a question in our Live Community.



Getting help is easy with QuickBooks Online