

# time

## ...to get started

Quick tips to get you  
up and running

- Create and manage invoices
- Track expenses
- See how you are doing

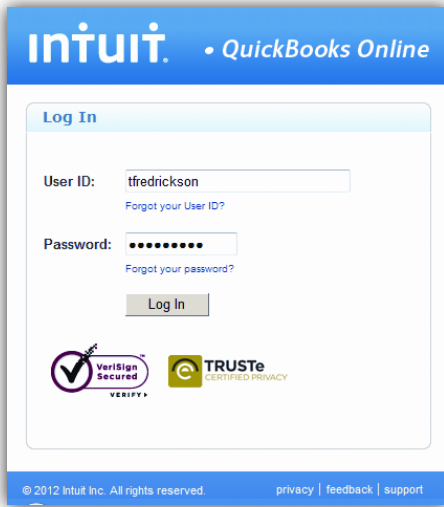
See inside to learn how you can get the  
most out of QuickBooks Online Essentials  
and QuickBooks Online Plus

# What's in this guide

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- 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 stock (*Plus only*)
- 5** Track expenses
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  - Give your accountant access for free
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# Get started easily



## Sign in from anywhere, anytime

Go to [uk.qbo.intuit.com](http://uk.qbo.intuit.com) and simply enter your user ID and password to securely sign in to your account. (If you purchased QuickBooks Online from one of our corporate partners, you might have to sign in to the partner's website instead.)

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 [uk.qbo.intuit.com](http://uk.qbo.intuit.com) 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 “Create an 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 High Street, Maidenhead, Berkshire, SL6 8AD. Contact: 1234 567 890, joe@RepairEverything.co.uk, VAT No.: GB123456789.
- Invoice Info:** DATE: 26/05/2010, INVOICE NO.: 827, TERMS: Net 30, DUE DATE: 25/06/2010.
- Customer:** Macbeath's Quality Knives, Sharktooth Road, London W9 1ED.
- Summary:** AMOUNT DUE: £810.00, ENCLOSED.
- Table:**

Service	Activity	Quantity	Rate	VAT	Amount
Sample Service	Sample Activity	2	225.00	20.0% S	450.00
Sample Service	Sample Activity	1	225.00	20.0% S	225.00
	VAT @ 20.0% S				135.00
<b>SUBTOTAL</b>					£675.00
<b>VAT TOTAL</b>					£135.00
<b>TOTAL</b>					£810.00

See terms, due dates and invoice details clearly organised

VAT and deposits are instantly calculated for you

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



You can import your entire customer list automatically from:

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

### Importing customers who use a foreign currency?

We recommend you turn on multicurrency **before** you create or import your customers. See Page 9.

**Note:** Multicurrency is available only in QuickBooks Online Essentials and QuickBooks Online Plus.

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

# Create and manage invoices

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## 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).

## Customise your invoices to fit your business

You can easily customise our standard invoices to fit your business needs. Want to add discounts, show quantities, or automatically include VAT 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.

## 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**.

Customise

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



Repair Everything & More  
123 High Street  
Maidenhead, Berkshire  
SL6 8AD

Give your invoices a professional touch by adding your logo.

# Track stock and quantity on hand

## Know when to order new stock

Use Stock Control to keep track of items you have in stock. When you purchase a product for resale, QuickBooks increases the quantity on hand. And when you sell it, the quantity goes down.

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

## Turning on Stock Control

You have to turn on Stock Control in your company to see product quantities. In the **Company** tab, go to **Preferences**, then turn on the **Quantity on Hand** option.

To see how much of an item you have available, go to the **Customers** tab and open the **Products and Services** list.

The **Quantity On Hand** column shows how much of a product is left

Name	Description	Account	Price/Rate	Quantity On Hand
Design	Custom landscape design	Billable Expense Income	150.00	
Fountain	Garden rock fountain	Sales	275.00	8.00
Gardening	Weekly gardening service	Billable Expense Income	75.00	
Rocks	Garden rocks - 10kg bag	Sales	75.00	37.00
Sales		Sales		
Soil	Garden soil - 2kg bag	Sales	20.00	29.00
Trimming	Tree and shrub trimming	Billable Expense Income	50.00	

Edit a product to set the starting quantity

# Track expenses



## Know where you're spending money

QuickBooks Online will keep track of each cheque, debit, 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 for each supplier with just a few clicks. If you have Essentials or Plus, you can access bills for each supplier too.

**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 Online will guide you through setting up your accounts (current, 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 'Enter Cheque' form in QuickBooks Online. At the top, 'Bank Account' is set to 'Current' with a balance of £21,402.00. The form includes fields for 'Cheque No.' (320), 'Date' (15/10/10), and 'Amount' (500.00). The 'Pay to the Order of' field is set to 'Cathy Quon'. Below this is the supplier's address: 'Cathy Quon, #23 Ardenham Court, Oxford Road, Aylesbury, Buckinghamshire, HP13 3EQ'. The 'Memo' field contains '2010 Tax Prep'. At the bottom, there is a table with columns for 'No.', 'Account', 'Amount', 'VAT', and 'Description'. The first row shows '1', 'Legal & Professional Fees', '500.00', and a dropdown arrow. A dropdown menu is open below the 'Account' field, listing various expense categories such as 'Legal & Professional Fees - Expense', 'Meals and Entertainment - Expense', 'Office Expenses - Expense', 'Promotional - Expense', 'Rent or Lease - Expense', 'Repair & Maintenance - Expense', 'Stationery & Printing - Expense', 'Supplies - Expense', and 'Taxes & Licenses - Expense'.

5 Choose an account to categorise the expense or money out

# Manage customers



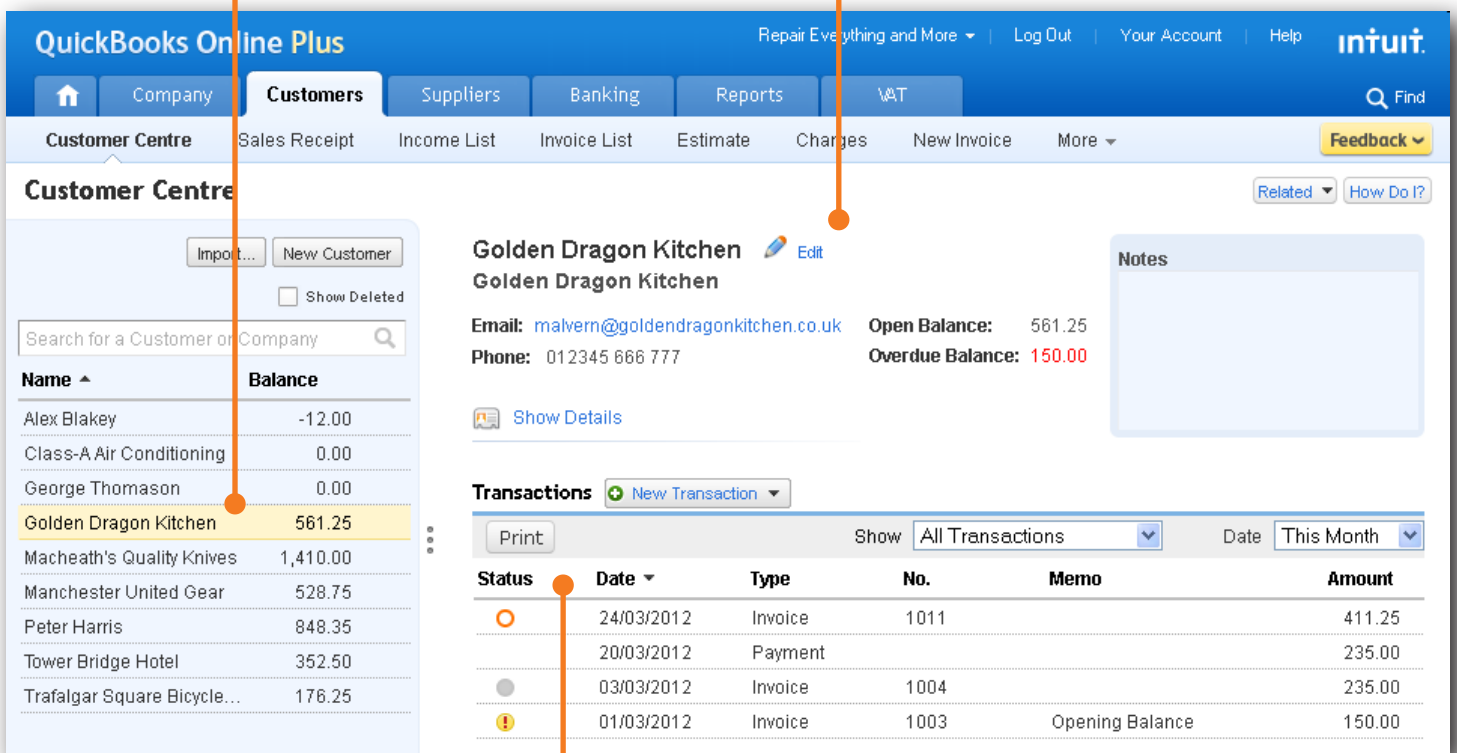
## See all the details in one spot

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.

**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



The screenshot shows the QuickBooks Online Plus interface. The top navigation bar includes 'QuickBooks Online Plus', 'Repair Everything and More', 'Log Out', 'Your Account', 'Help', and the Intuit logo. Below this is a secondary navigation bar with tabs for 'Company', 'Customers', 'Suppliers', 'Banking', 'Reports', and 'VAT'. The 'Customers' tab is active, and the 'Customer Centre' sub-tab is selected. The main content area is divided into several sections:

- Customer Centre:** A sidebar on the left containing a search bar, a list of customers with their names and balances, and buttons for 'Import...', 'New Customer', and 'Show Deleted'. The 'Golden Dragon Kitchen' customer is highlighted in yellow.
- Customer Profile:** The main area displays the profile for 'Golden Dragon Kitchen'. It includes contact information (Email: malvern@goldendragonkitchen.co.uk, Phone: 012345 666 777), financial data (Open Balance: 561.25, Overdue Balance: 150.00), and a 'Notes' box.
- Transactions:** A table below the profile shows a list of transactions. The table has columns for Status, Date, Type, No., Memo, and Amount. The first transaction is an invoice for 411.25 on 24/03/2012, and the last is an opening balance invoice for 150.00 on 01/03/2012.

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 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

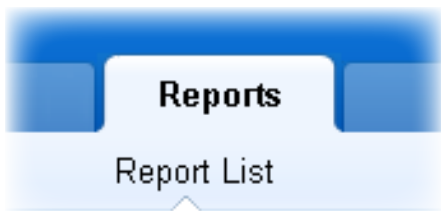
The screenshot shows the "Bank Register" interface in QuickBooks Online. The main window displays a table of transactions with columns for Date, Ref No., Payee, Type, Account, Memo, Payment, Deposit, Tax, and Balance. A "Customise Register" dialog box is open in the foreground, allowing users to sort transactions by date and show all transactions. The dialog box has fields for "Sort by:" (set to Date) and "Show:" (set to All Transactions). There is also a checkbox for "Show on one line instead of two". The main window shows a running balance of £30,164.50 at the bottom right.

Date	Ref No.	Payee	Type	Account	Memo	Payment	Deposit	Tax	Balance
15/09/2010		Opening Balance Equity	Deposit		Opening Balance		R 30,000.00		30,000.00
27/09/2010	87	British Telecom	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 Online keeps a running total—no math 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 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

The screenshot shows a 'Report' window with several buttons: 'Print...', 'Tips', 'Email...', 'Excel...', 'Memorise...', 'Customise...', and 'Collapse'. Below these is a 'Transaction Date' dropdown set to 'This Year-to-date', 'From' and 'To' date pickers for '01/01/2010' and '16/10/2010', and a 'Run Report' button. The report title is 'Repair Everything and More Profit & Loss' for the period 'January 1 - October 16, 2010'. The table shows income and expenses with a 'Total' column. An orange dot is placed over the '£4,304.73' value for 'Total Income', with a vertical line pointing to the text below the report.

	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 - Accrual Basis

Click on any amount to see the detail behind the number

# Manage and track VAT

## Keep track of the VAT you pay and collect

If you collect VAT, QuickBooks Online helps automate your VAT tracking so you can keep accurate records about the VAT you collect from customers and pay to suppliers.

To manage your VAT details, go to the **VAT** menu and click **VAT Centre** List.

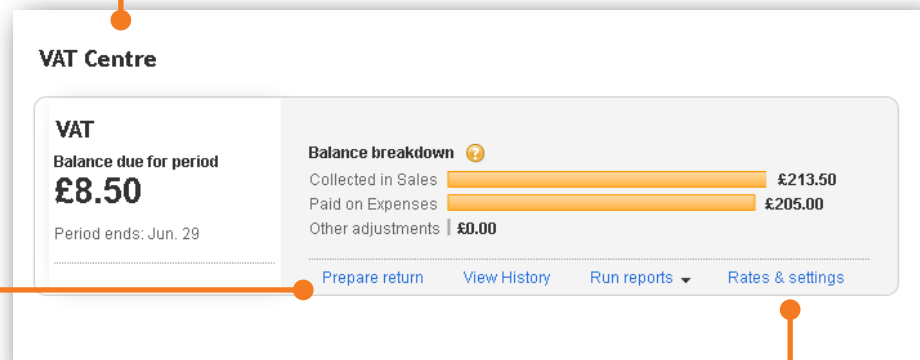
If this is your first time using VAT with this company, click the **Set up VAT** button to configure VAT-related information. You can track VAT using either a Standard VAT or Cash accounting scheme.

Amount	VAT
100.00	20.0% S
	17.5% S
	20.0% S
	5.0% R
	0.0% Z
	Exempt
	0.0% ECG

After you turn on VAT tracking, you can select the appropriate VAT codes for each product and service in forms like invoices or bills.

You can return to the VAT Centre at any time to view a snapshot of your VAT history and prepare and file your VAT return.

Click **Prepare return** to file VAT returns quickly and easily. QuickBooks takes you through the filing process step by step.



Click **Rates & settings** to update your VAT agency details and view information on VAT codes and rates.

# Work in multiple currencies

## Track invoices and bills in foreign currencies

With the QuickBooks Online multicurrency feature, you can track transactions in more than one currency!

To turn on multicurrency:

1. From the **Company** tab, select **Currency Centre**.
2. Click **Set up currencies**.

You can assign a currency to new customers, new suppliers, and new bank, credit card, debtor, and creditor accounts. (Things you've already added will continue to use your home currency.) Other account types, like income and expense accounts, always use your home currency.

**IMPORTANT!** Multicurrency affects many accounts and balances in your company file. Once you've turned on multicurrency, you cannot turn it off. Also, after you assign a currency to something (like customers and accounts), you cannot change it.

### Want to import customers or suppliers who use a foreign currency?

We recommend you turn on multicurrency **before** you create or import your customers and suppliers. Any you add before turning on multicurrency will use your home currency, which can't change.

**TIP!** When importing customers or suppliers from Outlook or Excel, QuickBooks highlights any whose Country does not match your home currency.

You can choose a different foreign currency for these customers before accepting the import.

QuickBooks downloads new exchange rates hourly.

The screenshot shows the 'Currency Centre' page in QuickBooks Online Plus. At the top, there are navigation tabs: Company, Customers, Suppliers, Banking, Reports, and VAT. Below these are sub-tabs: Chart of Accounts, Recurring Transactions, Preferences, Budgets, Currency Centre, and More. The main heading is 'Currency Centre'. Underneath, there's a section for 'Currency & Exchange Rates' with an 'Add New' button. A table lists currencies: GBP (British Pound Sterling - Home Currency) with a rate of 1.00, EUR (Euro) with a rate of 0.855432, and USD (United States Dollar) with a rate of 0.620694. A dropdown menu is open for the USD row, showing options: Edit Currency, View Historical Rates, Home Currency Adjustment, and Delete Currency. An orange line points from the text 'QuickBooks downloads new exchange rates hourly.' to the 'Rate' column. Another orange line points from the text 'Add new currencies at the click of a button.' to the 'Add New' button. A third orange line points from the text 'Click a foreign currency for a list of possible actions...' to the dropdown menu.

Currency	Rate	Last Updated
GBP British Pound Sterling - Home Currency	1.00	
EUR Euro	0.855432	25/2/2011 14:01:20
USD United States Dollar	0.620694	25/2/2011 14:01:20

Click a foreign currency for a list of possible actions. You can manually edit the exchange rate, view historical rates to see what the currency was worth on a previous date, and more.

# Go mobile

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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 or connect with your partner in another county. You can add your accountant as a user for no extra charge.

Here's how to add your accountant:

1. From the **Company** tab, select **Manage Users**.
2. Click **New** to add your accountant or business partner.

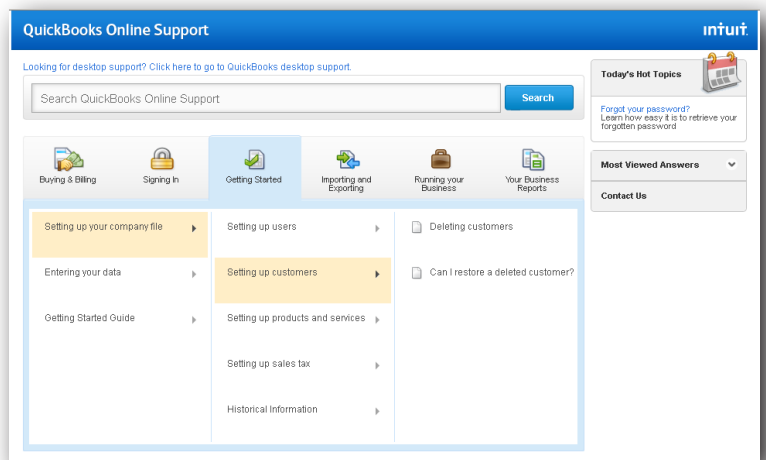
**Note:** If you purchased QuickBooks Online from one of our partners, you may need to add users from the partner's website instead.

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 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.
- **Contact us**—Still need help? Call our support consultants. It's free! Go to our support site for details.



Getting help is easy with QuickBooks Online