Intuit® QuickBooks® Online

time

...to get started

Quick tips to get you up and running

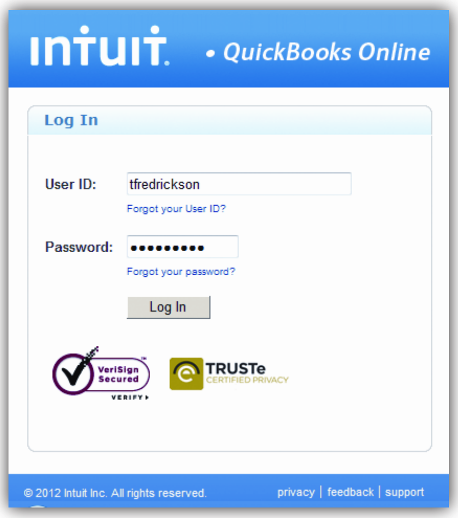
- Create and manage invoices
- Track expenses
- See how you are doing

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

2012-30-10-en_GB

What's in this guide

Get started easily



Sign in from anywhere, anytime

Go to 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.)

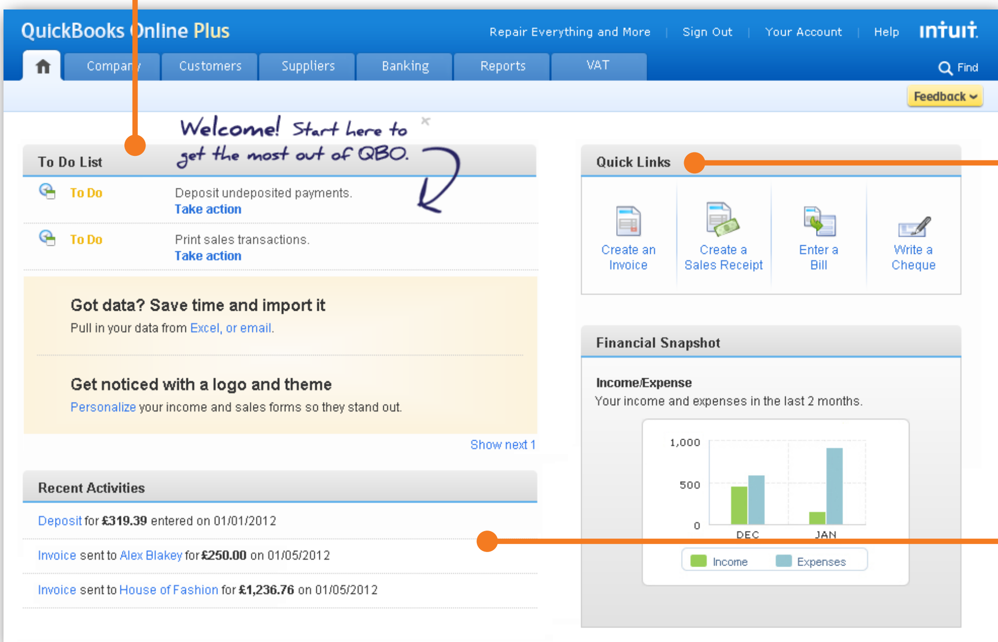
Access your account from any PC or Mac with an Internet connection whether you're at home, in the office, or at a client's site. It works on Internet Explorer, FireFox, Chrome for Mac and Windows, and Safari for Mac.*

TIP! Add uk.qbo.intuit.com 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.

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Create and manage invoices

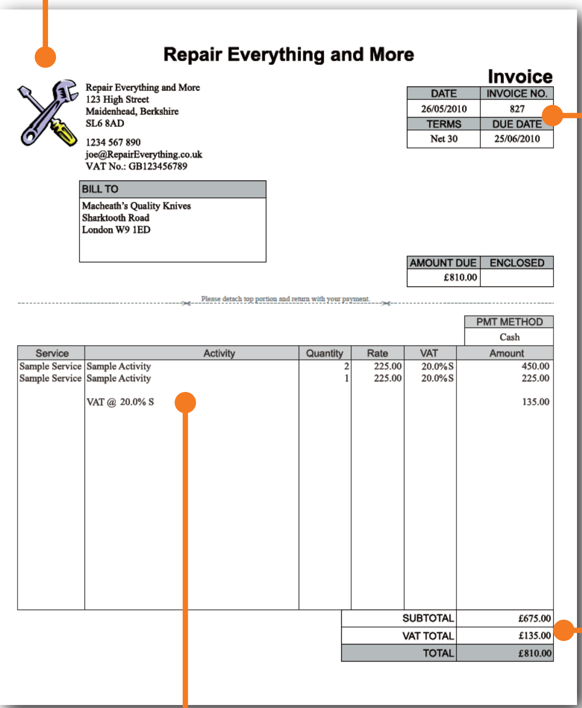
Easily create invoices and track payments

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



Repair Everything and More

Invoice

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

1234 567 890
joe@RepairEverything.co.uk
VAT No.: GB123456789

DATE	INVOICE NO.
26/05/2010	827
TERMS	**DUE DATE**
Net 30	25/06/2010

BILL TO
Macheath’s Quality Knives Sharktooth Road London W9 1ED

AMOUNT DUE	ENCLOSED
£810.00	

Please detach top portion and return with your payment.

PMT METHOD
Cash

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

SUBTOTAL	£675.00
VAT TOTAL	£135.00
TOTAL	£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.

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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).

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.

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**.

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.

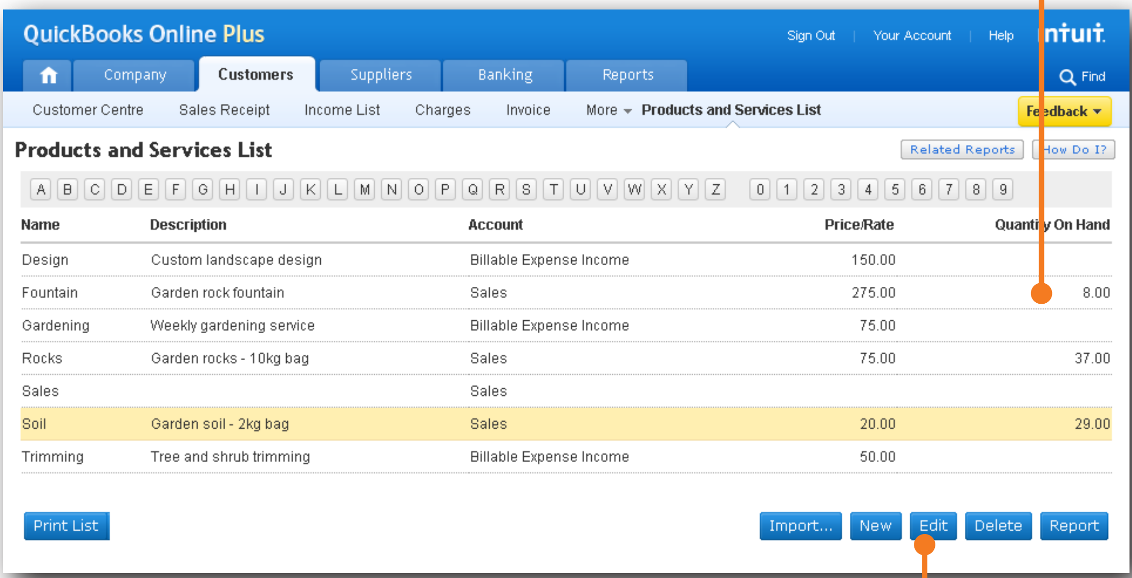
TIP: You can import your entire Products and Services list from Microsoft Excel.

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



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.

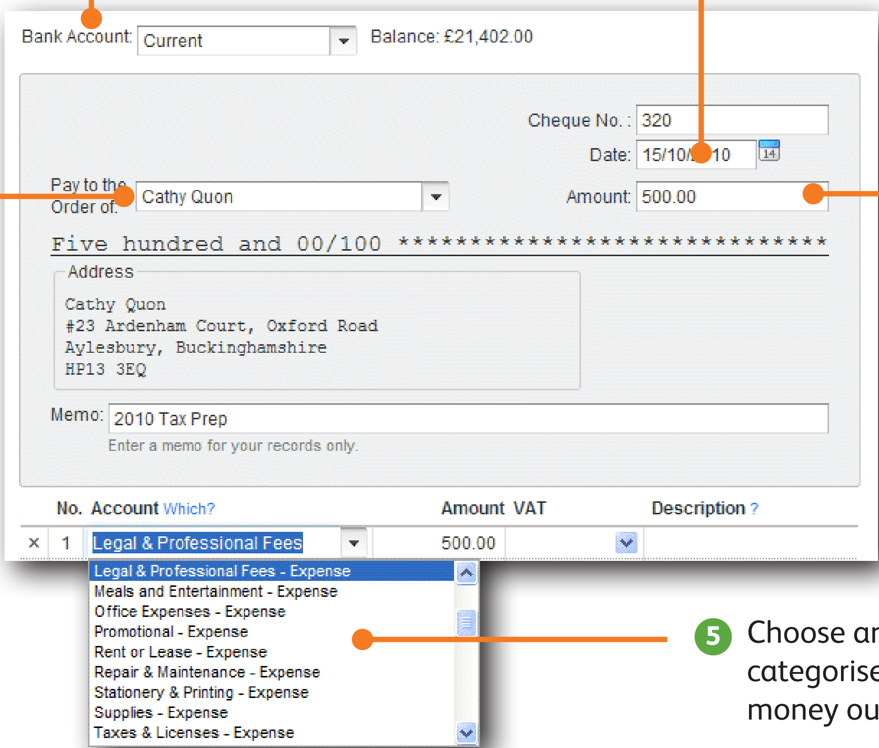
TIP! You can easily customise the account categories to track what's important to your business.

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
3. Enter the purchase amount
4. Select the name of the supplier
5. Choose an account to categorise the expense or money out



Manage customers

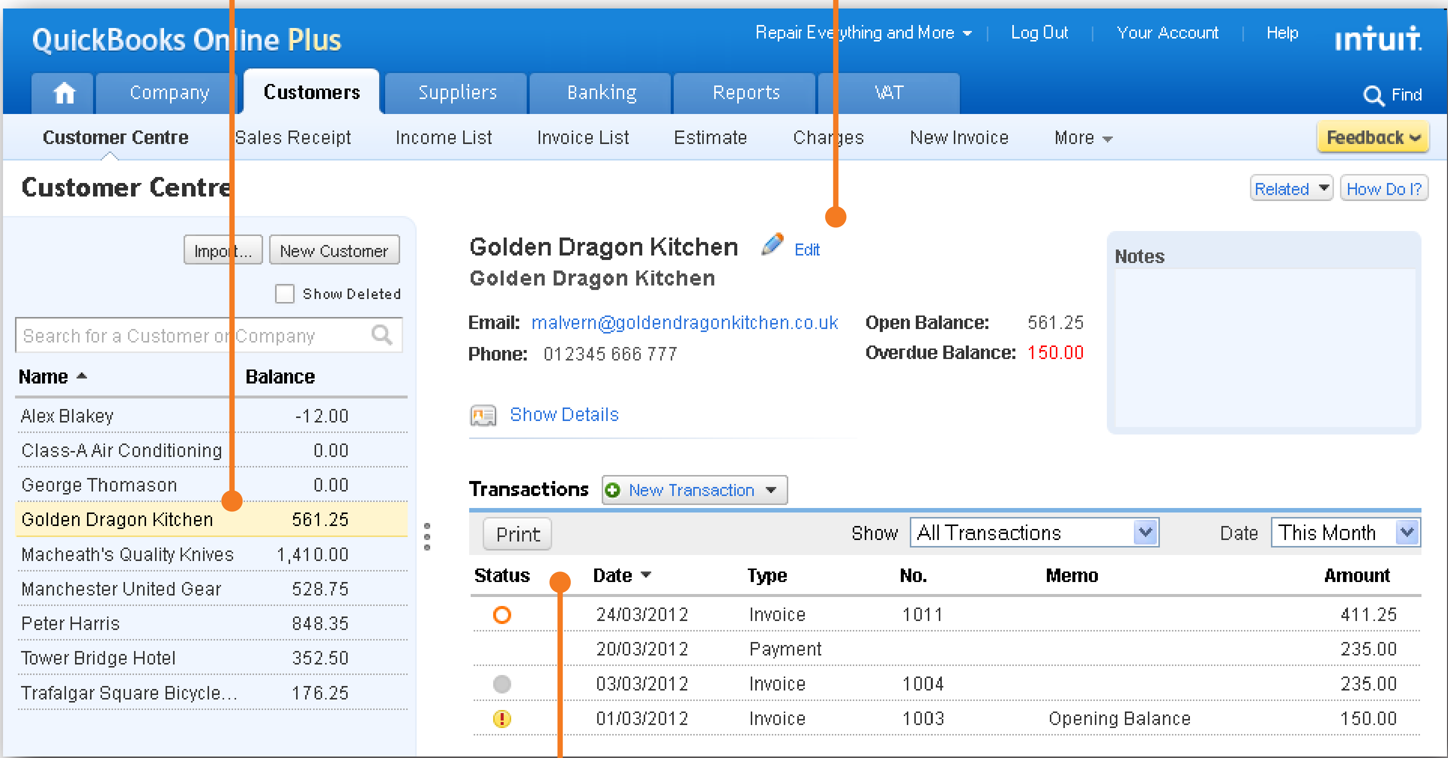
See all the details in one spot

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



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

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Manage your bank accounts

Staying on top of the details

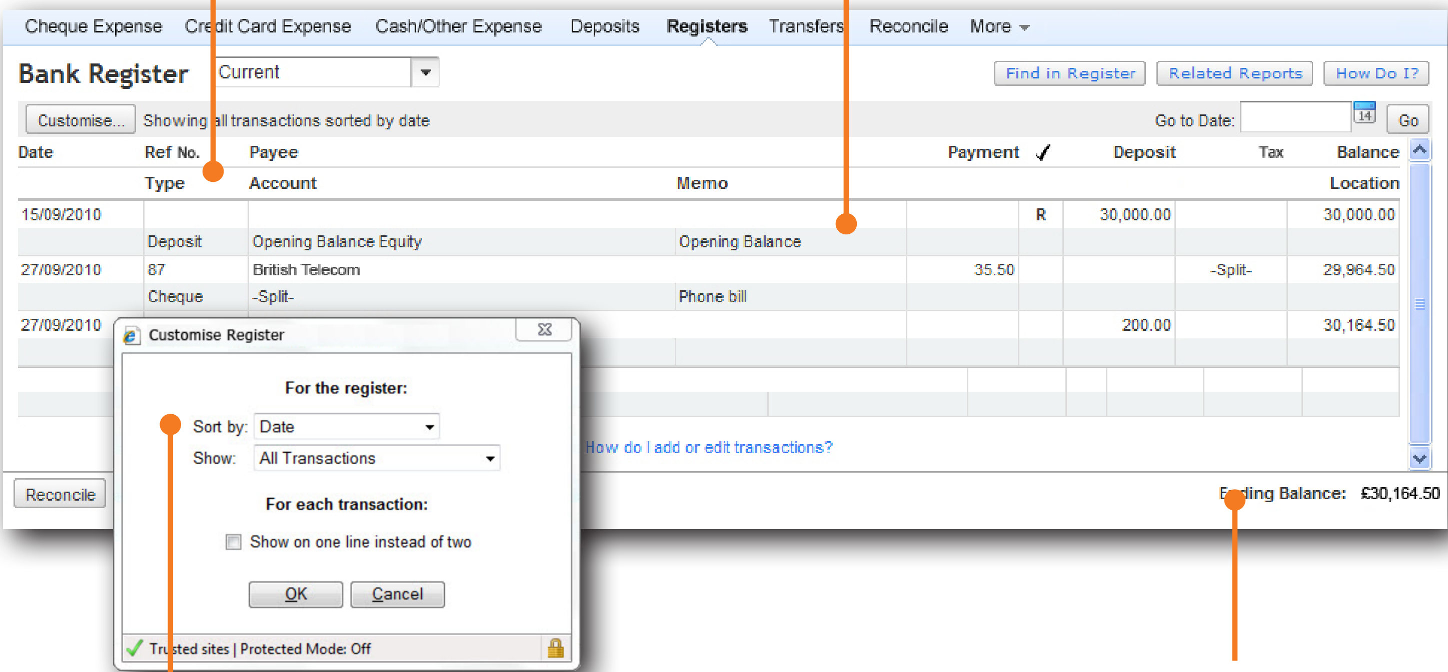
The bank registers in QuickBooks Online make it much easier to manage your bank account.

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



QuickBooks Online keeps a running total—no math needed

Quickly find specific transactions by sorting the register

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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.

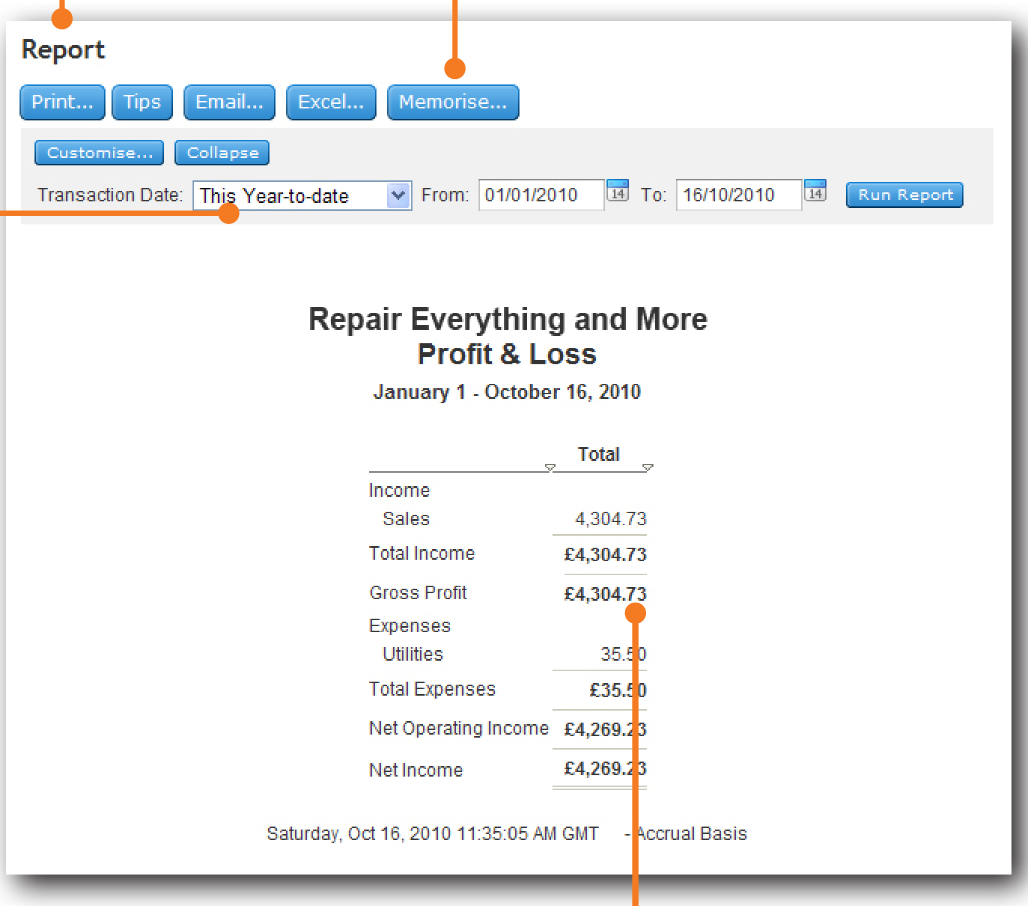
QuickBooks Online organises all the information you enter into easy-to-understand reports. You could save hours getting ready for tax returns with all your information in one place. Even better, your subscription includes free access for your accountant to make tax time easier.

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



Click on any amount to see the detail behind the number

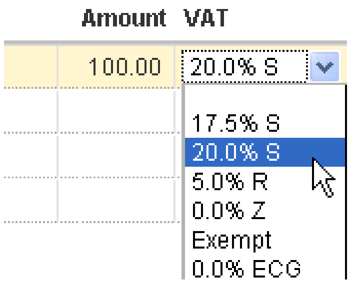
Manage and track VAT

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.

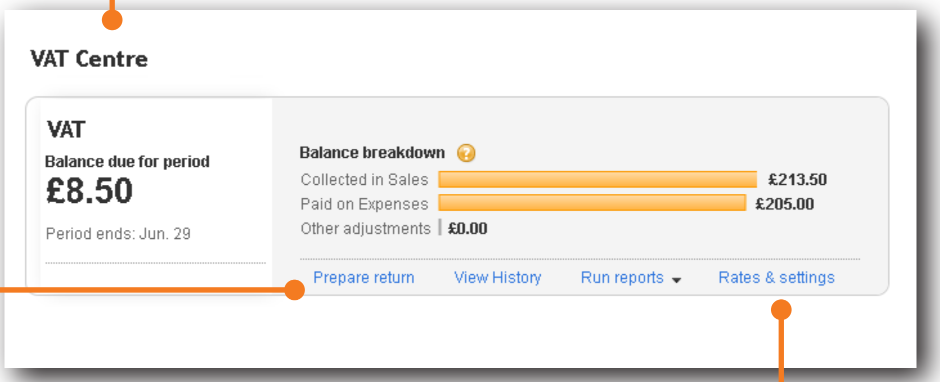
To manage your VAT details, go to the **VAT** menu and click **VAT Centre** List.

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.



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.

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✱ *Available in Essentials and Plus only*

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.

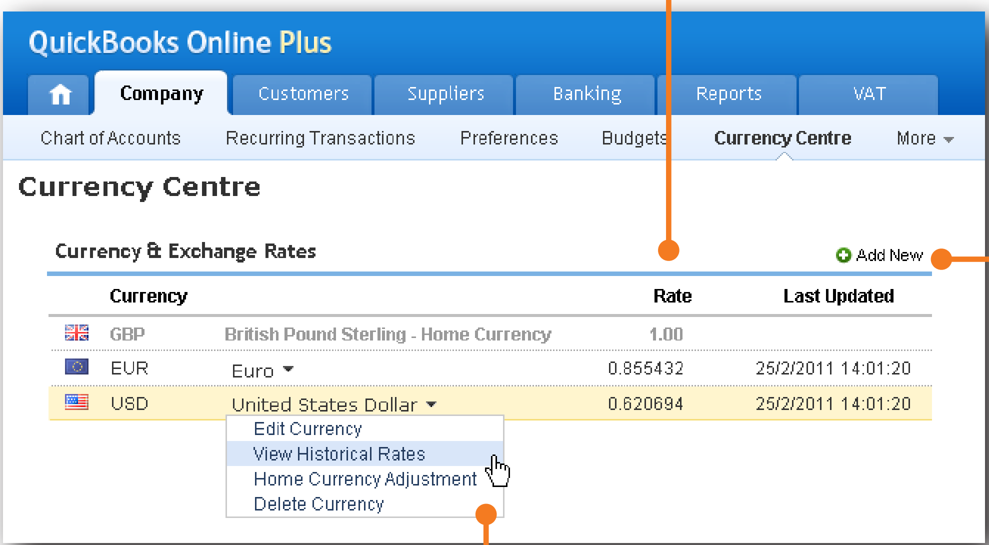
Want to import customers or suppliers who use a foreign currency?

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.



Add new currencies at the click of a button.

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.

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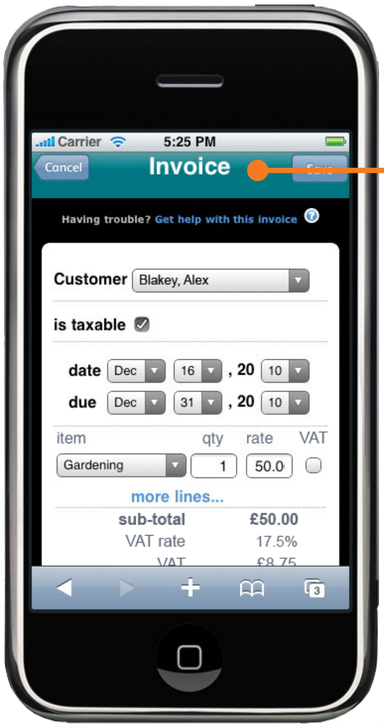
Go mobile



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 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.

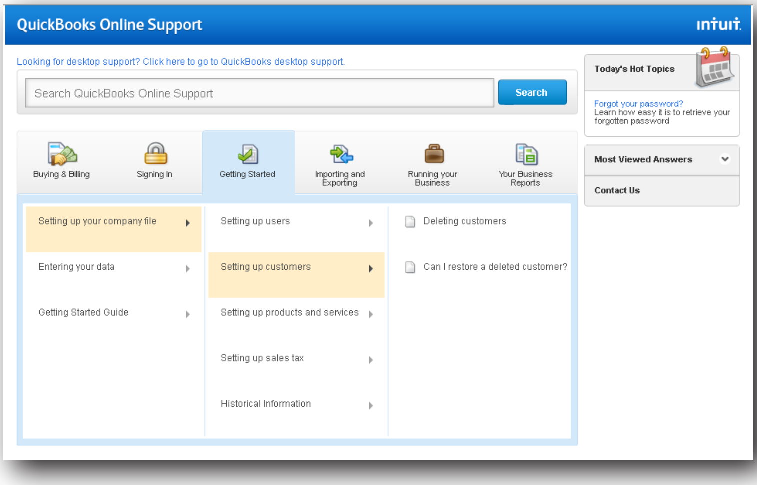
Note: If you purchased QuickBooks Online from one of our partners, you may need to add users from the partner’s website instead.

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