# Getting Started

Quick tips to get you up and running

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

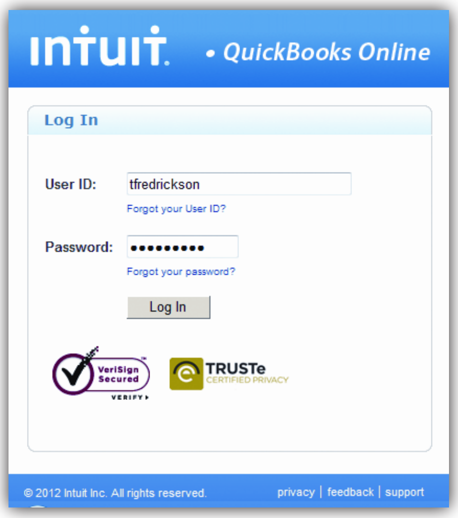
# QuickBooks Online

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

08-27-2012-en_CA

# What's in this guide

# Get started easily




## Sign in from anywhere, anytime

Go to ca.qbo.intuit.com and simply enter your user ID and password to securely sign in to your account.

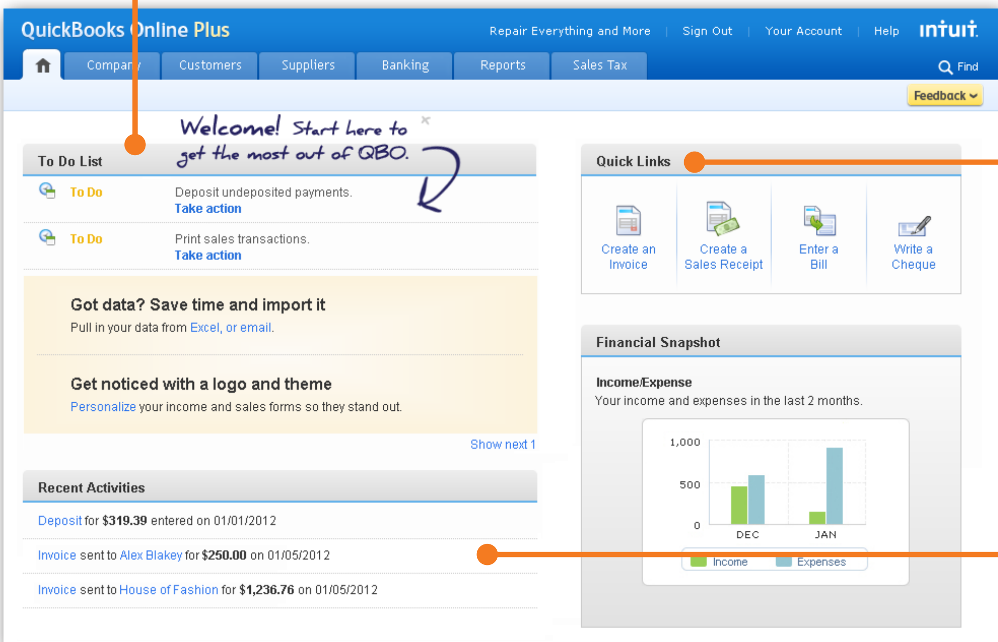
Access your account from any PC or Mac with an Internet connection whether you're at home, in the office, or at a client's site. It works on Internet Explorer, FireFox, Chrome for Mac and Windows, and Safari for Mac.*

**TIP!** Add ca.qbo.intuit.com to your browser bookmarks for faster access.

## Stay organized 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

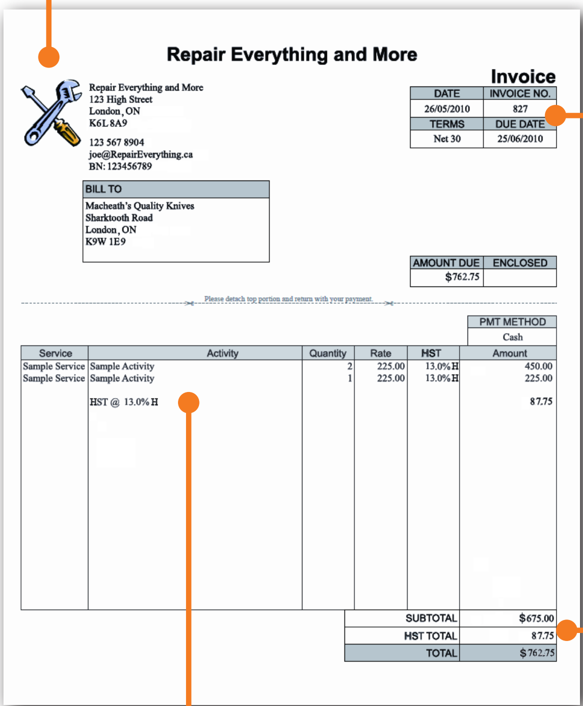

## Easily create invoices and track payments

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
London, ON
K6L 8A9

123 567 8904
joe@RepairEverything.ca
BN: 123456789

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

| BILL TO |
|---|
| Macheath's Quality Knives<br>Sharktooth Road<br>London, ON<br>K9W 1E9 |

| AMOUNT DUE | ENCLOSED |
|---|---|
| $762.75 | |

Please detach top portion and return with your payment.

| PMT METHOD |
|---|
| Cash |

| Service | Activity | Quantity | Rate | HST | Amount |
|---|---|---|---|---|---|
| Sample Service | Sample Activity | 2 | 225.00 | 13.0% H | 450.00 |
| Sample Service | Sample Activity | 1 | 225.00 | 13.0% H | 225.00 |
| | HST @ 13.0% H | | | | 87.75 |

| | |
|---|---|
| SUBTOTAL | $675.00 |
| HST TOTAL | 87.75 |
| TOTAL | $762.75 |

See terms, due dates and invoice details clearly organized

Sales Tax and deposits are instantly calculated for you

Customize 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**.

# 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 categorizes your receivables (the money coming in to your business).

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

Click here to learn more about importing customers.

## Customize your invoices to fit your business

You can easily customize our standard invoices to fit your business needs.  Want to add discounts, show quantities, or automatically include sales tax on your invoices?  No problem.

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


Click "Customize" 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 **Customize Printed Forms**.


Give your invoices a professional touch by adding your logo.

# Track expenses


## Know where you're spending money

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 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 customize 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 (chequing, credit cards and cash).

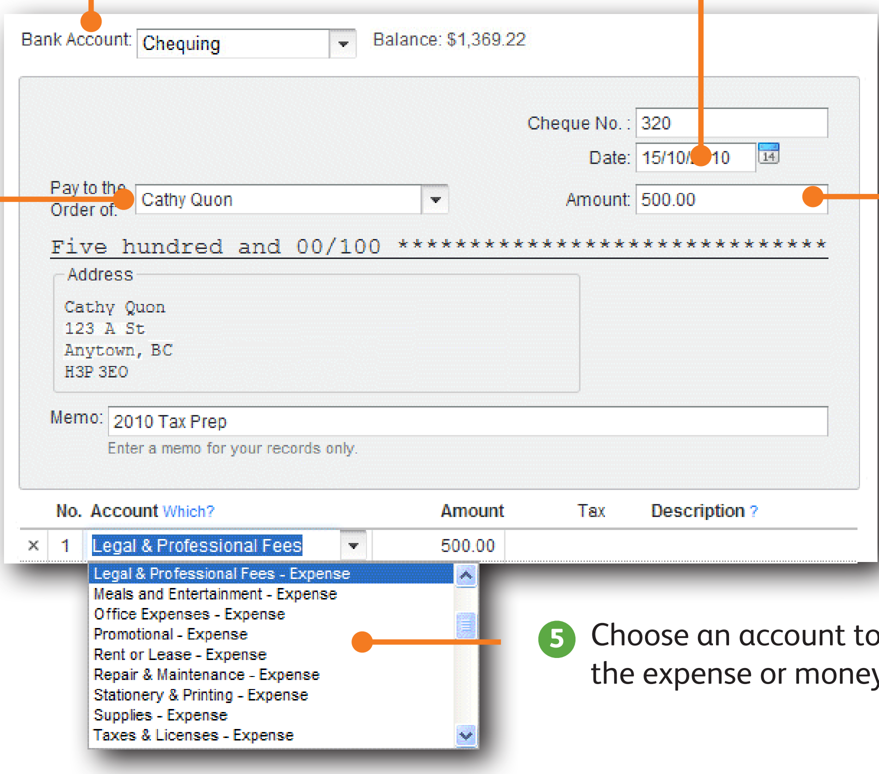
You'll enter a balance for the date you want to start tracking your business. This date could be when you started your business, the first day of the year, or any other day you choose.

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




5 Choose an account to categorize the expense or money out



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# Manage customers

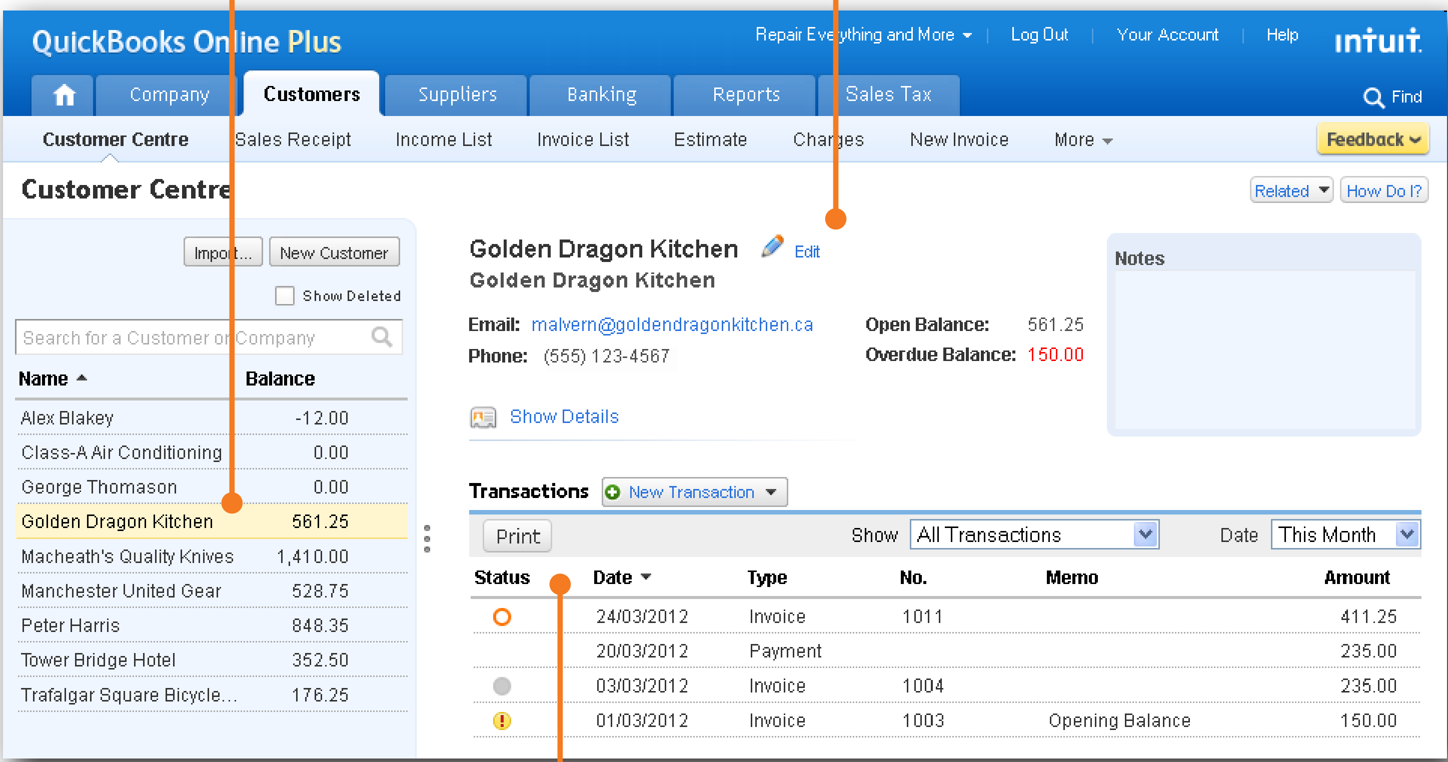

## See all the details in one spot

The Customer Centre makes it easy to see all of your customer details in one organized 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

# Manage your bank accounts


## Staying on top of the details

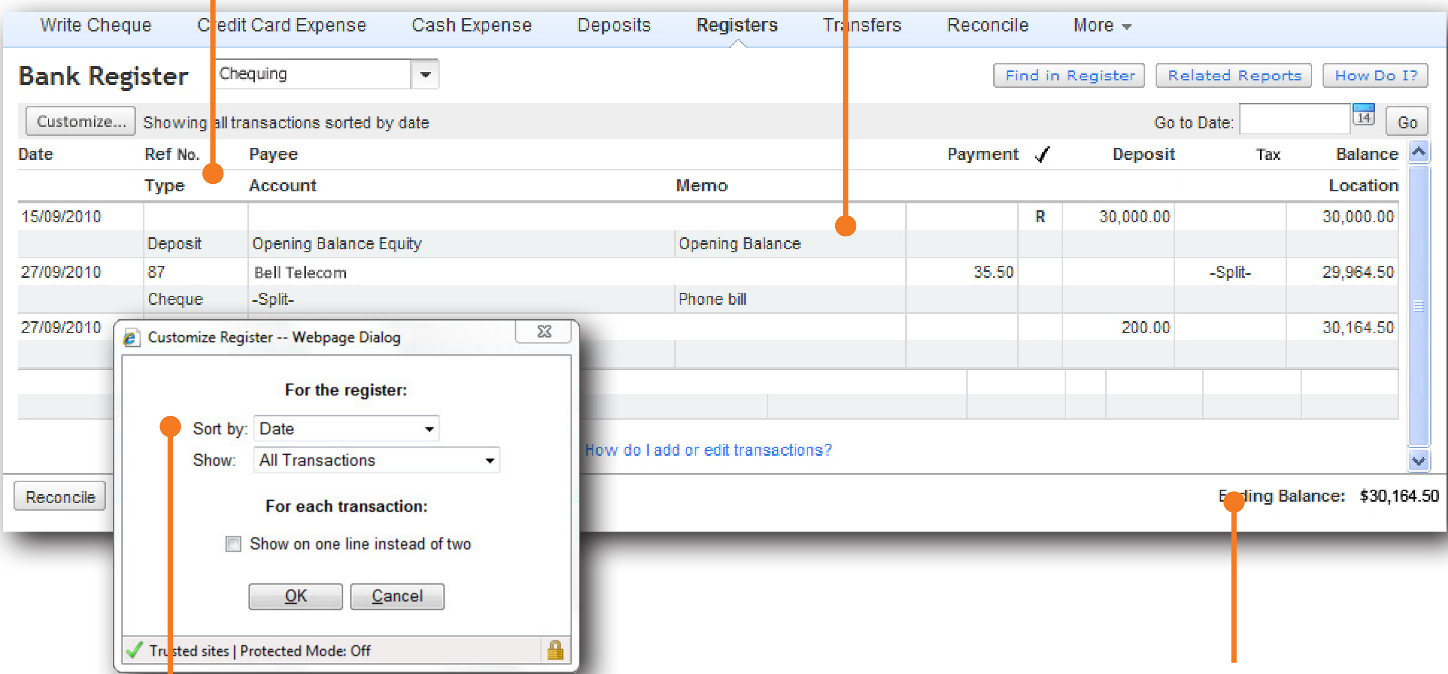
The bank registers in QuickBooks Online make it much easier to manage your bank account.

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 "Customize" 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

# 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.

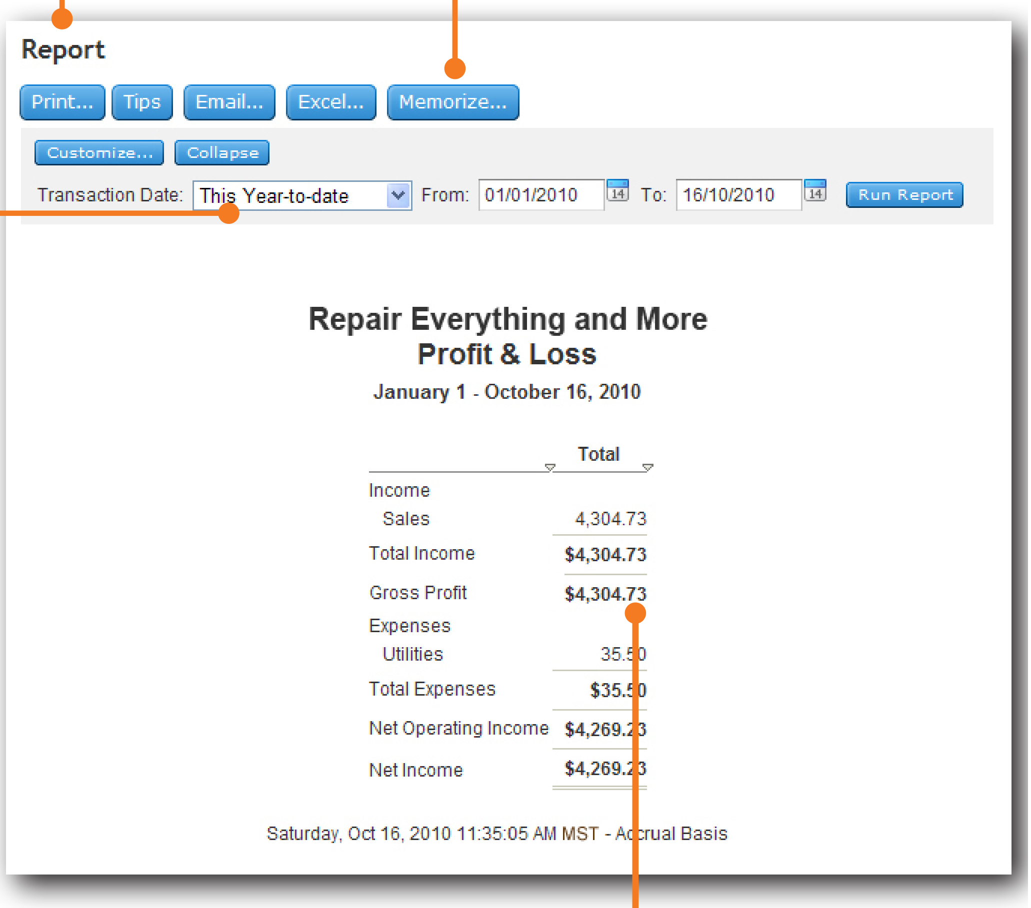
QuickBooks Online organizes all the information you enter into easy-to-understand reports. You could save hours getting ready for tax returns with all your information in one place. Even better, your subscription includes free access for your accountant to make tax time easier.

**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

Memorize 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

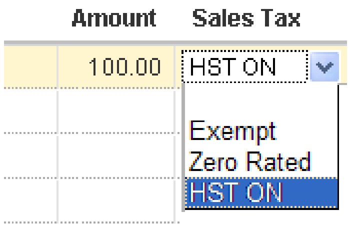
# Manage and track sales tax

## Keep track of the sales tax you pay and collect

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

To manage your sales tax details, go to the **Sales Tax** menu and click **Sales Tax Centre** List.

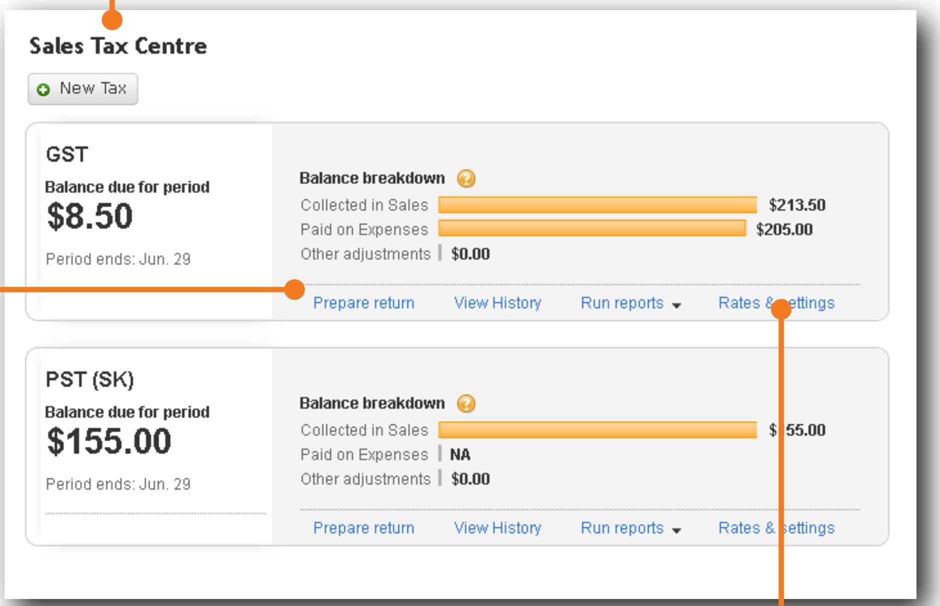
If this is your first time using sales tax with this company, click the **Set up Sales Tax** button to configure sales tax-related information. You can track GST/HST, PST, and QST at the same time.




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

You can return to the Sales Tax Centre at any time to view a snapshot of your sales tax history and prepare and file your sales tax return.

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




Click **Rates & settings** to update your sales tax agency details and view information on sales tax 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, A/R, and A/P 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.

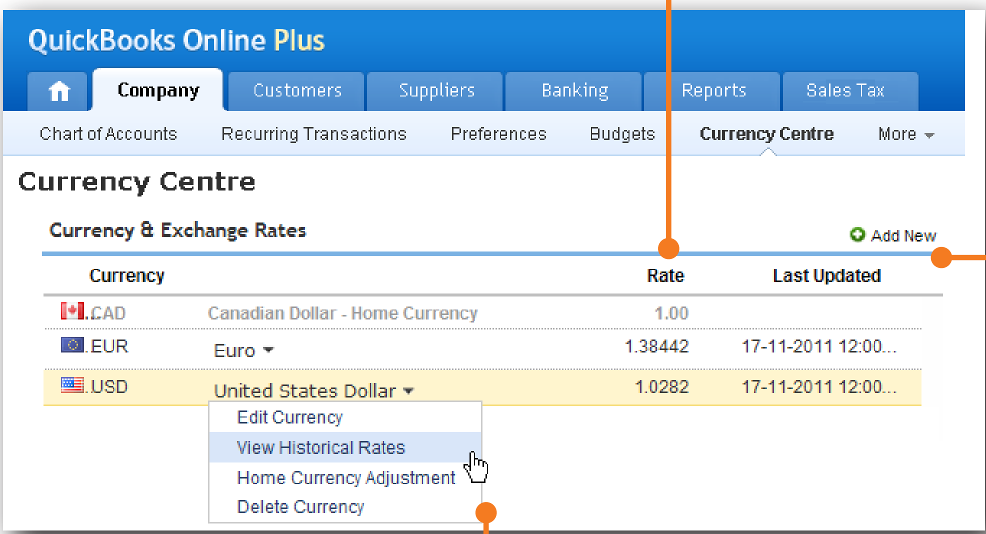
**Want to import customers or suppliers who use a foreign currency?**

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.

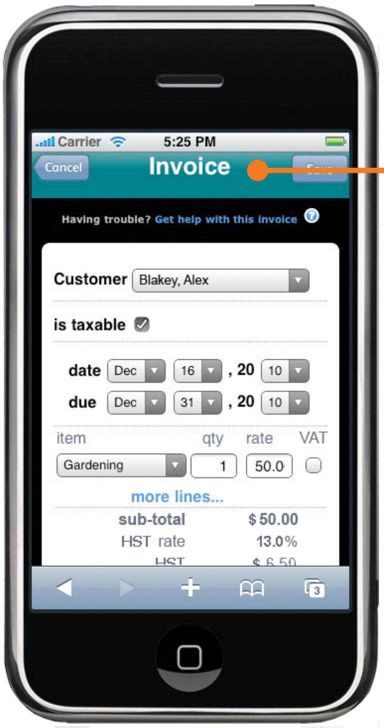
QuickBooks downloads new exchange rates hourly.




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.

# 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 province. You can add your accountant as a user for no extra charge.

Here's how to add your accountant:

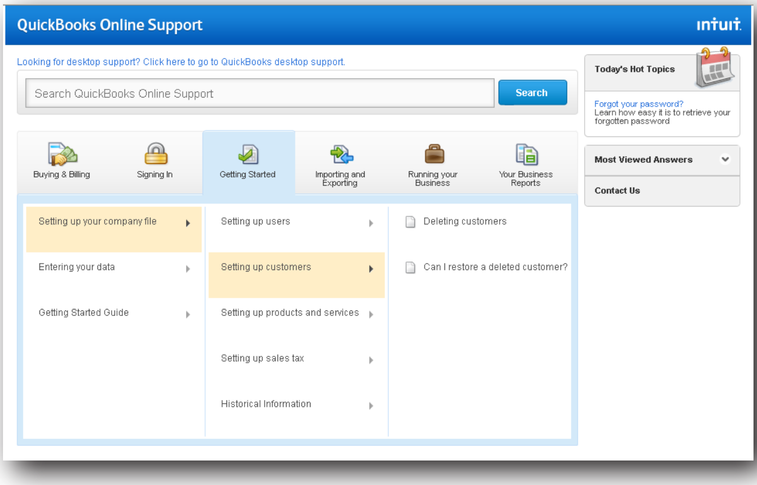
1. From the **Company** tab, select **Manage Users**.
2. Click **New** to add your accountant or business partner.

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