



## 1 SET-UP STEP 1

### LET'S GET YOUR FILE SET UP!

#### SETUP STEP 1

- **Create A New Company In Qb®:**

After selecting File > New Company, on the "Let's Set Up Your Business" screen, select "Detailed Start". Use the information below to *Create a New Company* for your company file for **Quincy Bookstore**.

- **New Company Set Up Information:**

Remember to check the information in your ***Bookkeeping Basics Series #3: QuickBooks™ Fundamentals*** course if you need to refresh on how to work through this process.

**NOTE:** Because each version of QuickBooks™ varies slightly, you may be asked slightly different questions, perhaps in different order, or the commands may be labeled differently. Use your best guess on anything that doesn't exactly match these instructions or visit our private Facebook group for more assistance.

- **Use the following information to work through the QuickBooks™ setup of a NEW company file for Quincy Bookstore:**

- Company and Legal Name: **Quincy Bookstore**
  - » Federal Tax ID: **46-6521446**
  - » Address: **1055 Quincy Street, St. Louis, MO 63111**
  - » Phone: **314-555-9876**; Fax: **314-555-6789**
  - » E-mail: **YourName@QuincyBookstore.com** (don't forget to use your real name)
  - » Web: **www.QuincyBookstore.com**
- Type of Industry: **Retail Shop or Online Commerce**
- Company Organization: **Sole Proprietorship**
- Fiscal Year Starts: **January**
- Passwords: **No** (leave blank for now but watch the video for instructions)
- File Name: **Quincy Bookstore.qbw**
- Sell **Both Services and Products**, record each sale **individually**
- Charge Sales tax: **Yes**
- Estimates - **No**
- Track Customer orders (sales orders) - **Yes**
- Customer Statements - **No**



- Progress Invoicing - **No**
- Manage bills - **Yes**
- Track inventory - **Yes**
- Track Time - **No**
- Employees: **Yes, W-2 Employees**
- Date to start tracking finances: **01/01/20XX** (If your date is not 01/01/20XX, select "Use today's date or the first day of the quarter" and enter 01/01/20XX.)
- When presented with a list of suggested/recommended Accounts, **UNCHECK ALL OF THEM**. We will manually enter them later.
- Click the option to **Go to Setup**. When given the option to enter Names, Items, etc., select **Start Working** at the bottom.
- Your company file will now open with the Home screen taking up most of the window. Your Task Bar will be on the left side of the window and there may be a window with "New Feature Tour"; close it when you're ready.

## 2 SET-UP STEP 2 (OPTIONAL)

### SELECT A TOP ICON BAR

After you have created the new company, if you wish to use a Top Icon Bar, use the View menu to change from the Left Icon Bar.