

Section: Additional Stuff  
Lesson: Creating A New Company File

THIS SECTION: ADDITIONAL STUFF

THIS LESSON...

# CREATING A NEW COMPANY FILE




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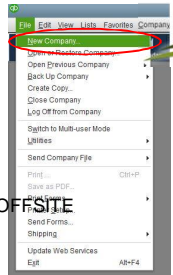

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### New Company File

- Take the time
- VERY strong system
- QuickBooksi Files
  - Working File - .qbw
  - Backup File - .qbb
- QBB file designed to take OFFSITE

Larry's Landscaping




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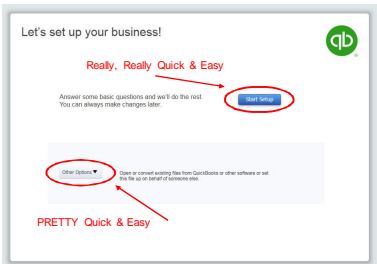

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### New Company File

- Use the Start Setup orð
- Other Options
  - Converting Quicken file
  - Converting other file
  - Advanced Setup


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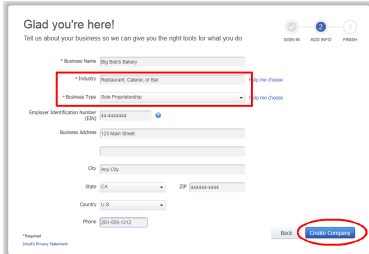


Section: Additional Stuff  
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### REALLY, REALLY Quick & Easy

- ~ Skip Log In
- ~ Complete all information
- ~ The %Industry+ and %Business Type+ fields will do most of the work
- ~ Click %Create Company+

**HOWEVER...**



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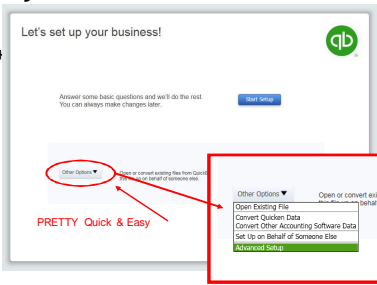
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### PRETTY Quick & Easy

- ~ Click %Other Options+
- ~ Select %Advanced Setup+



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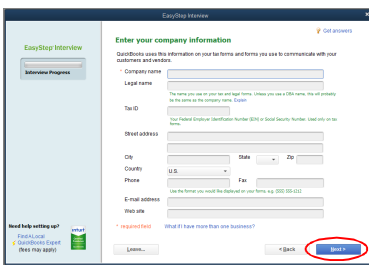
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### PRETTY Quick & Easy

- ~ Click %Other Options+
- ~ Select %Advanced Setup+
- ~ Required marked with \*



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Section: Additional Stuff  
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**PRETTY Quick & Easy**

- ~ Click %Other Options+
- ~ Select %Advanced Setup+
- ~ Required marked with \*
- ~ Select an Industry or %General+Business

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**PRETTY Quick & Easy**

- ~ Click %Other Options+
- ~ Select %Advanced Setup+
- ~ Required marked with \*
- ~ Select an Industry
- ~ Business structured as

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**PRETTY Quick & Easy**

- ~ Click %Other Options+
- ~ Select %Advanced Setup+
- ~ Required marked with \*
- ~ Select an Industry
- ~ Business structured as
- ~ Fiscal year starts in

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Section: Additional Stuff  
Lesson: Creating A New Company File

**PRETTY Quick & Easy**

- Click Other Options+
- Select Advanced Setup+
- Required marked with \*
- Select an Industry
- Business structured asō
- Fiscal year starts inō
- Admin password (optional)

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**PRETTY Quick & Easy**

- Click Other Options+
- Select Advanced Setup+
- Required marked with \*
- Select an Industry
- Business structured asō
- Fiscal year starts inō
- Admin password (optional)
- Ready to create the QB data file

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**PRETTY Quick & Easy**

Customize the new company file

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Section: Additional Stuff  
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**PRETTY Quick & Easy**

- Customize the new company file
- Products, services, both

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**PRETTY Quick & Easy**

- Customize the new company file
- Products, services, both
- Sales tax

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**PRETTY Quick & Easy**

- Customize the new company file
- Products, services, both
- Sales tax
- Create Estimates

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Section: Additional Stuff  
Lesson: Creating A New Company File

**PRETTY Quick & Easy**

- Customize the new company file
- Products, services, both
- Sales tax
- Create Estimates
- Monthly statements

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**PRETTY Quick & Easy**

- Customize the new company file
- Products, services, both
- Sales tax
- Create Estimates
- Monthly statements
- Accounts Payable

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**PRETTY Quick & Easy**

- Customize the new company file
- Products, services, both
- Sales tax
- Create Estimates
- Monthly statements
- Accounts Payable
- Track time

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Section: Additional Stuff  
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**PRETTY Quick & Easy**

- Customize the new company file
- Products, services, both
- Sales tax
- Create Estimates
- Monthly statements
- Accounts Payable
- Track time
- Employees

The screenshot shows the 'Do you have employees?' step of the EasyStep Interview. It has two radio button options: 'Yes' (with sub-options 'I have 1-2 employees' and 'I have 1000+ employees') and 'No'. Below the options is a 'QuickBooks Payroll' icon with a note: 'QuickBooks Payroll never lets you start faster than QuickBooks! Products are all downloaded to your laptop. On some computers and for some subscriptions, installation required.' At the bottom, there are 'Learn', 'Back', and 'Next' buttons. The 'Next' button is circled in red.

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**PRETTY Quick & Easy**

- Customize the new company file
- Products, services, both
- Sales tax
- Create Estimates
- Monthly statements
- Accounts Payable
- Track time
- Employees
- Chart of Accounts

The screenshot shows the 'Using accounts in QuickBooks' step. It asks 'How do you keep track of your bank accounts, which are categories of income, expense and more that you'll use to track your business?' and 'Why is the chart of accounts important?'. Below this, it says 'To set up your chart of accounts, you'll need to:' followed by a list: '1. Decide on a chart of accounts strategy (you'll need your business structure in QuickBooks (e.g. beginning of fiscal year, first of the month, etc.)', '2. Understand the specific obligations of your business' income and expenses. (You may want discuss this with your accountant, if you have one)'. At the bottom, there are 'Learn', 'Back', and 'Next' buttons. The 'Next' button is circled in red.

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**PRETTY Quick & Easy**

- Customize the new company file
- Products, services, both
- Sales tax
- Create Estimates
- Monthly statements
- Accounts Payable
- Track time
- Employees
- Chart of Accounts

The screenshot shows the 'Select a date to start tracking your finances' step. It says 'The date you select will be your start date in QuickBooks.' and has two radio button options: 'Beginning of this fiscal year: 01/01/2018' (with a note 'If you're incorporating this year, you'll need to enter transactions from the beginning of the fiscal year to today.') and 'Your date's closer to the start of the quarter or month' (with a note 'You'll need to enter transactions from the date forward.'). Below the options is a date field showing '01/01/2018'. At the bottom, there are 'Learn', 'Back', and 'Next' buttons. The 'Next' button is circled in red.

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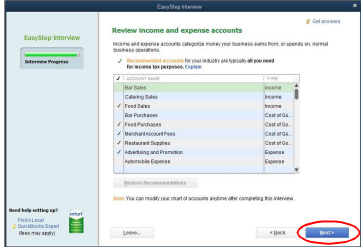
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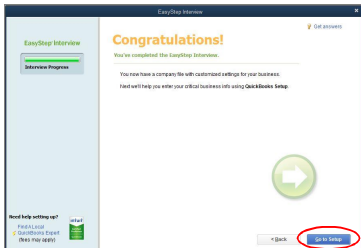
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**PRETTY Quick & Easy**

- Customize the new company file
- Products, services, both
- Sales tax
- Create Estimates
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- Chart of Accounts



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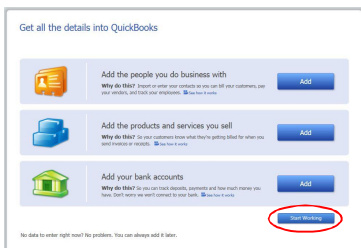
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**PRETTY Quick & Easy**

- Add Customers and Vendors
- Add Products and other Items to the Item List
- Add Bank Accounts to the Chart of Accounts



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