Activity Sheet: QuickBooks – Getting Started

**Activity #1**

1. Click on Create Company File
2. Type **ABC Widget Company** in the **Company Name** box
3. Type **Accounting** in the **Industry** Box
4. Select **Sole Proprietorship** as the **Company Type**
5. Type **12-3456789**in the Tax ID box
6. Skip filling out the Products/Services and Bank Account section by clicking **Start Working**

**Activity #2**

*Access QuickBooks Preferences*

1. Locate the **Main Menu**
2. Click on the **Edit** tab
3. Select **Preferences**

*Find the “Use Account Numbers” option*

1. Click the **Accounting** category
2. Click the **Company Preferences** tab
3. Check the appropriate box

*Find the “Show Reminders List”*

1. Click the **Reminders** category
2. Click the **My Preferences** tab
3. Check the appropriate box

*Find the “Use the last entered date as default” option*

1. Click on the **General** category
2. Click the **My Preferences** tab
3. Click on the appropriate option

**Activity #3**

*Access the Chart of Accounts and editing an existing account*

1. From the **Home Screen**, click on the **Chart of Accounts** Icon
2. Click on **Insurance Expense**
3. Click on the **Account** button
4. Click on the **Edit Account** button
5. Change to **Liability Insurance** **Expense**
6. Click **Save** and Close

*Practice Adding a New Account*

1. From the **Chart of Accounts**, click on the **Account** button
2. Click on **New Account**
3. Click on **Expense**
4. Type in **Scavenger Fees**
5. Click **Save** and Close

*Practice Deleting an Account*

1. From the **Chart of Accounts**, Click on **Scavenger fees**
2. Click on the **Account** button at bottom of screen
3. Click on **Delete** account
4. Click on **Yes**