

## Setup QuickBooks for First Use

When you login as you into a QuickBooks file the first time, you will want to go through and set your preferences so you can work effectively.

### Go to Edit, Preferences

The key elements to set are

- **Checking**
    - Set your default accounts, this will help keep the data correct.
  - **Desktop view**
    - Make sure you are working in multiple windows.
    - You can use colors if it helps you.
  - **General:**
    - Automatically recall last transaction for this name;
    - Use Today's date as default (This may change depending on what you are working on as there are reasons to turn this on/off)
    - Keep Custom Item Info: Depends on how you use your items. Usually No.
  - **Reports & Graphs**
    - Refresh Automatically
  - **Sales & Customers**
    - 99.99% of the time, this will be set to "Don't Add any" There are very few businesses that actually use QuickBooks for Time/Materials billing as that is a very complicated thing to do and use correctly.
  - **Search:**
    - Show Search field in the Icon bar – Yes
    - Search by Default – Search my company file.
  - **Send Forms:**
    - Web Mail
      - Add
      - Answer questions for your email address and client.
      - For Detailed instructions, go to <http://booksnbilling.com/help/>
  - **Spelling:**
    - Configure appropriately so that it spell checks based on your strengths.
- ❖ Once you have these set, you can now use QuickBooks effectively for your business.