INSTRUCTIONS TO INSTALL FRIENDS CHURCH SAMPLE DATA FILE INTO QUICKBOOKS

TO RESTORE A BACKUP FILE (IMPORT SAMPLE DATA FILE)

1. Open QuickBooks 2008 or higher version.
2. Select Open or Restore an Existing Company
3. Select Restore a Backup Copy/Next
4. Local Backup/Next
5. When you received the backup copy of QuickBooks (.QBB file), place it on your desktop for easy access. This is where you will point to find the file from within QB.
6. Double click on the file.
7. Let QuickBooks automatically assign a location for your working data file to exist if it is on a stand alone computer. It should be in the directory: Shared Documents/Intuit/QuickBooks/Company Files. QB sets this all up on its own when you install the software.
8. QB will do the rest of the work to download the file.

TO CUSTOMIZE THE DATA FILE FOR YOUR CHURCH

1. Go to Company/Company Information and type in the appropriate information in the fields as designated.
2. Go to Lists/Chart of Accounts, and open the bank accounts by double clicking on the account in the list and add the account number and bank name.

TO PASSWORD PROTECT THE FILE

1. G0 to Company/Set-up Users and Passwords.
2. First establish the Admin password. The login is always Admin, proceed to pick a password. Make sure to write it down! It will also offer a security question in case this is forgotten, but you do not have to use this feature and can tab past it.
3. Next set-up Users. You will enter unique user login names and passwords for each person using the data file. It is better that people login as themselves when accessing QB as it tracks transaction history and creates an audit trail that could help in the event of a problem.
4. QB will allow you to set-up specific areas that users have access to as well as levels to either create, edit, delete and/or report on transactions. If there will be one user, then assign access to all areas of QB. It can be a little tricky to assign portions of areas.