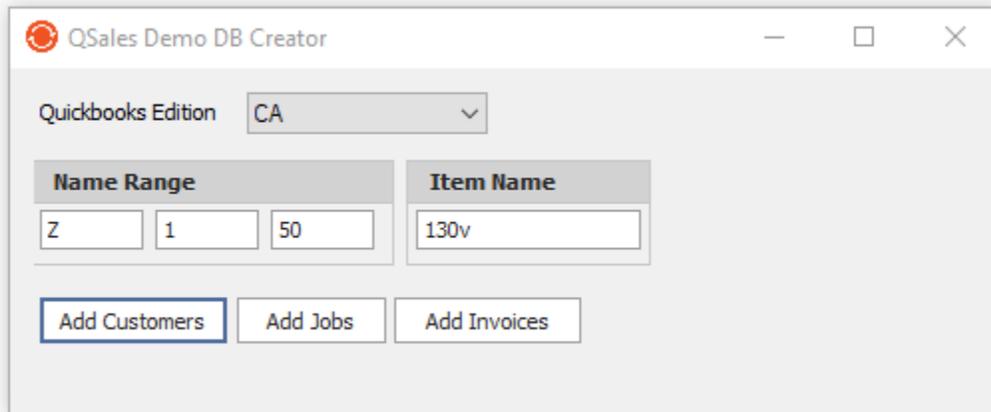


## The QuickBooks Demo file Utility

The QuickBooks Demo Utility is perfect for Act! Consultants looking to demo Qsales with non-production data. As the name implies, it helps populate a new QuickBooks database with customers, job, and transactions.

The first step is to launch the QuickBooks Demo Utility, and select the following parameters



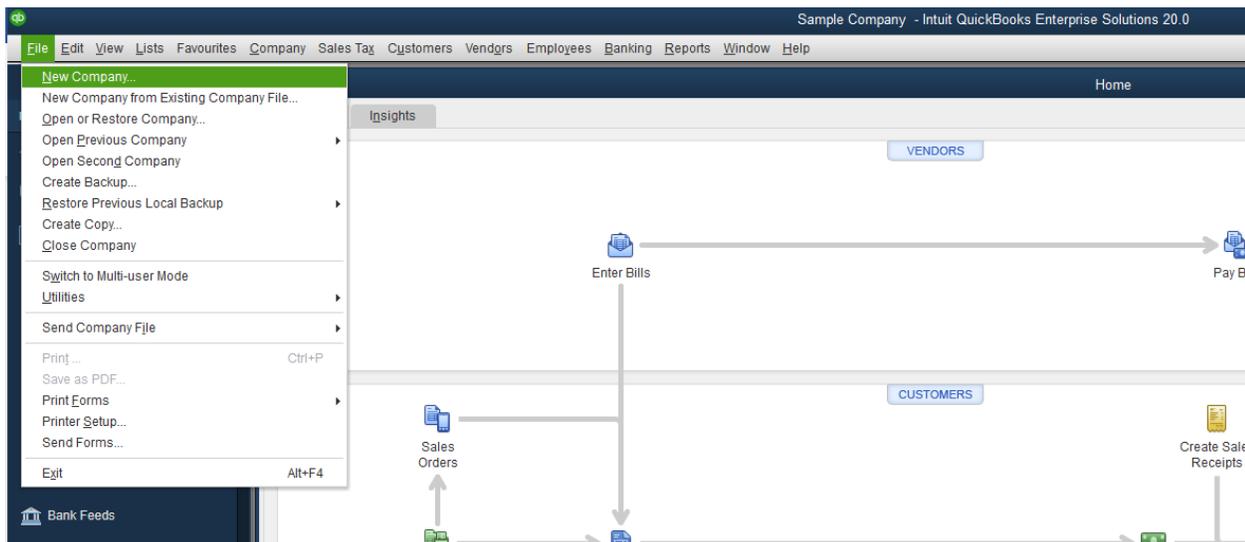
The screenshot shows the 'QSales Demo DB Creator' window. It features a dropdown menu for 'Quickbooks Edition' set to 'CA'. Below this are two main sections: 'Name Range' and 'Item Name'. The 'Name Range' section has three input fields containing 'Z', '1', and '50'. The 'Item Name' section has one input field containing '130v'. At the bottom, there are three buttons: 'Add Customers', 'Add Jobs', and 'Add Invoices'.

1. What letter(s) will be the customer name prefix?. We recommend a single letter like Z
2. The next two fields are the range of customers starting from 1 and ending at whatever number of customers you want to create (we recommend 50)
3. The next step is to create a product name. By default, the Item Name field will have "130v" in it, which is suitable for our purposes.

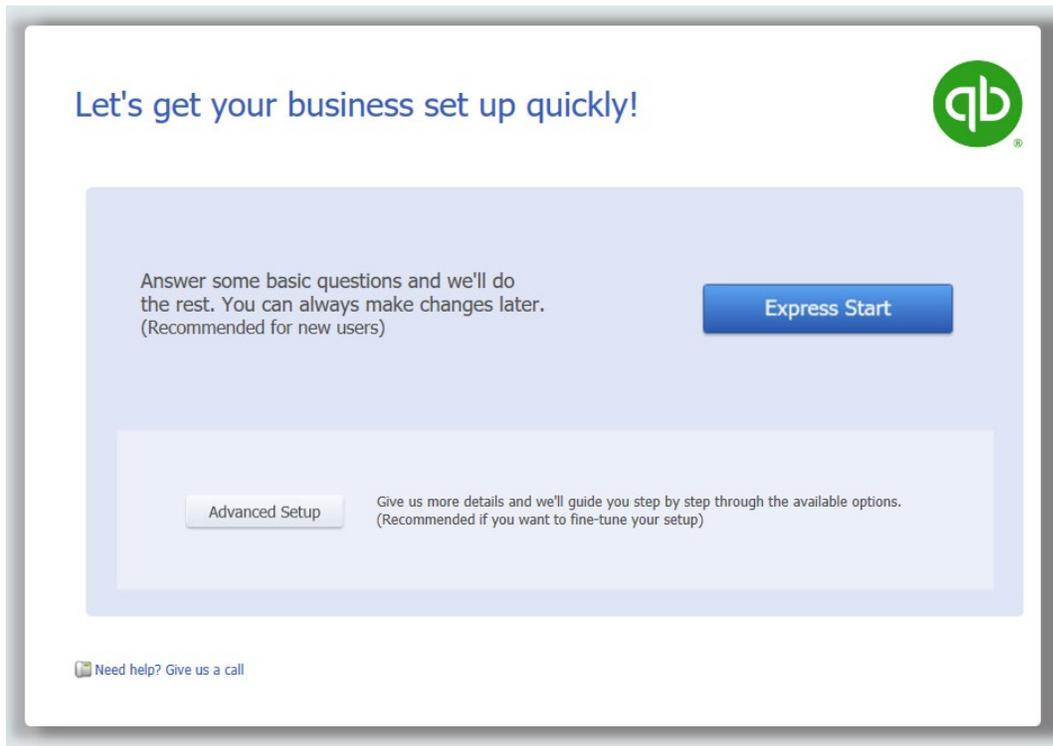
With these steps done, you're now ready to move on to creating the QB Demo file.

### Creating the QuickBooks Demo File

The following steps will help you create a blank QB demo file that will work with the USA, Canadian, or UK versions of QB (please remember Qsales v13 works with version 2018 or later).



1. Open QuickBooks and click File > New Company



3. Enter any company name (ie. "Sample Company")
4. In the industry field, type "retail" and then select the auto-complete option for "Retail Shop or Online Commerce."

Do NOT complete any of the other fields, and click Continue

**Enter your business contact information**  
Once you enter your contact information, you're ready to create your company file.

1 Tell us — 2 Contact info — 3 Add info — Start working

Legal Name: Sample Company

Address: \_\_\_\_\_

City: \_\_\_\_\_

\* Province: ON Postal Code: \_\_\_\_\_

Country: Canada

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Website: \_\_\_\_\_

\* Required

Enter basic contact information so you can instantly print and email invoices and other forms to your customers and vendors.

Back Preview Your Settings Create Company File

1. Under the Business Contact Info page, just select a Province or State from the drop down. It doesn't matter if it's accurate, but we recommend your own Province or State so you're familiar with the applicable sales taxes
2. Click "Create Company" File in the bottom right (if it prompts you about payroll, click OK to disregard).

The welcome screen will be presented after the company file is created. Select Add for "Add the products and services you sell" (you can also click "Start Working", and then click on the following:

- Lists > Items to create your one product manually)

You've got a company file! Now add your info.

Get your critical info into QuickBooks Desktop so you can start working.

1 Tell us — 2 Contact info — 3 Add info → Start working



**Add the people you do business with**

**Why do this?** Import or enter your contacts so you can bill your customers, pay your vendors, and track your employees. [See how it works](#)

[Add](#)



**Add the products and services you sell**

**Why do this?** So your customers know what they're getting billed for when you send invoices or receipts. [See how it works](#)

[Add](#)



**Add your bank accounts**

You've added 1 bank account

[Add More](#)

[Start Working](#)

No data to enter right now? No problem. You can always add it later.

1. Click Add, select "Non-Inventory part" for Item Type, and Continue

 **Add the products and services you sell**

1 Choose a type — 2 Select what to add — 3 Review and finish

QuickBooks stores your products and services as **Items** and categorizes them in two **types**. Choose a type below to get started. If you need to add more than one type, you can come back when you're finished and add more.

Item type	Use this type for
<input type="radio"/> Service	Work performed by you such as an hour of labour or an installation fee for a job.
<input checked="" type="radio"/> Non-inventory part	Products you sell but you <b>don't</b> want to track how many you have such as materials for a job.

[Cancel](#) [Continue](#)

2. Enter "130v" as the product name (or whatever you named it in the QB Demo Utility), and then give it a price. To keep it simple, we recommend \$100. No description or MFG Part number is required.

 **Add the products and services you sell** 1 Choose a type 2 Select what to add 3 Review and finish

Enter your products below. You can save time by pasting from Excel. Don't worry about getting everything perfectly, we'll let you know if you need to fix anything [How does this work?](#)

Name	Description	Price	Mfg Part #
130v		100.00	

Click Continue and Continue again, and then Start Working.

**You've got a company file! Now add your info.** 1 Tell us 2 Contact info 3 Add info → Start working

Get your critical info into QuickBooks Desktop so you can start working.

 **Add the people you do business with**

**Why do this?** Import or enter your contacts so you can bill your customers, pay your vendors, and track your employees. [See how it works](#)

 **Add the products and services you sell**

**Why do this?** So your customers know what they're getting billed for when you send invoices or receipts. [See how it works](#)

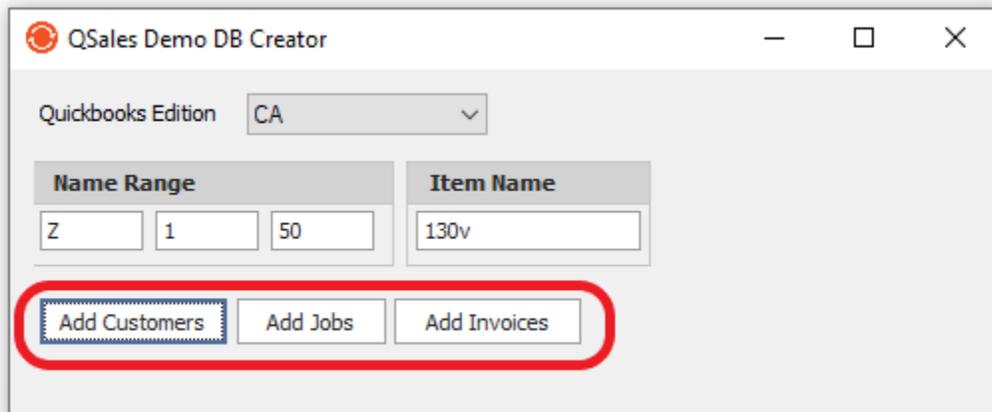
 **Add your bank accounts**

You've added 1 bank account

No data to enter right now? No problem. You can always add it later.

Click any popups in QB and return to the QB Demo Utility

## Final Steps with the QB Demo Utility



1. Click Add Customers, as seen above. You'll be prompted to apply a certificate, so select "Yes, whenever this QuickBooks company file is open", and click Continue. Then click Done
2. The QB Demo Utility will then resume creating the customers
3. Once completed, you can then create "jobs" (which are like "sub-customers"), or go to "Add Invoices". The Add Invoices feature will generate a random number of invoices across all the customers you created, and do so with dates from the past year.

When that process is completed, you're done. Go into your newly populated QuickBooks demo file and review the new list of customers, and look within each to see the invoices.