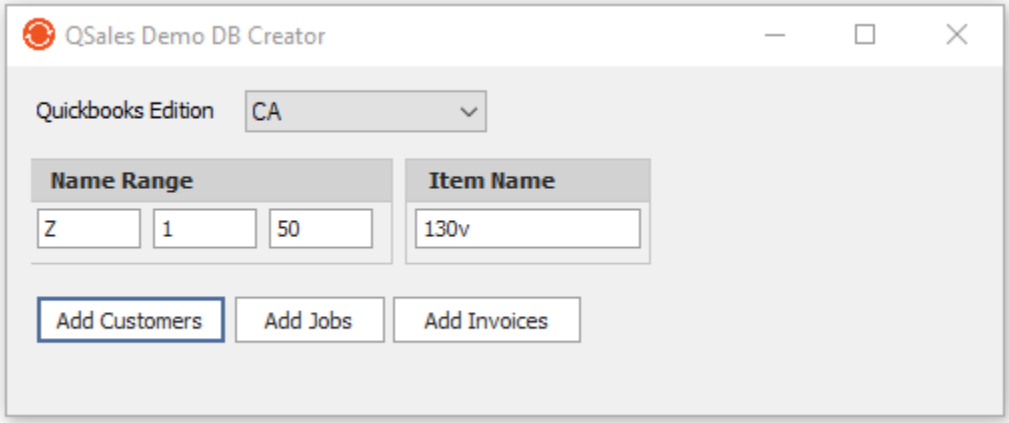
The QuickBooks Demo file Utility

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

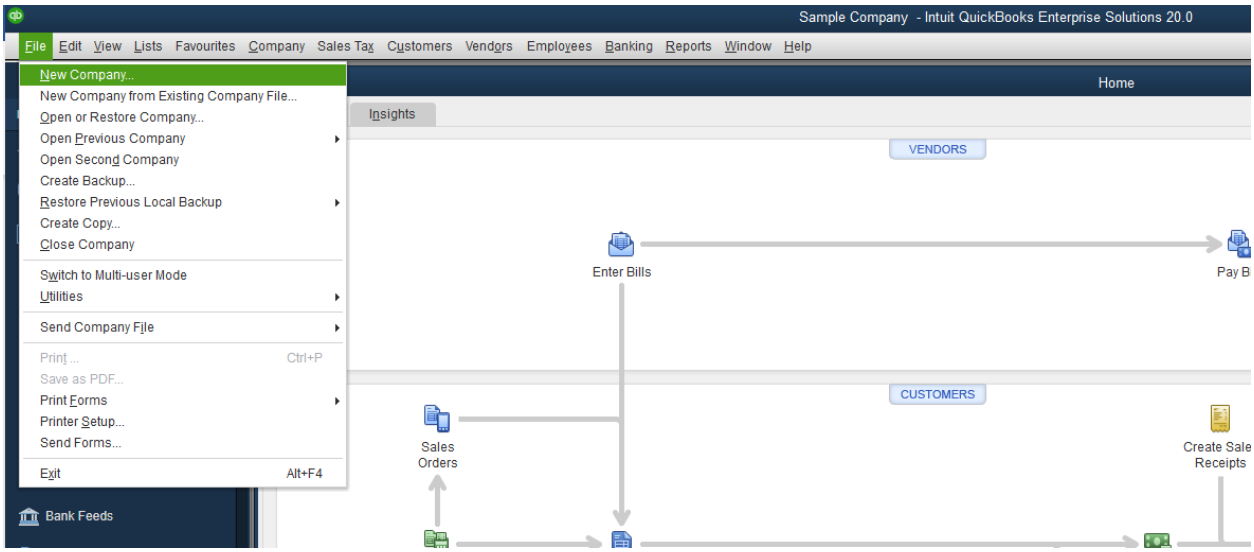


1. What letter(s) will be the customer name prefix?. We recommend a single letter like Z
2. The next two fields are the range of customers starting from 1 and ending at whatever number of customers you want to create (we recommend 50)
3. The next step is to create a product name. By default, the Item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

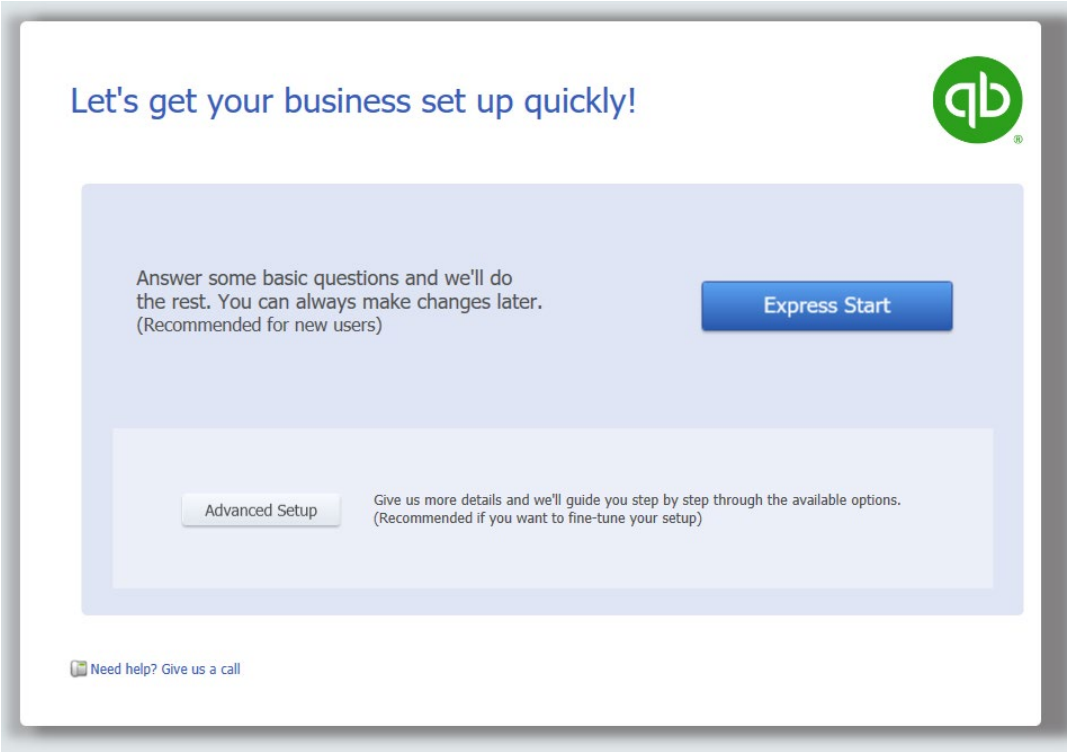
With these steps done, you're now ready to move on to creating the QB Demo file.

Creating the QuickBooks Demo File

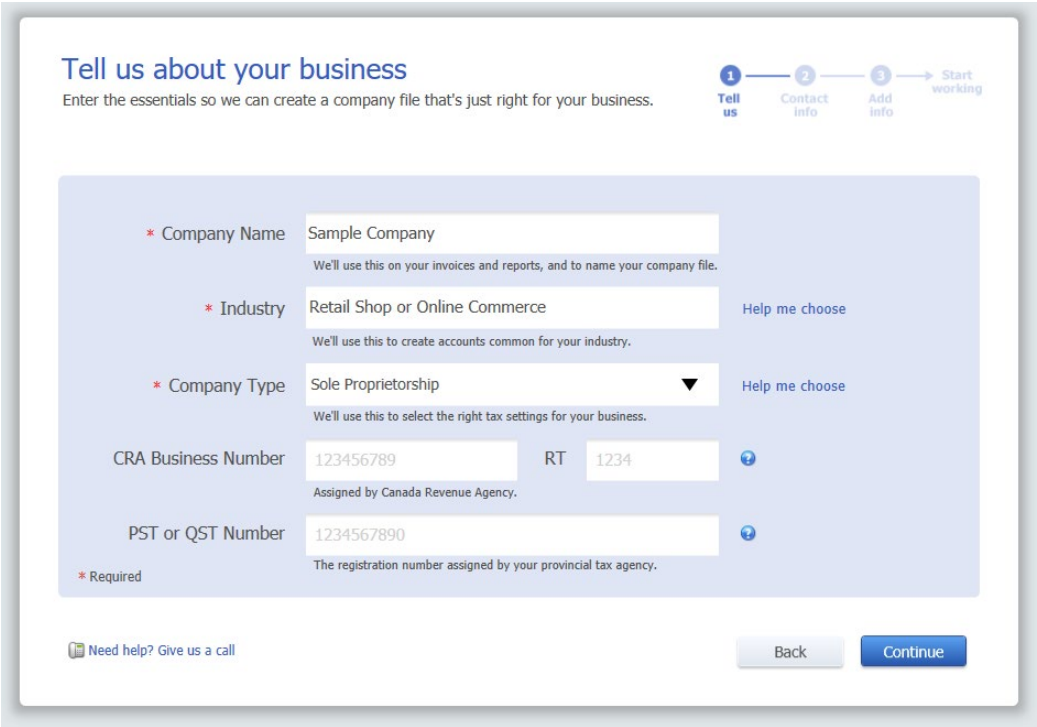
The following steps will help you create a blank QB demo file that will work with the USA, Canadian, or UK versions of QB (please remember Qsales v13 works with version 2018 or later).



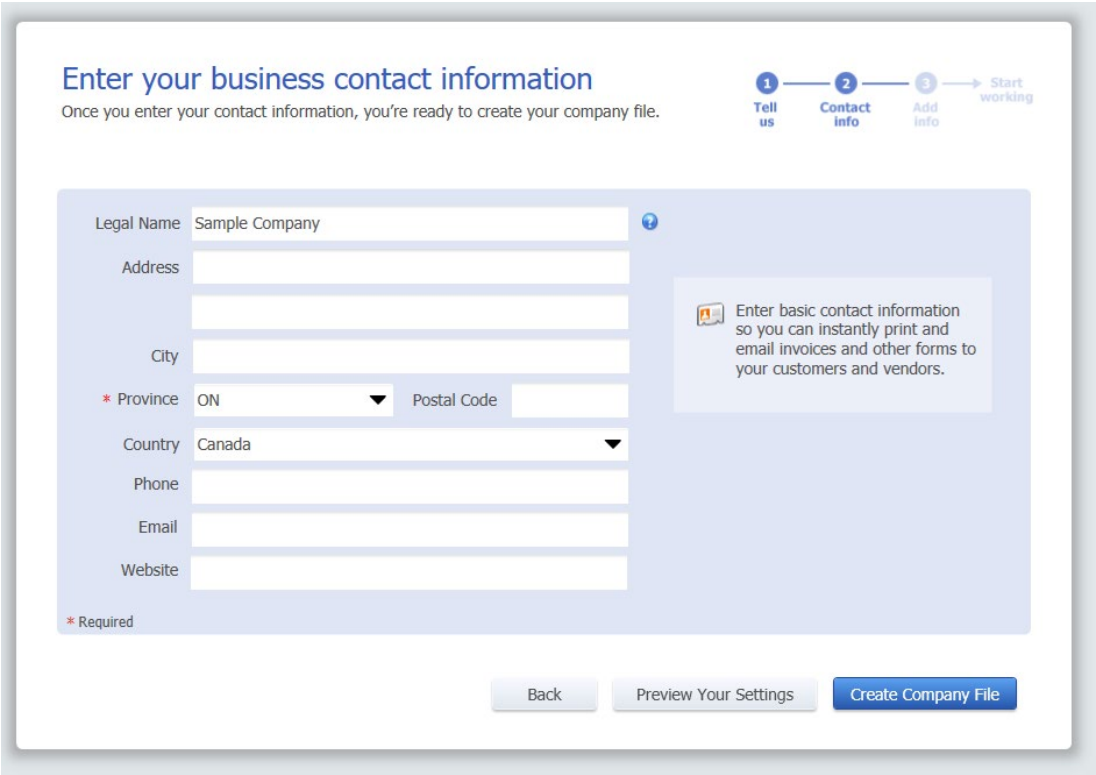
1. Open QuickBooks and click File > New Company



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."



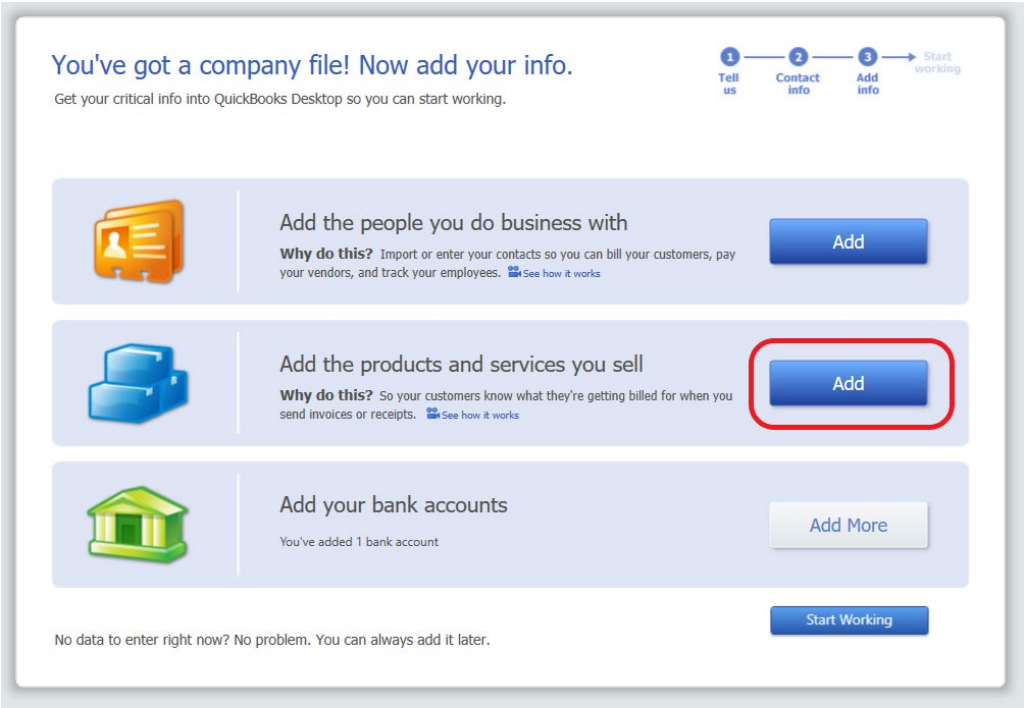
Do NOT complete any of the other fields, and click Continue



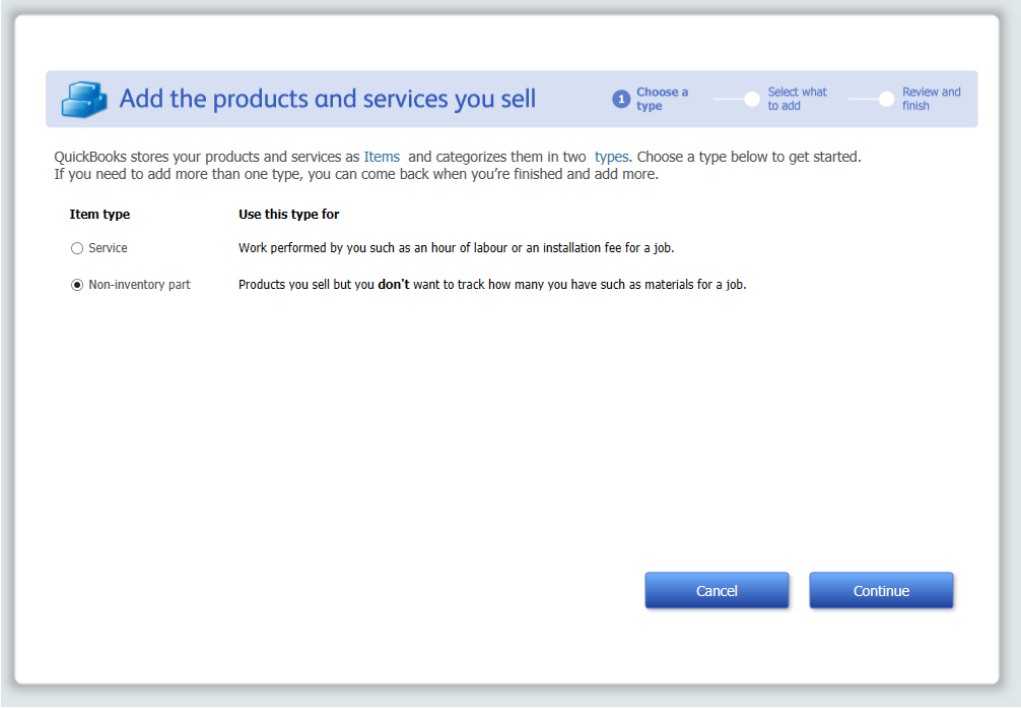
1. Under the Business Contact Info page, just select a Province or State from the drop down. It doesn't matter if it's accurate, but we recommend your own Province or State so you're familiar with the applicable sales taxes
2. Click “Create Company” File in the bottom right (if it prompts you about payroll,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

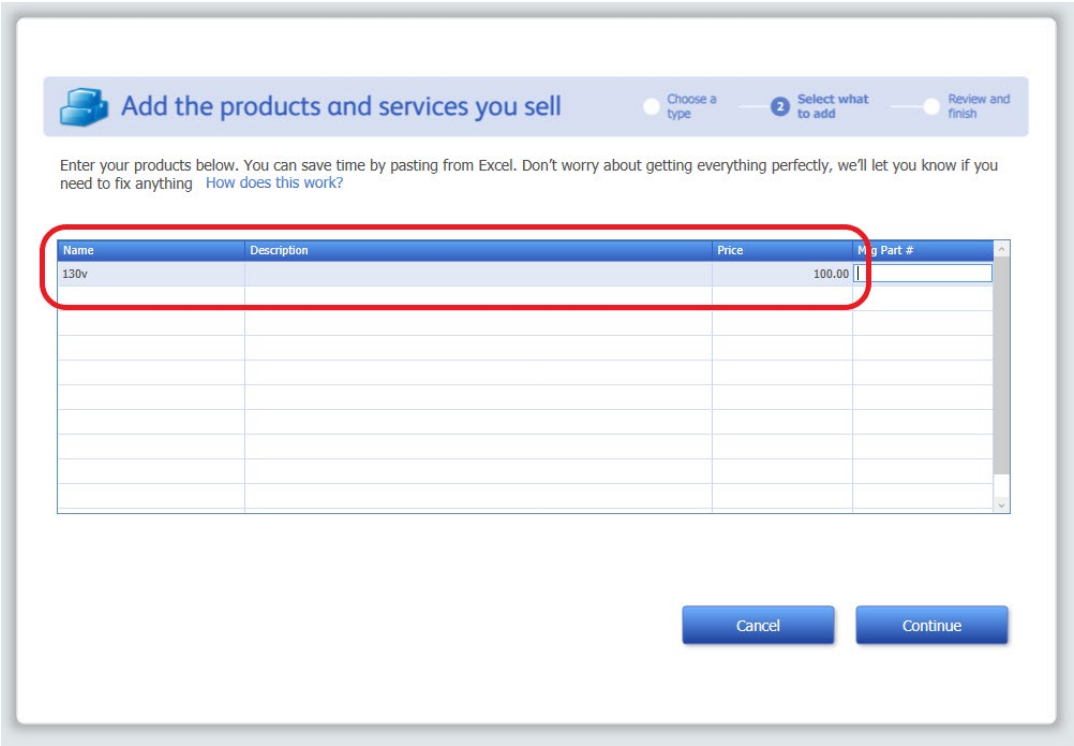
- Lists > Items to create your one product manually)



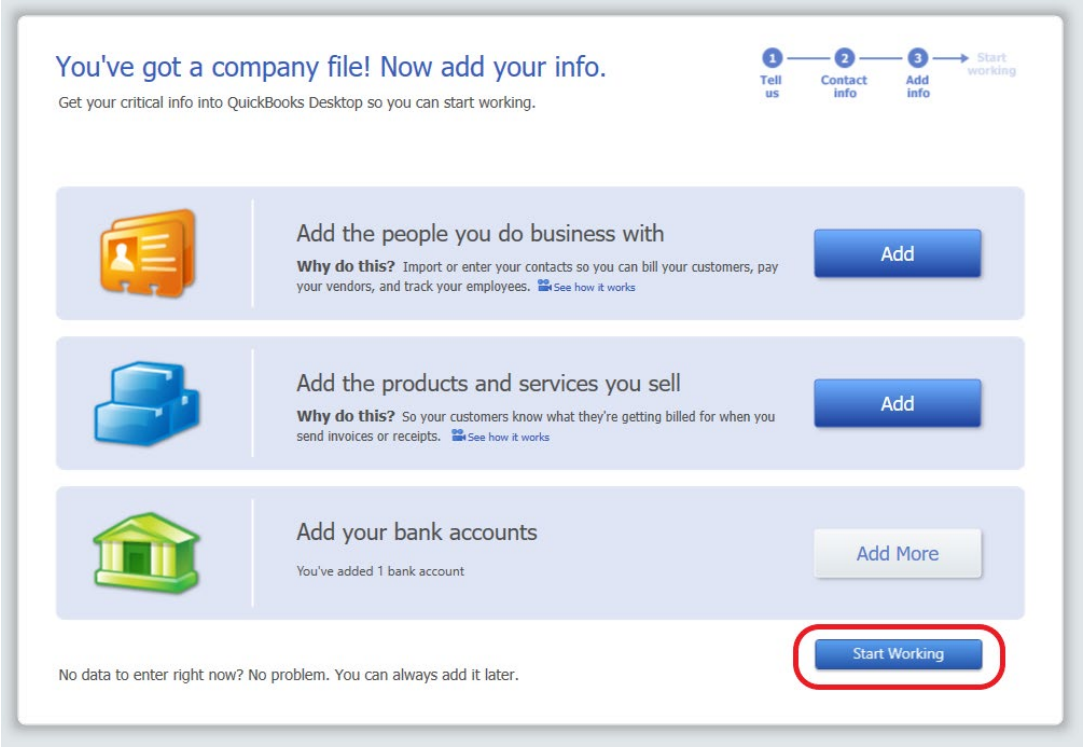
1. Click Add, select "Non-Inventory part" for Item Type, and Continue



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.

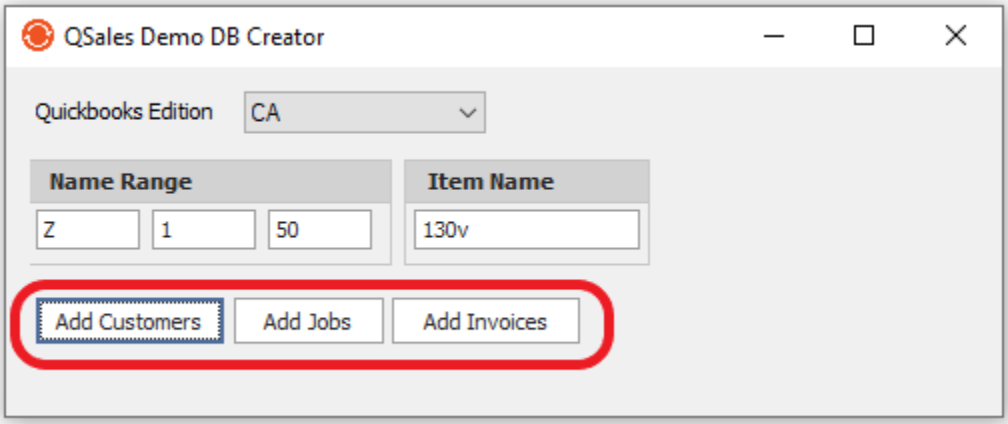


Click Continue and Continue again, and then Start Working.



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.