

BizSight Quick Start



WELCOME TO BIZSIGHT. WE HAVE PUT TOGETHER A FEW TIPS TO HELP YOU GET A QUICK START TO INSTALLING AND USING BIZSIGHT SOFTWARE.

BEFORE YOU INSTALL

- ◆ Download the edition of BizSight® that you plan to use from the BizTechnologies website. The trial version + License key make this a fully functional product.
- ◆ Depending on the browser used in the download, you may need to right-click the file, choose properties and 'unblock' the file. This is a browser setting to protect from unwanted downloads.
- ◆ Before you install, verify you are running **Windows 7 or later** on your workstation and it has at least 1Gig of free disk space. If this is a server, the minimum requirement is Windows 2008 R2. All later versions including Surface tablets are supported.
- ◆ Before you install, verify that you also have **administrator rights** on the machine that you plan to do the install. If this is going to be a server machine, network administrator rights is recommended.

THE INSTALL

- ◆ Launch the install BizSetup.exe. A prerequisite installation screen will be launched. This will install the Microsoft SQL Server 2012 Express database engine. This is a free run-time edition of the database. Depending on the machine that it is installed on, it will take 4-6 minutes to complete this installation. Do not interrupt this installation. Once the prerequisites is installed, you will continue to the Welcome and Licensing Screen.
- ◆ Accept the License Terms to continue with the installation. Choose Next. It may take several seconds to navigate to the next page as it is collecting information on other database instances that may be resident on the machine.
- ◆ On the Install Options screen, select the Default setting. This will automatically choose the database instance BIZSQL that was installed during the prerequisite installation process. If you wish to install this to a different SQL instance, choose custom option and select the desired SQL instance.
- ◆ Enter the password for the 'admin' user. **Save this password**, this will be required to login to BizSight the first time. This will be your default administrator password into BizSight®. Additional users with various rights including administrator can be added later once you are logged into the system.
- ◆ Select Next, review the selections, proceed with defaults to finish the install.

BizSight—Financial Accounting

Software for Small Business

- ◆ Before you Install
- ◆ The Install
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- ◆ Initial Configuration
- ◆ Add Customers and Items
- ◆ Generate an Invoice
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- ◆ The final installation page will show the website URL that you will need to use to login to BizSight®. By default, the page will launch when you finish. A BizSight® icon can also be found on your desktop.

ADDING A NEW COMPANY

Now that you have successfully installed BizSight®, you are ready to add your new test or production company.

- ◆ Login to BizSight® using the 'admin' user and password that you entered during installation. You will be logged into the BizSight® sample company.
- ◆ To add a new company within BizSight®, choose Company from the main menu, and click the '+' or add icon.
- ◆ Provide a company name and place of business. This is the company name you will select when you open BizSight® in the future.
- ◆ Choose an industry Chart of Accounts that closely describes your business. If you are planning on importing or manually entering this, choose 'None'.
- ◆ Choose the fiscal year for the earliest transaction within BizSight® for your business. If this data is being imported, missing fiscal years will be automatically created.
- ◆ Browse to select your company logo. This will print on quotes, invoices, purchase orders, and other printable templates.
- ◆ Finish to create the new company. You will be logged out of the current sample company and asked to login to this new company. Use the same 'admin' login and password.

INITIAL CONFIGURATION

This will allow you to establish or accept the default numbering scheme as well as the default accounts that will be used. It is recommended that all fields have values.

- ◆ Choose Settings from the Company homepage and navigate to the [Transaction Numbers](#) and [System Accounts](#) tabs. Make the necessary changes or accept the defaults. If accounts are missing make the best guess or ask your accountant.
- ◆ The most common payment terms, and other codes that are typically used will already be available. These are available under the Company homepage and [Support List](#) selection. Make the necessary additions or changes to the desired codes. These can also be added later, during transaction entry.
- ◆ You can also add additional users and grant them rights through the [Manage Users and Roles](#) in the Company homepage.
- ◆ If your company logo was not defined during the initial company creation, you can add this under the [Reports](#) tab of Settings.

ADDING CUSTOMERS AND ITEMS

Customers and Items can be added one at a time or imported in from a Excel spreadsheet. Customers migrating from Microsoft Office Accounting can accomplish all this in one step using the migration wizard.

- ◆ Navigate to the Customer homepage and add a customer from the menu. Add the necessary customer and address information for your customers.

- ◆ If sales tax or VAT needs to be collected, add this within the Accounting homepage under sales Tax groups or codes. Enter the appropriate sales tax percent and add this to the customer.
- ◆ Add items from the same menu. Add inventory, non-inventory or service items that you will be selling on an invoice or purchasing from your vendors.
- ◆ Enter the known selling (invoicing) or purchasing price (cost) of these items.
- ◆ To import accounts, customers, vendors, and items navigate to the Company home page and choose [Import from Excel](#) or [Import from Office Accounting](#).

GENERATING AN INVOICE

You are now ready to generate and print or email an invoice. If these are done in the above mentioned sequence, you could be generating an invoice within a few minutes of installing the product.

- ◆ Navigate to the Customer homepage and select [Invoice](#) from the menu.
- ◆ Select the customer that was added. You can also enter a new one here and choose the quick add (just name) or add customer to add all the necessary details for the customer.
- ◆ Payment terms, shipping methods, and other fields can be selected or added during entry.
- ◆ Select or enter the products or services that you will be invoicing your customer.
- ◆ choose the [preview](#) icon on the invoice menu to preview the invoice. Choose [Print](#) icon from the invoice menu to print to a printer. Depending on the browser used, you may be asked to download Adobe reader (free download) to use the print controls.
- ◆ To [email the invoice](#) through Outlook, choose the email icon. If the email address is defined in the customer record the outlook message with a .pdf attachment will be ready to be emailed out. You can further modify the text before it is sent. Additional email options are available in the Email tab of Settings.

Several videos are also available on [YouTube](#). A few are listed below.

- ◆ [Invoice Customers and Receive Payments](#)
- ◆ [Record Expenses and Pay Vendors](#)
- ◆ [Manage Purchase Orders and Receiving](#)
- ◆ [Convert Outlook Appointments to Invoices](#)
- ◆ [Manufacturing Overview](#)

Additional information on performing other tasks is available within the online help documentation of BizSight®.



Website: www.BizTechnologiesonline.com
 Email: Hello@BizTechnologiesonline.com
 Twitter: [@HelloBizSight](https://twitter.com/HelloBizSight)