



TRUCKERSBOOKS GENERAL USER GUIDE UPDATE

GENERAL GETTING STARTED PROCEDURES.

1. Using the download link sent to you by email, download the software
2. Save the download to your computer
3. Save the file with no data as follows: (**YOUR COMPANY NAME BOOKKEEPING MASTER**)
4. Make a copy of the Master file you saved and name the file: (**YOUR COMPANY BOOKS JUNE 2014**)

If June is the first month you will begin using the software to capture your bookkeeping data.

► How to Save the New Workbook.

- ◆ Right click your mouse and select copy
- ◆ Save the copy to your computer. It will save with the same file name as copy 2
- ◆ Place your cursor over the copy-2, right click and select rename, and give the new workbook the new month name you wish to work with.

WITH THAT DONE, YOU ARE READY TO SETUP YOUR COMPANY INFORMATION IN THE SOFTWARE.

1. IF YOU ARE A US TRUCKERS OPEN THE SOFTWARE AND GO TO THE TBINS-SETUP PAGE AND EDIT THE FOLLOWING FIELDS:

- **Business Month and the Business year field**
- ◆ **NEXT Edit the following optional fields:**
 - ◆ **IFTA LICENSING NUMBERS AND YOUR FID#**

1. IF YOU ARE A CANADIAN TRUCKER GO TO THE BUSINESS RULES PAGE IN YOUR SOFTWARE AND EDIT THE FOLLOWING FIELDS:

2. if you are a Canadian Trucker. (**Canadian Version Software**)
3. Edit the following Data Fields:
 - Business Month and the Business year field
 - ◆ **NEXT YOU CAN ADD THE APPLICABLE NUMBERS IN THE FOLLOWING FIELDS**
 - ◆ **IFTA LICENSE**
 - ◆ **GST/HST NUMBER**

WITH THIS DONE, YOU ARE READY TO BEGIN ENTERING YOUR INCOME AND DEDUCTIONS FROM THE BROKER STATEMENT RECEIVED FROM YOUR CARRIER AND OTHER OFF BROKER STATEMENT INCOME AND EXPENSE INVOICES AND/OR RECEIPTS.