



## Intuit QuickBase: Collect, Manage, Share

Designed with simplicity in mind, QuickBase is a powerful online database platform built around the basic concept of a spreadsheet. This way, anyone can use it and it's easy to get started.

On top of that, QuickBase offers ready-to-use applications for just about any business process, from project management and CRM to HR and content management. You can also create your own applications for just about any task, including ones to help you track, manage or collaborate on a project.

## How do QuickBase applications work?

A QuickBase application consists of a table (or series of tables), with each table consisting of rows and columns, just like a spreadsheet. Think of it as a collection of spreadsheets that can be linked together.

Watch a short video about the [building blocks of QuickBase applications](#).

Still have questions? Learn more at these links:

[What is a field?](#)

[What is a table?](#)

When you manage tasks, each task is a row (record) and each column (field) contains data about this task.

Grid Edit   EMAIL   PRINT   OTHER											
Results 1 to 49 (out of 49)											
Task Name	Assigned To	Milestone	Priority	Start Date	Duration (days)	Calculated Finish Date	Predecessor	Status	Percent Complete	Days Overdue	Export Event
<b>Building D Move</b> 6 Tasks											
<a href="#">EDIT</a> <a href="#">VIEW</a> Sign Lease	Tim Riedel	✓	Medium	04-19-2008	0	04-21-2008		Not Started		449 days	<a href="#">Export</a>
<a href="#">EDIT</a> <a href="#">VIEW</a> Order Furniture	Tim Riedel		Medium	04-26-2008	1	04-28-2008		Not Started		442 days	<a href="#">Export</a>
<a href="#">EDIT</a> <a href="#">VIEW</a> Complete Seating Chart	Tim Riedel		Medium	04-28-2008	2	04-29-2008		Not Started		441 days	<a href="#">Export</a>
<a href="#">EDIT</a> <a href="#">VIEW</a> Schedule Movers	Tim Riedel		Medium	05-10-2008	1						<a href="#">Export</a>
<a href="#">EDIT</a> <a href="#">VIEW</a> Packing Days	Tim Riedel		Medium	06-02-2008	5						<a href="#">Export</a>

You can edit a QuickBase table just like a spreadsheet. Try using [Grid Edit](#) to enter multiple rows of data.

In QuickBase a row is referred to as a record and a column is referred to as a field.

## It all starts with My QuickBase

My QuickBase is your personal workspace for creating, editing, and organizing your applications within the QuickBase platform, and a great place to get familiar with the tools available for managing your QuickBase applications.

When you first arrive at your personal My QuickBase page, you will notice some of our most popular applications. It's also where you'll access our large library of ready-to-use applications, which you can either use as-is or customize for your specific needs. There's virtually no limit to what you can do and the number of applications you can use.

The "My QuickBase" home page gives you instant access to our most popular ready-to-use applications. Learn more about [My QuickBase](#).

Help is easily accessible from the My QuickBase page.

Click here to create a new application or search our library of ready-to-use applications.

Use this button to return to your My QuickBase page.

This is an application.

Sign up for a webinar or submit a help request.

# Using QuickBase

## Get started right out of the box with ready-to-use applications

When you use QuickBase you have access to hundreds of ready-to-use applications, including project management, sales management and customer service applications.

If you don't find the ready-to-use application you need on your My QuickBase page, you can find additional ready-to-use applications by following these steps:

1. Click on the "Create a New Application" button on the My QuickBase page.
2. At the top left section of the page, our most popular application categories are listed:
  - 1) Select an application category.
  - 2) Select an application and click the "Get Started" button.
3. If you can't find an application that suits you, you can browse hundreds of other applications in the QuickBase Application Library. Just click the "Visit the QuickBase Application Library" link on the lower left of the "Create a New QuickBase Application" page.
  - 1) Browse for your application by Type or Function.
  - 2) Select an application by clicking the "Get App" button on the right side of the page.

**1. Select an application category.**

**2. Select an application and click the "get started" button.**

	Project Manager	Project Manager Plus
<b>APPLICATION FEATURES</b>		
<b>Projects</b> Manage and report on your multiple projects	✓	✓
<b>Tasks</b> Delegate tasks and monitor their status	✓	✓

Once you start using your new application you can customize it for your specific needs by simply "right clicking" on fields and records. Check out the links below and the resources section at the end of this document for more information about customizing your application.

[Watch a tutorial](#) about selecting a ready-to-use application.

[Read about adding fields](#), or [watch a short video](#).

[Read about adding tables](#), or [watch a short video](#).



## Our Concierge Service is available to help!

During your trial you can **talk with one of our Concierge team members**. This free coaching service gives you instant access to a QuickBase expert who will:

- Partner with you to get your trial up and running;
- Work with you to customize QuickBase for your specific needs; and
- Solve any problems you may be having.

*"My teams rely on QuickBase to collaborate, share, and communicate across the board. The flexibility of QuickBase ultimately enables each project team to adapt and work the way they need to for each project, ensuring all aspects of a project remain in synch."*

- Southwest Airlines (QuickBase customer since 2004)

# Importing Data & Custom Applications

## Build your own application & import data

If you already know how you want your data structured you can start from scratch and create your own application. There are two ways to create an application from scratch: spreadsheet style or database style.

Read more about creating your own application [here](#) or watch a short tutorial [here](#).

**Intuit QuickBase**

Help | Signed in as Tim Riedel | MY QUICKBASE

### Create a New QuickBase Application...

**from one of our pre-built applications**

Start with one of our pre-built applications and customize it to fit your needs.

- [Project Management](#)
- [Sales Management](#)
- [Customer Service](#)
- [Marketing](#)
- [Professional Services](#)
- [Employee and Training Management](#)
- [IT and Back Office](#)
- [Legal](#)
- [Real Estate](#)
- [Process Excellence](#)

**Creating an Application By Importing Your Data**

If you've been tracking project tasks, issues, assets or sales opportunities in a spreadsheet, QuickBase can help! Just copy and paste your data into QuickBase, and you'll have a shared solution your entire team can access and update within minutes.

[Create Now](#)

One simple click sets you on the path to creating your own application.

**from scratch**

- [by importing your data](#)
- [by importing from Microsoft Project@ spreadsheet style database style](#)

Create your own application by importing your own data or start from scratch with either database style or spreadsheet style.

## Use your existing data to build a custom application

You can also import data by cutting and pasting it from your existing spreadsheets. Additionally, you can browse for a CSV or tab-delimited file. Both options create new QuickBase applications with fields, forms, dashboards and roles created for you.

Click here for a [step-by-step guide for importing data](#), or click [here](#) for a short tutorial.

	A	B
1		
2		
3	Task Name	Date Started
4	Sign Lease	6/1
5	Order Furniture	6/15
6	Complete Seating Chart	7/1
7	Schedule Movers	7/1
8	Packing Days	7/15
9	Move to new space	8/1

Select existing data

Task Name	Date Started	Date Completed
Sign Lease	6/1/09	6/1/09
Order Furniture	6/15/09	6/20/09
Complete Seating Chart	7/1/09	7/2/09
Schedule Movers	7/1/09	7/1/09
Packing Days	7/15/09	7/15/09
Move to new space	8/1/09	

Paste into here:

Copy and paste or import file

click in the box below, choose Paste from click the "Next" button below. QuickBase and display the results.

You can also **import from a file** in either (.CSV) or tab-separated value (.TSV) for database and spreadsheet programs can formats.

GRID EDIT   EMAIL   PRINT   OTHER ▾			
	Task Name	Assigned To	Milestone
<a href="#">EDIT</a> <a href="#">VIEW</a>	Sign Lease	Tim Riedel	✓
<a href="#">EDIT</a> <a href="#">VIEW</a>	Order Furniture	Tim Riedel	
<a href="#">EDIT</a> <a href="#">VIEW</a>	Complete Seating Chart	Tim Riedel	
<a href="#">EDIT</a> <a href="#">VIEW</a>	Schedule Movers	Tim Riedel	
<a href="#">EDIT</a> <a href="#">VIEW</a>	Packing Days	Tim Riedel	
<a href="#">EDIT</a> <a href="#">VIEW</a>	Move to new space	Tim Riedel	✓

View your data in QuickBase

In some cases, importing existing data to create a new application requires a simple cut and paste from an existing data source into QuickBase. If your data resides in MS Access, ask your coach about the best way to migrate your information.

# Resources & Support



## Connect with the QuickBase Concierge Team

During your trial you can talk with one of our Concierge team members. This free coaching service gives you instant access to a QuickBase expert who will partner with you to customize a QuickBase application for your specific needs. Please don't hesitate to give us a call if you're having trouble.

[Contact Concierge](#) today.

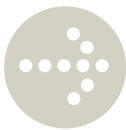


## Attend a Free QuickBase Webinar

Another great resource for getting started with QuickBase, or learning how to use it for specific tasks, is our series of [webinars](#). Webinars are held daily and include titles such as:

- Learn QuickBase in Minutes
- QuickBase Process and Workflow
- Customizing your QuickBase

[Register now.](#)



## Community & Support

We have a broad range of [support resources](#) to help you make the most of your application. Two great places to start are the [QuickBase Knowledge Base](#) and the [QuickBase Community Forum](#).



## A World of Resources

Ranging from short clips to longer tutorials, we've created a host of step-by-step guides and [training videos](#) to speed up your success with QuickBase. The four listed below are specifically designed to help you make the most of your application.

### Share your application

[Watch the video](#) or [read the guide](#) to learn how you can grant access to other users so your colleagues can also take advantage of your applications.

### Create table relationships

[Read the guide](#) to learn how to create a relationship so you can link multiple tables.

### Customize forms

Everything you need to know about creating, customizing and then publishing forms in QuickBase is right here. [Watch the video](#) or [read the guide](#).

### Customize reports

[Watch the video](#) or [read the guide](#) to learn how you can customize existing table reports by adding columns, sorting or grouping records, and more.

### Control permissions in your application

It's possible to set access controls so only those with permission can see or edit your data. This [video](#) will show you how. Or you can [read the guide](#).