



Set Up QuickBooks the Right Way

So your numbers actually make sense

Step 1: Set Up Your Account

- Sign up for QuickBooks Online
- Enter your business name and basic details
- Choose the correct subscription level

Step 2: Connect Your Bank Accounts

- Go to Banking → Link Account
- Connect your business bank and credit cards
- Transactions will flow in automatically

Step 3: Set Up Your Chart of Accounts

- Review the default accounts
- Add or adjust based on your business
- Keep it simple

Step 4: Add Customers, Vendors & Products

- Enter customers and vendors
- Set up products/services if needed
- This keeps reports clean

Step 5: Categorize Transactions

- Review imported transactions
- Assign categories consistently
- This drives your reports

Step 6: Run Your First Reports

- Go to Reports → Profit & Loss
- Review income and expenses

- Start understanding your numbers