

Jose's Tax Service

QuickBooks Setup Checklist

Step-by-step setup instructions for streamlined bookkeeping

- ☐ Create a QuickBooks account
- ☐ Set up your chart of accounts
- ☐ Link your business bank account
- ☐ Customize your invoice template
- ☐ Input opening balances
- ☐ Set up customers and vendors
- ☐ Set up payroll (if applicable)
- ☐ Create recurring transactions

www.josestaxservice.com | customer-support@josestaxservice.com | (475) 254-9373