

QuickBooks Setup Guide

✔ Step 1: Create Your Account

- Choose the correct plan (Simple Start, Essentials, etc.)

✔ Step 2: Set Up Company Profile

- Business name
- EIN
- Industry

✔ Step 3: Connect Bank Accounts

- Sync transactions automatically

✔ Step 4: Create Chart of Accounts

- Income
- Expenses
- Assets

✔ Step 5: Customize Invoices

- Add logo
- Set payment terms

✔ Step 6: Track Expenses

- Categorize transactions weekly