



QuickBooks Online Setup Service



Setting up QuickBooks Online involves several steps to ensure your accounting and financial management processes run smoothly. Here's a general outline of the steps we need to follow. Remember that the specifics might vary depending on your location, business type, and needs.

Sign Up and Choose a Plan

- We recommend starting with *QB Simple Start* but Sign up for an account and choose the plan that suits your business needs.
- If you already have an account, you must add Clario Consulting as an Accounting utilizing our email: Info@ClarioConsulting.com

Set Up Your Company

- Provide basic information about your company, including its name, address, and fiscal year.

Connect Bank and Credit Card Accounts

- Link your business bank and credit card accounts to QuickBooks Online. This allows for automatic transaction syncing.

Customize Chart of Accounts

- We would customize your chart of accounts to match your business's specific financial categories and needs.
- We will send you a proposal in Excel files, and then we will meet on Zoom or by phone to revise and get it approved.
- We will upload the Chart of Accounts to your QB Online.

Add Products and Services

- We would create your business's products or services, including descriptions and prices.

Revise Customer and Vendor Contacts

- If you have an existing list of customers and vendors, we can import their contact information into QuickBooks Online.

Set Up Sales Tax

- If your business collects sales tax, configure the appropriate tax rates based on your location and requirements.

- **Customize Templates**
 - Customize invoices, estimates, and other templates to match your brand and business style.
- **Configure Payment Settings**
 - Set up payment gateways to accept online payments from customers through invoices.
- **Enter Opening Balances**
 - If you're migrating from another accounting system, enter opening balances for your accounts to ensure accurate financial reporting.
- **Customize Reports**
 - Tailor the financial reports to provide insights specific to your business operations.
- **Invite Users and Set Permissions (If needed)**
 - Invite team members, accountants, or advisors to access your QuickBooks Online account with appropriate permission levels.
- **Test and Review**
 - Create some test transactions to ensure everything works as expected before you start using QuickBooks Online for your live business transactions.
- **Training and Support**
 - Help you to familiarize yourself with QuickBooks Online features through Zoom tutorials, creating videos for your needs.

Optional Services: (Additional Costs)

- **Regular Maintenance**
 - If you pay for a subscription with us, we will continuously update and reconcile your financial data to keep your records accurate and current.
- **Set Up Payroll**
 - If you have employees, set up payroll within QuickBooks Online or integrate with a compatible payroll provider.
 - Create the Contractors you would need to obtain their W-9s and set up the Form 1099 tracking.

INFORMATION NEEDED

We would need the following information to set up your QuickBooks Online Account:

- Owner(s) Information. address, phone number, email address, etc.
- Company name, address, phone number, email address, etc.
- Logo for the company and if you want on your invoices and statements.
- Business structure (Sole proprietorship, LLC, C Corp, S Corp, etc.) and Tax ID.
- Cash basis or Accrual based accounting.
- Bank account names and Credit card account numbers.
- Payment terms, Due on Receipt, 15 Days, 30 Days, etc.
- Information you want on estimates and invoices for customers.
- If applicable, all business locations and if they bill differently, such as another state with different sales taxes and taxing entities.

If you have any other questions, please do not hesitate to email us: Info@ClarioConsulting.com

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