

QuickBooks Set Up Checklist

Company Information	Questions You Will Need To Answer
<ul style="list-style-type: none">• Business Name• Address• Email• Website• Company Logo• Tax ID• Business Structure (i.e. Sole proprietor, Partnership)• Accounting Method (cash or accrual)	<ul style="list-style-type: none">• What industry does your business fall into? (select from a list)• What payments terms do you want to assign your to customers? (i.e. Net 30)• Do you need to create estimates for your customers?• What payment terms do you have with suppliers? (i.e. Net 30, 60)• Do you need to create purchase orders?• What is your accounting year?• Do you need to track income and expenses for multiple locations?• Do you need to track income and expenses for multiple departments?