

**PRIOR TO QUICKBOOKS TRAINING**

Please make sure each of the following are completed prior to your first QuickBooks training session.

\_\_\_\_\_\_\_\_\_ Open a Business Bank Account & Obtain a Business Credit Card

\_\_\_\_\_\_\_\_\_ Purchase QuickBooks Online or QuickBooks Desktop (contact our office to discuss options)

\_\_\_\_\_\_\_\_\_ Confirm all expenses that are being paid via the Business Bank Acct and all expenses that are paid via the Business Credit Card

\_\_\_\_\_\_\_\_\_ Have primary access to all accounts (logins and passwords)

\_\_\_\_\_\_\_\_\_ Confirm that all Business Bank and Credit Card accounts have the capability to be linked with QuickBooks

\_\_\_\_\_\_\_\_\_ Bring your most current Loan or Line of Credit statements