

PROJECT SERVICE

QuickBooks Setup

Start Strong with the Right Bookkeeping System

\$150

per project

Free with a 12-month bookkeeping agreement.

Whether you're launching a brand-new business or upgrading from spreadsheets, getting your bookkeeping system set up correctly from day one saves time, money and stress.

Our **QuickBooks Setup** service gives you a clean, organized, easy-to-use system that grows with your business.

Who It's For

- New business owners setting up their first bookkeeping system.
- Companies switching from manual spreadsheets to QuickBooks Online.
- Businesses migrating from another accounting platform.

Questions Setup Helps You Answer

- “ *Is my chart of accounts set up the way my business actually runs?* ”
- “ *How do I get my spreadsheets into QuickBooks?* ”
- “ *Will my reports show what I need to see?* ”

What's Included

- ✓ **QuickBooks Online Setup** – Create your account and configure settings for your business type.
- ✓ **Chart of Accounts Customization** – Tailored to your industry and reporting needs.
- ✓ **Data Migration** – Import existing transactions, balances and customer and vendor lists.
- ✓ **Bank and Payment Connections** – Connect accounts for automatic transaction syncing.
- ✓ **Basic Training Session** – Learn how to navigate QuickBooks and handle daily tasks.
- ✓ **30-Day Support Window** – Ask questions as you get comfortable with your new system.

Why It Matters

A proper setup means:

- Accurate reports from day one.
- Less time spent fixing errors later.
- A system that scales as your business grows.

Our Approach

We don't just set up your QuickBooks and walk away. We make sure you know how to use it, so day-to-day tasks feel manageable.

Good to know – QuickBooks Setup is \$150 per project, or free when you sign a 12-month bookkeeping agreement. Already have QuickBooks but it's behind or messy? See our Clean-Up service.

Questions about your quote?

Call or email anytime. You'll hear back from Lorelei directly.

(336) 596-4920

lhughes@claritasfinancesolutions.com