

We're so glad to be supporting another small business! Our goal is simple: to give you accurate, up-to-date financials so you can focus on running your business with confidence.



Step 1 – Getting your Software Ready

QuickBooks is where we do our work. We chose it because it's the industry standard, highly reliable, and used by our CPA partners. If you already have QuickBooks, we'll request access to your subscription. If you don't, we'll create the right subscription for your needs and send you a payment form so we can set up automated billing for it.



Step 2 – Paperwork to Get Started

Client Data Sheet – Helps us gather all key details to manage your books.
Engagement Letter– Outlines services, expectations, and agreed-upon rates.



Step 3 – Your Onboarding Meeting

In this meeting we will:

- Share screens and connect your bank feeds.
- Check if bank statements import automatically; if not, set reminders or request access.
- Review reconciliations, accounts, and check accounts payable & receivable for accuracy.
- Verify your business entity status with the Secretary of State.
- If applicable, gain access to payroll reports and MassTaxConnect.
- Learn your workflow to ensure your QuickBooks setup supports it.



Step 4 – What We'll Need From You

To keep your books running smoothly, please:

- Provide timely access to bank/credit card statements.
- Let us know about major business changes.
- Respond to requests within a few business days whenever possible.

Step 5 – What's Next?

Below is an example of how we may proceed with your bookkeeping. This will vary:

Week 1 - Paperwork and statements received, QuickBooks Access

Week 2 - Initiate bookkeeping and start creating a workflow

Week 3 - Complete bookkeeping, review, reach out to your CPA

Monthly - Keep books up to date on a monthly basis including communication and reports.