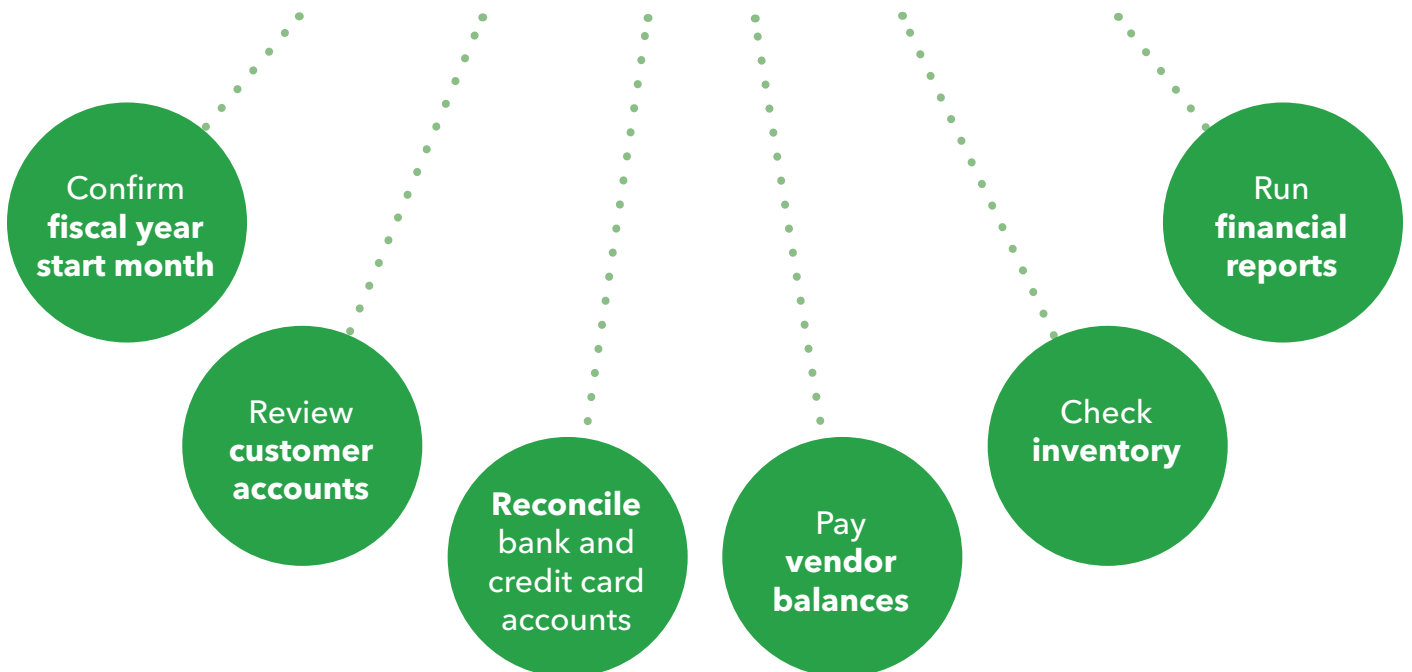




QuickBooks Online Year-end checklist



Confirm your fiscal year start month

- Select the Gear icon > Account and Settings > Advanced > Accounting to [check the first month of your fiscal year](#) so your year-end reports use the correct dates
-

Review customer account balances

- [Run an Accounts Receivable Aging Summary or Detail Report](#) so you can settle any outstanding customer payments
 - [Send Balance Statements](#) to customers with outstanding balances
 - Clear [customer deposits](#) in your deposit queue as needed so they count as income for this year
-

Reconcile bank & credit card accounts

- Ensure your [QuickBooks accounts match](#) your bank and credit card statements
-

Review vendor account balances

- Run an Accounts Payable Aging Summary or Details report so you can review and pay any outstanding bills

Check your inventory

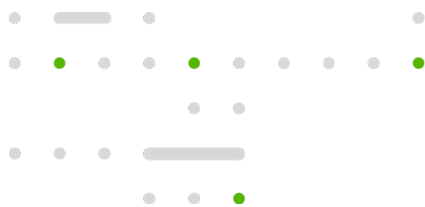
- Ensure your [inventory quantities are accurate](#) and match what's recorded in QuickBooks
-

Run year-end financial reports

- [Run a Profit and Loss Report](#) to review your business's yearly profitability
 - Use the [Balance Sheet](#) to evaluate your business's health and current net worth
-

Connect with your accountant

- [Invite your accountant](#) to your QuickBooks so you can collaborate, prepare for tax season, and easily share documents



Success!

You're ready to go for 2019

Be sure to check the QuickBooks Year-end Center for more information and full articles

