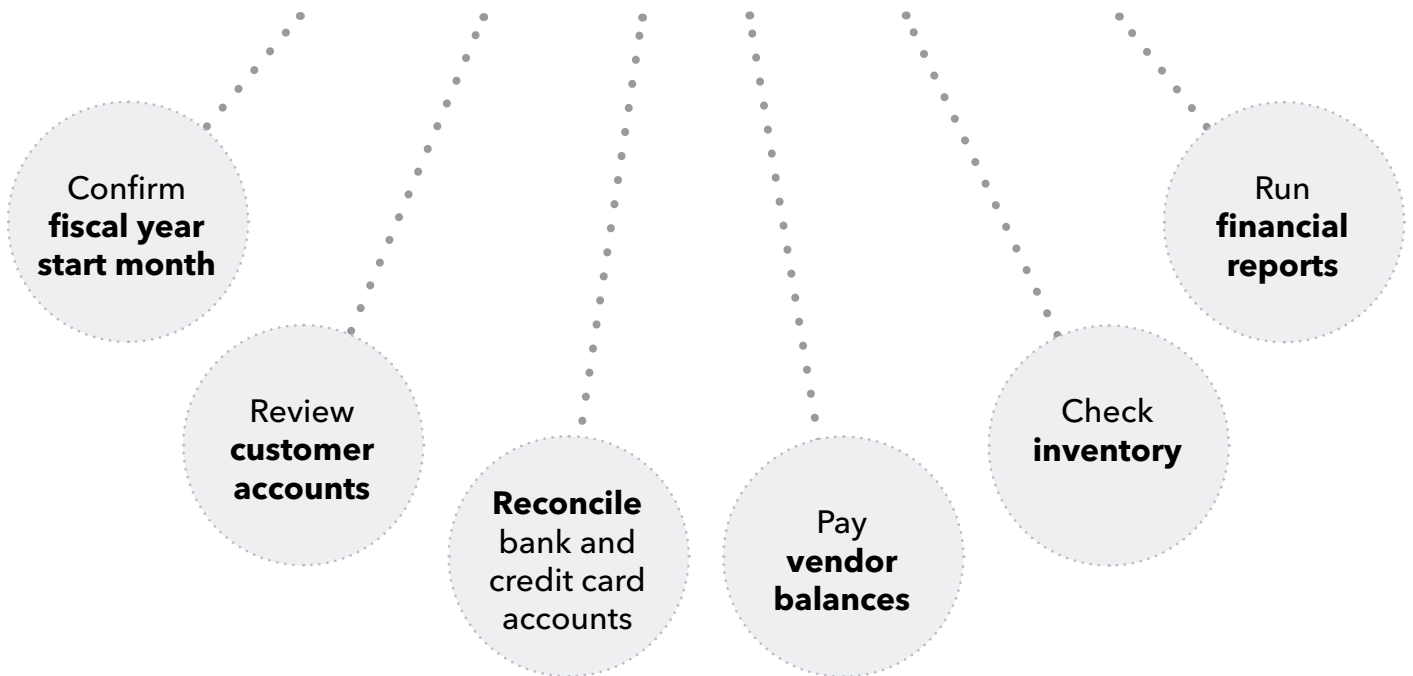




QuickBooks Online Year-end checklist



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