CLEAN BOOKKEEPING

GETTING STARTED WITH CLEAN

1 Accept proposal sent via Ignition (our third party billing application).

2 Establish 'VIEW ONLY' or sometimes referred to as 'ACCOUNTANT VIEW' access to your banking.

> NOTE: this may or may not be limited to any business banking checking and savings or credit card accounts if applicable.

3 Grant access to your quickbooks:

   a. Online access:

   i. Sign in to QuickBooks Online as a primary admin.
   ii. Go to Settings and select Manage users.
   iii. Select the Accounting firms tab.
   iv. Select Invite.
   iv. Enter your accountant's info and select Save.

   b. Desktop (call Megan...)