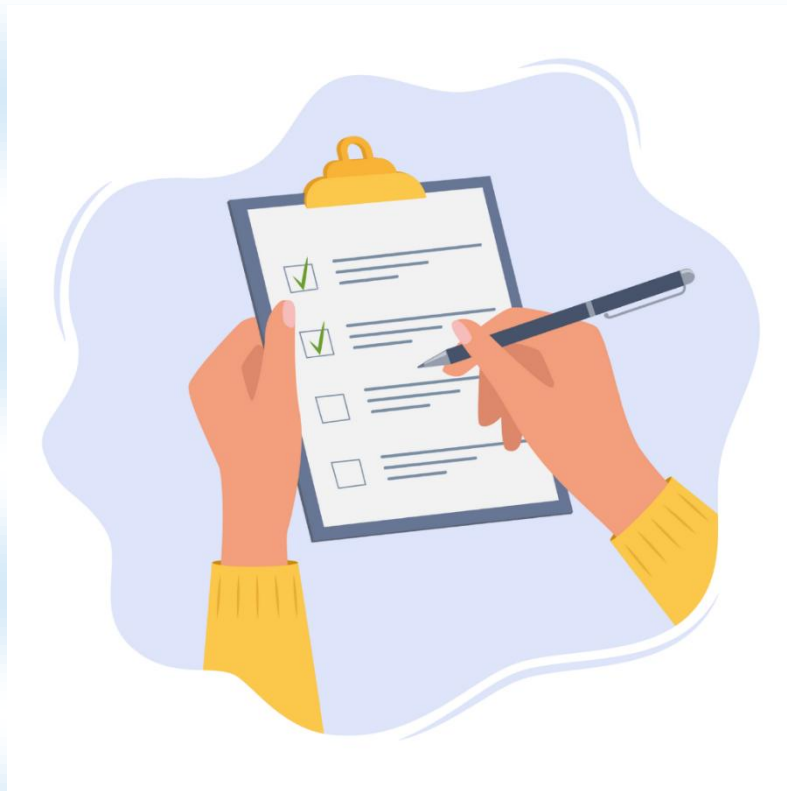


# The *Ultimate* QuickBooks Survival Checklist

**Simplify Bookkeeping and Stay Organized!**



Created by Brian, Founder of Surviving QuickBooks,  
with 20+ years of small business finance expertise.



Feeling overwhelmed by QuickBooks? This checklist is your go-to guide for staying organized and stress-free. Follow these simple tasks to keep your bookkeeping on track and your sanity intact!

### Daily Tasks (a.k.a. “The Keep-Your-Sanity List”)

- ✓ Check bank balances (*Did your payments go through? Or did QuickBooks ghost you?*)
- ✓ Enter income & expenses (*Don't let receipts become a pile of regrets!*)
- ✓ Review open invoices (*You worked hard—get paid!*)

### Weekly Tasks (a.k.a. “Avoid a Spreadsheet Meltdown”)

- ✓ Categorize transactions (*Guesswork is for lottery tickets, not bookkeeping!*)
- ✓ Reconcile bank feeds (*QuickBooks may be smart, but it still needs a babysitter.*)
- ✓ Check for duplicate transactions (*Because one coffee is enough, even if QuickBooks thinks you bought five.*)

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## Monthly Tasks (a.k.a. “Your CPA Will Thank You Later”)

- ✓ Run a Profit & Loss report (*Do you even know if you made money this month?*)
- ✓ Check outstanding bills & invoices (*Before your vendors send you passive-aggressive emails!*)
- ✓ Reconcile bank & credit card statements (*Make sure your books and bank actually agree on reality!*)



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## Year-End Tasks (a.k.a. “Last-Minute Panic Prevention”)

- ✓ Send 1099s (*The IRS is watching...*)
- ✓ Back up QBO data (*Just in case Murphy’s Law strikes!*)
- ✓ Review reports for tax prep (*Or risk a “fun” audit!*)

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**Need more help?** Join the Surviving QuickBooks community for tips, tools, and support from fellow small business owners! Learn more at [Surviving QuickBooks](#).

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