

Getting Started with Bluebonnet

What to expect from your first conversation through your first bookkeeping cycle.

1 / Start with a discovery conversation

Tell us about your business, current accounting system, number of financial accounts, and approximate monthly transaction volume.

Share the support you need, any overdue bookkeeping, and important upcoming dates. Remote consultations and in-person meetings at your business are available by appointment.

2 / Agree on the work

We confirm scope, pricing, responsibilities, and timing before work begins. Monthly bookkeeping and one-time projects may have separate scopes.

Share known bookkeeping issues early. Catch-up or cleanup may be needed before regular monthly work can begin.

3 / Prepare for onboarding

Have your business contact information, account list, recent statements, and existing financial reports ready.

Accept the Financial Cents portal invitation sent to your agreed contact email. We use the portal for document requests and bookkeeping communication.

Coordinate accounting software access with us using an appropriate user invitation. Keep your personal passwords and verification codes private.

4 / Establish your routine

Agree on document due dates, your primary contact, and how questions and reports will be handled.

Review meetings and reporting vary by package or project. Confirm your agreed schedule rather than assuming every service is included.

Before our call

My top priority: _____

My current software / last completed month: _____

We can organize documents for your tax preparer and provide sales tax and 1099 preparation and filing within an agreed scope. We do not currently prepare or file individual or business income tax returns.