

# Accounting Setup Checklist

Getting started with Patriot's Accounting Software is easy when you have everything you need to enter into the software.

Here's a list of some suggested documents to have handy for your accounting setup:

- ☐ **A spreadsheet of your Chart of Accounts** - You can [upload your Chart of Accounts into Patriot's accounting software](#) with a few clicks. If you are new to accounting and just setting up for the first time, please check out our help article, [Setting Up Your Chart of Accounts](#).
- ☐ **All bank account login information** - This will be useful if you want to [connect your bank account to import transactions](#) automatically. Alternatively, you can [manually import your bank transactions](#).
- ☐ **Your customer list and information** - You can [import your customers into the software](#). You can also [manually enter your customer information](#).
- ☐ **Your vendor list and information** - If you have your vendors in a spreadsheet, you'll be able to [import your vendors into the software](#). You can also [add your vendor information manually](#).
- ☐ **Your product and/or services** - Add product or service information, such as a description, default price, and the income account. Check out [our help article](#) for more details.
- ☐ **Your sales tax rates** - Read our [help article](#) on setting up your sales tax rate in the accounting software.
- ☐ **Your trial balance** - You can [import your trial balance into the software](#). Check out our blog post for more [information on trial balances](#).
- ☐ **All outstanding customer invoices** - You'll need to add each unpaid customer invoice, one at a time.
- ☐ **All unpaid bills you owe** - You'll need to add each outstanding vendor bills you owe, one at a time.
- ☐ **Beginning balances and the date of your last reporting period** - Please read our help article, "[Entering Your Beginning Balances](#)."