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Jennifer Katrulya • Feb. 12, 2018

When you started your business, you may not have had any choice but to do your own bookkeeping, since you were the only employee. But as your company grew, two things happened. Your accounting got more complicated. And you had more demands on your time.

Whether you're hiring a new worker whose responsibilities will include bookkeeping or you're tapping an existing employee to take over the job, you have to find a way to transfer all your knowledge about your customers and vendors, your products or services, and your overall accounting workflow to someone else. How you do that depends on a few things:

- **Your accounting method.** Are you doing it manually or by using software or a dedicated website?
- **The complexity of your finances.** Do you simply track accounts receivable and payable? Or do you have to manage things like inventory, time billing, and reports?
- **The level of financial knowledge required.** You may have learned about accounting as you went along, but are you willing to have your new person do the same?

Basic Tasks

Let's say you've been doing most of your work on paper. You send invoices and keep a database of customers and vendors using Microsoft Word or Excel. You send paper checks or access your bank's website to pay bills and maintain a paper ledger for

payments. A mature, competent person could take this over with only a day or two's

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What would happen if you had to be out of the office for an extended period of time. Could anyone figure out your "system?" As you prepare to hand off your bookkeeping, consider your options:

- Teach the old system to the new person,
- Develop more understandable, organized bookkeeping methods,
- Automate at least some of your accounting functions (there are websites that support single functions like scheduling and inventory), or,
- Consolidate everything by making the transition to QuickBooks.

***Tip:** Think about cross-training a second employee on whatever approach you end up choosing. It's dangerous to leave the keys to your accounting system in one person's hands.*

Training Help

You may have mastered the basics of the accounting process on your own, but training is a specialized skill. We can help here. Let us take a close look at how you're doing things now and recommend ways to improve your existing accounting workflow –before you bring someone in. If you want help making the transition from manual accounting to QuickBooks, we can facilitate that, too, and train your new worker. You may also decide that you'd like expert help with your bookkeeping, in which case we can take it over for you. Contact us at 816-298-8482, and we'll schedule an introductory meeting.

This article first appeared on the [MarksNelson blog](#). Jennifer Katrulya is a Practice Leader at [MarksNelson](#).

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