

WWW.CREATIVEANALYTICSDC.COM

6 STEPS TO ORGANIZING YOUR BUSINESS FINANCES





6 Steps To Organized Business Finances!

Staying on top of your business finances is crucial to scaling. Managing your finances while creating new and visionary ways to grow your business can become increasingly challenging. Luckily for you, we have developed this quick and handy resource checklist with six steps to ensure your business finances are easily managed and organized. Check it out!

Before starting this checklist, do you have the time and staff to manage your business finances at an optimal level completely? If the answer is no, consider outsourcing to ensure timeliness, expertise, and optimal scaling potential. □

Here is your checklist!

- Do not co-mingle funds (have a separate personal and business bank account).
- Get a business credit card or line of credit.
- Keep track of your income (save time and money with an invoice, accounting, and payroll software)- Here's some accounting software to consider:
Quickbooks, Melio, Zoho, Oracle, and Xero.
- Keep good records. Create an organized filing system or go digital with file management software to save time. Some file management software systems are to consider: **Google Drive, Evernote, DocuWare, Microsoft Sharepoint, and OnlyOffice.**
- Scan all your receipts and upload them to one place on your phone.
- Review your finances often—schedule meetings with key staff to review finances each quarter.