



Getting Started with Bayside Ledger

1st

Accept Engagement Letter via Ignition (our third-party billing service).

2nd

Establish “View Only” or sometimes referred to as “Accountant View” access to your bank accounts.

Common accounts to grant access are as follows:

- Business Checking
 - Business Savings
 - Business Credit Cards
-

3rd

Grant access to your QuickBooks

Granting online access as follows:

- Sign into QuickBooks Online
 - Go to Settings & Select Manage Users
 - Select the Accounting Firm tab
 - Select Invite
 - Enter Accountants Info & Save
-