



# The Checklist

How to try out bexio business software, step by step



## 4 important steps in bexio

### Complete your company profile

First, complete your company profile. The information in the company profile appears on various documents, regardless of whether they're quotes or invoices.

### Create your first contact

Now, create your first contact (or multiple) contact. Choose e.g. your most important supplier or largest customer.

### Set up important products

Set up your first product so that you can create offers and invoices as efficiently as possible, e.g. one of your products or an important service.

### Enter bank account info

Not only do all payments go through your bank account, it also appears on all documents, e.g. on invoices that have been issued. So enter this in bexio right at the beginning. With bexio's banking functionality, you can also compare bank transactions directly with open invoices and pay supplier invoices. Here in the banking area, you can also set up your orange payment slips (ISR) for your account.



*«Find it difficult to work with new software for the first time? It doesn't have to be. With easy-to-use software like bexio and personal support, you'll find what you need in no time.»* Rouven Mayer, Head of Operations



## Accounting and VAT

### Set up accounting and VAT

Set up **accounting** now. Send an invoice, for example, and bexio automatically enters the appropriate account receivable in the background. You can customize the standard chart of accounts to fit your needs.

Accounting also includes **VAT**. If you haven't already taken care of it during setup, enter your VAT settings and check the current tax rates. You can enter new ones right here. Setting this up in advance is important since VAT is displayed starting on your very first invoice.



*«Unsure about aspects of your accounting? It's easy to work together with your accountant directly in bexio online. In our accountant directory, you'll find qualified bexio accountants who would be happy to assist you with tax questions, payroll accounting, or with your financial accounting in general.»* Franziska Iselin, Head of Consulting

### Find and grant access to your accountant

Via user management, you can directly invite your accountant and give him or her access to your bexio accounting right from the get-go. As a result, you'll simply work together online. This makes tedious Excel exports a thing of the past.



## ...off to order processing

### Create your initial offer

Create your first offer in bexio: select a contact and one of your products or services you've set up, set the terms – and you're done. You can then go to „bexio network“ to view your document directly from the customer's point of view.

### Create an order or invoice

If your offer has been set to “accepted”, you can proceed to create an order or an invoice with just a one click. All information is directly imported. Of course, you can also create a new order or a new invoice without a previous offer.

**Our tip:** You can also open a new project directly from an accepted offer and e.g. aggregate further work in the project as well as record times in it.



*«Once the most important settings have been entered, things really get going.»* Rouven Mayer, Head of Operations



## Also worth a look

### **Perform bank reconciliation**

For banking, just a few clicks is all you need to import bank transactions directly into bexio via your linked bank account. If a matching open invoice is found, the status is automatically set to „paid“ and the invoice is posted. Bank transactions that aren't automatically assigned can still be assigned and posted manually, if necessary. It's that easy.

### **Handle payroll**

Payroll accounting in bexio is tailored to small businesses. With bexio payroll accounting, you can easily and conveniently perform payroll for your employees.

### **Create projects and record time**

Project management in bexio helps you keep projects organized: create tasks, assign them to team members and record times. At the end, you can bill your project directly to your customer.

### **Manage your warehouse**

Manage your products warehouse in bexio. Thanks to our add-ons, you can also opt to connect your online store directly to bexio.



## Also worth a look

### Add-ons and additional functions

You can extend bexio's basic functionality with various add-ons (additional functions). For example, you can use Mail-Chimp to send newsletters and information to your contacts in bexio. Or, you can synchronize your online store with bexio via "PepperShop" or "Synceria". Or, you can use „Pie-Sync“ to synchronize your bexio contacts with various other contact managers. Or, you can pre-finance invoices with "Advanon". Or, or, or...have a look at the overview at [www.bexio.com/marketplace](http://www.bexio.com/marketplace)



*«bexio is more than just software: we connect you with your customers and suppliers, your bank, your employees and the your accountant. Everything on one platform.»*

Jeremias Meier, Managing Director and co-founder of bexio



## Get started!

More than 20,000 small businesses, start-ups and self-employed entrepreneurs rely on bexio business software

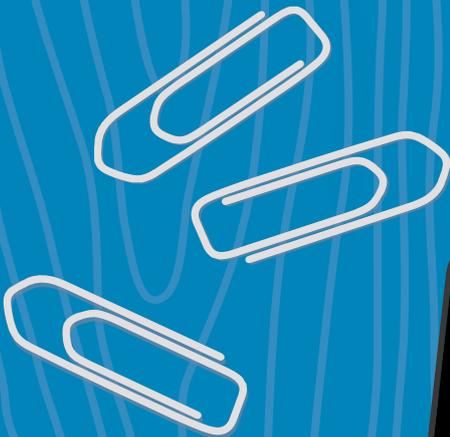
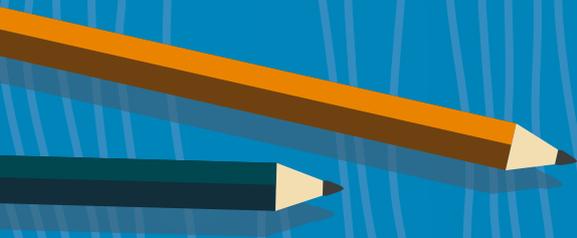
## Have questions?

We'll be happy to help – at no charge.  
+41 71 552 00 61 or [customers@bexio.com](mailto:customers@bexio.com)

You'll also find various help articles 24/7

in the Help Center  
[support.bexio.com](http://support.bexio.com)

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