

How to set up AssetAccountant

Thanks for signing up to AssetAccountant. This page is a step-by-step guide for getting your assets into AssetAccountant and making it ready to start saving you time every month through automated depreciation and leasing calculations.

Frequently Asked Questions

First things first.....there are some common questions that arise in setting registers in AssetAccountant so here's a handy list of those with answers:

[General introduction](#)

[What is the account structure in AssetAccountant?](#)

[What user roles are available in AssetAccountant?](#)

[How do I add assets into the system?](#)

[Can I bring in my existing opening balances?](#)

[What is the difference between a Classification and a Custom Field?](#)

[How do Journals work in AssetAccountant?](#)

[Bulk importing of assets](#)

[How can I make fundamental changes to assets?](#)

Setting AssetAccountant up with one of our Integration Partners

For detailed instructions on how to set up AssetAccountant with one of the systems below, see the relevant link for full instructions.

[Setting AssetAccountant up with Sage Intacct](#)

[Setting AssetAccountant up with Xero](#)

[Setting AssetAccountant up with QuickBooks Online](#)

Instructions for setting AssetAccountant up as a standalone system

If you are not fully familiar with AssetAccountant, here is a short overall introductory video



<https://onboarding.asset-accountant.com/file/84qB93YVNj>

When you're ready to get started, here are the steps to follow:

1

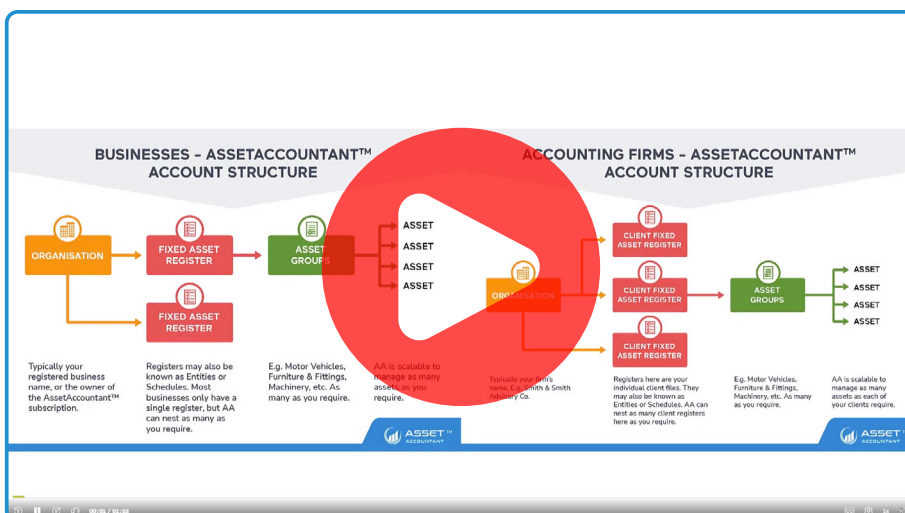
Create an account with AssetAccountant and invite the relevant team members to the Organisation

Navigate to app.asset-accountant.com.

If you do not have an account already:

- Select "Create Account"
- Use your company name for the Organisation
- Once you have created your account, add the other users from your business :
 - » you can do this from Organisation Settings > Users.

Video about account structures :

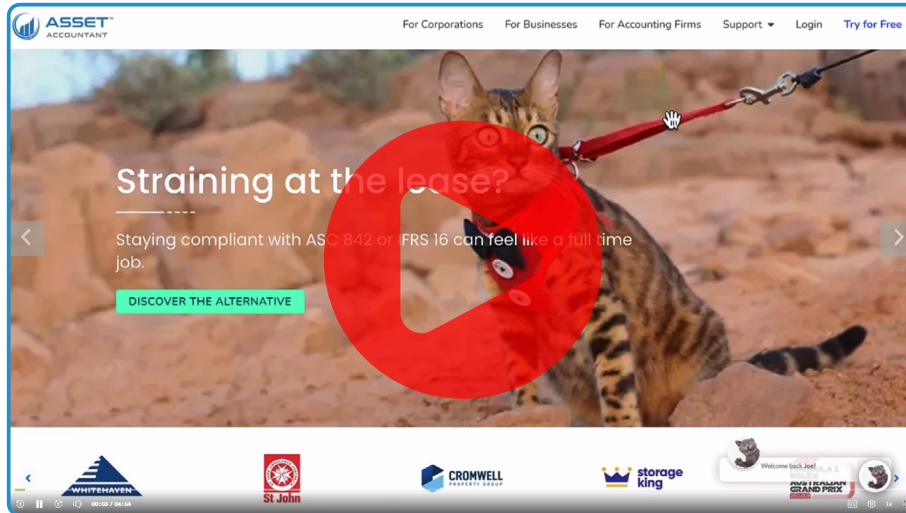


<https://onboarding.asset-accountant.com/file/I7qLJWVXD9>

Set up the register that you want to work with and invite the relevant users

Select "Create register" and fill in the required details for the register.

Video about setting up a register:

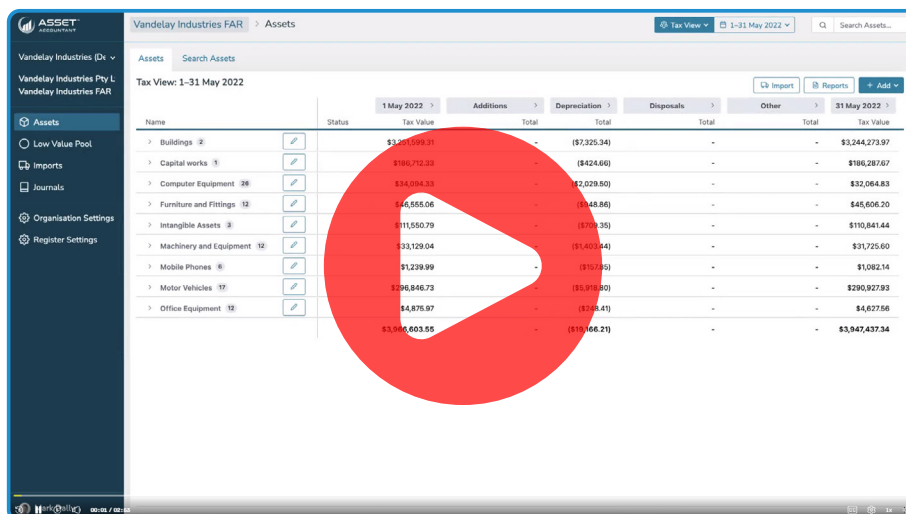


<https://onboarding.asset-accountant.com/file/P524PLYE21>

In Register Settings > users you can invite other users to the register. Make sure you select the correct roles for your users:

- Register Guests have "Read only" access
- Register Users can manage the asset data (add, edit, delete) in the register
- Register Managers can manage settings and invite other users

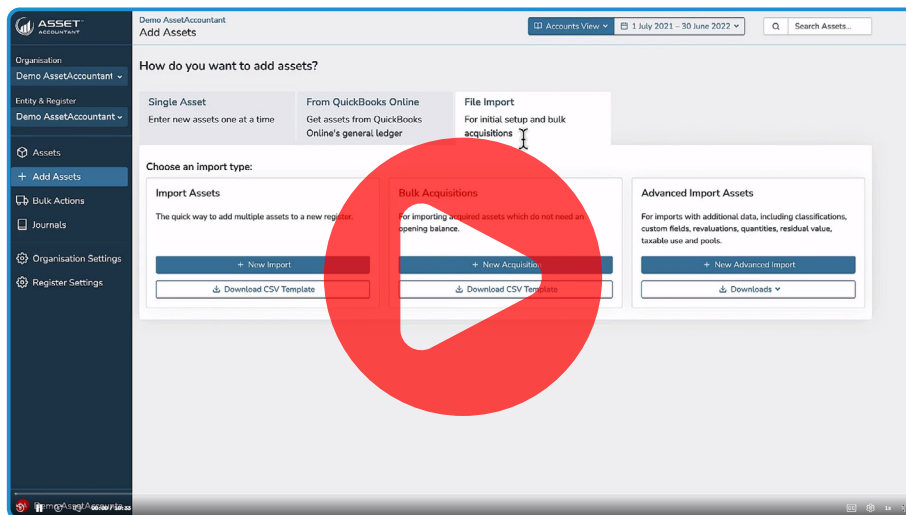
Video about inviting users:



<https://onboarding.asset-accountant.com/file/WP2EavIP2R>

You will need to import the existing data for your assets from a spreadsheet – you can download both the import template for you to use and also the “cheat sheet” of the data that is mandatory for the import from the Add Assets > File Import > Downloads menu item. Note that if you have this in a spreadsheet already you can use that rather than having to put it in the template.

Video about importing data:



<https://onboarding.asset-accountant.com/file/W6NMwdpe2Z>

If you are migrating data from MYOB or Handisoft, we have Macros available to get your data into the correct format. Please email “support@asset.accountant” if you would like more information on these.

4 Set up your Asset Groups

Once the data has been imported, you'll be able to go into each Asset Group Screen and set

1. the default depreciation for each group and
2. the mappings to the GL in Sage Intacct - note you can copy these across from another group and just amend the accounts that are different for each screen.

Congratulations AssetAccountant is now set up for your use

Video/Support sites

The support sites that we provide are as follows:

Video hub with lots of short instructional videos that show you how to complete various tasks in the system

<https://asset-accountant.com/>

All our onboarding videos are available in one place at :

onboarding.asset-accountant.com

Support site with lots of How-To guides

<https://support.asset.accountant/>

