



BOOKS

Companies & Switching

Run multiple companies in one Books account. Adding, switching, plan limits, deleting.

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Books supports multiple companies in a single account. Each company has its own chart of accounts, bank accounts, transactions, and reports. You switch between them from the company selector in the top nav.

Why Multi-Company?

- **Multiple agencies** — you run two travel businesses under different brands
- **Personal + Business** — you want to keep personal finances separate from agency finances
- **Per-client books** — your agency does bookkeeping FOR multiple sub-clients
- **Test companies** — you want a sandbox to learn or test before doing it in your real books

Plan Limits

- **Books Individual** — 1 company
- **Books Founder** — 2 companies
- **Books Growth** — 2 companies
- **Books Pro** — 5 companies

Adding a Company

1. Click the company selector in the top nav and choose **Add Company**.
2. Enter the new company's name, address, tax ID, fiscal year.
3. Books creates a fresh chart of accounts (travel-agency default) and the new company is empty.
4. Set up bank accounts, import transactions, etc. — same as your first company.

Switching Between Companies

Click the company name in the top nav → pick the company you want. Books reloads with that company's data — chart of accounts, transactions, reports, everything is scoped to the active company.

ADVISOR TIP

Bulk imports, bulk actions, and report exports always apply to the **active** company. Always double-check the company selector before doing anything destructive or bulky.

Deleting a Company

Deleting a company is permanent. All transactions, reports, attachments, and history for that company are removed. Books requires you to type the company name to confirm. We recommend exporting reports and downloading attachments first.

Transferring Between Companies

Books doesn't natively transfer transactions between companies (this would corrupt one or both companies' books). If you need to move data, export from the source as CSV and import into the destination, then delete from the source.