

Bookkeeper interview questions

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What to expect

Bookkeeper interviews tend to focus less on abstract theory and more on whether you can actually run a ledger cleanly under real deadlines. Expect a mix of practical process questions, questions about handling client relationships (since many bookkeepers work across several small businesses), and at least one scenario testing judgement when the numbers don't add up.

- **Process:** Walking through how you actually do a task, such as a bank reconciliation or BAS preparation, step by step.
- **Behavioural:** Past examples of handling deadline pressure, errors, or difficult clients.
- **Scenario:** Hypothetical situations testing judgement, such as discovering a discrepancy or a client pushing back on a figure.
- **Technical/software:** Specific questions about Xero, MYOB or QuickBooks functionality and how you'd handle a particular ledger problem in that system.
- **Compliance:** Understanding of BAS agent obligations, GST treatment, or superannuation guarantee rules, even if you're not the registered agent.

Most bookkeeper interviews run 30 to 45 minutes. They usually open with a couple of background questions about your current or most recent ledger work, move into two or three process or scenario questions to test how you actually work, then a software-specific question, and close with questions about your availability and how you handle multiple clients or deadlines at once.

1. Walk me through how you reconcile a bank account at month end.

Why they ask

This is the core task of the role, and the interviewer wants to hear a clear, repeatable process rather than a vague description.

How to structure your answer

Answer as a step-by-step walk-through: starting point, the checks you run, how you handle unmatched transactions, and how you sign off the reconciliation.

Example answer

"I start by importing the bank feed and matching it against the ledger in Xero. I go through unreconciled items first, checking them against invoices or receipts to find the source. If something doesn't match, I check for timing differences like outstanding cheques or unbanked deposits before assuming it's an error. Once everything ties out, I print the reconciliation report, note any adjusting entries I've made, and file it for review before month-end reporting goes out."

2. Tell me about a time you found an error in the accounts that someone else had missed.

Why they ask

Tests attention to detail and how you handle correcting someone else's work without causing friction.

How to structure your answer

Use STAR: situation, task, action, result.

Example answer

"At a previous client, I noticed a supplier had been paid twice for the same invoice a few months earlier. The situation was that the ledger showed a credit balance that didn't make sense for that supplier. My task was to trace back through the invoices and payment records to confirm what had

happened. I contacted the supplier, confirmed the duplicate payment, and arranged a refund, then corrected the ledger entry. The result was we recovered the funds and I flagged a process change so invoices were checked against a payment register before processing, which prevented it happening again."

3. A client insists a GST-free expense should be claimed with GST credits. How do you handle it?

Why they ask

Tests both technical knowledge of GST treatment and how you manage a client relationship when you have to disagree with them.

How to structure your answer

Judgement-under-pressure structure: state the immediate response, the reasoning you'd apply, and how you'd communicate the outcome to protect the relationship.

Example answer

"I'd explain to the client why the expense is GST-free, referencing the specific category if I can, rather than just telling them they're wrong. If they're not convinced, I'd suggest checking with their accountant or the ATO's guidance together, since getting BAS lodgements wrong creates real compliance risk for them. I wouldn't code it incorrectly just to keep the client happy, because that's the kind of thing that comes back on both of us at audit time."

4. How do you manage your workload when you're doing the books for several small business clients at once?

Why they ask

Many bookkeepers juggle multiple clients, so the interviewer wants evidence of realistic time management, not just a general answer.

How to structure your answer

Behavioural, STAR-lite focused on systems and prioritisation rather than a single incident.

Example answer

"I keep a running schedule based on each client's BAS and payroll deadlines, since those are fixed and non-negotiable. Day-to-day transaction coding gets batched by client on set days each week rather than done reactively, which stops any one client's work piling up. If something urgent comes in, like a client needing a report for a bank meeting, I'll shift the batch schedule for that week rather than let recurring work slip."

5. What's your experience with Xero, MYOB or QuickBooks, and is there one you'd say you know best?

Why they ask

Software fluency is a genuine day-one requirement, and the interviewer wants specifics rather than a generic list of names.

How to structure your answer

Direct technical answer: name the platform, give a concrete example of a feature or workflow you've used, and be honest about gaps.

Example answer

"I've used Xero the most, including bank rules, payroll and BAS reporting through the activity statement function. I've also worked in MYOB for a client who hadn't migrated yet, mainly for invoicing and reconciliation. I haven't used QuickBooks in a live job but I've done a training module on it and the core ledger logic is similar enough that I'd expect to pick it up quickly."

6. Given that a lot of routine bookkeeping is now automated through bank feeds and software rules, what do you think a bookkeeper still adds?

Why they ask

With bookkeeping flagged as high AI exposure, interviewers want to know you understand where your judgement adds value beyond data entry.

How to structure your answer

Direct opinion question: give your view, back it with a concrete example, keep it grounded rather than defensive.

Example answer

"The software handles the matching and the maths, but it doesn't know when a transaction has been coded to the wrong category, or when a client's numbers don't make sense for their business. I see my role as catching what the automation misses and giving the owner a clear read on their position, not just a set of reconciled accounts. That judgement side of the job hasn't gone away, even as the manual data entry has shrunk."