

Onboarding Instructions

1. If you don't have any accounting software..

- Please bring this up during the initial call so we can create an action plan to set this up.

2. If you have spreadsheets you would like to share with the team

- Please send/share it to qbo@simplecfo.com

3. If you are on Xero

- Please send access request to qbo@simplecfo.com

4. If you are on another platform (i.e. Rentec, Wave etc.)

- Please bring this up during the initial call

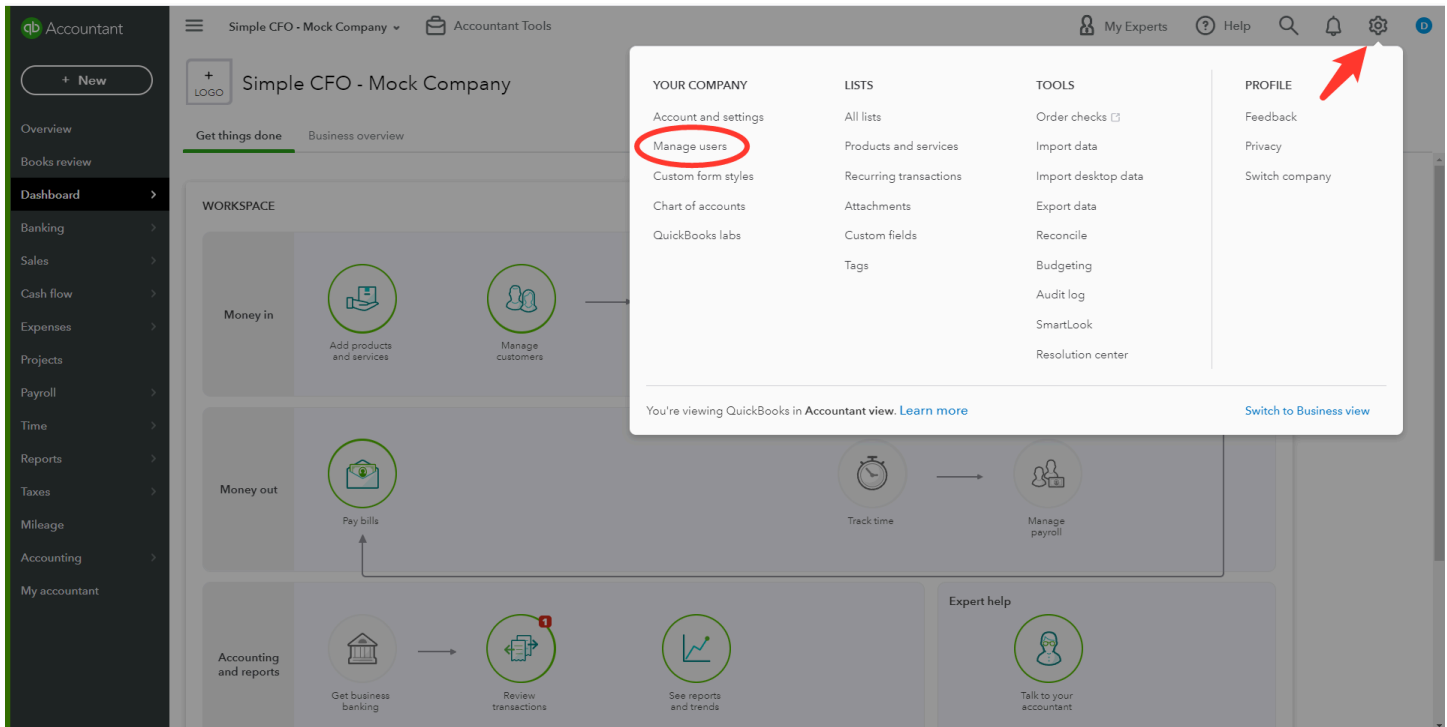
5. If you are on Quickbooks Desktop..

- You would have to share Quickbooks Desktop access with your CFO via remote access services
- We have listed some of the remote access service providers below:
 - [Swizznet](#)
 - [Microsoft Remote Desktop](#)
 - [Log Me In](#)
 - [TeamViewer](#)
 - [Zoho Assist](#)
 - [Go to My PC](#)
- Please keep in mind that the computer they are remote accessing needs to have Quickbooks Desktop installed and turned on

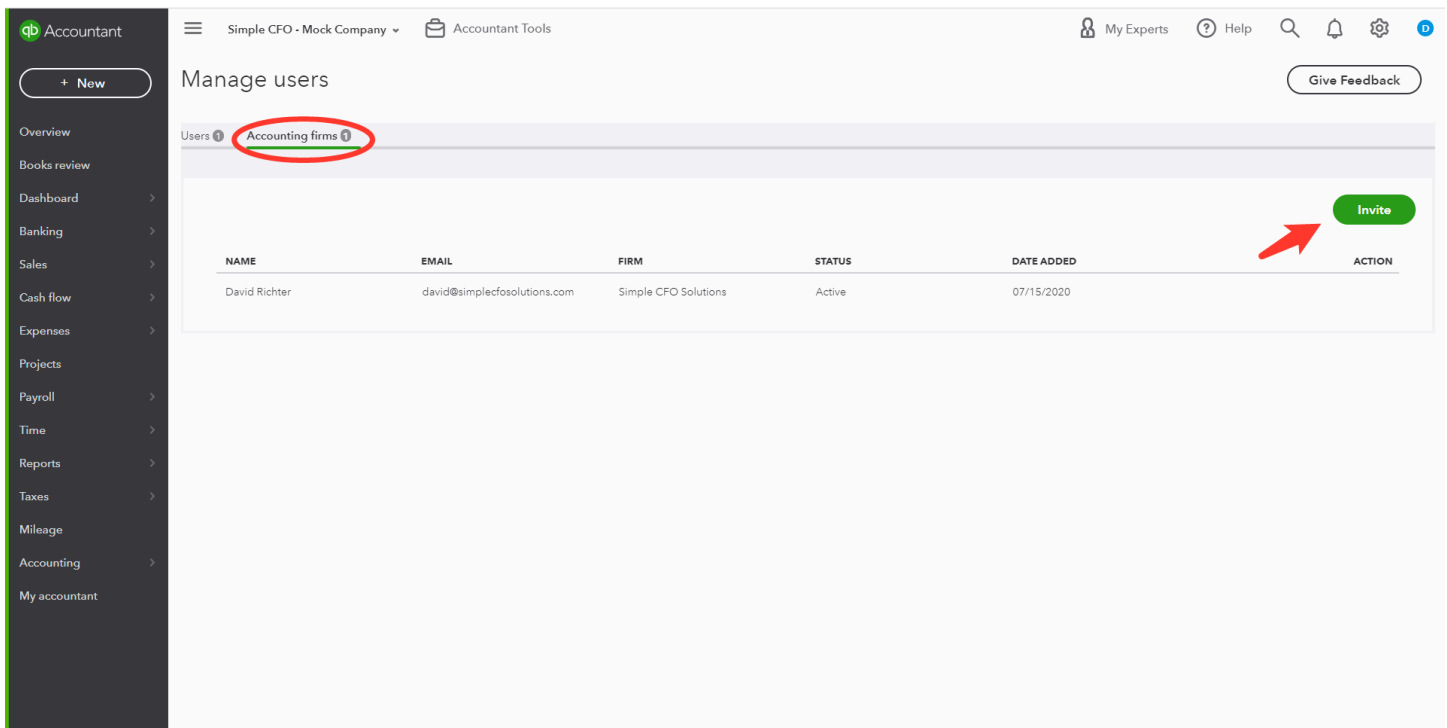
6. If you are on Quickbooks Online.

- Please send accountant access to qbo@simplecfo.com
- Here's how you can give us accountant access to your QBO account:

A. Click the gear icon on the top right hand corner, and then choose "manage user"



B. Click on the "accounting firm" tab and click invite.



C. Fill out the First Name (Simple) Last Name (CFO) and on the email field put gbo@simplecfo.com

Add a new accounting firm

What's your accountant's contact info?

Your accountant and members of their firm will have admin access to your company data.

We'll invite them to create a QuickBooks account and password for access to your company. This invite expires after 30 days.

First name

Last name

Email

This will be their user id.

Hope this helps! Let us know if you have questions.

Simple CFO Team

We appreciate you!

