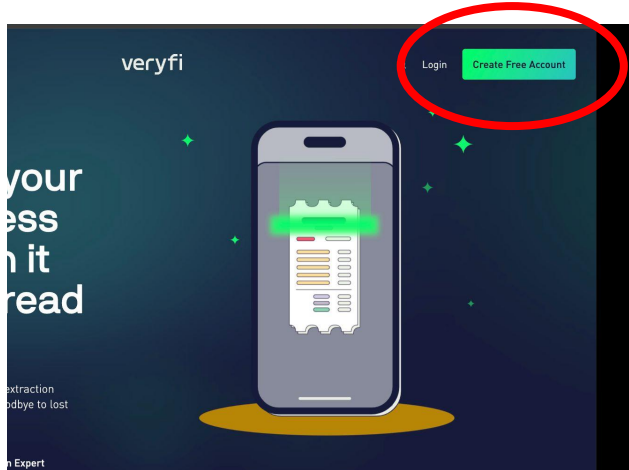


# Welcome to Veryfi for Accountants Practise Management

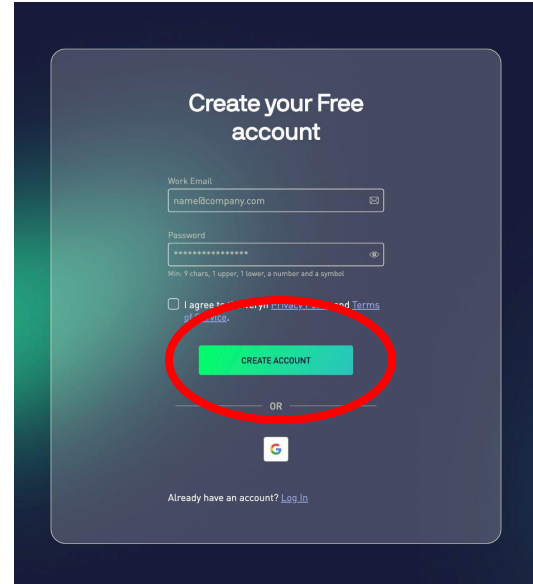
# How to Sign Up as an Accountant / Bookkeeper

# How to Sign Up

1. Go to [veryfi.com](https://www.veryfi.com) and click on “Create Free Account”

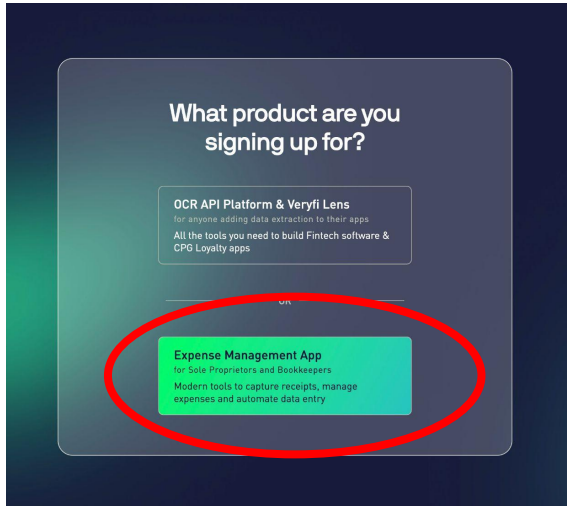


2. Go through the steps of creating an account starting with your email address. When done, hit “Create Account” to start the process.

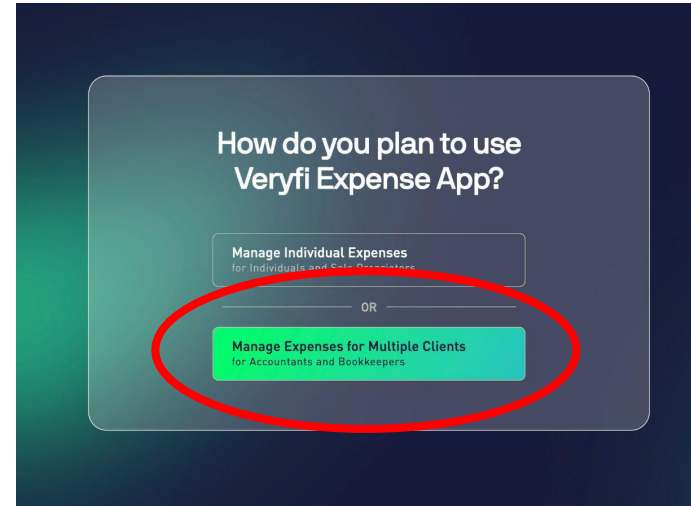


# How to Sign Up

3. Select “Expense Management App” as highlighted below.

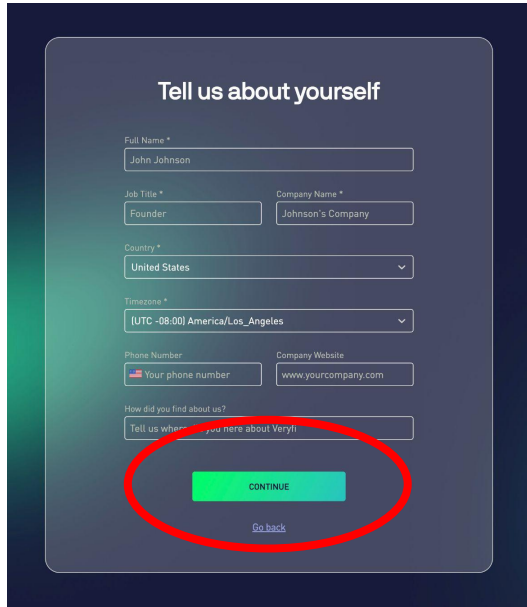


4. Next select “Manage Expenses for Multiple Clients” as shown below.



# How to Sign Up

5. Tell us a bit about yourself so we can customize the product for you. When done hit “Continue” button.



**Tell us about yourself**

Full Name \*  
John Johnson

Job Title \*  
Founder

Company Name \*  
Johnson's Company

Country \*  
United States

Timezone \*  
[UTC -08:00] America/Los\_Angeles

Phone Number  
Your phone number

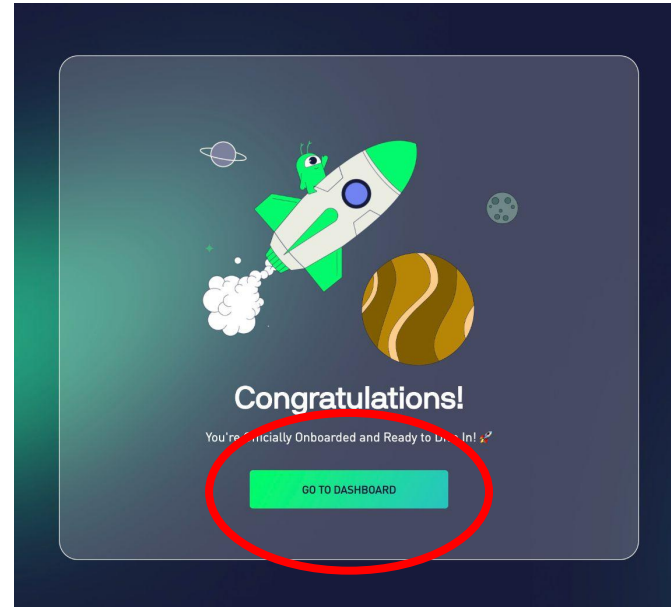
Company Website  
www.yourcompany.com

How did you find about us?  
Tell us where you here about Verifi

**CONTINUE**

[Go back](#)

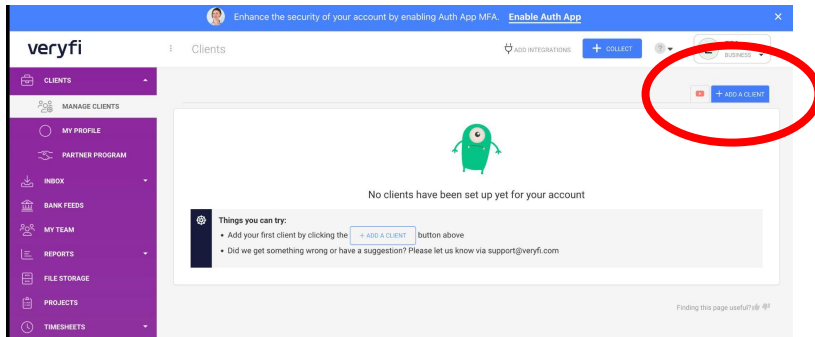
6. Done. Press “Go To Dashboard” to start using Verifi.



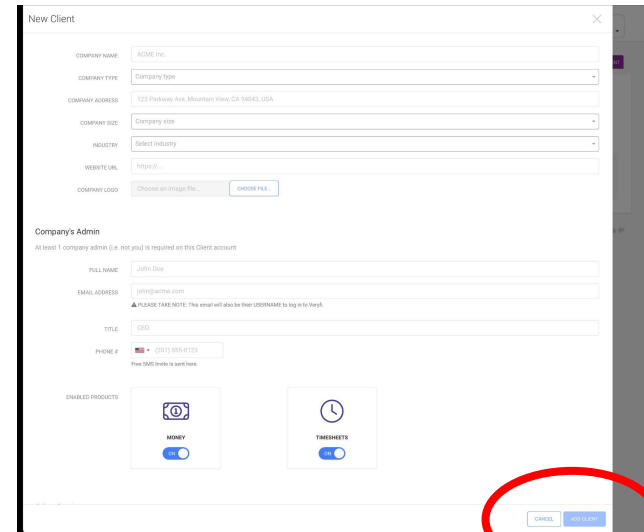
# Adding Your First Client

# Adding Your First Client

1. This is your Dashboard. The purple left nav indicates you are in your Accountant admin mode. It turns green when you login as your client. Let's add a NEW client. Press "Add a Client" button



2. Fill out this modal with your client's credentials and they will receive an invite to Veryfi. "Add Client" button will enable when you have filled out all the required fields.

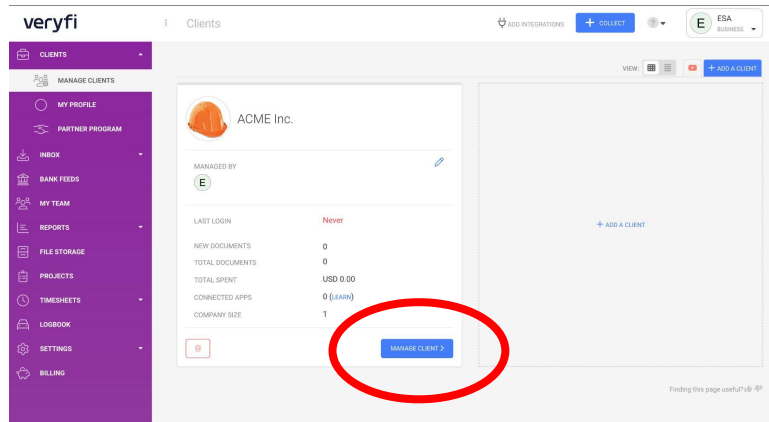


# Managing Your Client(s)

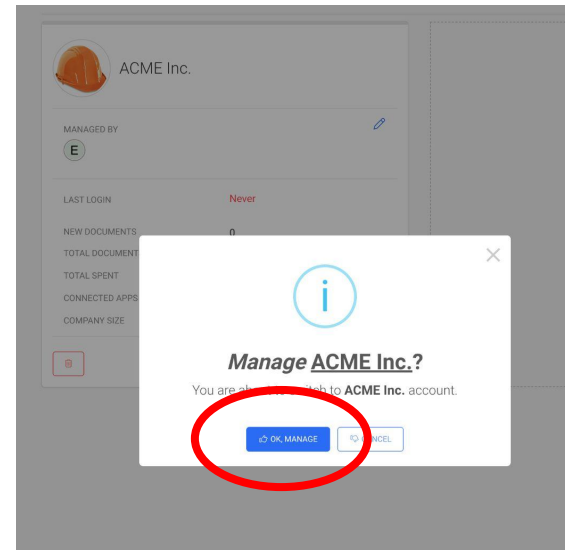


# Managing Your Client(s)

1. This is how your Dashboard will look when you have added a Client.



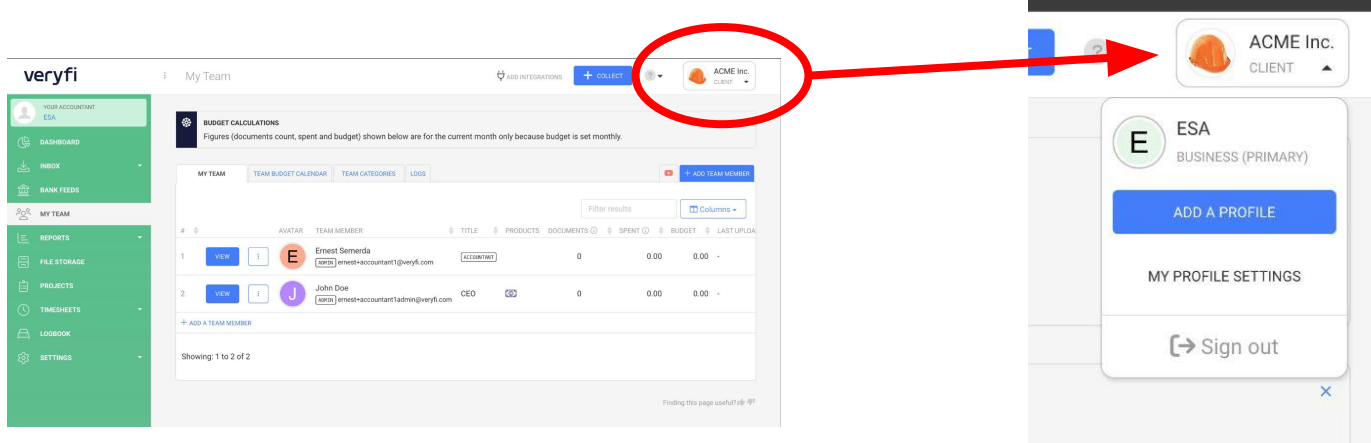
2. Let's now login to your new client's account to manage their documents. Press the "Manage Client" button then OK to continue.



# Managing Your Client(s)

3. You are now in your Client's account. Note the left hand menu turned green to indicate that. Explore all the options in the left hand side.

4. When you are ready to leave and go back to your Accountant profile, press the account icon in the top right corner and select your primary account to switch back.



# Resources / Help

# Resources

- Email: [support@veryfi.com](mailto:support@veryfi.com)
- FAQ: <https://faq.veryfi.com/en/collections/3522930-expense-management-app>
- How-To Videos: <https://www.youtube.com/@Veryfi/playlists>
- Practice Management Videos:
  - [Getting Started with Practice Management](#)
  - [How to Manage Clients](#)
  - [How Billing Works](#)
- Download Mobile Apps:
  - [iPhone](#) and [Android](#)
  - [Learn about Veryfi's Expense Management](#)
- Integrations:
  - [QuickBooks](#)
  - [Xero](#)