

ACCOUNTING TIMELINE

WE HAVE ESTABLISHED OUR ACCOUNTING SERVICES TO BE FLEXIBLE TO MEET YOUR INDIVIDUAL BUSINESS NEEDS

We take an agile project management approach and break the onboarding into Sprints. A Sprint lasts anywhere from 5-10 days and allows us to focus on key components. If we find during a Sprint that you need more time to complete, we can easily pivot and adjust.

You will work with our Onboarding Specialist during this process.

SPRINT 1	SPRINT 2	SPRINT 3	SPRINT 4	SPRINT 5
<p>Initial Set-up and Communication</p> <p>Email accounting document request to client</p> <p>Advise and enroll client on our systems</p> <p>Assist client with set-up for payroll (if needed)</p> <p>5-10 days*</p>	<p>Server and Documentation</p> <p>Migrate software to cloud-based server</p> <p>Verify that accounting software complies with guidelines</p> <p>Receive requested documents from client</p> <p>5-10 days*</p>	<p>Obtain Online Access</p> <p>Gain online access to the following programs:</p> <p>Accounting Software Payroll Provider Banks (Read Only) Credit Cards (Read Only) Loans (Read Only)</p> <p>5-10 days*</p>	<p>General Ledger</p> <p>Revision of Chart of Accounts (will need the most time)</p> <p>General Ledger Transaction review and clean up</p> <p>10-20 days*</p>	<p>Assign to Foresight Accountant</p> <p>Foresight Accountant briefed on client and expectations</p> <p>Client introduction, discuss expectations for timely monthly financial statements</p> <p>5-10 days*</p>