Hello CASHFLOW

CLIENT ACTIVATION GUIDE

A step-by-step guide for accountants to onboard and optimise their clients Hello Cashflow account

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CLIENT ACTIVATION GUIDE

Complete each step in order to successfully onboard your clients to their Hello Cashflow account.

Step 1

Preparation for Client Onboarding

Do this step before setting up your client's Hello Cashflow account.

- [ ] Discuss and identify your client's specific goals for cash flow management. Write down their cashflow management goals.
- [ ] Provide a brief overview of Hello Cashflow and its benefits to your client.

Step 2

Setting Up Your Client's Hello Cashflow Account

Actions completed by: Advisor

- [ ]
1. Log in into your Hello Cashflow account
2. Navigate to your Partner Dashboard
3. Select the **"Invite Client"** button
4. Enter your client's name and email address
5. Click **"Invite"**

Action completed by: Client

- [ ] After the invite has been sent, complete these steps:
  - Open the invitation email from hello Cashflow
  - Click the **"Join My Team"** link.

**This action will not take your client to activate a free trial since they are joining your account as a client.*

Action completed by: Advisor

- [ ] Confirm that your client has:
  - Successfully logged in
  - Completed the initial onboarding setup: steps 1-4
  - Their data sync is complete

**The time needed to sync their data for the first time will vary based on the size of the clients data stored within their accounting software.*
You can make changes to the initial setup inputs in your clients account* ***organisation settings.

Step 2 continued

Setting Up Your Client's Hello Cashflow Account

Actions completed by: Advisor and Client

- [ ] For the most accurate reporting; Log in to your client's accounting software (Xero or Quickbooks) and confirm that all transactions are **reconciled**.

- [ ] Double check that your historical financial data correctly synced to Hello Cashflow from your accounting software.

  **Bugs are very rare with Hello Cashflow, but if you think there is a genuine error, please provide a screenshot or a video and send to support@hellocashflow.com*

- [ ] Double check that your **organisational settings** are set to your correct preferences; including Cash On Hand and Owners Earnings

  **Owners Earnings are the line items that directly correlate to the clients income from the business. Ticking these expense lines allows for deeper understanding of their total remuneration from the business.*

Step 3

Walkthrough Hello Cashflow with Your Client

Actions completed by: Advisor and Client

- [ ] While logged into your client's Hello Cashflow account, navigate to the **Budget Editor**.
  1. Click on the **Cashflow** tab in the budget editor.
  2. Make sure all historical financial data is accurate.
  3. Manually enter **non-P&L items** (like tax payments).

- [ ] Stay in the **Budget Editor.**
  1. Select which **budget forecast** they want to edit: Revenue, Expenses, Cashflow, Customers, or Custom Reports
  2. Work with your client to edit their selected budget forecast – You can import CSV files, update manually or use the powerful autofill feature. ***Save as you go***

- [ ] Navigate to the **Reports.**

  Review the five **Reports Tabs** by:
  - Highlighting growth/decline insights
  - Demonstrating how the gauges/percentages work and why they are important

- [ ] Within the Reports, select **My Cashflow**

  Review the My Cashflow Tab by:
  - Analyzing the cashflow forecast
  - Identifying available cash on hand
  - Set cashflow targets

Step 3 continued

Walkthrough Hello Cashflow with Your Client

Actions completed by: Advisor

- [ ] Introduce your client to the **Scenario Calculator** for creating "what-if" scenarios to test impact on financial decisions in their business.

Step 4

Trainings and Best Practices to Follow

Actions completed by: Advisor

- [ ] Confirm with your client that they feel confident:
    - Logging into their Hello Cashflow account
    - Understand the app's key features

  Share useful resources (help articles, tutorials, and FAQs) from the **"Help Centre"** and **"Get Started"**.

- [ ] Advise your client on the importance of regularly reconciling accounting software and reviewing forecasts weekly/monthly

Step 5

Complete Client Onboarding

Actions completed by: Advisor

- [ ] Schedule the first **check-in call** to review your client's budget and cash flow forecast together.

- [ ] Mark your client as fully onboarded in your own workflow system.

You have successfully completed onboarding your client to Hello Cashflow!