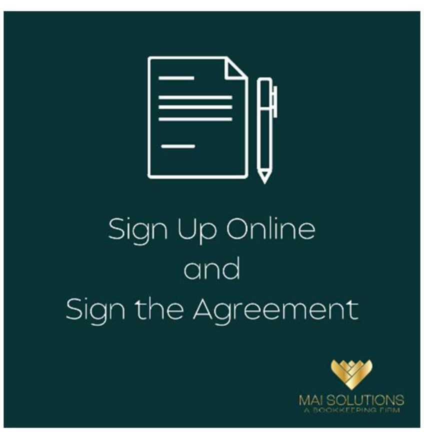

Welcome, you have either already had your initial call with us, or you went ahead and signed up before our initial call. Either way, we have an idea of what you need, and we are very excited to get started!

If you have not scheduled a call with us, we will schedule that, so that we make sure that we are clear on what your needs are and to ensure that we are a good fit for your business.


Now that you have spoken with us and are ready to hire your bookkeeper, we will try and make the process as smooth as possible!


If you have any questions along the way, feel free to reach out!




You may have already signed up online, if you have not you will go to our website **www.MaiSolutionsNow.com**

Select Services on the menu at the top and then select **Bookkeeping**. Scroll down to the **Sign up Now** Section and select a box. You will be able to sign up for the basic packages online, where you will be asked to accept the terms and conditions as well as add your signature.

If you want additional services, you can request them after and pricing will be given to you at that time.


Once you have signed up online, you will receive an email that will include the initial payment invoice.

We will not start work or move past this section until the first payment is made.

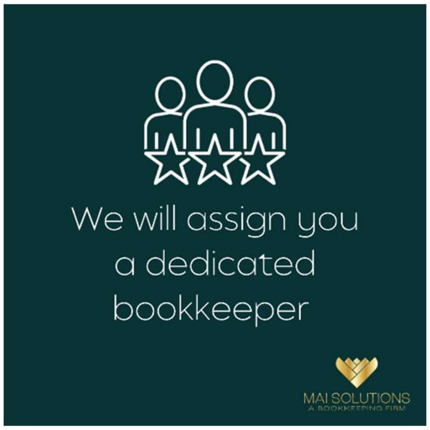

Once the invoice is paid you will receive an email prompting you to accept access to our client portal, aka Client Hub.

You will be the initial contact. If you want more users added, we can invite them for you. If you want staff with limited access, we have options for that as well which we can discuss.


Once you are in Client Hub you will have a couple of things that you will need to do. The first is to watch the onboarding video. This will explain how to use Client Hub, Transactions to Review (if you use QBO), and our expectations so that we can get the information needed.


At this point we will ask you to please add us to your accounting software. The instructions will be added to Client Hub.

You will also have a client details form that we would like to have you fill out to help to ensure that we have a full understanding of your business and to make sure that we are not missing anything.




You will be assigned a dedicated bookkeeper after you have been added to client hub and you will see them reach out to you. Our communication policy in the Terms and Conditions will explain that, but we also discuss in the on boarding video.

Client Hub is our main communication between you and your bookkeeper, you may also call the office between the hours of 9am- 5pm. If you have a quick question call the office 407-926-8330


You may begin uploading your statements and documents into Client Hub so that we can get started.


Ask questions in Client Hub on the computer or via the mobile app!!

You can send us direct messages (like a text message) and see any client tasks we have created for you, right on your phone!


We will begin working! Expect to hear from us and we most likely will have a lot of questions the first few months.

Please note, that Client Hub does send automatic reminders of your tasks daily to your email.