



STEP 2: SETTING UP  
"READ-ONLY" ACCESS

STEP 3:  
INTRODUCTION TO  
IMPLEMENTATION  
TEAM

STEP 4:  
ONGOING  
SERVICES

**YOU ARE HERE!**

## STEP 1: ONBOARDING MEETING

After signing your contract you will have a one-hour meeting with Reconciled's Onboarding team to discuss your business and set up access to your business applications/platforms.

**TIME FRAME: ONE 60-MINUTE VIDEO CALL**

**NEXT STEP: SETTING UP "READ-ONLY" ACCESS**



STEP 1: ONBOARDING  
MEETING

**YOU ARE HERE!**

2

STEP 3:  
INTRODUCTION TO  
IMPLEMENTATION  
TEAM

STEP 4:  
ONGOING  
SERVICES

## STEP 2: SETTING UP "READ-ONLY" ACCESS

Reconciled requires "read-only" access to your business applications / platforms. Your onboarding team will provide you with instructions and information through Karbon (onboarding software) to set up this access. You will not be able to meet your implementation team until this stage is completed.

**TIME FRAME: 10 or FEWER BUSINESS DAYS**

**NEXT STEP: INTRODUCTION TO IMPLEMENTATION TEAM**



**YOU ARE HERE!**

STEP 2: SETTING UP  
"READ-ONLY" ACCESS

**3**

STEP 1: ONBOARDING  
MEETING

STEP 4:  
ONGOING  
SERVICES

## **STEP 3: INTRODUCTION TO IMPLEMENTATION TEAM**

Once access has been granted you will be introduced to your implementation team who will set best practices, create processes, and provide cleanup if needed.

**TIME FRAME: ONE 30-MINUTE VIDEO CALL**

**NEXT STEP: ONGOING SERVICES**



STEP 1: ONBOARDING  
MEETING

STEP 2: SETTING UP  
"READ-ONLY" ACCESS

STEP 3:  
INTRODUCTION TO  
IMPLEMENTATION  
TEAM

4

**YOU ARE  
HERE!**

## STEP 4: ONGOING SERVICES

We take a collaborative approach to service at Reconciled. As cleanup is being completed and processes are being set, your implementation team will work closely with our Cloud Accounting Team to train them on ongoing services