

Accountant Onboarding Checklist



Your Steps to Success



Understand the basics (demo) of CashFlowTool

Learn how to jumpstart your experience with CashFlowTool

[Watch video](#)

Create your CashFlowTool Account

If you haven't already, make sure to create your account.

[Create Account](#)

Add a business and connect to QuickBooks

Many Partners like to add their own business first to get familiar with the software. We have a video to help get started.

[Watch video](#)

Request a CFT demo account w/sample biz

You may want to request a demo account that you can use when getting certified or if you want to demo CashFlowTool to your potential clients (so you don't have to show your data!)

[Request Sample](#)

Learn the basics of CashFlowTool

We have several quick tutorials to help you learn the basics of CashFlowTool ranging from connection to QuickBooks all the way to how to how QuickBooks Desktop in the Cloud

[Learn the Basics](#)

Become certified in CashFlowTool

Become a CashFlowTool Certified Pro. Partners receive a discount on the certification course.

[Get Certified](#)



Learn how to select the right clients to start

Use our team's guide to identify the 'low hanging fruit' clients you want to start rolling out cash flow forecasting & management services to.

[ID best clients](#)

Get ready to pitch your new service to clients

Access our team's resources on how to pitch to cash flow services to your clients

[Learn to pitch](#)

Learn how to run a cash flow meeting

Learn how to run a great cash flow meeting with your clients

[Learn how](#)

Watch the "Beginners Guide" Video

We partnered with the Summit CPA group to 1-hour video that highlights how to go from couch to cash flow experts in no time!

[Access Webinar](#)

Watch the "Ultimate Cash Flow Playbook"

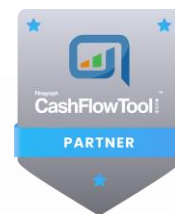
We partnered with the Summit CPA group to deliver a 1-hour video showcasing their proven, profitable methods to adding cash flow services to your firm.

[Access Webinar](#)

Market cash flow services on your website

Add the Partner logo and if you are certified as a Cash Flow Pro, proudly display those so your customers know you are ready.

Consider creating a "Cash Flow Services" dedicated section on your website that details your offerings, why it is important and why your customers need this service!



Stay up to date on our Blog

We constantly update our blog with insights, tips, product information and more so you are always on top.

[Access Blog](#)