



Prime Entry Bookkeeping Onboarding Guide

A simple overview of what to expect during your first 90 days with Prime Entry Bookkeeping – how we work, what we deliver, and how we keep everything predictable and stress-free.

Welcome to Your First 90 Days

Your onboarding is designed to give you clarity, confidence, and a predictable rhythm from the start. Whether you're newly signed or exploring how Prime Entry supports clients, this guide outlines the structure, communication, and systems that define your first three months.

Understanding Your Business

Your onboarding begins with a working session focused on how your business operates and how money moves through it. We review how income is generated, how expenses flow, and any operational nuances that matter for accurate, reliable books.

This ensures your financial system reflects the reality of your business from day one.

Aligning Your Financial Accounts

We review all active bank and credit card accounts, how they connect to QuickBooks, and which accounts should be closed or archived.

We also confirm how payments are made — automated, manual, or split across entities — so every transaction is captured cleanly and consistently.

Mapping Income, Expenses, and Operational Flow

We document how sales are recorded, how subscriptions and recurring transactions work, and how payroll is handled.

This gives us a complete picture of your financial activity and ensures your books stay accurate without extra work on your end.

Your Monthly Support Rhythm

You'll know exactly what happens each month:

- categorization
- reconciliations
- month-end close
- questions and clarifications

This rhythm is the backbone of your ongoing support — predictable, repeatable, and designed to keep your books current without stress.

Reporting You Can Rely On

Each month, you receive clean financial statements delivered on a consistent schedule.

We confirm who should receive them and whether you want additional visibility, KPIs, or reporting enhancements.

Our goal is simple: you always know where your business stands.

Communication That Keeps Everything Moving

We establish a simple communication rhythm — typically a weekly check-in — to confirm missing items, share updates, and keep your books moving forward.

You'll always know what we need, what's in progress, and what's complete.

Secure, Organized Systems

We align your systems with ours so documents, receipts, and approvals flow cleanly and securely.

This includes shared folders, signature tools, and clear handoff points so nothing gets lost and everything stays organized.

Transition and Cleanup (If Applicable)

If you're coming from a prior bookkeeper or internal team, we review any handoff notes, open questions, or cleanup items.

This ensures a smooth transition and gives you a clean starting point for ongoing support.

What You Can Expect by Day 90

By the end of your first three months, you will have:

- fully aligned financial systems
- a predictable monthly reporting rhythm
- clean, reconciled books
- a clear communication cadence
- a bookkeeping partner who understands your business and supports it proactively

Our Promise

We listen first, not assume.

We design support around your business.

We build scalable systems without overwhelm.

We meet you where you are and move forward together.

A clean, corporate PDF benefits from a closing section that signals professionalism, reinforces stability, and gives both new and prospective clients a clear next step. It should feel like a natural endpoint — not salesy, not pushy — just confident and service-oriented.

Here's a version that fits seamlessly with the guide's tone and structure:

Staying Connected

Your onboarding is a collaborative process, and we're here to make every step clear and predictable. If questions come up at any point — before, during, or after your first 90 days — you can reach us directly.

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Moving Forward Together

Your financial systems should support your business, not complicate it. Our role is to keep your books accurate, your reporting consistent, and your workflow stress-free — so you can focus on running and growing your business with confidence.

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