

Your Squirrel Street Implementation Checklist!

Set up your Trial Client

- Update the Trial Account Name via the Pro Partner Portal:

<http://app.squirrelstreet.com>

- Update the postal address for the trial account
- Set the submission email address for the account

Communicate! Let your client know you're using Squirrel Street!

- Draft an email / letter or phone script - ask us for ideas or templates if you like!
- Send your client written advice explaining that you're using Squirrel Street in your practice
- Give them clear and simple instructions on how to submit documents to you weekly
- Follow up with a phone call to answer questions or confirm acknowledgement
- Let your client know they'll be receiving their Magic Envelopes

Send out the first Magic Envelopes

- Go to “all receipts” > “Dashboard” > “My Envelopes” > “Request Envelope”

- Send out the first batch of envelopes manually - once received by us, the next envelopes will be sent out automatically
- Check back with your client in 5 days to make sure they've received their envelope
- Confirm with your client that their first Magic Envelope has been sent off to Squirrel Street

Integrate your Client's Accounting Platform (Only do this if you plan to use Squirrel Street in conjunction with an accounting software)

- Integrate your accounting software via API OR import your Chart of Accounts (see the FAQ on our website, or contact our Support team for assistance)
- Check you can see the correct Chart of Accounts and read up on the export process!

Receive and Action Documents

- You'll receive a notification when documents are completed and ready for you - then log into Squirrel Street to view your documents
- Go to "Other Documents" and read through the list of "Other Documents"
- Action and write notes on the documents as required
- Once you've read, noted and actioned the other documents, go to the "Receipts" tab
- Sort the receipts by NAME to begin creating allocation rules
- For each Supplier, select all the receipts / invoices and allocate them to an appropriate account
- When allocated, confirm that all future receipts should be allocated to the same account, if appropriate!

platform

- When all receipts are coded (as required) export the receipts to the accounting platform

- Find the receipts in the accounting platform!