

Your Shoeboxed Implementation Checklist!

Set up your Trial Client

- Update the Trial Account Name via the Pro Partner Portal:
<http://www.shoeboxed.com.au/pplogin>
- Update the postal address for the trial account
- Set the submission email address for the account

Communicate! Let your client know you're using Shoeboxed!

- Draft an email / letter or phone script - ask us for ideas or templates if you like!
- Send your client a written advice explaining that you're using Shoeboxed in your practice
- Give him 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 he'll be receiving his magic envelopes

Send out the first Magic Envelopes

- Go into your client's account, and go to Manage Envelopes
- Send out the first batch of envelopes manually - once received the next will be automatic
- Check back with your client in 5 days to make sure he received his envelope
- Confirm with your client that his first Magic Envelope has been sent off to Shoeboxed

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

- Go into your client's account and remove the default tax categories (settings / international settings)
- 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 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 Shoeboxed 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 - call your Practice Improvement Manager for tips and ideas!
- 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!
- When all receipts are coded (as required) export the receipts to the accounting platform
- Work in the client's account as per usual - and talk to your practice improvement manager if you need to adjust any of your systems or processes