

# ACCTIVATE Onboarding

A dedicated **Acctivate specialist** will help you meet your **planned Go Live date within 90 days**. Your Acctivate specialist will **create** and **configure** your Acctivate company remotely while assisting in your **education** of how to operate and optimize your software.



## Acctivate Onboarding includes...

### A dedicated Acctivate Specialist for the first 90 days

Your 90 Day period begins at the interview call, typically within 30 days of purchase, with a timeline to Go Live within 60 Days, along with 30 days of Post-Live Onboarding support. Additional Onboarding time may be acquired for an additional fee.



### Scheduled Weekly Calls with your Acctivate Specialist

Calls should be scheduled at least once a week during Onboarding. Call schedule subject to change based on your specific needs.

### Company Creation & Configuration

Your Acctivate Specialist will create an Acctivate Model Company for learning purposes by taking a snapshot of your live QuickBooks file. When it's time, your Acctivate Specialist will create & configure your live Acctivate company.



### Form & Document Personalization

Your Acctivate Specialist will personalize your forms and documents with your company branding and formatting preferences. Custom reports are not included.