

Onboarding Instructions

Welcome to the Book Werkz Family! We are so excited to partner with you!

Let's get started! Email Hillary@BookWerkz.com with your desired start date. We will send you a proposal to sign electronically.

Grant Accountant Access in QuickBooks Online. Find the gear in the top right corner. Click on Manage Users. Choose Accountant User. Enter Hillary@BookWerkz.com.

Grant AxisCare access by emailing Sam Hamilton (sam.h@amadaseniorcare.com).

Create a View-Only user for each of your Bank and/or Credit Card Accounts. This process varies for each financial institution. We can assist you in setting this up for most major banks. If given the option to choose a username, use BookWerkzAFIXXX where XXX represents your franchise number. The email associated with the account will be Hillary@BookWerkz.com. Some banks and credit cards do not support this feature.

Contact your payroll provider and request an accountant user be created. If given the option to choose a username, use BookWerkzAFIXXX where XXX represents your franchise number. The email associated with the account will be Hillary@BookWerkz.com

Please reach out to us if you have any questions about the steps above.