

# How The Moving You Online Process Works

1



Get Background  
Details

2



Go Proposal

3



Set up **QBO**

4



Set up **RB**

8



**QBO** Set up  
Auto  
Reporting

7



**QBO** Connect  
up Bank  
Accounts

6



**QBO** 90 Min  
Online  
Training

5



**RB**: 30 sec  
intro video

9



**RB** Fetch

10



Check in

**We Move  
Alongside You**

## **1 Background Details**

- Type of business you run
- Vat Registered
- Export/Import activities
- Employee Numbers?
- Number of users needed

## **2 Go Proposal**

- Fee Investment proposal to check out
- Includes QBO & RB subscription fees and ongoing support

## **3 Set Up QBO**

- Design your program so you are happy
- Email and text you the apps to Download

## **4 Set Up RB**

- Design Your program
- Integrate it with QBO
- Supplier programming
- Dedicated Email Address for bill forwarding
- Accepts Purchases and Sales photos

## **5 RB: 30 Sec Video**

- Simultaneous to RB Set Up
- Email and Text you a 90 second video on how to set your p/w and enter bills and sales

## **6 90 Min Online Training**

- Using Zoom, we get you going

## **7 Connect Bank Accounts**

- We do not access your bank accounts
- Your bank send over daily details of bank accounts lodgements and pay outs
- No bank statements needed any more

## **8 Set Up Auto Reporting**

- Daily, Weekly or Monthly Info is designed to be emailed to you routinely
- You decide what you want

## **9 Fetch**

- Give RB your UN and PW for websites that don't send out bills
- EFlow, Electric Ireland, Eir, Three.... (3000 companies)
- Program auto enters them to RB

## **10 Check In**

- We check in every quarter to ensure all running smoothly
- Answer and resolve any issues