XBert

AI Powered Work Intelligence

Fast Track Onboarding Program

What to Expect

Understanding your goals

The first step in our Fast Track program is to understand your goals for integrating XBert into your technology/application stack.

You might want to grow your business through new clients or service those you have more effectively and easily. Reducing complexity and saving time might be more important - perhaps enabling a greater focus on delivering advisory and other high-end services to your clients.

Your goals might be different of course, and once we understand them, they are an important reference point to look back on as the program progresses, and we make decisions on how to best configure XBert.

In this packet you'll find

- Customer Onboarding Form
  - Kindly fill out and submit back to us before your first session. We'll review your answers together on your first call
- Getting started with Fast Track guide
- An outline of the Fast Track Sessions and agenda
- Links to help documentation and other resources

Getting started with fast track

Step		Instructions	Related Articles
1	Connect Client Files	Add as many client files as you can (the more the merrier). Click here to connect client files	**How to:** Add client files Bulk Import Clients
2	Invite your team to XBert	Get the conversation going about implementing XBert in your practice, get your team ready to work in XBert. Click here to invite your team	**How to:** Invite Team Members
3	Create and customise roles	Rename and/or create role names specific to your practice and your team, make it personal. Click here to set up your roles	**How to:** Add custom roles
4	Go through processes and statuses	What kind of processes outside of the templates do you use on a day-to-day basis and would like to see in your XBert? Go through the processes and statuses to tailor it specific to you! Click here to set up processes Click here to set up statuses	**How to:** Create Custom Processes Add your custom statuses
5	Review the Data Quality of your Client Files in Client Insights	This section of your XBert account is a powerful tool providing you with quick snapshots to understand your firm's setup, efficiency, and client activity. Click here to review the data quality of your client files!	**Overview:** Client Insights
6	Resolve XBerts found in your clients files!	If supported, an Auto Resolve button enables you to fix an XBert alert directly within XBert. Click here to go to your work list and check out any XBerts that have been triggered.	**Overview:** XBerts Custom XBerts using XI
7	Build out your client role board	Assign roles for smooth workflow. Delegate tasks. Fast-track your experience! Click here to build out your role board	**Overview:** Roles **How to:** Assign Roles

Session Outlines

There will be a total of four one hour sessions. They will be conducted over Microsoft Teams, each session will be recorded and a share link will be sent to you via email after every session.

Session 1
XBert Configuration
1 hour

Session 2
Workflow Implementation
1 hour

Session 3
Custom XBerts & Analytics
1 hour

Session 4
Training
1 hour

Session 5
Post-Fast Track Review
30 mins

Prework for Sessions 1 & 2

To get the most out of your first and second session, we recommend that you start by mapping out all the processes and recurring tasks you currently handle for your clients.

For example, if you manage payroll, this is a great opportunity to create standardised tasks and set up schedules to automate these processes at your chosen frequency.

One task can have multiple schedules, allowing you to manage all your weekly, fortnightly, and monthly payroll clients under a single task. XBert will handle the rest, generating tasks on the specified day and recurring frequency.

This will enable us to configure them in your account during the session, ensuring everything is set up to match your specific workflow.

Your implementation manager will be sharing their screen during the session. If possible, we recommend following along on your own screen to help you get familiar with the interface.

XBert Configuration

Our first Fast-Track session will kick off with a discussion to tailor XBert to your firm's and clients' goals. We'll then dive into setting up XBert to meet your specific needs.

During this session, we'll focus on reviewing and configuring your XBert Settings. Including Statuses, and Roles. These settings are flexible, so don't hesitate to experiment by adding or renaming them as needed, you can always make adjustments later. Based on your firm's goals and requirements, we'll explore how XBert can be leveraged to meet your specific needs. This could include showcasing features like AI Audit XBerts, Workflow and Capacity Management, or Analytics. For instance:

Data Quality
- A summary of the automated data quality checks that XBert runs across your accounting data every day.

Estimate Accuracy
- Across clients, review estimated vs. actual time by staff, processes and work items. Discover work that is over vs. within estimates.

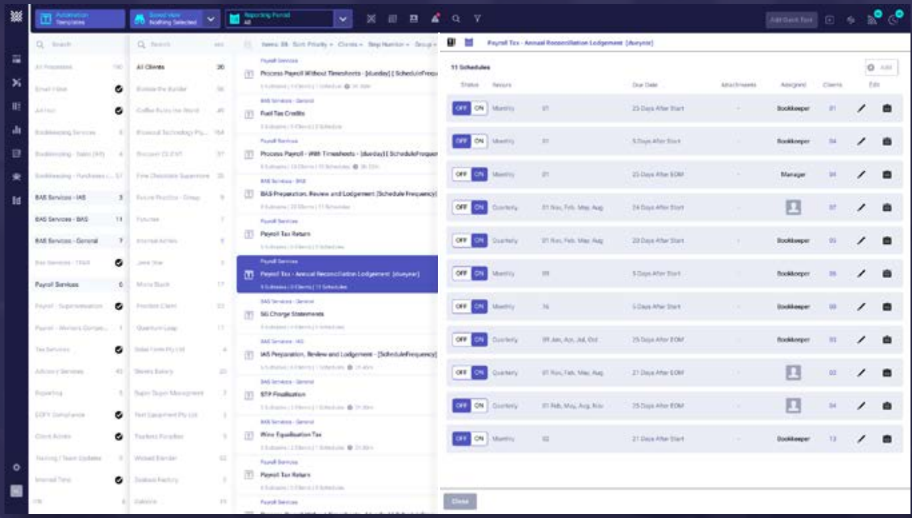
Session 2

Implementing Workflow

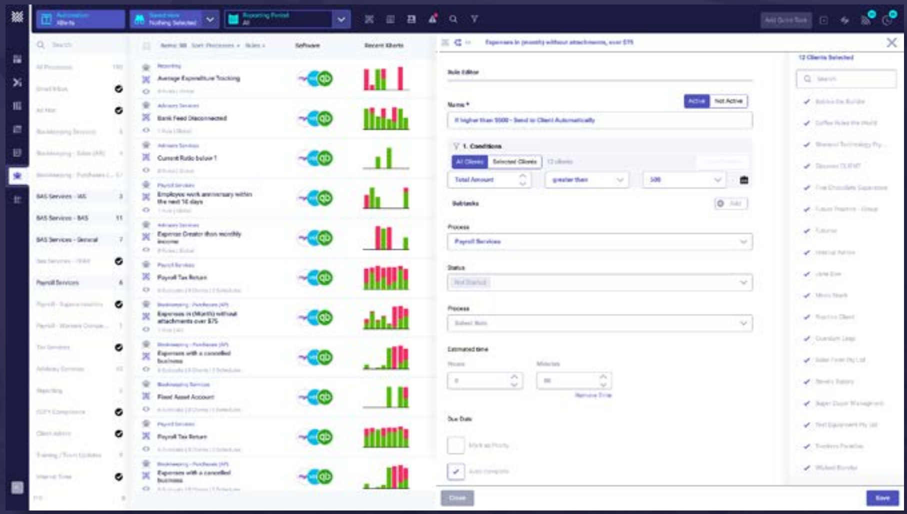
For the second session, we aim to have the majority of your processes and recurring tasks added to XBert. This will allow you and your implementation manager to review the setup together, ensuring everything is correctly configured and tailored to your needs.

We'll also review the XBerts that have been generated for your connected client files. You may find that the current alert thresholds differ from your preferences. You can adjust these by modifying the XBert Rules, setting specific Conditions and Actions. Rules can be tailored to modify your XBerts based on various fields, either across your practice or for individual clients.

We'll dive deeper into this in Session Three.



XBert template schedules



XBert automation rules

Prework for Session 3

To make the most of our AI Audit XBerts, please review any XBerts that have been generated for your connected client files. Organise these by Reporting Month or Year and use the filter to view only XBerts in your Work Board.

Take note of any XBerts that you expect to see for one or more clients but aren't currently visible. We can create custom XBerts to meet these needs. Also, if there are XBerts you prefer not to be notified about, we can adjust the rules by adding conditions and actions.

In addition, think about the types of reporting and analytics you'd like to review. This includes any specific data insights or team performance metrics that would be useful for your practice. We'll explore these reporting options in detail during the session.

Custom XBerts & Analytics

In this session, we will start by reviewing and adjusting your existing XBerts, including examining those generated for connected client files and discussing any additional XBerts you might need. We'll then proceed to create and configure Custom XBerts, setting up rules and conditions for notifications and alerts as required.

Additionally, we will explore and review the current reporting options and analytics in XBert, discussing specific data insights and performance metrics you want to track.

Prework for Session 4

If you have additional team members, we need to ensure they are invited as a Connect User and have the correct client file permissions in XBert.

They should also be assigned the relevant Client Roles for their responsibilities. We recommend inviting your team members to this session so we can ensure everyone is set up correctly and can make the most of XBert's features.

XBert Training

In the fourth session, we will focus on training for you and your team. We'll begin by ensuring that all additional team members are properly invited as Connect Users and have the correct client file permissions in XBert. We'll also assign the necessary Client Roles to each team member based on their responsibilities.

This session is an opportunity for your team to get hands-on experience and ask any questions they might have, so we recommend having everyone attend to ensure a smooth transition and effective use of XBert's features.

Session 5

Post Fast Track Review

In this final session, we'll wrap up your Fast Track program and go over best practices moving forward. Typically this session takes place a couple of weeks after the completion of session four.

Your account manager will also be joining to ensure ongoing success.

XBert Support

Self Implementation Course - This course is an interactive, step-by-step guide to get you and your practice set up for success using XBert.

If you need any assistance, please use Chat with us in your XBert Menu or reach out to a member of our team!

Need extra help? Not a problem.

Open your profile settings menu and click the "Chat" or the "Help and Support" while in XBert.