

AccountingSuite™ CUSTOMIZATION PROCESS

1

Pre-Customization Agreement Form



Please fill out **the pre-customization form** (this should only take you 1 minute) so that we can send you the customization agreement.

2

Customization Agreement



Before we have our Discovery Call, we need you to sign our customization agreement. This does not obligate you to work with us, but it does allow us both the freedom and protection to share information with each other. This will arrive in your inbox and requires e-signature.

3

Discovery Call



This 45-minute Zoom call will include developers from our team and may require screen-sharing and document exchange.

4

Business Requirements



After our discovery call, our team will review and send over business requirements to map out the entire customization build. Once you receive this from us you will be able to request changes or approve.

5

Statement of Work & Quote



We will email you over a statement of work and quote. This is a contract and will require e-signature.

6

Bill for 50% of Customization



We will send you an invoice for 50% of the customization build upfront and once the invoice is paid, we will start the development.

7

Development & User Acceptance Testing



We will notify you once development is complete & provide instructions to User Acceptance Testing (UAT)

8

Bill for Remaining 50% of Customization



When the UAT is complete we will send you an invoice for the remaining 50% and then once payment is recieved, we will move your customization into live production.

9

User Acceptance Agreement



Once your customization is moved to production, we will send your user acceptance agreement. When you sign this, you are saying that the customization is working as expected & the customization is complete.

10

Testimonial



Your feedback matters to us and we would love to publish your testimonial on our website!

Please complete this quick questionnaire. This should only take you 5 minutes. Thank you so much for your business, AccountingSuite™ Customization Team

