



VALENTIS

accountants, tax & business advisors



Your Journey



Our Onboard Process

Info Gathering

Before we can start work, we need bits of information from you to get you set up on our systems.
<https://www.valentis.co.uk/the-valentis-approach>

Step
1



Transferring To Us

Once you've let your previous accountant know we are taking over, we'll contact them for connecting information. We can't strictly take over till we've heard from them.

Step
2



Setting You Up

Once we've got everything from you and your previous accountants, we will be quietly getting you up and running on our systems, so that we can manage your work and deadline for you.

Step
3



Step
4

The Magic

OK, we're ready to get you up and running on Xero and Receipt Bank! Now we can really get started!

Checking In

We are not done! We will keep checking in with you to see how you're doing, and you're ready for more apps and automations.

Step
5

