

# Accounting Seed

## GETTING STARTED GUIDE

### Get Started with Accounting Seed

Welcome to Accounting Seed! We're excited to have you join our customer family. To help you get started smoothly, we've created this **10-step Getting Started Guide** to support you throughout your onboarding journey, ensuring you gain confidence and maximize the value of Accounting Seed from day one.

Let's introduce you to the key Learning Resources you'll find throughout this guide:



Accounting Seed Website



Accounting Seed Copilot



E-learning



Knowledge Base



Support



Webinars

### Step 1

#### Install & Logging into Accounting Seed

First things, first! Let's get you logged in and Accounting Seed installed. Your Salesforce system administrator will create your Salesforce login, which you'll use to access Accounting Seed. Once that's complete, your system admin can utilize the resources below to install the app, assign licenses and establish permissions for users.

#### Resource Guide

##### **Accounting Seed Website**

The Accounting Seed website is your go-to hub for product info, best practices, and guides.

##### **Accounting Seed Copilot**

Your friendly in-app AI assistant for quick answers, help articles, and guided how-to's.

##### **E-Learning (coming soon)**

Self-paced, in-depth learning modules to help you master the system, taken at your own pace.

##### **Knowledge Base**

A treasure trove of help articles covering every aspect of Accounting Seed.

##### **Support**

Support portal is your go-to resource to submit cases, chat with Support, and access additional resources.

##### **Webinars**

Join expert lead sessions that cover a range of topics from product how-to's, live Q&A's and industry specific insights.

If you're working with an Implementation Consultant, no sweat, they've got you covered. Lean on them to help you through this step.



[Accounting Seed Implementation Best Practices](#)



[Product Installation Links](#)



[Releases](#)



[Install Accounting Seed](#)

Great! Now that you're installed and have access to the Accounting Seed app, just a few more steps to finalize getting your app setup and ready to go! Follow the steps below to send your organization ID to our team so that we can finalize the install on our end.



[Locate Your Organization ID](#)



[Connect with Accounting Seed Support](#)



[Grant Access to Accounting Seed Support](#)

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## Step 2

### Meet your Accounting Seed Team in the Welcome Call

Welcome! Your Accounting Seed team is looking forward to meeting you and getting you rolling! Shortly after your organization has signed on with Accounting Seed, you'll receive an email from our Implementation Program Manager and your designated Customer Engagement Manager inviting you to a Welcome Call. This is your chance to meet your team, learn about the onboarding process, and ask any questions you may have.

*(P.S. This call is separate from your Kick-off call that will be planned with your Implementation Consultant.)*

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## Step 3

### Explore Learning Resources & Support

We know that being successful in Accounting Seed means making sure you have plenty of Learning Resources available to support you throughout your journey with Accounting Seed.



The first place to start is accessing the **Support Portal**. The Support Portal is where you can submit and track cases, schedule a 30-min call with our product experts, as well as access additional resources. After your Welcome Call, you'll receive an email to set up a password to access the Support Portal. Use the link from the email to login and update your password. When you need to submit a case post implementation, you'll want to grant Accounting Seed's support team temporary access to your app so that they can further troubleshoot the issue. Use the articles below to help you locate your organization ID and grant access. If a new user on your team needs access to the Support Portal, please reach out to your Customer Engagement Manager for help and they will work with you to set up the new user.



[Contacting Support](#)



[Support Portal registration](#)



[Support Portal link](#)



[Grant Access to Accounting Seed Support](#)



[Locate Your Organization ID](#)

Help right where you need it – meet **Accounting Seed Copilot** – your in-app, AI assistant. Accounting Seed Copilot offers real-time assistance, step-by-step walkthroughs, and instant answers to your questions all without having to leave the app. Click on the book icon in the right-hand corner of your Accounting Seed app to get started! Curious and want to learn more about Copilot's features? Explore the article and webinar below.



[Copilot your in-app AI tool](#)



[Accounting Seed Copilot](#)



[Meet Accounting Seed Copilot](#)

Next, let's take a look around the **Learning Library**. Here you'll find a wealth of resources, including guides, webinars, and e-learnings, to help you jump in and start your learning path with the Accounting Seed app.



[Learning Library](#)

All the help articles you could ever need! Check out the **Knowledge Base**. Here you can search by topics and discover articles to help you through workflows, product customizations, troubleshooting and more.



[Knowledge Base](#)



Stay in the know with all things happening at Accounting Seed. Sign up for our **Bloom** newsletter below.




[Bloom Newsletter Signup](#)

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## Step 4

### Get Started with Accounting Seed

Now the fun part! Let's Get Started with exploring your Accounting Seed app. Choose an option that works best for you:

 Let Copilot take you on a tour of the homepage, select the *Accounting Home - Guided How-To* from the Copilot app in Accounting Seed.

 [Getting Started with Accounting Seed](#)

 [Introduction to Features](#)


 [Navigation Overview](#)

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## Step 5

### Setup & Configurations

Now that you're feeling comfortable navigating Accounting Seed and accessing the Learning Resources, let's dive into the world of Setup and Configuration in the app. Your Implementation Consultant will do most of the heavy lifting getting your app setup and data imported. To help you get more familiar with what you'll be working on in this step, check out some of the resources below.

 [Setup & Configuration Series – Part 1](#)  
[Setup & Configuration Series – Part 2](#)


 [Setup Checklist](#)

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## Step 6

### Billings Accounts Receivables

Let's talk about receivables! Here's how to process customer payments using the Billings component in Accounting Seed.

 Use Copilot's Guided How-to, to walk you through creating your first Billings. From any Billings list view, open Copilot and select *Create a Billing – Guided How-To*.





[Master Billings in Accounting Seed Series – Part 1](#)  
[Master Billings in Accounting Seed Series – Part 2](#)



[Cash In – Feature Overview](#)



[Create a New Customer](#)



[Create or Clone a Billing](#)

PRO TIP: SAVE TIME AND MONEY WITH AR AUTOMATION—FULLY AUTOMATE CUSTOMER PAYMENTS FOR A SMOOTHER PROCESS! CHECK OUT A [DEMO HERE](#).

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## Step 7

### Accounts Payables

Now that we've mastered processing receivables, let's dive into outgoing payments with Payables.



Use Copilot's Guided How-to feature, to walk you through creating your first Payable. From any Payables list view, open Copilot and select *Create a Payable – Guided How-To*.



[Processing Payables in Accounting Seed Series \(coming soon\)](#)



[Cash Out Features Overview](#)



[Create a New Vendor](#)



[Create or Clone a Payable](#)

TIME-SAVER ALERT: CHECK OUT AP AUTOMATION TO CUT DOWN ON MANUAL DATA ENTRY. FIND OUT MORE [HERE](#).

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## Step 8

### Journal Entries

Journal Entries are a key part of managing your finances. Here's how to handle them like a pro.



Let Copilot's Guided How-to feature help you create your first Journal Entry. From any Journal Entry list view, open Copilot and select *Create a Journal Entry – Guided How-To*.



[Ledger & Banking Overview](#)



[Create or Clone a Journal Entry](#)



[Create Recurring Journal Entries](#)

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## Step 9

### Banking

We're almost there... now that we've walked through each of the main functions of Accounting Seed, the next step is to connect your bank account and reconcile your transactions!



[Banking Direct Connect](#)



[Bank Reconciliation Configuration](#)



[Create a Bank Reconciliation](#)

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## Step 10

### Reporting & Dashboards

Last step, phew — analyzing and reporting on your financial data!



[Reporting Map](#)



[Financial Standard Reporting](#)



[Management Reports & Dashboards](#)



[Reporting Series \(coming soon\)](#)

## Congratulations! You Did it!

You've completed the 10-step Getting Started Guide and are now ready to make the most of Accounting Seed. If you ever need help, revisit the [Learning Library](#), reach out to [Support](#), or chat with [Copilot](#) in your Accounting Seed app for on-the-spot assistance.

Welcome to the Accounting Seed family—happy accounting!

