

# THE BUDDY BOOKKEEPING SOLUTIONS DIFFERENCE

TAILORED  
OPTIONS FOR  
YOUR  
BUSINESS

## WHY CHOOSE BBS?

- ✓ EXPERIENCE WITH BOTH MYOB AND XERO
- ✓ MYOB CERTIFIED PARTNER STATUS
- ✓ PROFESSIONAL INDEMNITY INSURANCE
- ✓ EXPERIENCE IN SMALL BUSINESS BOOKKEEPING

BBS MAKES IT  
SIMPLE AND  
TRANSPARENT

## HOW DOES THE BSS PROCESS WORK?

### STEP 1

#### Initial Assessment

Every new client begins with...

- ✓ Consultation to discuss your requirements
- ✓ Clarification of responsibilities between the client, Bookkeeper, BAS and Tax Agent/s
- ✓ A review of current bookkeeping processes
- ✓ Identification of backlog or compliance risks
- ✓ A structured onboarding questionnaire

### STEP 3

#### System Set Up / Review

Now the foundation can be set...

- ✓ Your bookkeeping software is set-up or current software reviewed for compliance
- ✓ Bank Feeds, Payroll & Superannuation requirements and settings are set-up or reviewed
- ✓ Any compliance issues are raised and discussed for rectification
- ✓ A clear foundation is set to build regular, reliable bookkeeping
- ✓ BAS Agent reviews all set-ups and ensures GST settings align with your requirements
- ✓ Connection established with your Accountant / Tax Agent

### STEP 5

#### Ongoing Communication

When regular work is done, it's not the end!

- ✓ Your compliance is constantly reviewed between bookkeeping periods
- ✓ Nothing out of scope is completed without clear pricing and your approval
- ✓ Ongoing communication with your Accountant / Tax Agent, not just at Tax Time!

### STEP 2

#### Scope & Engagement

A clear scope and engagement is set...

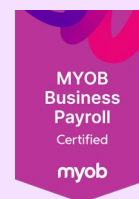
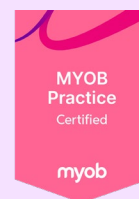
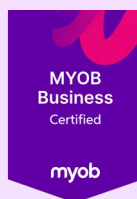
- ✓ Identity checks are performed
- ✓ Your questionnaire is reviewed
- ✓ Queries are clarified early in the process
- ✓ A Welcome Pack is issued for your approval including an engagement agreement and a formal estimate
- ✓ The scope of services are set in place
- ✓ Collaboration is established with our BAS Agent to ensure compliance and raise any concerns early in the process
- ✓ Bookkeeping does not begin until you are satisfied

### STEP 4

#### Regular Work Commencement

The Bookkeeping can begin!

- ✓ Your work is scheduled as per your scope of services in your agreement
- ✓ Communication given regarding your schedule and clarification of any additional queries or documents required
- ✓ Work commences and any queries for clarification are collated for your review
- ✓ Regular communication regarding work progress / completion
- ✓ BAS Agent reviews all work and you are sent approval documents before lodgement/s



BUDDY BOOKKEEPING SOLUTIONS

HELPING YOU GET BACK TO BUSINESS