White-Label Bookkeeping Setup Guide

For CPA and Bookkeeping Firms

Overview

This guide outlines everything you need to start offering white-label bookkeeping through RemoteBooksOnline. Whether you're a CPA firm, accounting firm, or solo bookkeeper, our private-label service helps you expand without hiring or managing staff.

1. What's Included in Our White-Label Service

- Bookkeeping performed under your firm's name
- Access to our secure white-label portal
- Custom CRM for client document uploads
- Monthly reports delivered with your branding
- U.S.-timezone aligned communication
- Dedicated bookkeeping team assigned to your firm
- Catch-up, monthly, and year-end cleanup available

2. Initial Setup Requirements

- Firm logo (PNG format, high resolution)
- List of services to offer under your brand
- Primary contact email (for client-facing notifications)
- Optional: Custom domain (e.g. portal.yourfirm.com)
- Whitelisted email addresses for your internal team
- Basic firm info for inclusion in client report footers

3. CRM and Portal Setup

- Set up a shared intake form link or login area
- Verify your firm’s admin login
- Configure client invitation email copy
- Assign default report delivery method (email, portal, or both)
- Test document upload and bank statement workflow

4. Security and Compliance

- All data is handled under SOC 2-compliant processes
- Client logins are IP-restricted and encrypted
- MFA is available on request
- No client documents are stored locally
- Your firm remains the face of all client communication

5. Onboarding Your First Clients

- Submit client list (or start with one)
- Provide prior bookkeeping records (if available)
- Share current QuickBooks or accounting file access
- Determine monthly or catch-up scope
- Assign internal point of contact at your firm

6. Timeline and Support

- CRM and branding setup: 2–3 business days
- First client onboarding: 3–5 business days
- Dedicated support channel available via Slack, Zoom, or email
- Monthly reports reviewed internally before release
- No minimum client volume required

Need Help?

We’re happy to walk your firm through onboarding via live call or recorded training session.