



## Welcome to Qvinci!

### Here's a checklist to help you get started.

We're thrilled you added Qvinci's automated report styling, templating, publishing and workflow management capabilities to your tech stack. You're now able to provide all clients with reporting packages in less than 3 minutes per client.

## 1 Explore Qvinci Solo

- View a [Solutions Video](#) to learn more about Qvinci Solo
- Take a [test drive](#) and see how accountants are solving their client's advanced reporting, workflow and BI needs.
- Explore [sample reports](#) and see how Qvinci's JumpStart Gallery allows accountants to automate and eliminate time-consuming tasks
- Validate Qvinci Solo using numbers and facts with [Qvinci Solo's ROI Calculator](#)
- Since Qvinci Solo can only be purchased through QBOA, explore QBOA to see how to [choose and purchase Qvinci Solo](#)

## 2 Set Up and Manage your Qvinci Solo Account

- [Configure a Qvinci Solo account](#) from inside QBOA
- Return to your QBOA account to [set up more clients](#) and begin custom reporting and managing through the Qvinci Solo portal
- [Provision Unlimited Users](#) in Qvinci Solo so that each user may run their own reports or utilize reports you have shared with them
- [Create Custom Account Groupings](#) using Qvinci's Standard Chart of Accounts (SCoA) feature, which allows for automated reporting (per client) to be configured based on a custom Chart of Accounts (CoA)

## 3 Explore Qvinci Solo's Advanced Custom Reporting Tools

- Visit [Reports & Libraries](#) for help with the advanced report editing, styling, templating, and publishing capabilities
- [Download](#) the JumpStart Package to see FREE report samples
- [Style and Customize Reports](#) with your own logo, firm information, cover page, and more
- [Create and Template a Custom Reporting Package](#) - then share with your clients! Build it once and use it forever!

## 4 Learn More About Qvinci Solo

- Visit the [Qvinci Solo Knowledgebase](#) and explore additional helpful articles
- Need help with custom report building? We can teach you or build it for you at an additional charge. [Contact Qvinci Support](#) for any assistance
- Learn how the Qvinci Solo [Portal](#) allows accountants to see a user configurable dashboard layout across all their QBO clients
- Register for a [FREE Best Practices Webinar](#) held weekly to hear how other accountants are using the Qvinci solutions

## HAVE A QUESTION?

Contact our dedicated Qvinci Customer Success Team, available when you need them via email at [support@qvinci.com](mailto:support@qvinci.com), chat at [www.qvinci.com/support](http://www.qvinci.com/support) or phone at (512) 637-7337, Ext. 1.