



FAQs

Q: How do I get my clients started with OnBalance Express?

A: You can get your clients started by sending them a registration email through Accounting CS®. Once your client successfully registers for an account, their data will automatically be connected with your Accounting CS software. Your client can access their data on our mobile app or by visiting onbalance.tr.com. The app is available in the **Apple® App Store** or the **Google Play™ Store**. The client must register for OnBalance Express via the accountant's invitation before downloading and signing into the OnBalance mobile app.

Q: What type of client is OnBalance Express best suited for?

A: OnBalance Express is designed for entrepreneurs who don't have employees. Professionals like tutors, consultants, plumbers, contractors, landscapers, builders, home or child care providers, florists, and caterers — to name a few — would benefit from OnBalance Express.

Q: Does the mobile app or the website provide the best experience with OnBalance Express?

A: The website and the mobile app both provide a great experience. The mobile app also allows for automatic mileage tracking and OCR receipt tracking.

Q: Can small businesses link their bank accounts with OnBalance Express to record transactions?

A: Yes, OnBalance Express allows a company to link their bank accounts to easily record transactions.

Q: How much does OnBalance Express cost?

A: OnBalance Express is currently available at \$10/month per company, billed to the accountant.

Q: Is OnBalance an online application or is a software download necessary?

A: OnBalance Express is available as a mobile app or through your internet browser, so there are no downloads or software installations needed.

Q: What are the system requirements?

A: To use OnBalance Express, a high-speed internet connection or a cellular data connection is required. Safari®, Google Chrome, Microsoft® Internet Explorer, Microsoft Edge, and Mozilla® Firefox® are all supported browsers

Q: How do my clients get access to technical product support?

A: OnBalance Express is supported through the **OnBalance Help & How-To Center**, an online portal that includes resources that your clients need to manage their OnBalance Express. Through the **CS Professional Suite® Help & How-To Center**, you can find detailed instructions on client setup, data imports to Accounting CS, and how to help your clients use OnBalance. For additional questions or suggestions about the application, your clients can complete the feedback form within the OnBalance app once they are registered for an account.

Q: What if my clients need more functionality than what is available?

A: We're working on adding additional features and capabilities. Stay tuned as additional functionality is released. We'll communicate that as it becomes available.

Q: I don't use Accounting CS, but I have clients that could benefit from using OnBalance Express. How do I proceed?

A: Currently, OnBalance Express is only available to accountants who use Accounting CS. However, OnBalance Self-Employed is currently available whether or not you own any CS Professional Suite products.

Q: How does using OnBalance Express benefit my firm?

A: Upon invitation to use OnBalance Express, your clients will automatically be connected with you so you can import their data at any time with Accounting CS. The integration with Accounting CS is seamless, so no bridge or additional applications are needed to gather data. You can simply populate their transactions into Accounting CS.

Q: Are there video tutorials on how to get started using OnBalance Express?

A: Video tutorials are currently being recorded and will be posted in the Help & How-To Center once complete.

Q: Is there a contract required to use the app?

A: There is no contract required to use OnBalance Express. However, you will need to agree to the billing terms associated with OnBalance Express since there is a cost to the accountant for each of their clients using OnBalance Express. OnBalance Express can be cancelled at any time.

Q: How can my small business clients accept online payments?

A: OnBalance Express users can send their clients invoices and accept payments by using the built-in Stripe™ integration.

Q: Do I have to register with Stripe to utilize online payments?

A: Yes, you have to sign a merchant agreement with Stripe to utilize online payments.

Q: Can I accept ACH payments?

A: At this time, only credit card payments are accepted.

Q: How can I upgrade from OnBalance Self-Employed to OnBalance Express?

A: At this time you cannot upgrade from OnBalance Self-Employed to OnBalance Express. If you want to use OnBalance Express, you must be invited through Accounting CS and create a new account.

Discover OnBalance Express

The OnBalance mobile app is available for download via the **Apple and Google** stores.

Note: A user must sign up for OnBalance Express via an invitation from their accountant before they can download and sign in to the mobile app.