

Freshify™ Frequently asked questions

Is JFH Consulting LLC and Freshify™ a part of Freshbooks®?

No. Freshify™ is a product of JFH Consulting LLC and is not controlled or owned by Freshbooks®.

How does Freshify™ provide the right bookkeeping for my business?

The team of Freshify™ bookkeepers includes professionals with experience in a wide range of industries. During the onboarding process, we try to match you with a primary bookkeeper who has experience in your industry. If that isn't possible, we try to make sure that a member of the online bookkeeping team has the experience necessary to handle industry-specific questions that you may have.

How does Freshify™ access my Freshbooks® data?

Freshify™ will access your businesses books via Freshbooks® after you invite JFH Consulting LLC as an accountant user. Your JFH Consulting LLC representative will provide the email address where you will send your invitation.

What qualifications does my bookkeeper have?

Bookkeeper qualifications include:

- At least one of the following:
 - Active Certified Public Accountant
 - Active Certified Public Bookkeeper
 - Bachelor's degree in Accounting/Finance
 - Expertise in accounting, finance, or bookkeeping.
 - Minimum one year of experience working with Freshbooks Online

What's included in Freshify™?

Freshify™ can include one optional and two ongoing service phases: Phase 1) Freshify™ Prior Period Add-On(optional), phase 2) ongoing bookkeeping, and phase 3) month-end close.

- In the Freshify™ Prior Period Add-On phase, if needed, your bookkeeper helps you set up your chart of accounts, connect your banks, and teach you the basics of the Freshbooks® platform. If you have information in Freshbooks® already, your bookkeeper will help you create a plan to review and adjust the setup, the existing data, and practices that you choose to deploy in your business.
- As part of ongoing bookkeeping, your bookkeeper helps to categorize your transactions following your established practices and reconciles your accounts each month.
- At the end of each month, your bookkeeper closes your books and confirms they're accurate by preparing a trial balance. Copies of key financial reports, including your

profit and loss statement and balance sheet, are then available for review directly within Freshbooks.

What's not included in Freshify™?

Freshify™ doesn't include sending invoices, paying bills, or management of inventory, accounts receivable, or accounts payable. The service doesn't include financial advisory services, tax advice, facilitating the filing of income or sales tax returns, creating or sending 1099s, or management of payroll. Freshbooks® conveniently offers Gusto payroll service integration for an additional cost. If you're interested in this additional service, please ask your JFH Consulting LLC representative about possible discounts when bundling services, or for unbeatable introductory offers. Your JFH Consulting representative can also recommend other payroll options that could better suit your business needs.

How much time do I get with my bookkeeper each month?

There's no set amount of time you get per month. Small businesses often schedule video appointments once or twice per month to discuss questions and to review month-end results. You're limited to one scheduled appointment at a time and appointments have to work within your bookkeeper's schedule. Communications that are available any time include document sharing and live chat with a member of your bookkeeper's extended team.

There's no contract, correct?

That's right. There's no contract or commitment. You're free to switch plans or cancel any time.