



## moneyXplier® New Subscriber / Company Owner Onboarding Guide

- ***For incoming organisation owners following a transfer of ownership -***

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### **Step 1: Accept subscription / company ownership**

You'll receive confirmation from Support. To verify:

- Log in to your moneyXplier® account.
- Navigate to Company Settings → My Companies and look for the company name. Your name should appear next to the company name.
- Ensure your role is listed as "Subscriber".
- If you are still marked as an Admin, or if you are unable to see your name, please contact support@bmim.co.uk to complete the transfer.

### **Step 2: Set up your subscription (if the current billing cycle is due to expire)**

The previous owner's subscription will not renew automatically. To activate your own subscription:

***Go to Company Settings → Billing → Current Plan → Manage Subscriptions***

Follow the on-screen prompts to complete payment

💡 Your billing cycle starts fresh from your subscription date.

### **Step 3: Update billing contact details**

To ensure accurate invoices and tax records:

***Go to Company Settings → find the company you are looking for and click edit***

Update the:

- Billing contact name
- Company name and VAT number (if applicable)

### **Step 4: Review & Customise company settings**

With subscription / ownership transferred, we recommend:



### ***Manage Your Team***

- Add/remove users via Company Settings → Manage Users

### ***Review Financial Data***

- Review cash flow reports, Dashboard and financials

### ***Assign Key Roles***

- Set yourself or your finance lead as the main support contact

### ***Plan to upgrade, change plans***

- Plan upgrades/changes are done via Company Settings → Billing History

### **Step 5: Contact Support If Needed**

Reach out to [support@bmim.co.uk](mailto:support@bmim.co.uk) if you:

- Are unable to see copies of past invoices
- Any other issues you may encounter.

### ***You're All Set***

You're now fully set up as the Subscriber / Company Owner in moneyXplier®. You have full control over:

- Team & user access
- Billing and subscriptions
- Financial data and tools
- Dashboards and Reports

Welcome aboard — and if you need any help, our support team is here to assist.

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