

Getting Set Up in Mighty: Your Onboarding Checklist

Onboarding

Last updated 5 October 2026

Welcome to Mighty! Before we can start managing your bookkeeping, tax and compliance, there are a few things we need from you. This guide walks you through everything on your side, step by step. Most of it takes less than 15 minutes in total.

1. Clear Your Onboarding Tasks

When you log in, your Dashboard shows a card called **Onboarding tasks**. This lists the details we still need from you, such as:

- VAT Registration Number
- Government Gateway ID
- Government Gateway Password
- Companies House Authentication Code
- Corporation Tax UTR
- Employer PAYE Reference Number
- Employer PAYE Office Number
- Employer Accounts Office Reference

What to do:

1. Go to your **Dashboard**.
2. Find the **Onboarding tasks** panel on the right.
3. Click each item and enter the requested information.

Don't worry if you don't have all of these to hand right away. You can come back and add them as you find them, and we'll flag anything urgent directly with you. If you're not sure where to find a particular number (for example, your Companies House Authentication Code or Government Gateway login), just ask us and we'll point you in the right direction.

2. Connect Your Bank Account

Linking your bank account is what allows Mighty to pull through your transactions automatically, so we can keep your bookkeeping accurate and up to date without you having to upload statements manually.

What to do:

1. From the Dashboard, go to the **Automate your accounting** prompt (or **Bookkeeping** in the left-hand menu).

2. Click **Sync your bank account**.
3. Follow the prompts to securely log in to your bank. This takes under 60 seconds.

This connection is handled through TrueLayer, an FCA-authorised and regulated open banking provider, so your login details are never shared with us or stored by Mighty.

If your bank isn't supported through open banking, you can still get set up by manually creating a bank account and uploading your statements. There's a link for this on the same page.

Once connected, you'll see your income and expenses appear automatically, and you'll be able to filter transactions, approve categories and VAT rates, and set up rules so recurring transactions categorise themselves in future.

3. Configure Your Invoice Settings

If you plan to raise invoices through Mighty, it's worth setting these up before you send your first one, so your invoices look right from the start (correct business details, logo, payment terms, and numbering).

What to do:

1. Go to **Sales** in the left-hand menu.
2. On the Sales Invoices screen, click the ... (more options) button next to **Create Invoice**.
3. Select **Invoice settings** from the dropdown.
4. Fill in your details, such as business address, logo, default payment terms, and invoice numbering preferences.

You'll only need to do this once. After that, every invoice you create will automatically use these settings.

4. Arrange Your Onboarding Call

Once you've had a chance to work through the steps above, we'd recommend booking a short onboarding call with your dedicated accountant. This gives us a chance to answer any questions, make sure everything's connected properly, and talk through how Mighty will fit into your routine going forward.

What to do:

1. Click **Support** at the bottom of the left-hand menu.
2. Under **Book a call**, click **Book now**.
3. Choose a time that suits you.

If you'd rather get in touch another way in the meantime, you can also:

- Email your dedicated accountant directly, or
- Browse the **Knowledge Centre** for step-by-step guides, or
- Email support@mightyaccounting.com and we'll respond within 2 working days.

That's It

Once these four steps are complete, you're fully set up in Mighty and we can start working from live, accurate data straight away. If you get stuck at any point, don't hesitate to reach out. We're here to help.

Related guides

- [Expense Mileage Through Your Company](#)
- [How to Add Corporation Tax to Your Government Gateway Account](#)
- [How To Add Your PAYE Scheme to Your Government Gateway Account](#)
- [How to Add Your VAT Scheme to Your Government Gateway Account](#)
- [How To Register for PAYE with HMRC](#)
- [How to Update the Bank Details on an Invoice](#)
- [How to Upload Sales Invoices Into Mighty](#)

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