Next Steps for QuickBooks Online:

If you have decided that you would like to move forward with the QuickBooks Online option, please see the below “Next Steps” to get started.

1. Send an email to ssutton@hjerpecpa.com requesting to be set up on QuickBooks Online through our firm. We will need the following information from you to start this process:
    a. Full legal name of the Agency or first and last name if you are a Sole Prop
    b. Email address (This will also be your username when logging into QuickBooks online)
    c. The version of QuickBooks that you feel would best suit your needs (See below)
    d. Please provide the date you would like your subscription to start

**QuickBooks Options and Pricing:**

We have secured a discount rate off the retail price

**Simple Start**: $26.00/month-Very Basic version of QBO. Allows for importing bank and credit card transactions. Only one user access and limited reporting.

**Essentials**: $47.00/month -Basic version of QuickBooks Online that allows for expense tracking, bank account and credit card imports, and multiple user functions. For the majority of agents, this option will be sufficient.

**Plus:** $68.00/month –Advanced version of QuickBooks Online that allows for all options in Essentials. Additionally, it offers inventory tracking, class tracking, and 1099 preparation. If you have multiple locations, and would like to track your expenses by location or by an individual, this option would be best.

In order to secure our discounted pricing, we will bill you yearly for your subscription.

2. Once the account is set up, you will receive an email from QuickBooks online, with a link inviting you to log into your QuickBooks Online file. Please click on the link and create a password.

3. We will import a standard Chart of Accounts relevant to State Farm Agents. This will be completed within a couple of days of activating the account.

*Please note that any additional training/set-up time is billed at our standard rates. This includes assistance with linking bank/credit card accounts and general user training. Appointments for training will need to be scheduled with your assigned accountant.