Next Steps for QuickBooks Online Transition:

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)
2. If you currently have a QuickBooks online subscription and would like to take advantage of our pricing discounts please send email to ssutton@hjerpecpa.com requesting to move your account to our subscription. You will just need to provide us with your current ID number which can be retrieved by hitting CRTL, ALT, ?. Once we have this we can contact Intuit to get the subscription switched over.

QuickBooks Options and Pricing:

We have secured a 30% discount off the retail price

Essentials: $25/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: $35/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, the firm will be billed monthly for your subscription. We will bill you quarterly and charge it to your credit card that we will keep on file. We will send you a copy of the paid invoice quarterly.

3. 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.

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

5. Importing Vendor Lists from Quicken: If you would like to import your vendors from Quicken, please see below steps:

    a. Export your vendor list from Quicken into a CSV Excel file and save to your desktop

b. Once in QuickBooks online, click on Expenses on the left hand menu
c. Then click on Vendors (2nd tab on the top of the screen)
d. Now click on the arrow next to “New Vendor” and choose “Import Vendors”
e. Then browse to find your saved CSV file on your desktop, then click next.
f. Please note that the excel file needs to be a CSV file, if not, it may not import correctly

6. QuickBooks Online Training- We are partnering with QuickBooks Online to offer Live Webinars for basic training. This will include transaction entry, linking bank and credit card accounts, setting up user preferences, etc. We will be sending out communication regarding the dates and times for these webinars in the next week or so.