New Client Checklist

How to use this form:
Try using this handy form in your initial meeting with your new client to establish their needs. Select the features your new client needs. Then cross-check to the four columns in the middle to decide which subscription is best for their business needs. The “x” shows what is included in each subscription.

New Client details

Name of Company:	
Legal Name:	
Contact Name:	
Phone Number:	
Website:	
Email:	
Address: Street, City	
Address: State, Zip	
Industry:	
Entity:	
EIN:	
Tax Form:	
Year-end:	
Number of Users	
Current software & version:	

New Client details

	What features does your client need?	Self-Employed	Simple Start	Essentials	Online Plus
	Estimated Taxes (Schedule C)	x			
	Mileage Tracking	x			
	Invoices	x	x	x	x
	Online Invoices	x	x	x	x
	Custom Invoices		x	x	x
	Sales Receipts		x	x	x
	Product & Service Items		x	x	x
	Estimates		x	x	x
	Sales Tax		x	x	x
	Statements		x	x	x
	Convert from QuickBooks Desktop		x	x	x
	Import lists from Excel		x	x	x
	Integrate Apps (see below)		x	x	x
	Print Checks		x	x	x
	Payroll		x	x	x
	Payables			x	x
	Recurring Transactions			x	x
	Multi-currency			x	x
	Delayed Charges			x	x

	Time Tracking	x	x
	Time-Tracking-Only Users	x	x
	Billable Hours	x	x
	Expenses by Customer		x
	Billable Expenditures		x
	Class Tracking		x
	Location Tracking		x
	Budgets		x
	Inventory [FIFO]		x
	Purchase Orders		x
	1099-Misc		x
	Reports-Only Users		x

New Client details

What extra requirements does the client have that could be met by adding an app?

	Merchant Services	QuickBooks Payments
	Bill Pay	Apps.com
	Expense Reporting	Apps.com
	Sales Orders	Apps.com
	Inventory Assembly	Apps.com
	Units of Measure	Apps.com
	Price Levels	Apps.com
	Time Tracking approval & GPS	Apps.com
	Billing: Wholesale v Independent	Wholesale

Notes/advisories

Self-Employed Profile Details

If you have decided that Self-Employed is the best option for your client, then it’s a good idea to capture all the information you need to get their profiles set up.

Tax profile

Marital status:	
Are they the head of the household?	
Number of dependants:	
Personal exemption:	
Annual W2 income:	

Federal withholding:	
Spouse annual W2 income:	
Spouse federal withholding:	
Standard or itemized deduction amount	
Home office sq. ft.	

Healthcare profile

What's their healthcare insurance situation?	
Do they contribute to a Health Savings Account (HSA)?	
Does an employer contribute to their HSA? If so, how much?	
Do they have a high-deductible health plan (HDHP)?	
Who is covered by this HDHP?	
What's their date of birth?	
Will they be enrolled in Medicare at any time this year?	

Vehicle profile

Vehicle make and model:	
Vehicle year:	
Ownership status:	
Purchase date:	
Purchase cost:	
Date vehicle placed in service:	

Notes/advisories