

## QuickBooks Online Features and Solutions

1. The needs you identified in the previous section automatically appear next to the related QuickBooks Online feature in Column A
2. Identify any additional features your client will benefit from in Column B
3. Cross-check the features needed against the five subscription columns on the right to decide which subscription is best for their business needs. The "x" shows what is included in each subscription. (You can also see a description of each subscription level at the bottom of the sheet)

Recommended features from Needs Assessment	Self-Employed	Simple Start	Essentials	Online Plus	Online Advanced
	<b>1</b>	<b>1</b>	<b>Up to 3</b>	<b>Up to 5</b>	<b>Up to 25</b>
Number of users					
Estimated taxes (Schedule C)	x				
Simple invoices	x	x	x	x	x
Separate personal and business expenses	x				
Mileage tracking	x	x	x	x	x
Custom invoices		x	x	x	x
Sales receipts		x	x	x	x
Product & service items		x	x	x	x
Estimates		x	x	x	x
Sales tax		x	x	x	x
Statements		x	x	x	x
Convert from QuickBooks Desktop		x	x	x	x
Import lists from Excel		x	x	x	x
Integrate apps		x	x	x	x
Electronic bill payment (fees apply)		x	x	x	x
Print checks		x	x	x	x
Payroll		x	x	x	x
Prepare and file 1099-MISC		x	x	x	x
Progress invoicing		x	x	x	x
Receipt and bill capture		x	x	x	x
Accounts payable			x	x	x
Custom fields			x	x	x
Recurring Transactions			x	x	x
Multicurrency			x	x	x
Delayed charges			x	x	x
Time tracking			x	x	x
Time-tracking-only users			x	x	x
Billable hours			x	x	x
Expenses by customer				x	x
Billable expenditures				x	x
Class tracking				x	x
Customer types				x	x
Location tracking				x	x
Budgets				x	x
Inventory [FIFO]				x	x
Price rules				x	x
Project tracking				x	x
Purchase orders				x	x
Reports-only users				x	x
Custom user permissions					x
Custom reporting fields					x
Import invoices					x
Import budgets					x
Batch-enter invoices, checks, bills, or deposits					x
Automated approvals and reminders					x
Restore company data (backup)					x
Smart reporting powered by Fathom					x
Priority support and free training					x

## QuickBooks Online functionalities by subscription

### QuickBooks Self-Employed

One user plus one accountant user  
Ability to separate business from personal spending  
Ability to create invoices and use QuickBooks payments (no accounts receivable tracking)  
Ability to calculate estimated quarterly taxes  
Ability to track mileage and Schedule C deductions  
Ability to download transactions from your bank and credit card accounts  
Basic reporting including Profit and Loss and Income Tax Summary Reports

### QuickBooks Online Simple Start

Single-user license  
QuickBooks Online account  
Automatic data backup  
Bank-level security and encryption  
One full-access user  
Invite up to two accountant users/firms at no additional charge  
Unlimited invoices and estimates  
Charge sales tax to customers  
Print checks and record transactions  
Download bank and credit card transactions  
Import from QuickBooks Desktop  
Import/export lists from Microsoft Excel® (customers, vendors, Chart of Accounts, Products and Services)  
Add payroll to pay W-2 employees and file payroll taxes  
Forms 1099-MISC  
20+ reports

### QuickBooks Online Advanced

Up to 25 users  
Smart reporting powered by Fathom  
Importing of invoices  
Custom user permissions  
Dedicated Customer Success Manager  
Premium care with Priority Circle  
Self-paced online training

### QuickBooks Online Essentials

Up to three users  
Access for three users with permission controls  
Ability to manage and pay bills, including scheduling payments for later  
Setup of Recurring Transactions to automate data entry  
Multicurrency  
Ability to track billable hours by customer  
Automatic invoicing with ACH or credit card payments (requires QuickBooks Payments account)

### QuickBooks Online Plus

Up to five users  
Access for five users with permission controls  
Unlimited time-tracking-only users  
Unlimited reports-only users  
Price levels and customer types  
Project tracking  
Purchase orders  
Class and Location tracking  
Inventory tracking using the FIFO method  
Budgets  
Two-sided items  
Estimates  
100+ reports