New Client Checklist

How to use this form:

Try using this handy New Client details 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 subscriptionis best for their business needs. The ✓ 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:

Apps currently in use:

Product Features Required

What features does your client need?	Self Employed	Simple Start	Essentials	Online Plus
☐ Estimated Taxes (Schedule C)	✓			
☐ Mileage Tracking	✓			
☐ Invoices	✓	✓	✓	✓
☐ Online Invoices	✓	✓	✓	✓
☐ Custom Invoices		✓	✓	✓
☐ Sales Receipts		✓	✓	✓
☐ Product & Service Items		✓	✓	✓
☐ Estimates		✓	✓	✓
☐ Sales Tax		✓	✓	✓
☐ Statements		✓	✓	✓
☐ Convert from QuickBooks Desktop		✓	✓	✓
☐ Import lists from Excel		✓	✓	✓

☐ Integrate Apps (see below)		✓	✓	✓
☐ Print Checks		✓	✓	✓
☐ Payroll		✓	✓	✓
☐ Payables			✓	✓
☐ Recurring Transactions			✓	✓
☐ Multi-currency			✓	✓
☐ Delayed Charges			✓	✓
☐ Time Tracking			✓	✓
☐ Time Tracking Only Users			✓	✓
☐ Billable Hours			✓	✓
☐ Expenses by Customer				✓
☐ Billable Expenditures				✓
☐ Class Tracking				✓
☐ Location Tracking				✓
☐ Budgets				✓
☐ Inventory [FIFO]				✓
☐ Purchase Orders				✓
☐ 1099-Misc				✓
☐ Reports Only Users				✓

Product Features Required

What are existing challenges, inefficiencies, or bottlenecks in the client's business management or workflow?

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

	Functionality	Where to Locate
☐	Merchant Services	QuickBooks Payments
☐	Bill Pay Apps.com	Apps.com or Apps tab in QuickBooks Online Accountant
☐	Expense Reporting	Apps.com or Apps tab in QuickBooks Online Accountant
☐	Sales Orders	Apps.com or Apps tab in QuickBooks Online Accountant
☐	Inventory Assembly	Apps.com or Apps tab in QuickBooks Online Accountant
☐	Units of Measure	Apps.com or Apps tab in QuickBooks Online Accountant
☐	Price Levels	Apps.com or Apps tab in QuickBooks Online Accountant
☐	Time Tracking approval & GPS	Apps.com or Apps tab in QuickBooks Online Accountant
☐	Billing: Wholesale v Independent	Wholesale

Notes/advisories