



## QuickBooks Training and Support Packages

All of our service packages come with a **30 minute complimentary** consultation. This will allow us to properly assess your setup, business process, and bookkeeping for your company.

Services	Description of work to be performed
<b>Basic Installation Service Package</b>  ½ Day Session (4 hours)	<ul style="list-style-type: none"><li>● A cost-effective solution that meets both the present and anticipated future accounting and reporting needs of the company</li><li>● A professional QuickBooks software installation and Company setup.</li><li>● One-hour on-site instruction conducted by an expert on basic operation of QuickBooks</li></ul>
<b>Gold Installation Service and Employee Training Package</b>  2 – ½ Day Sessions (20 hours)	<ul style="list-style-type: none"><li>● Basic Installation Service Package (see above)</li><li>● Half-day on-site instruction conducted by an expert on operation of QuickBooks, include file back-up and generating reports</li><li>● One-hour of Telephone Support with QuickBooks Experts</li></ul>
<b>Platinum Installation Service and Employee Training Package</b>  3 – ½ Day Sessions (28 hours)	<ul style="list-style-type: none"><li>● Gold Installation Service and Employee Training Package</li><li>● Additional half-day on-site instruction and consultation conducted by an expert on the operation of QuickBooks and its integration with your specific business processes</li><li>● One additional hour of Telephone support with QuickBooks experts</li></ul>

- Inventory setup available upon request
  - Job Costing available upon request
  - All other modules outside the scope of this engagement available upon request.
- (These are billed separately - hourly or subtracted from pre-paid blocks of time)

All package rates are based on standard installations on systems, which have the recommended hardware, with enough space and memory to adequately load and run the software with no conflicts. Additional on-site consultation and service will be billed at the normal hourly rate. Any additional accounting services, not QuickBooks related will be billed according to a fee schedule which is available upon request. Mileage rate is at the current federal rate of \$ .55 per mile.

	Pre-paid blocks of time may also be purchased
\$479	04 - hour blocks of pre-paid time (\$120/hr)
\$1,999	20 - hour blocks of pre-paid time (\$100/hr)
\$2,519	28 - hour blocks of pre-paid time (\$90/hr)

**Please contact Howard for an estimate and to schedule an appointment TODAY!**

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# F.Y.I.

## QuickBooks Consulting Activities

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**Prepaid Remote Support includes phone, email, desktop sharing (QuickBooks Remote Access), and field service!**

### **New Client Evaluation**

Collect all contact information, tax and legal information, determine proper use of QuickBooks features

### **Technology Checkup**

Examine current computer systems, basic hardware and software analysis, perform any required updates and maintenance releases

### **Start Up, Preferences, Opening Balances, and Backup Step (for new users)**

Enter new client information including preferences, chart of accounts, and trial balances

### **Users**

Create any additional user accounts and install access settings and password

### **Customer and Vendor Lists**

Establish customer, vendor, and class information with: contact info, payment info and terms, shipping info if applicable, sales tax, subclasses, and any other custom fields or Other Names

### **Set up Products and Services**

Enter products and services items including descriptions, price points, tax requirements, reorder points, units for measurement, and inventory adjustments

### **Customizing Features: Forms, Templates, Reports, and Reminders**

Customize any desired templates like invoicing, purchase orders, estimates, and credit memos. Create any form letters for customers vendors, employees. Modify and memorize custom reports desired by client. Modify user preferences and setting including customizing any reminders.

### **Transactions**

Enter client transactions since start date including purchase orders, receipts, bills, invoices, payments, deposits, payroll checks, and journal entries followed by any bank reconciliation and recurring transactions

### **Set up Payroll**

Evaluate and set-up current payroll system for tax set-up, payroll items, all employee information, and y-t-d figures

### **Additional Features**

Determine if client needs additional services and subscriptions including merchant credit card services, online banking, credit check services, remote access.

### **Project Wrap-Up**

Establish back-up procedures and train administrator on system and software, confirm all deliverables accomplished

### **Follow Up Appointment (approximately 3 weeks)**

Re-evaluate client's future needs like training and maintenance, set-up follow-up analysis upon client's request