

Sample Levels of Service for Small-Capitalization Service Businesses

	Silver	Gold	Platinum
QuickBooks Online Subscription Included (w/ wholesale billing)	Not Included, Suggest QB Self-Employed	Essentials (\$35 value)	Plus (\$60 value)
QuickBooks Payroll Included (up to _ employees) (w/ wholesale billing)			3 (\$45 value)
QBO Management and Maintenance			
-Users (with access-level controls)	Must "share" user	1-3 plus Accountant	1-5 plus Accountant
-Customers		★	★
-Vendors		★	★ Includes 1099 Vendors
-Editable Chart of Accounts		★	★
-Locations			★
-Classes			★
-Budget(s)	Manual	Manual	★

	Silver	Gold	Platinum
Basic Bookkeeping Functions and Financial Reporting			
-Bank Transaction Import and Matching		★	★
-Creating electronic invoices		within 72 hours	within 48 hours
-Capturing misc/admin/overhead deposits & expenses		within 72 hours	within 48 hours
-Capturing and paying vendor bills		within 72 hours	within 48 hours
-Monthly account reconciliation	Audit only	★	★
-Monthly Profit & Loss reports	★	★	★
-Quarterly Balance Sheets	★	★	★
-Budget vs. Actuals reports	Quarterly	Quarterly	Monthly
-Ensure ease of Quarterly Estimates/Annual Tax Filings	★	★	★
-Calculation and Payment of Federal Quarterly SE Tax Estimates		★	★
-Calculation and Payment of Annual State Business Tax		★	★
Sales Tax Functions			
-Monthly State Sales Tax Filings		★	★
-Quarterly Local Sales Tax Filings		★	★
-Track sales tax within QBO			★
MONTHLY LEVEL OF SERVICE AGREEMENT	Call for Quote	Call for Quote	Call for Quote

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ONE-TIME ONBOARDING FEE INCLUDES:	Call for Quote	Call for Quote	Call for Quote
-Initial import and setup	★	★	★
-Complete reporting infrastructure	★	★	★
-Set up EFTPS tax payment account	★	★	★
-Set up TN Department of Revenue online account	★	★	★
-Set up TNTAP account	★	★	★
-Assist in creating budgets	★	★	★
-As-Needed Support through Go Live	★	★	★