

QUICKBOOKS IMPLEMENTATION AND TRAINING SERVICES AGREEMENT

This Agreement is entered into and made effective as of _____, by and between:

Service Provider:

Name/Company: _____

Address: _____

Contact: _____

Client:

Name/Company: _____

Address: _____

Contact: _____

WHEREAS, Client desires to retain Service Provider to perform QuickBooks setup, implementation, and training services, and Service Provider agrees to perform these services under the terms and conditions set forth below.

1. SCOPE OF SERVICES

Service Provider shall provide the following services (checked items apply):

- ☐ QuickBooks Account Setup & Configuration (Chart of Accounts, Preferences, Lists)
- ☐ Historical Data Migration & Opening Balances
- ☐ Third-Party Application Integration
- ☐ Customized Financial Reporting Setup
- ☐ Staff Training & Knowledge Transfer
- ☐ Post-Implementation Support & Troubleshooting

Detailed Scope of Work / Specific Deliverables:

2. FEES AND PAYMENT TERMS

- a. **Service Fee:** Client agrees to pay Service Provider a fee of _____ for the completion of the services described herein, payable as follows:
 - _____ Deposit: _____ due upon execution of this Agreement.
 - _____ Milestone/Installment Payments: _____
 - _____ Final Balance: _____ due upon completion of services.
- b. **Out-of-Pocket Expenses:** Client shall reimburse Service Provider for pre-approved, reasonable out-of-pocket expenses incurred during the performance of services.
- c. **QuickBooks Software Licensing:** Software subscription and licensing fees are the sole financial responsibility of the Client and are not included in the Service Provider's fees.

3. TERM AND TERMINATION

- a. **Term:** This Agreement shall commence on the effective date and shall remain in effect until the services are completed, or until terminated by either party.
- b. **Estimated Completion Date:** _____
- c. **Termination:** Either party may terminate this Agreement upon _____ days written notice to the other party. Upon termination, Client shall pay Service Provider for all services rendered up to the date of termination.

4. CLIENT RESPONSIBILITIES

Client agrees to provide timely access to all necessary financial records, banking credentials, previous accounting software platforms, and designated personnel required for the successful completion of the QuickBooks setup and training.

5. CONFIDENTIALITY

Service Provider agrees to keep all financial information, client lists, and operational data of the Client strictly confidential and shall not disclose any such information to third parties without prior written consent from the Client.

6. LIMITATION OF LIABILITY

Service Provider does not provide audit, tax, or legal advice. QuickBooks setups are based on information provided by the Client. Service Provider shall not be liable for any inaccuracies in data provided by the Client, nor for any loss of data, profit, or consequential damages arising from the use of the software.

7. GOVERNING LAW

This Agreement shall be governed by and construed in accordance with the laws of the State/Jurisdiction of _____.

IN WITNESS WHEREOF, the parties hereto have executed this Agreement as of the date first written above.

Service Provider:

Client:

Authorized Signature

Authorized Signature

Printed Name: _____

Printed Name: _____

Title: _____

Title: _____

Date: _____

Date: _____