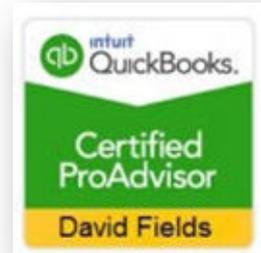


We've partnered with
QuickBooks Online
Ask us for more information



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QUESTIONNAIRE BEFORE VISIT& DATA PROTECTION

The information you send us is to help us see how best we can help you. It will be destroyed as soon as you request or a couple of months after first visit. The information is not sent to any other people. Please confirm you agree by signing bottom of this document and returning to me in Word format or pdf.

JUST ANSWER YES OR NO OR WRITE COMMENTS OR N/A (NOT AVAILABLE)

THIS GIVES ME AN OVERVIEW AND SOME UNDERSTANDING OF YOUR COMPANY NEEDS.

DO NOT FEEL OBLIGED. TO ANSWER ANY THOUGH.

1. Are you familiar with accounting? Example used other version of accounts like Sage. Answers Yes or no.
2. Can you check which version of Quickbooks do you plan to use? "Quickbooks Online" and or "Quickbooks UK Desktop"
3. Have you started using Quickbooks or Do you need me to setup? Answers Yes or no.
4. Have you made any changes to Quickbooks since downloading and if so what ones?
5. What kind of service to you provide? Plumbing or electrical would be example?
6. How many invoices do you produce each month? ()_
7. How many purchases do you enter each month? ()_
8. Do you reconcile bank statements? Answers Yes or no. ()_____
9. Do you use multi-currency? Answer Yes or No ()_____
10. Do you have bank accounts also in non-euro. Yes or No_____ Say for example UK or Euro.
11. Do you charge Vat? X in options as to which one. Accrual () Cash () Receipts Basis () None () You might want to check this with your accountant.
12. What is your vat period? (example every 2 months) Write Answer_____
13. Do you have any problems with vat? Yes or No or Comment_____
14. Will you be doing vat returns yourself or will you accountant handle?
15. Will you be doing accounts or someone else?

16. Have you **fully satisfied in your own mind** and with assistance of your accountant that this version of "Simple Start" or "QuickBooks Online Essential" or "Quickbooks Plus" or "QuickBooks Desktop" will be suitable for your business? Answer Yes or No.

17. What are the main features you want to use in Quickbooks? Mention at least 5. **Give detailed answer please.**

- 1.
- 2.
- 3.
- 4.
- 5.

18. **Mention up to 5 things you need to know more fully?**

- 1.
- 2.
- 3.
- 4.
- 5.

Do you have any further information you would like us to know?

The answer to these questions is very important as I need them to ascertain how to best help you. All bookings need to be paid one week in advance by Banking OnLine (details will be on Invoice. **Please read page 3 before you return to us.**

Tick Box if you have read page 3.

Your Company Name Here & Contact Name	
Your Postal Address	
Email Address	
Phone Number	
Mobile	

**CANCELLATION POLICY FOR TRAINING OR/AND PAYMENT MUST BE PAID
IN ADVANCE BY 1 WEEK**

If you decide to cancel or amend the date of the training prior to the arranged day just let us know in by email and we will be happy to re-schedule the training to suit your new requirements. Please provide as much notice as possible to avoid cancellation charges.

Less than 24 Hours notice..	100 % Cancellation charge
1 day to 2 days notice	50% Cancellation charge
3 days to 4 days notice	25% Cancellation charge
More than 7 days notice	No charges.



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