

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 the 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 AVILABLE)

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? Have you ever used any software like Sage before?**
Or brief comment (

2. **Can you confirm which version of Quickbooks you are planning to use?**

Is it Quickbooks Online or [YOUR COMMENT HERE](#)

Quickbooks UK Desktop? [YOUR COMMENT HERE](#)

3. **Have you started using Quickbooks yet or do you need me to set it up?**
Please TICK. YES () NO () Or brief comment (

4. **Have you made any changes to Quickbooks since you downloaded it?**
If so, what changes have you made? [YOUR COMMENT HERE](#)

5. **What kind of services do you offer? For instance, plumbing or electrical services?**
[YOUR COMMENT HERE](#)

6. **How many invoices do you usually create each month?**
Please fill in the blank here: _____

7. **How many purchases do you typically enter each month?**
Please provide your answer here: _____

8. **Do you reconcile your bank statements?**
Please answer with yes or no: _____

9. **Do you use multi-currency feature? Answer with yes or no please:** _____
Please TICK. YES () NO () Or brief comment (

10. **Do you have bank accounts in currencies other than Euro, such as UK or Euro?**
Please answer with yes or no.
Please TICK. YES () NO () Or brief comment

11. **Do you charge VAT? Please choose one of the options:**
Accrual , ()
Cash Basis, ()
Receipts Basis, ()
Not Apply ()

12. **What is the period for your VAT returns? For instance, every two months.**
Please provide your answer here: _____

13. Have you experienced any issues with VAT?

Please TICK. YES () NO () Or brief comment

14. Will you be handling VAT returns yourself or will you be relying on your accountant?

Please fill in the blank: _____

15. Will you be managing the accounts on your own or will someone else be doing that for you?

Please provide the name of the person: _____

16. Are you fully satisfied with your chosen version of accounting software such as 'Simple Start', 'Quickbooks Online Essential', 'Quickbooks Plus' or 'QuickBooks Desktop'?

Have you also confirmed with your accountant that it is suitable for your business? Please answer with yes or no.

Please TICK. YES () NO () Or brief comment

**17. WHAT ARE THE MAIN FEATURES YOU WANT TO USE IN QUICKBOOKS?
LIST IN IMPORTANCE**

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.



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

18. Would you like me to look at your at your Quickbooks file before my Visit or Consultation? Yes or NO.

Yes () No () Cost about 50 to 100 Euro plus vat.

Answers are important to help. Bookings must be paid a week in advance via Banking OnLine (invoice contains details).

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	

STRONGLY RECOMMENDED

18. Would you like me to look at your at your Quickbooks file before my Visit or Consultation?

Yes or NO. Yes () No () Cost about 50 to 100 Euro plus vat.

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.

Introducing QuickBooks Online, a remarkably extensive and adaptable platform that is packed with a **plethora of exceptional features that are guaranteed to leave one awestruck**, from its top-of-the-line accounting functionalities to its unparalleled invoicing capabilities and expenditure tracking mechanisms, all designed to help businesses of all magnitudes **streamline their financial operations with ease**.

And it is thus, with great pride and satisfaction, that we present QuickBooks Online as one of our front-running recommendations for the best accounting software available on the market tailored specifically to **cater to the unique needs and preferences of small business enterprises**.

It offers a 30-day test run, including 100% capabilities of the Simple Start Plan, to help you decide if it suits your needs.

QuickBooks Online has four pricing tiers, with a 50% discount for the first three months of purchase.