

The purpose of this questionnaire is to provide us with information to assist you in the selection of an appropriate software package for your business. Accounting packages can be utilised for many of the important financial transactions in your business and you will rely on it to give you critical information about the health of your business. In order to make the right choice, you need to consider a number of different issues including defining your business requirements and then matching them to the available packages.

GENERAL DETAILS

Nature of Business: Manufacturer / Wholesale / Retail / Distribution / Service / Other: _____

Industry (e.g. Clothing): _____

Type of Entity: _____ Company / Trust / Partnership / Sole Trader / Other: _____

Current Annual Turnover/Sales (or estimate if new business): _____

Approximate number of transactions per month (Sales and Purchases/Expenses): _____

Do you have more than one business and would like to prepare consolidated reports: Yes / No

Number of People who will be using the software *at the same time*: _____

Do you require concurrent access to the software at more than one physical location: Yes / No

Are you currently using any other computerised accounting system: Yes / No: Details: _____

Operating System currently in use: Windows / Mac / Linux / Unix / Other: _____ Version: _____

Approximate level of general Computer Knowledge/Skill: Excellent / Very Good / Good / Average / Poor

Do you intend to: Enter the data yourself / Have a staff member do it / Use a bookkeeper

Do you require the ability to import or export data to Microsoft Excel: Yes / No

SALES / RECEIPTS DETAILS

Do you engage in electronic commerce via the Internet: Yes / No

Do you require the use of Electronic Point of Sale Facilities (EFTPOS): Yes / No

Do you need to track the performance of different departments, locations or sections: Yes / No

Do you require the ability to utilise bar-coding functionality: Yes / No

Does your business offer credit and therefore maintain Accounts Receivable/Debtors: Yes / No

Does your business need to account for inventory/stock purchased, sold and on hand: Yes / No

Does your business sell goods or services for which you wish to track work-in-progress: Yes / No

Does your business need to record and invoice the time spent by employees on projects: Yes / No

Do you need the ability to have multiple price levels for one item of stock: Yes / No

Do you trade in more than one currency (in addition to \$AUD): Yes / No

PAYMENTS / EXPENSES DETAILS

How many employees do your business have? Myself / Two-Five / Five-Ten / Ten-Fifty / More than Fifty

Do you want to print cheques or deposit slips directly from your accounting software: Yes / No

Do you wish to make payments electronically directly from your accounting software: Yes / No

Do you wish to keep track of supplier invoices received but not yet paid (Accounts Payable): Yes / No


YOUR DETAILS

Customer Number if known: _____


Company Name _____


Contact Name Mr/Mrs/Ms/Miss First Name	Surname	Position
_____	_____	_____
Email	Telephone	Facsimile
_____	_____	_____

WHAT TO DO NOW?


Telephone
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