

The purpose of this questionnaire is to provide information to assist us in providing your business with the most relevant and tailored training in your accounting software package.

Please note that some of these questions may relate to options that are not available in your version of the software.

## GENERAL DETAILS

Software Purchased:	QuickBooks / MYOB	Version:	
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):			
Is this a new business:		Yes / No	
Do you have more than one business or more than one location:		Yes / No	
Are you registered for Goods & Services Tax (GST):		Yes / No	
IF YES:	What is your accounting method:	Cash / Accrual	
Number of people requiring training:			
What is their level of accounting/book-keeping knowledge:	Excellent / Very Good / Average / Poor / None		
What is their level of general computer knowledge:	Excellent / Very Good / Average / Poor / None		
Do you require assistance in setting up your data file:		Yes / No	
Do you import data from or export data to Microsoft Excel:		Yes / No	
Do you need to account for the performance of different departments, sections or locations:		Yes / No	
Do you want to enter budgets and compare these to actual performance:		Yes / No	

## SALES / RECEIPTS DETAILS

Do you prepare estimates, bids or quotes to customers:	Yes / No
Do you require the use of Electronic Point of Sale Facilities (EFTPOS):	Yes / No
Does your business 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
Does your business progress bill its customers/clients:	Yes / No
Do you trade in more than one currency (in addition to \$AUD):	Yes / No
Are you engaging in electronic commerce via the Internet:	Yes / No
Do you charge a Finance or Interest Charge for late payment by customers:	Yes / No
Do you send Debtors Statements to customers/clients:	Yes / No


## PAYMENTS / EXPENSES DETAILS


Do you want to print cheques 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
Do you wish to keep track of Petty Cash:	Yes / No
Do you use purchase orders:	Yes / No


## YOUR DETAILS


Customer Number if known:			
Business Name			
Contact Name Mr/Mrs/Ms/Miss First Name	Surname	Position	
Email	Telephone	Facsimile	

## WHAT TO DO NOW?

  
**Telephone**  
**(03) 9348 0313**

  
**Fax**  
**Fax to**  
**(03) 8677 2438**

  
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