



Bookkeeping Quote

Business Name: _____

Business Location (city): _____ Contact Name: _____

Contact Email: _____ Contact Phone: _____

Type of Business: _____ Number of Locations: _____

QuickBooks Version Currently In Use: _____

How Many People In Your Organization Use QuickBooks? _____

For What Duties? _____

Estimated Current Bookkeeping Hours Per Week: _____

Do You Need Full Payroll Services? Yes No

If Yes, For How Many Employees? _____ Pay Cycle: _____

Would You Be Willing to Have An Offsite Bookkeeper Who Picks up and Delivers Paperwork?

Yes No

How Many Bank Accounts Does Your Business Use? _____

How Many Bank Credit Cards Does Your Business Use? _____

Do You File Sales Tax Returns? Yes No

Do You Use QuickBooks For Accounts Receivable? Yes No

If No, System Name: _____

Do You Track Accounts Payable On An Aging system Or Cut Checks When The Bills Come In?

Aging System Cut Checks

Would You Like To Use Budgeting And Other Financial Tools To Monitor Your Progress Throughout The Year And To Help Manage Cashflow? Yes No

Do You Need To Track Inventory In QuickBooks? Yes No

Do You Need To Track Separate Areas Of Your Business Using "Classes" In QuickBooks?

Yes No



Other Unique Procedures In Your Business That Need To Be Handled Differently Than Expected:
