About Your Business

1. What is your name and what do you like to be called?

|  |
| --- |
|  |

1. What is your business name?

|  |
| --- |
|  |

1. Where is your business location(s)?

|  |
| --- |
|  |

1. How long have you been in business?

|  |
| --- |
|  |

1. Do you have a website? If so, what is the URL?

|  |
| --- |
|  |

1. What type of corporate structure is your business organized as?

|  |
| --- |
|  |

1. What is your accounting year end?

|  |
| --- |
|  |

1. What is your current accounting solution? Can be anything from handwritten notes to Excel to an accounting solution like Quickbooks.

|  |
| --- |
|  |

1. Who does your accounting today? Please specify if multiple people.

|  |
| --- |
|  |

1. What is your annual gross revenue?

|  |
| --- |
|  |

1. If you have employees, how many full and part time?

|  |
| --- |
|  |

1. If you have employees, what is your current payroll solution?

|  |
| --- |
|  |

1. Approximately how many customer (sales) transactions do you have in a typical month?

|  |
| --- |
|  |

1. Approximately how many vendor transactions do you have in a typical month for supplies for your business?

|  |
| --- |
|  |

1. Please include any other information that you think may be useful for our conversation.

|  |
| --- |
|  |