Date	
Contact Name	
Position	
Contact Phone Number	
Contact Email	
ENTITY INFORMATION	
Business Name	
Legal Name	
Entity Type	
FEIN/SSN (if applicable)	
Tax Form (if applicable)	
Industry	
Business Address	
Postal Address	
QUICKBOOKS SUBSCRIPTIO	N
Subscription Type	New
	Existing
SALES INFORMATION (Your Customers)	

Do You Send Invoices?

Invoice Terms

Invoice Reminders?		
Are Deposits Taken?		
Are Statements Needed?		
Other	Please note any other important information about sales invoices (e.g. late fees charged, discounts given etc)	
Product & Services	Do you need to track items (such as services?) If so, please list these on a separate spreadsheet and email this back to us.	
PURCHASES (Your Suppliers)		
Do You Use Purchase Orders for Expenses?	If so, please list supplier contact information and payment terms on a separate spreadsheet and email this back to us	
OTHER		
Please note other relevant information here (or email to us separately)		