**BUSINESS CLIENT SETUP FORM**

**CLIENT INFORMATION**

MAIN BUSINESS INFORMATION:

Client ID Federal ID # Entity Type

Business Name

Assigned To: Partner Manager Staff

Referred By

**PRIMARY CONTACT INFORMATION**

BUSINESS CONTACT INFORMATION:

Company Name

Business Phone # Fax #

Address

City State Zip

Client Categories: Email List Opt-In Text Message Opt-In Cell Phone #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**ENGAGEMENTS**

Bookkeeping – $ Payroll – $

Write-Up – $ Payroll Tax Return – $

Annual Business Return – $ Property Tax Return – $

**PROJECTS**

Financial Statement – Starting Month Payroll Tax Returns – Starting Quarter

Monthly Tax Return – Starting Year

Quarterly Property Tax Return – Starting Year

Payroll Preparation – Starting Pay Date Tax Projection – Starting Year

**CLIENT CUSTOM FIELDS**

Drake Portal User Software Data Location

Web Employee User QB Version

Financial Statement Preparation QB Admin Password

Username \_\_\_\_\_\_\_\_\_

EFTPS Pin

EFTPS Password

**BUSINESS CLIENT SETUP FORM**

**ADDITIONAL SETUP**

1) Client Entered in Drake CS 2) DRAKE PORTAL 3) PRACTICE FOLDER

Drake User Setup Connect Portal to Contact Create Hard Folder

4) CLIENT DATA FOLDER 5) Portal CS

Created Folder and Mapped to Practice CS Client Added Document Presentation to Contact

6) BOOKKEEPING FOLDER 7) PAYROLL FOLDER

Created Hard Folder Created Hard Folder

**CLIENT COMMUNICATION**

New Client Welcome Letter has been sent Engagement Letter has been sent

**ADDITIONAL CONTACT**

Mr. Mrs. First M.I. Last Name

Job Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ SSN: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ D.O.B. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address

City State Zip

Home # Mobile# Business #

Email

**ADDITIONAL CONTACT**

Mr. Mrs. First M.I. Last Name

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