

Bookkeeping & Software Training Form

Tell us what you want to learn so your training can be tailored to you.

CONTACT & BUSINESS INFORMATION

Name

Business Name

Email

Phone

WHAT WOULD YOU LIKE HELP WITH?

- | | |
|---|---|
| ☐ QuickBooks Online | ☐ Dext |
| ☐ Plotoo | ☐ Hubdoc |
| ☐ Wagepoint | ☐ Bookkeeping Fundamentals |
| ☐ Bank / Credit Card Reconciliations | ☐ Accounts Payable |
| ☐ Accounts Receivable | ☐ Financial Reports |
| ☐ HST / Sales Tax Workflow | ☐ Payroll Workflow |

EXPERIENCE LEVEL

- ☐ Beginner - new to the software / bookkeeping
- ☐ Some experience - comfortable with basics
- ☐ Confident - need help with specific or advanced tasks

TRAINING GOALS

What are the top 3 things you would like to be able to do after your session?

Describe any current problems, questions or workflows you want to review.

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Session preparation

CURRENT SETUP

Accounting software / version

How long have you used it?

Other apps connected to your bookkeeping

PREFERRED TRAINING STYLE

- ☐ Walk me through it step-by-step
- ☐ Show me, then let me try
- ☐ Focus only on my specific questions
- ☐ Not sure - recommend the best approach

ANYTHING ELSE?

Security: Do not enter passwords, banking credentials, SINS or payment card information on this form.

Name

Date