



**RANGE**  
PARTNERS  
Certified Practising Accountants

**NEW QUICKBOOKS CLIENT INFORMATION SHEET**

DATE: \_\_\_\_\_

**BUSINESS:**

BUSINESS NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

ABN: \_\_\_\_\_ TFN \_\_\_\_\_

INDUSTRY : \_\_\_\_\_

WEBSITE : \_\_\_\_\_

EMAIL : \_\_\_\_\_

TYPE:           SOLE TRADER ☐      PARTNERSHIP ☐      COMPANY ☐      TRUST ☐

**PREVIOUS RECORD KEEPING**

QUICKBOOKS/MYOB/RECKON/BANK STATEMENTS/OTHER \_\_\_\_\_

VERSION: \_\_\_\_\_

USER NAME: \_\_\_\_\_

PASSWORD: \_\_\_\_\_

**GST / PAYG**

GST REGISTERED:	YES/NO
MONTHLY/QUARTERLY	CASH/ACCRUAL
BAS LODGEMENT WITH ATO UP TO DATE	YES/NO
PAYG REGISTERED:	YES/NO MONTHLY/QUARTERLY
PAYG TAX INSTALMENTS:	YES/NO

**SALES**

DO YOU SELL	PRODUCTS / SERVICES / BOTH
DO YOU DO QUOTES	YES/NO
WILL YOU REQUIRE A CUSTOMIZED INVOICE AND/OR QUOTE TEMPLATE	YES/NO
INVOICE TERMS _____ DAYS	
IMPORT CUSTOMERS	YES/NO
INVENTORY	YES/NO
PAYMENT OPTIONS	EFT / PAYPAL / CREDIT CARD / DIRECT DEBIT
WOULD YOU BE INTERESTED IN THE BITPAY FREE APP ATTACHED TO QBO	YES/NO

**SUPPLIERS**

DO YOU USE PURCHASE ORDERS Yes/No  
IMPORT SUPPLIERS Yes/No

**PAYROLL:**

WILL YOU REQUIRE PAYROLL: Yes/No  
TOTAL EMPLOYEES \_\_\_\_\_  
PAYROLL WEEKLY/FORTNIGHTLY/MONTHLY  
CURRENT SUPERSTREAM COMPLIANCE SYSTEM SWITCH TO CLICKSUPER Yes/No \_\_\_\_\_  
WHAT AWARD ARE YOU UNDER \_\_\_\_\_  
EMPLOYMENT AGREEMENTS Yes/No  
EMPLOYEES TO MANAGE OWN TIMESHEETS Yes/No

ANNUAL LEAVE – 4 WEEKS PER YEAR PLEASE SPECIFY IF DIFFERENT  
PERSONAL LEAVE – 2 WEEKS PER YEAR PLEASE SPECIFY IF DIFFERENT

ANY ALLOWANCES/OVERTIME

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**WE WILL REQUIRE THE FOLLOWING -**

- ☐ CURRENT BACK UP FROM PREVIOUS RECORD KEEPING FOR DATA IMPORTS
- ☐ PROVIDE YOUR LOGO IN EITHER JPG, GIF, BMP, PNG
- ☐ BANK ACCOUNT DETAILS FOR ALL BUSINESS ACCOUNTS
- ☐ PROVIDE COPY OF CURRENT INVOICE TEMPLATE IF CUSTOMIZE INVOICE REQUIRED
- ☐ SIGNED QUICKBOOKS AUTHORITY FORM

USERS –

NAME: _____	EMAIL ADDRESS: _____	LEVEL OF ACCESS 1/2/3/4
NAME: _____	EMAIL ADDRESS: _____	LEVEL OF ACCESS 1/2/3/4
NAME: _____	EMAIL ADDRESS: _____	LEVEL OF ACCESS 1/2/3/4

LEVEL OF ACCESS

1. COMPANY ADMINISTRATOR
2. REGULAR USER ALL ACCESS RIGHTS
3. REGULAR USER LIMITED ACCESS TO CUSTOMERS & SALES
4. REGULAR USER LIMITED ACCESS TO SUPPLIERS & PURCHASES

PLEASE ADVISE ANY OTHER INFORMATION YOU THINK IS NECESSARY?


OFFICE USE ONLY: (TO BE TICKED WHEN COMPLETED)

CLIENT REFERENCE \_\_\_\_\_

PARTNER \_\_\_\_\_

STAFF \_\_\_\_\_

SIMPLE START \$15 P/M ☐

ESSENTIALS \$20 P/M ☐

PLUS \$25 P/M ☐

QUICKBOOKS AUTHORITY FORM ☐

INVOICED ☐

FILE COMPLETION DATE ☐

TRAINING APPOINTMENT MADE ☐

FOLLOW UP EMAIL SENT ☐