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| \\Dbxvmxq1\fortune accoounting\Office\Marketing Graphics\Fortune Logo JPEG.jpg  1825 ALLENTOWN RD, LIMA OH 45805  419-516-4435  Email: staff@fortuneaccounting.com |

# What is your QuickBooks knowledge?

Please take a few minutes to fill out this survey on your skills using QuickBooks. Fortune Accounting & Business Solutions, Inc. knows your time is valuable. In order for us to present you the best possible experience and training for your time, we need to know your current skill level. Thank you for your participation.

## General QuickBooks and Computer Applications

In general, how familiar are you with computers?

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Very 🞎 | 🞎 | 🞎 | 🞎 | 🞎 | 🞎 | 🞎 Has not been attempted. |

### How well do you navigate through QuickBooks, i.e. backup and restoring files, single and multiuser modes, using the preferences, etc?

🞎 Outstanding 🞎 Good 🞎 Adequate

🞎 Needs improvement 🞎 Poor 🞎 N/A

### Are you familiar with setting up QuickBooks?

🞎 Regular user 🞎 Somewhat Set up 🞎 Need Assistance

## Your Business

### How comfortable are you with setting up QuickBooks for your type of business?

🞎 Very 🞎 I’m sure I could make it better 🞎 Need Assistance

### What is your ability to manage lists?

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Outstanding 🞎 | 🞎 | 🞎 | 🞎 | 🞎 | 🞎 | 🞎 Very difficult |

### I am familiar with using the customer center and the flow from the sale to making deposits.

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| --- | --- | --- | --- | --- | --- | --- |
| Outstanding 🞎 | 🞎 | 🞎 | 🞎 | 🞎 | 🞎 | 🞎 Very difficult |

### I am comfortable navigating the Vendor Center; the different sales tax, bank recording etc.

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| --- | --- | --- | --- | --- | --- | --- |
| Outstanding 🞎 | 🞎 | 🞎 | 🞎 | 🞎 | 🞎 | 🞎 Very difficult |

### How well do you navigate the Payroll Setup Wizard?

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| --- | --- | --- | --- | --- | --- | --- |
| Outstanding 🞎 | 🞎 | 🞎 | 🞎 | 🞎 | 🞎 | 🞎 Very difficult |

### I can easily utilize the Report Center to benefit my type of business.

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| Outstanding 🞎 | 🞎 | 🞎 | 🞎 | 🞎 | 🞎 | 🞎 Very difficult |

## Beyond the foundation of QuickBooks

### How are your skills at customizing QuickBooks for your business?

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| Outstanding 🞎 | 🞎 | 🞎 | 🞎 | 🞎 | 🞎 | 🞎 Has not been  attempted |

### I can easily manage sales transactions; complex sales tax situations, and working with multiple accounts receivable.

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| Outstanding 🞎 | 🞎 | 🞎 | 🞎 | 🞎 | 🞎 | 🞎 Has not been  attempted |

### I know well how to work with special circumstances with purchase transactions; i.e. voiding prior period checks, payment errors, using cash flow projection tool 1, etc.

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| Outstanding 🞎 | 🞎 | 🞎 | 🞎 | 🞎 | 🞎 | 🞎 Has not been  attempted |

### How well have you mastered QuickBooks reports, trouble shooting, using the advanced fields etc.?

|  |  |  |  |  |  |  |  |
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| Outstanding 🞎 | 🞎 |  | 🞎 | 🞎 | 🞎 | 🞎 | 🞎 Has not been  attempted |

### I am familiar with exporting and importing data between QuickBooks files, lists, between QuickBooks and other programs or using special Excel import features.

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| --- | --- | --- | --- | --- | --- | --- |
| Outstanding 🞎 | 🞎 | 🞎 | 🞎 | 🞎 | 🞎 | 🞎 Has not been  Attempted |

### I know how to get around the Quickbooks payroll section to customize it fully to my business; handling special payroll deductions and payments, job costing, tracking workers compensation, etc.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Outstanding 🞎 | 🞎 | 🞎 | 🞎 | 🞎 | 🞎 | 🞎 Has not been  Attempted |

### I am familiar with managing collections, writing off bad debts and customer under and over payments.

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| Outstanding 🞎 | 🞎 | 🞎 | 🞎 | 🞎 | 🞎 | 🞎 Has not been  Attempted |

### I am familiar with handling bank reconciliation errors.

|  |  |  |  |  |  |  |
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| Outstanding 🞎 | 🞎 | 🞎 | 🞎 | 🞎 | 🞎 | 🞎 Has not been  Attempted |

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| Please share any additional comments. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

## Personal Information

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  |  | | |
| First Name | Last Name |
| Business Name | Type of Business |  |  |
|  |  |  |  |
| Address | City | State | ZIP Code |
|  |  |  |  |
| Email | Phone |  |  |

Thank you for taking the time to fill out our survey. Your input is greatly appreciated.

