Configuration

Before file upload, we're going to need some info..

Qualitative:

Revenue:

1) Which of these do you use for in-store transactions?

- Quickbooks

- Stripe

- Square

- I just invoice directly

- Combination

- Other - Write it in

2) Are you familiar with the concepts of an income statement?

- Yes

- Maybe, but explain it to me again

\*More detailed approach with "Skip" feature

\*Resources

- Nope!

\*General Accounting info with "Skip" feature

\*Resources

3) What industry are you in?

- Manufacturing

- Distribution

- Retail

- Wholesale

- Other

- I'm not sure...

4) How do you make money?

- Subscription

- Sales Orders

- Other

5) Do you offer discounts to customers?

- Yes

- No

If "Yes," How do you discount?

- I just take it off of the total price of the transaction (e.g. If I sold it for $5

and discounted for $2, then the total price on the transaction would be $3

6) Do you charge the customer for shipping?

- No, we pay for it always (Priced into total price).

- Yes, they pay for it always

5) How many employees do you have?

6) Do you have any

7) Marketing

8) G&A