

GrowthLab General Ledger Review

* Indicates required question

1. Email *

2. Company Name *

3. Lead Name *

4. **Account #1**

*

Financial Accounts (Bank Accounts, Credit Cards, Loans) - **NAME OF INSTITUTION & TYPE OF ACCOUNT**

5. Financial Accounts (Bank Accounts, Credit Cards, Loans) *

Check all that apply.

	<20 TRX	20-100 TRX	>100 TRX
Account #1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6. **Account #2**Financial Accounts (Bank Accounts, Credit Cards, Loans) - **NAME OF INSTITUTION & TYPE OF ACCOUNT**

7. Financial Accounts (Bank Accounts, Credit Cards, Loans)

Check all that apply.

	<20 TRX	20-100 TRX	>100 TRX
Account #2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

8. **Account #3**Financial Accounts (Bank Accounts, Credit Cards, Loans) - **NAME OF INSTITUTION & TYPE OF ACCOUNT**

9. Financial Accounts (Bank Accounts, Credit Cards, Loans)

Check all that apply.

	<20 TRX	20-100 TRX	>100 TRX
Account #3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

10. **Account #4**Financial Accounts (Bank Accounts, Credit Cards, Loans) - **NAME OF INSTITUTION & TYPE OF ACCOUNT**

11. Financial Accounts (Bank Accounts, Credit Cards, Loans)

Check all that apply.

	<20 TRX	20-100 TRX	>100 TRX
Account #4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

12. **Account #5**Financial Accounts (Bank Accounts, Credit Cards, Loans) - **NAME OF INSTITUTION & TYPE OF ACCOUNT**

13. Financial Accounts (Bank Accounts, Credit Cards, Loans)

Check all that apply.

	<20 TRX	20-100 TRX	>100 TRX
Account #5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

14. **Account #6**Financial Accounts (Bank Accounts, Credit Cards, Loans) - **NAME OF INSTITUTION & TYPE OF ACCOUNT**

15. Financial Accounts (Bank Accounts, Credit Cards, Loans)

Check all that apply.

	<20 TRX	20-100 TRX	>100 TRX
Account #6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

16. **Account #7**Financial Accounts (Bank Accounts, Credit Cards, Loans) - **NAME OF INSTITUTION & TYPE OF ACCOUNT**

17. Financial Accounts (Bank Accounts, Credit Cards, Loans)

Check all that apply.

	<20 TRX	20-100 TRX	>100 TRX
Account #7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

18. **Account #8**Financial Accounts (Bank Accounts, Credit Cards, Loans) - **NAME OF INSTITUTION & TYPE OF ACCOUNT**

19. Financial Accounts (Bank Accounts, Credit Cards, Loans)

Check all that apply.

	<20 TRX	20-100 TRX	>100 TRX
Account #8	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

20. **Account #9**Financial Accounts (Bank Accounts, Credit Cards, Loans) - **NAME OF INSTITUTION & TYPE OF ACCOUNT**

21. Financial Accounts (Bank Accounts, Credit Cards, Loans)

Check all that apply.

	<20 TRX	20-100 TRX	>100 TRX
Account #9	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

22. **Account #10**Financial Accounts (Bank Accounts, Credit Cards, Loans) - **NAME OF INSTITUTION & TYPE OF ACCOUNT**

23. Financial Accounts (Bank Accounts, Credit Cards, Loans)

Check all that apply.

	<20 TRX	20-100 TRX	>100 TRX
Account #10	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

24. **Account #11**Financial Accounts (Bank Accounts, Credit Cards, Loans) - **NAME OF INSTITUTION & TYPE OF ACCOUNT**

25. Financial Accounts (Bank Accounts, Credit Cards, Loans)

Check all that apply.

	<20 TRX	20-100 TRX	>100 TRX
Account #11	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

26. **Account #12**Financial Accounts (Bank Accounts, Credit Cards, Loans) - **NAME OF INSTITUTION & TYPE OF ACCOUNT**

27. Financial Accounts (Bank Accounts, Credit Cards, Loans)

Check all that apply.

	<20 TRX	20-100 TRX	>100 TRX
Account #12	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

28. **Account #13**Financial Accounts (Bank Accounts, Credit Cards, Loans) - **NAME OF INSTITUTION & TYPE OF ACCOUNT**

29. Financial Accounts (Bank Accounts, Credit Cards, Loans)

Check all that apply.

	<20 TRX	20-100 TRX	>100 TRX
Account #13	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

30. **Account #14**Financial Accounts (Bank Accounts, Credit Cards, Loans) - **NAME OF INSTITUTION & TYPE OF ACCOUNT**

31. Financial Accounts (Bank Accounts, Credit Cards, Loans)

Check all that apply.

	<20 TRX	20-100 TRX	>100 TRX
Account #14	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

32. **Account #15**Financial Accounts (Bank Accounts, Credit Cards, Loans) - **NAME OF INSTITUTION & TYPE OF ACCOUNT**

33. Financial Accounts (Bank Accounts, Credit Cards, Loans)

Check all that apply.

	<20 TRX	20-100 TRX	>100 TRX
Account #15	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

34. **Account #16**Financial Accounts (Bank Accounts, Credit Cards, Loans) - **NAME OF INSTITUTION & TYPE OF ACCOUNT**

35. Financial Accounts (Bank Accounts, Credit Cards, Loans)

Check all that apply.

	<20 TRX	20-100 TRX	>100 TRX
Account #16	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

36. **Account #17**Financial Accounts (Bank Accounts, Credit Cards, Loans) - **NAME OF INSTITUTION & TYPE OF ACCOUNT**

37. Financial Accounts (Bank Accounts, Credit Cards, Loans)

Check all that apply.

	<20 TRX	20-100 TRX	>100 TRX
Account #17	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

38. **Account #18**Financial Accounts (Bank Accounts, Credit Cards, Loans) - **NAME OF INSTITUTION & TYPE OF ACCOUNT**

39. Financial Accounts (Bank Accounts, Credit Cards, Loans)

Check all that apply.

	<20 TRX	20-100 TRX	>100 TRX
Account #18	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

40. **Account #19**Financial Accounts (Bank Accounts, Credit Cards, Loans) - **NAME OF INSTITUTION & TYPE OF ACCOUNT**

41. Financial Accounts (Bank Accounts, Credit Cards, Loans)

Check all that apply.

	<20 TRX	20-100 TRX	>100 TRX
Account #19	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

42. **Account #20**Financial Accounts (Bank Accounts, Credit Cards, Loans) - **NAME OF INSTITUTION & TYPE OF ACCOUNT**

43. Financial Accounts (Bank Accounts, Credit Cards, Loans)

Check all that apply.


	<20 TRX	20-100 TRX	>100 TRX
Account #20	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

44. eCommerce

Check all that apply.

	1 account	2 accounts	3 accounts	4 accounts	5 accounts
Amazon	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shopify	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Square	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Etsy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ebay	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WooCommerce	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

45. Revenue COA Allocations (2 Included) *

 Dropdown
Mark only one oval.

- ☐ 1-2
- ☐ 3-5
- ☐ >5 (=custom pricing)

46. List the customer's COA Revenue Categories *

47. # of Active Classes *

⌵ Dropdown

Mark only one oval.

- ☐ 0
- ☐ 1
- ☐ 2
- ☐ 3
- ☐ 4
- ☐ 5
- ☐ 6
- ☐ 7
- ☐ 8
- ☐ 9
- ☐ 10

48. Is Catchup Bookkeeping required? *

Mark only one oval.

☐ Yes

☐ No

49. What is the Catchup Bookkeeping date range?

50. Additional Notes:

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