**Project Evaluation**

**for**

**Baystate Consulting Products**

Please fill out this form and return it (by fax or email) to us so that we can get a clear idea of what you need. We will also need a copy of your QuickBooks file and a copy of the source file (or desired output file). There is a “yousendit” link on our website to send us these items. We can provide a Mutual Non-Disclosure/Confidentiality Agreement if you require one (email us separately requesting a non-disclosure).

We charge an “assessment fee” of $120 for our in-house Transaction Pro knowledgeable staff to review your items and your requirements. Once we have reviewed these, we can give you a firm price and time schedule for completion of your project. Should you decide to engage our services, we will issue a Letter of Engagement and outlining those requirements, along with an invoice for 50% deposit to begin. The balance due upon completion. The $120 prepaid assessment fee will be credited to the balance of your project when you decide to move this project forward.

1. Any information you feel would be helpful to understand your project (be as specific as possible):

1. How did you hear about us?
2. Which product are you wanting to utilize, do you already own it/them, and what is its/their version:

**Product Name Already Own It Version**

Transaction Pro Importer for QuickBooks yes  no

Transaction Pro Exporter for QuickBooks yes  no

Transaction Pro Deleter for QuickBooks yes  no

Transaction Pro Deleter for QBOE yes  no

Transaction Pro Importer for QBOE yes  no

Other:

1. What edition and version QuickBooks? edition       version
2. What operating system do you have?
3. Who will run the process using the Baystate product(s) – does this person have the FULL QuickBooks permissions?\* yes  no

\* if not, we have a ‘bridge’ product available that allows a limited permission user to run the import or export.

1. Company Information

Company Name

Contact Name

Contact Title/Role

Address

City

ST

Zip

Phone

Website

Accounting Contact Name

Accounting Contact Email

Accounting Contact Phone

Technical/IT Contact Name

Technical/IT Contact Email

Technical/IT Contact Phone

IT Contact Cell Phone

1. What is your industry and your product line?
2. What is the company’s approximate annual revenue?
3. How many sales do you complete per year      , and what is your average income per sale?

If you have several businesses, please specify these averages PER business:

Business 2: #sales per year       average income per sale $

Business 3: #sales per year       average income per sale $

Business 4: #sales per year       average income per sale $

Business 5: #sales per year       average income per sale $

1. Do you have employees?  No  Yes How many
2. Are you currently using QB for your payroll?  No  Yes If yes, which Intuit Payroll Service?

If you use an outside service, which payroll service do you use?

Would you be interested in information on Intuit QB payroll service?  Yes  No (an Intuit Payroll rep will

contact you separately)

1. Describe your technical environment (type of server, network, number of computers, number of remote

users)…

1. Is remote access available for installation and technical support?  Yes  No

If No, a free *logmein®*  account will be installed on the host computer.

1. Who is your current Merchant Services provider?

If it is not Intuit, are you interested in finding out if you could save money through Intuit Merchant Services?

Yes  No (an Intuit Merchant Services rep will contact you directly)

1. Web Hosting provider:

Web Hosting Contact Name:

Web Hosting Contact Email:

Web Hosting Contact Phone:

1. Do you use EDI (Electronic Data Interchange) in your business?  Yes No

Are you interested in seeing if we can save you money, time or both in this process?  Yes  No

If yes, who is your EDI provider?

EDI Contact Name:

EDI Provider Contact Email:

EDI Provider Contact Phone:

Major EDI Trading Partners

Transaction Types

Approx volume (estimate)

1. Services Needed (check all that apply)

Baystate Consulting mapping, basic training

QuickBooks Installation, Setup and Configuration

Hosting Installation, Setup and Configuration

Webgility Install, Setup and Configuration

T-Hub Install, Setup and Configuration

EDI Integration with QuickBooks

New Cart Integration What software

New Shipping Software Integration What software

Santrio Installation

Other; specify

1. What is your anticipated budget for this project:
2. What is your anticipated start date for this project: