

Interview Worksheet

Company:

Date:

Attendees:

What do you sell? A little about the company			
Who do you sell to? (Wholesalers, Retailers, etc.)			
How do you get your orders? (Phone, Email, Webstore, EDI)			
Are your customers mainly domestic or international? Do you purchase or sell in multiple currencies?			
Company Statistical Information			
# of Customers		# of Products	
Orders per Day (or week)	Lines/Order	PO per Week (or Day or Year)	Lines per PO
Do you use FedEx Shipping Workstation, UPS Worldship, StarShip or ShipRush?			
Current program used for data / QB Version. What size is your QB file? Is your inventory tracked in QB? If so, is the item list correct?			
What is the sales process? How do you want to process orders through Activate			
What is the target go live date?			
Configuration Requirements			
Warehouses. (Balance Sheet Side) Each warehouse is linked to an inventory asset account in QB. Multiple warehouses can use the same asset account or they could be different. They can be physical or virtual warehouses.			
Branches (Balance Sheet Side): Branches are linked to different A/R accounts.			
Sales/COGS (P&L Side): Do you have multiple income and COGS accounts? If so, are there different income accounts and COGS based on the types of products, customers, or something else? Income and COGS can be linked to Product Class,			

Sales Category, Branch, Salesperson, or Customer Type in Acctivate.
Do you use "CLASSES" in QB? If so, how? Acctivate can integrate on the sales side with QB Class.
Product Classes (Required)– Main way to categorize products. Most commonly linked to income and COGS accounts in QB. Used as a filter to look up products and has multiple reports built around it.
Product Type (Required)– Another way to categorize your items which is another available filter on the product lookup window. Do you have a hierarchy setup in your QuickBooks item list? The parent of the hierarchy can be brought in as is, as the Product Type, or as the Sales Category. If you have multiple levels, only the first level will be created as one of these groupings. The rest can be updated via import to update the IDs when necessary.
Sales Category (Optional) – A third way to categorize products, however it is not a lookup filter. There are two sales reports built around the sales category.
Valuation/Cost method (QB uses Average cost) We support Average, FIFO, LIFO, Standard and Actual (only with Lot and Serial).
Units Of Measure. Our products can have a stocking unit, sales unit, and purchasing unit. Do you deal with your products in multiple units?
Do you have any special pricing? We offer pricing based on Product Groupings, as well as Customer and Product specific.
Do you have a physical server or are you hosted? If hosted, what provider?