

## ACCOUNTING NEW CLIENT TRANSITION

**Date:** \_\_\_\_\_ **ASAP Rep:** \_\_\_\_\_

ASAP Region:  Telluride  Roaring Fork Valley  Montrose  Durango  Denver  Out of Region

Payroll Client?  Yes  No How did they hear about ASAP? \_\_\_\_\_

**Company** \_\_\_\_\_ **DBA** \_\_\_\_\_

Address \_\_\_\_\_  
(Legal/Physical) STREET CITY STATE ZIP

Address \_\_\_\_\_  
(Billing, if different from above) STREET CITY STATE ZIP

Owner/Principal \_\_\_\_\_ Email \_\_\_\_\_

CPA/Accountant \_\_\_\_\_

Billing Contact \_\_\_\_\_ Phone \_\_\_\_\_ Email \_\_\_\_\_

Alternate Contact \_\_\_\_\_ Phone \_\_\_\_\_ Email \_\_\_\_\_

Billing Method  Credit Card\*  Auto-ACH\*  Bill.com ePayment\*\*

### ITX Login Information:

Username/Password: \_\_\_\_\_ Username/Password: \_\_\_\_\_ Username/Password: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Number of Workstations Initially Set Up: \_\_\_\_\_ Monthly ITX Charges: \_\_\_\_\_  
(As outlined in proposal) (\$45 first login, \$25 additional users (\$35 non-profit))

### Bill.com Information:

ASAPBill.com Email: \_\_\_\_\_

Number of Users Initially Set Up: \_\_\_\_\_  
(As outlined in proposal)

Monthly Bill.com Base Charges: \_\_\_\_\_  
(Payables = \$19.99 with one user, \$9.99 additional users)

**Total Amount Quoted:** \_\_\_\_\_

Notes: \_\_\_\_\_