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1. To save a copy of this as a Google Doc to fill out digitally, select File > Make a Copy. When you are done filling out the file, share that copy with bryan@bryancanary.com. I will make a copy for myself and then ask you to unshare it.
2. To save this as a PDF or a docx file, Select File > Download As > xxx.. If you fill out the pdf or the docx digitally, please forward a pdf of the file to bryan@bryancanary.com (note, I won't open docx files).
3. To print and fill out by hand, select File > Print OR select the printer icon from the menu bar. Fill out the form and email a pdf of the form to xxx@yyyy.com

If you fill this out digitally:

- Checkmark -- here is a checkmark (✓) you can use as needed (ctrl-c to copy, and ctrl-v to paste. Use ctrl-shift-v to paste into table cells)
- Multiple Choice -- You can bold, highlight or change the color of the words to accentuate your answer
- To change font color and style for the text for your answers (optional) -- 1) Type a little something 2) highlight that something and change the color/font as desired 3) On the menu above where it says "Normal Text" (to the right of the zoom %) -- click the down arrow, then click the arrow next to "normal text", then click "update Normal Text to Match"

Pre-Reading Affirmation - Beta User Welcome Letter and PreQuestionnaire

I have read the "ZAP Systems - New User Welcome Letter" and I am familiar and comfortable with the information and ideas shared in that document. I also have submitted the "Beta User Screening Questionnaire" via email and I have been invited to take the next step in this process.

From the descriptions in the New User Welcome letter, I would categorize myself as (check all that apply):

<input type="checkbox"/>	Self Sufficient Explorer
<input type="checkbox"/>	The Blossoming Explorer
<input type="checkbox"/>	The Budding Explorer
<input type="checkbox"/>	The Excited Seedling
<input type="checkbox"/>	The Leggy Seedling
<input type="checkbox"/>	The Traumatized Seed

Personal Information

Full Name	
Email Address	

Phone Number (mobile)	
Phone Number (other)	
Mailing Address	
Occupation	
Self Employed, 1099 or w2	
Business Name / Employer Name	
Website for Business(es)	

User Demographics

Birth Year	
Higher Education Schools attended and Degrees pursued/obtained (if applicable)	
High School Name, City and State	
Years of Experience in Current Occupation	
Job titles and employers unrelated to your current occupation going back to childhood (this is relevant)	
Creative/ Artistic Talents (we all have them and it is relevant)	
Birth Country	
# of Countries Visited (approximate)	

Personal and Business Credit Items

This is very relevant. Folks who have been or are credit challenged often will require more time in the software setup and use process because they have more moving parts to their financial world due to various limitations.

What is your credit score?	
Has your credit score ever been significantly impacted by Bankruptcy or Debt?	Yes / Yes a little, but nothing major / No
Do you have the ability to get or expand credit lines easily or are there hurdles for that?	
Do you currently have business credit cards or business credit setup?	

Accounting and Account Related Facts

# of Business Entities you are doing accounting for at this time?	
# of Business Entities in addition to the current entities you may/will need to do accounting for in the next 12 months	
Do you think you will also setup a copy of the software for personal expense tracking?	Yes / Maybe / No
I currently do my bookkeeping/accounting in... (if other, please list software vendor/methods)	Quickbooks / Spreadsheets / Other
I currently do my own bookkeeping	Yes / No
I currently have a full time / part time bookkeeper	Yes / No
I currently have my accountant do my bookkeeping	Yes / No
# of checking accounts I have total (personal and business)	

# of checking/savings accounts I expect to track for my business	
# of checking/savings accounts dedicated solely to business	
My checking/savings accounts are with: (name of banks)	
# of credit card accounts I have total (personal and 1 business)	
# of credit card accounts I expect to track for my business	
# of credit card accounts dedicated solely to business (either a business account or a personal account used exclusively for business transactions)	
Do you have a corporate credit card account? Yes / No If yes, how many card holders on the corporate account? _____	
My credit card accounts are with (name of banks)	
I have a Paypal account	Yes / Can't remember / No
I use my Paypal account	Regularly / Rarely / Never
I have a Square account for processing Credit Cards If yes, is this your primary CC processor?	Yes / Can't Remember / No
I have a service similar to Square for processing Credit Cards? If yes, what is it?	Yes / No

I have a merchant account for processing Credit Cards	Yes / No
I have separate credit card terminals connected to phone lines in my office	Yes / No
My primary credit card processing is built into my Point of Sale System. If yes, what is name of system?	Yes / No
My primary credit card processing is built into my Accounting System. If yes, what is name of system?	Yes / No
My Credit Card purchases flow right into my working checking account nightly	Yes / No, they go into a holding account
I deposit checks and cash into my account _____	Daily / Weekly / Irregularly
When I deposit my checks and cash I typically use the night deposit box. If no, how do you do it?	Yes / No
Do you have a system that tracks what checks you deposited (other than online banking after the fact)?	Yes / Kind of / No

Your Primary Objectives for considering/switching to/using ZAP Accounting Software

Rate each of these from 0 to 10 in the left box. (0 is low/no motivation and 10 is high motivation...)

	Gain operational control over my bookkeeping and accounting to a greater degree than I have now
	Take my bookkeeping over from my bookkeeper / accountant (circle applicable).
	Find software I can use and understand that is better than what I'm using now. I am currently using Quickbooks, plain spreadsheets, other. (circle, bold or accent all that apply) If other, please comment
	Reduce my bookkeeping and accounting costs
	Reduce the time required for bookkeeping and accounting
	Increase my self confidence in business as a byproduct of learning a new trade (bookkeeping and accounting)

	Learn how to wisely reduce money paid to the IRS because I do not like the way our tax money is spent
	Learn about the computer programming that is behind the accounting portion of this solution
	Learn about the advanced spreadsheet programming (non-accounting specific) that drives these spreadsheets
	Learn about the advanced javascript programming module built into google sheets
	Become proficient with this solution so I can become a paid consultant to others
	Become proficient with this solution so I can become a support person for others as part of my paid work or as part of my social service to others
	Other -- please comment

Negative Bookkeeping/Accounting Experiences

Check all that apply...

	I have lost my data before // My bookkeeper/accountant has lost my data before (circle which apply)
	I have overpaid for bookkeeping services before
	I have overpaid for accounting services before
	I have had my bookkeeper or accountant steal money from me
	I have had a business partner who controlled the books steal money from our company
	I have been forced to upgrade to new versions of software that I did not need before
	I have used spreadsheets for accounting before and felt like there must be a better way
	Other -- please comment

Bookkeeping / Accounting Background

Did you grow up in a family business or around small business commerce ? If yes, were you familiar with handling money and/or accounting (yes / no)	Yes / No
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Did you take an Accounting 101 class in High School?	Yes / No
Did you take an Accounting 101 class in Undergrad?	Yes / No
Did you take an Accounting 101 class (or greater) in Grad School?	Yes / No
Do you have bookkeeping experience? If yes, how much? ____ (Scale from 1-10 w/ 10 being a lot) Comments:	Yes / No

Operating System Familiarity

Scale of 0 to 10 with 10 being very comfortable and 0 being no experience at all / not comfy at all.

How comfortable and experienced are you with PC's (Windows machines)? ____ (0-10) Years of experience? ____
How comfortable and experienced are you with Macs? ____ (0-10) Years of experience? ____
How comfortable and experienced are you with Chromebooks (Chrome OS)? ____ (0-10) Years of experience? ____

Technologist Rating (Self Assigned)

I am a: (check all that apply)

<input type="checkbox"/>	Master Technologist
<input type="checkbox"/>	Technology Hobbyist (I enjoy learning new things and futzing on my computer)
<input type="checkbox"/>	Happy Technology User
<input type="checkbox"/>	Reluctant Technology User
<input type="checkbox"/>	Techno-scaredy cat

When I have a computer problem I : (check all that apply)

<input type="checkbox"/>	Freeze up and walk away
<input type="checkbox"/>	Bumble around non-systematically trying to figure out the problem and/or try to get help from other individuals
<input type="checkbox"/>	Quickly go to google and start looking for answers with low / medium / high success rates

Support? (check all that apply)

	I have a family member or friend who is awesome with computers and he/she is my go to support person. That person's first name is: _____
	I have a family member or friend who is awesome with spreadsheets . He/she is my go to support person. That person's name is: _____
	I have a family member or friend who is awesome with google related stuff . He/she is my go to support person. That person's name is: _____

MS Excel Background

Have you used MS Excel?	Yes, a lot / Yes a moderate amount / Yes a little / No, not yet
Can you use it for very basic things like lists?	Yes / Moderately / No, not yet
Can you use it for math related work?	Yes / Moderately / No, not yet
Can you create your own simple equations?	Yes / Some familiarity / No, not yet
Can you create complex spreadsheets that reference other cells and manage equations?	Yes / Some familiarity / No, not yet
Have you ever used the VB Editor in MS Excel for Macros or other programming?	Yes / I have some familiarity / No, not yet

Technology Questions -- Hardware, Software, Peripherals

Monitors

How many monitors do you have connected to your primary computer?	
If you only have a single monitor have you worked on multiple monitors before?	Yes / A little / No, not yet
Do you recognize the benefits of multiple monitors?	Yes / A little / No, not yet

If you only have one monitor are you willing to upgrade to at least two?	Yes / Maybe / I'd prefer not
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Mice

Do you use an external mouse regularly?	Always / Occasionally / No, I don't like them
If not, do you own one ?	Yes / I think so / No
If not, are you willing to use an external mouse?	Absolutely / Maybe / I'd prefer not

HINT: Spreadsheets are far more challenging to use with just touchpad than they are with an external mouse. Greatest level of efficiency and high speed use requires an external mouse.

Screenshots and Screen sharing

I know how to take screenshots and paste them into an email	Yes / I think so / No
I know how to do video recordings of my screen and share them	Yes / I think so / No
I am familiar with remote access tools and/or screen sharing	Yes / I think so / No

Copy, Paste, Delete, Undo and Paste Special

I know what Ctrl-C, Ctrl-V, Ctrl-X, Ctrl-Z and Ctrl-shift Z do for text	Yes / I think so / No
I know how to use the ctrl and shift keys when dragging around spreadsheet cells for different effects	Yes / I think so / No
I understand in detail what "paste special > values only" does in spreadsheets (this is used all the time and very important)	Yes / I think so / No

Google Suite Account and Google Account

Do you have a google suite account? (your email is typically related to a private domain but you use google to check it)	Yes / No / Not sure
Do you have a google account? (An email address ending in @gmail.com)	Yes / I think so / No

A google account or a google suite account is required to take full advantage of ZAP Software. It can be used in Excel, but the cloud based functionality is lost and that dramatically reduces its overall potential.

Google Drive

I am experienced with Google Drive	Yes / Some / No, not yet
I know how to share files and find shared files	Yes / I think so / No, not yet
I know how to make copies of files shared with me and relocate them	Yes / I think so / No, not yet

Google Sheets Background

Check the statement(s) that apply...

<input type="checkbox"/>	I'm a wizard with Google Sheets (more or less)
<input type="checkbox"/>	I can get around, but I don't see it as any different than MS Excel
<input type="checkbox"/>	I have no significant experience with Google Sheets, but I'm excited / not excited / terrified (circle one) to learn how to use it

Circle appropriate answer

I understand the networking benefits of google sheets	Yes / Some familiarity / No, not yet
I understand how multiple users can interact on a google sheet at the same time when it is shared	Yes / Some familiarity / No, not yet

Initial Setup Expectations

Based on the little that I've seen and heard...

<input type="checkbox"/>	I expect to be setup and using this in 15-30 minutes
<input type="checkbox"/>	I expect to be setup and using this in 30-60 minutes
<input type="checkbox"/>	I expect to be setup and using this in 60-180 minutes

Proficiency Expectations

Based on the little that I've seen and heard...

<input type="checkbox"/>	I expect to be proficient in this with 1-2 hours of use
<input type="checkbox"/>	I expect to be proficient in this with 3-10 hours of use

	I expect to be proficient in this with 11-30 hours of use
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Other Comments

Please include any other comments here...