Approved Horizon customer Setup Form:

The purpose of this document is to communicate general information about your organization. This information is necessary to create an operational Property Genie database and corresponding QuickBooks file.

General Information:

☐**Contacts Only:** My members are individuals, never companies, and we always invoice the individual.
OR:
☐**Company and representatives:** My members are Companies with individuals that represent them. We usually invoice companies, not individuals.

Company Name (as it should appear on reports):

Main Contact's Name:

Address Line 1:

Address Line 2 (optional):

City:

State:

Zip Code:

Phone:

Fax:

Toll Free:

Email:

Approved Horizon customer Setup Form:

Will you be processing Events, Membership dues or other payments vie electronic payments? ☐ Yes ☐ No

If YES, please gather the following information:

Identify your Payment Processor:

Authorize.net
Cybersource
eProcessing
PayFlow Pro
Revolution Payment Gateway
YourPay

☐ Please have a processor contact me to set up an account.

Online Merchant Processing

Merchant Processor	PayFlow Pro

Accept: ☑ Master Card ☑ Visa ☑ Discover ☑ Amex ☐ Diners
☐ e-Check

User Login	••••••••••••••••••••••••••••••••••••••
Transaction Key	••••••••••••••••••••••••••••••••••••••

 An approved Horizon Representative will assist you with entering this information into your database
during training and implementation.

Approved Horizon customer Setup Form:

QuickBooks Information:

Version of QuickBooks you are using:

Year:	Level: (i.e. Standard, Pro, or Enterprise)

Which best describes your QuickBooks database (Circle one):
1. Do not currently use a QuickBooks database and plan to start with a new database.
2. Currently use a QuickBooks database but plan to start with a new database created by Approved Horizon.
3. Currently use a QuickBooks database and plan to continue with the same database

If you selected # 2 or # 3 above:

Your Employer ID Number:

First Day of your Fiscal year:

Legal Company Name:

Organization Type:

☐ Sole Proprietorship ☐ Partnership ☐ LLP ☐ LLC ☐ S Corp ☐ C Corp Other:

Accountant Name:

Email:

Comments regarding QuickBooks:

Preliminary Schedule:

Task ID	Task	To Be Completed By
1	Create Approved Horizon SQL database.	AH
2	Complete and submit Horizon Information Sheet (this document).	Customer
3	Complete and submit Excel Spreadsheet with Owner, Tenant, Property and Lease Information.	Customer
4	Complete and submit Excel Spreadsheet with member Information.	Customer
4	Import of data into Horizon from Excel Spreadsheet (Note: Import will only be performed when member count exceeds 25. If less than 25 members, data will be hand-keyed by customer).	TBD
5	Installation of Approved Horizon including, QuickBooks Toolkit, QuickBooks data file and Microsoft Report Viewer.	AH
6	Connect to database and review imported data.	AH
7	Training.	AH

System Users:

Name	LoginID	Password	Email	Roles In Database (Check for Yes)										
				Admin	Membership	Acctg	QuickBooks	Acctg Supv	Website manage	Events	CRM	Owner	School	Security

Web Configuration

Website Address:

Will you be using the horizon website features?

☐ Yes

☐ No

☐ ☐ ☐ ☐

If yes, Website Technical Contact:

☐ ☐ ☐ ☐

Name:

☐ ☐ ☐ ☐

Phone:

☐ ☐ ☐ ☐

Email:

Send web email from name:

Email address: