



**FROM** Calmwaters Cloud Accounting  
16 Lakeside Dr  
RR2 Puslinch, ON N0B2J0

**QUOTE** 3263433  
**ISSUED** November 15, 2018

**TO** Calmwaters Cloud Accounting  
**Kellie Parks**  
16 Lakeside Drive  
Puslinch, ON N0B2J0

## Additional Options

Please select any of the following options:

	QUANTITY	PRICE	TOTAL
<input checked="" type="checkbox"/> <b>Resale - Client Handbook Copy</b> Clients are more engaged and compliant if expectations of their responsibilities are clear, workflows are pre-set for them, CRA best practices are established and they understand the basics of bulletproof bookkeeping. Calmwaters will supply relevant content, using our templates, for a printed and an online Client Handbook, and supply you with the final copy to have customized and branded for your business.	1	\$250.00	<b>\$250.00</b>
<input checked="" type="checkbox"/> <b>Resale - Email Templates</b> This is a series of email templates that will be a great head start on creating consistent communications that can be sent out efficiently. "Never compose an email twice!" Here's a quick rundown sampling: Nagging - Start of the Month and Monday Morning reminders. We can't complete... Gov't - HST, PD7A reminder, approval and filing confirmations. Rep a Client instructions. App partners - Disconnected bank connection notices. Notices accounts have been set up. Education sessions notices. Collaboration and approval - Report approvals. Daily Sales, UNFs, Sales clearing reports. This is the short list. In all there are over 20 templates that cover everyday bookkeeping and engagement communications.	1	\$100.00	<b>\$100.00</b>
<input checked="" type="checkbox"/> <b>Resale - Onboarding, Engagement and General Contracts</b> These Word Doc templates of contracts include summary and detail engagement forms, a rescue file contract, a lack of source document firm release and contract to grant accountant access to acct'g programs.	1	\$100.00	<b>\$100.00</b>
<input checked="" type="checkbox"/> <b>Resale - Prospective Customer Questionnaire - Google Form</b> This form will hone prospective clients for fit and feel as well as provide a solid starting point for pricing.	1	\$75.00	<b>\$75.00</b>

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Please select any of the following options:

	QUANTITY	PRICE	TOTAL
<input checked="" type="checkbox"/> <b>Resale - Google Form File Review/Year End Template</b> This is a great pack to make your year end or general file reviews seamless and profitable. Make year end work quick and consistent. Know what you are getting into clean up/catch up files so you can price them accurately. Review end user files effectively as a stand alone service offering. You will streamline your workflow. You can duplicate and customize easily for each niche or client.	1	\$50.00	<b>\$50.00</b>
<input checked="" type="checkbox"/> <b>Resale - Google Form Customer Workflow</b> This is a checklist for your customer to use to remind them of the steps they need to complete and documents they need to supply to you.	1	\$50.00	<b>\$50.00</b>
<input checked="" type="checkbox"/> <b>Resale - Google Form Onboarding Workflow</b> Use this checklist to make sure you gather the right information and documentation, complete the process of CRA representation, send out engagement and expectation setting collateral and move your customers smoothly onto their app stacks and document sharing platforms.	1	\$50.00	<b>\$50.00</b>
<input checked="" type="checkbox"/> <b>Resale - Google Form Bank &amp; Reconciliation Information Form</b> This is a questionnaire your customer completes so you have an accurate picture and record of their bank/credit card providers, account last 4 digits and a note to change their statements to month end dates. It is key information needed to how many accounts you are reconciling and what those accounts are.	1	\$50.00	<b>\$50.00</b>
<input checked="" type="checkbox"/> <b>Resale - Google Form Payroll Information Form</b> This is a questionnaire your customer completes so you have an accurate picture and record of their payroll requirements, including number of employees, payroll cycles and pay types.	1	\$50.00	<b>\$50.00</b>
<input checked="" type="checkbox"/> <b>Resale - Google Form Bookkeeping Workflow</b> Implement consistent, accurate and effective bookkeeping using this standard workflow. It has the steps and stages for all bookkeeping task (except payroll) broken into the 3 stages of tasks. The pre-work stage of review and document gathering. The work stage. And the reporting stage	1	\$50.00	<b>\$50.00</b>
<input checked="" type="checkbox"/> <b>Discount For Purchasing Template Full Package</b> Please tick this option to receive \$50.00 discount if you purchase all the above items together.	1	-\$50.00	<b>-\$50.00</b>

Subtotal:	<b>\$775.00</b>
HST (13%)	<b>\$61.75</b>

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<b>Total:</b>	<b>\$836.75</b>
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To indicate your acceptance of the above, click the button below.