

# 2Shakes SIGNING UP form.

1 Your business > 2 Branding > 3 Services & Fees > 4 Authorities > 5 Terms & Conditions > 6 Users > 7 Review

Please set up your account first.

### BUSINESS Details

Search for your company

Entity name or NZBN

Legal name (required)	Trading name	NZBN	
<input type="text" value="Patel Law &amp; Accounting Systems"/>	<input type="text"/>	<input type="text"/>	
Street (required)	Suburb	City (required)	Post code
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Website	Business email	Office Phone	Fax
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

## 1<sup>st</sup> Page: Your Business

- Question mark should maybe be another color (kind of hard to see)
- but good use of pop-up
- I like that you can search businesses and a window pops up where you can select an option. Once the option is selected then some of the information is already filled out for you.
- Good button placement
- Potentially need to asterix options that are required fields.
- however when you click the save button it does indicate which fields are required
- I like the bar at the top that tells you what stage you're at and the instruction underneath tells you to 'Please set up your account first' is good
- 

1 Your business > 2 Branding > 3 Services & Fees > 4 Authorities > 5 Terms & Conditions > 6 Users > 7 Review

### Logo

Enter your logo, credentials and social media to promote your business. Those will be used on screen, on agreement paperwork and on e-mails to your clients.

Patel Law & Accounting Systems's logo (please select a jpg, png or gif of 1MB maximum size)

No file chosen

### Email footer image

please select a jpg, png or gif of 1MB maximum size

No file chosen

### Social Media

LinkedIn	<input type="text" value="www.linkedin.com/YourCompany"/>	Facebook	<input type="text" value="www.facebook.com/YourCompany"/>
Twitter	<input type="text" value="twitter.com/YourCompany"/>		

## 2<sup>nd</sup> Page: Branding

- Logo
- Instructions are there but they need to be another colour
- If you upload a logo, no option to delete the photo
- Header titles don't really stand out
- Email
- I'm still a little unsure about it. It could look better.
- Might need little pop-up explaining what it is
- Don't know what attachment button is for
- Option to go to the previous page

Email

This email will be sent to your client with the copy of the agreement. You can alter this email text for each agreement you send out.

A new message to you from [PRACTICE NAME]

Dear [CLIENT\_NAME],

Congratulations for signing up with [PRACTICE\_NAME]

We are delighted to attach here your signed agreement. This agreement outlines the services, T&C and fees we have agreed.

As part of the sign up process an authority request forms we need to perform these agreed services for you have been completed, signed and sent in on your behalf. Details of the organisations where authority has been set up are listed in the attached agreement.

If you would like a copy of the authority paperwork and forms please contact [PRACTICE\_NAME] and we can send you a copy.

You can revoke any authority by contacting the relevant organisation and completing their authority change process.

Thank you for choosing [PRACTICE\_NAME]

We look forward to working with you.

Yours sincerely,

## Attachments

[Add an Attachment](#)

Save

1 Your business > 2 Branding > 3 **Services & Fees** > 4 Authorities > 5 Terms & Conditions > 6 Users > 7 Review

Select the services that you offer your clients. These will appear as a check list on the Sign Up form. You can select from the list below and add your own Services.

- |   |   |
|---|---|
| Accounts processing using computerised accounts package | <input checked="" type="checkbox"/> Bank reconciliations                |
| Debtor invoices & statements                            | <input checked="" type="checkbox"/> Online payments                     |
| GST Returns   | <input checked="" type="checkbox"/> Payroll processing & PAYE           |
| Withholding Tax deducted from Contractors               | <input checked="" type="checkbox"/> Fringe Benefit Tax                  |
| Management Reports                                      | <input checked="" type="checkbox"/> Monthly Employer Deduction Schedule |
| Annual Accounts to Trial Balance                        | <input checked="" type="checkbox"/> ACC levies                          |
| Companies Office returns                                |   |

Something Professional

Remove

Remove

Add Service

Fee Description	Amount
Application Fee	\$100.00
Registration Fee	\$50.00
Exam Fee	\$150.00
Materials Fee	\$25.00
Travel Fee	\$100.00
Accommodation Fee	\$100.00
Meals Fee	\$50.00
Transportation Fee	\$50.00
Insurance Fee	\$25.00
Security Fee	\$25.00
Other Fee	\$25.00
<b>Total Fee</b>	<b>\$600.00</b>

Our fees for services are **\$AMOUNT** per Month/Week/Hour excluding GST. We require payment for services as specified in our attached terms and conditions.

[Previous](#)

Save

Next

### 3<sup>rd</sup> Page: Services and Fees

- A little bit overwhelmed by the options
- Problem with the adding a service
  - it looks really weird
- Fee Description
  - could be presented nicer maybe

1 Your business > 2 Branding > 3 Services & Fees > 4 Authorities > 5 Terms & Conditions > 6 Users > 7 Review

Here you select which authorities you need to allow you to represent your clients with different organisations.

☐ Identity Capture: Show ID Capture on the Review and Sign Agreement Screen.

☐ Inland Revenue: Show Inland Revenue Authority on the Client Signup screen. ⓘ

☐ ACC: Show ACC Authority on the Client Signup screen. ⓘ

☐ Companies Office: Show Companies Office Authority on the Client Signup screen. ⓘ

☐ Authority Letter: Show Authority Letter (e.g. Insurance) on the Client Signup screen.

☐ Document Authority: Authority and Consent Documents to show on the Client Signup screen.

☐ General Authority: Show General Authority Statement on the Client Signup screen. ⓘ

Xero Practice Manager & Workflow Max: Authorise ZShakes to create new client records and upload information to Practice Manager.

Click **Get Authorised** to go to the Practice Manager website and authorise ZShakes to upload clients you sign up.

Get authorised

#### 4<sup>th</sup> Page: Authorities

- Little Confusing
- Maybe instead of one big chunk of options it's turned into a step by step process
- Or instead of the list could be displayed as buttons or something
- Arrows are misleading

1 Your business > 2 Branding > 3 Services & Fees > 4 Authorities > 5 Terms & Conditions > 6 Users > 7 Review

Standard Terms and Conditions for your clients

Here you define your standard and alternate terms of engagement for clients. You will be able to modify and confirm these when signing up individual clients. Once confirmed, they will form part of the agreement created between you and the client. We have developed these terms in consultation with bookkeepers and the NZBAI, but they are a starting point only. Please check to make sure they meet your needs. We are not a law firm, and do not provide legal advice.

costs associated with termination.

**6. ACCEPTANCE**

6.1 Any subsequent instructions written or otherwise received by Us from You for the supply of additional Services, shall constitute continuing acceptance of these Terms of Engagement.

6.2 We may change these Terms of Engagement by notice to you in writing, which may be by email.

**7. DEFINITIONS**

"Us/We" means the "Contractor" as set out above. "You/Your" the person, client, authorised agent or legal entity described in the letter, or stated on the invoice or order form/ quote.

"Services" shall mean all services supplied by Us to You and includes any recommendations & advice.

Alternate Terms and Conditions for your clients

#### 5th Step:

- Fairly Straightforward
- 

1 Your business > 2 Branding > 3 Services & Fees > 4 Authorities > 5 Terms & Conditions > 6 Users > 7 Review

Users

Enter details of other users who will need a ZShakes login to sign up Clients

First name (required) Last name (required)

Vrutika Patel

Staff email (required) Staff phone

patelvrut@myvuw.ac.nz

First name (required) Last name (required)

Hello Bye

Staff email (required) Staff phone Is admin

helloby@gmail.com 0210948213 ☒

Add staff

#### 6<sup>th</sup> Page: Users

- Can add staff
- Unsure about what 'is admin' means
-

## 7<sup>th</sup> Page: Review

- I kind of like the review page
- Terms and Conditions too long
- could have a button to click view terms and conditions instead that displays a pop up window or something
- Preview agreement takes you to an external link that displays nicely
- Cannot edit information on the screen would have to go through the process again

1 Your business > 2 Branding > 3 Services & Fees > 4 Authorities > 5 Terms & Conditions > 6 Users > 7 Review

### Review

Legal Name:	Patel Law & Accounting Systems	NZBN:	
Trading name:		IRD-Number:	
Organisation email:		Street:	216 Patel Land
Phone:		Suburb:	
Fax:		City:	Wellington
Website:		Post code:	

### Social media

Facebook:	www.facebook.com/
Twitter:	twitter.com/
LinkedIn:	www.linkedin.com/

### Services

- Accounts processing using computerised accounts package
- Bank reconciliations
- Debtor Invoices & statements
- Online payments
- GST Returns
- Payroll processing & PAYE
- Bank reconciliations
- Debtor Invoices & statements
- Online payments
- GST Returns
- Payroll processing & PAYE
- Withholding Tax deducted from Contractors
- Fringe Benefit Tax
- Management Reports
- Monthly Employer Deduction Schedule
- Annual Accounts to Trial Balance
- ACC levies
- Companies Office returns
- Something Professional

### Fees

Our fees for services are \$AMOUNT per Month/Week/Hour excluding GST. We require payment for services as specified in our attached terms and conditions.

### Staff

First name:	Vrutika	First name:	Hello
Last name:	Patel	Last name:	Bye
Staff phone:		Staff phone:	0210948213
Staff email:	patelvrut@myvuw.ac.nz	Staff email:	hellobye@gmail.com

### Standard Terms and Conditions for your clients

The following terms of engagement shall apply to all Services provided by Us to You.

#### 1. SCOPE:

- 1.1 Prior to the commencement of engagement, we will send You a letter recording the scope and cost of the Services You require to be delivered.  
1.2 By signing/acknowledging this letter You confirm that You have read and accepted the scope and cost of Services and these Terms of Engagement.

#### 2. FEES, PAYMENT TERMS, INTEREST AND COLLECTION EXPENSES

- 2.1 We will charge You the agreed hourly rate or contracted rate as stated in the letter plus any associated costs on a weekly basis unless otherwise stated in the letter. Terms of payment are seven (7) days from the date of invoice, unless otherwise stated in the letter.  
2.2 If you fail to make a payment by the due date You shall be liable to pay Us:  
(a) Default interest on the amount outstanding calculated at 3.5% per month, and which shall accrue after as well as before judgement.  
(b) All expenses, & administration fees, including collection costs from obtaining the services of a debt collection company and/or legal fees in relation to any overdue amount will be added to Your account.  
2.3 These Terms remain in place after termination of Service until all fees are paid.

#### 3. CONFIDENTIALITY AND INFORMATION

- 3.1 Subject to clause 3.4, we will treat all information made available by You in connection with any engagement, as Strictly Private and Confidential.  
3.2 Each party will both comply with all applicable provisions of the Privacy Act 1993.  
3.3 In the event of any breach of confidentiality, or any irregularities etc we will report them to You.  
4.3 You acknowledge that the Services do not include an audit or review of your financial information and statements and accordingly we are not responsible for the accuracy of any material We prepare in reliance of any information provided by You. We are not Chartered Accountants and the use of our services do not constitute the receipt of accounting or taxation advice. If you require accounting, taxation or other financial advice please contact a Chartered Accountant.  
4.4 If We are found to be liable to You (whether in contract, tort or otherwise) for any direct loss, damage or liability incurred by You in connection with the Services our total liability for all claims will be limited to [a refund of the amount of fees paid by You to Us in connection with the Services in respect of which the claim has arisen] or \$500.00.  
4.5 You agree to indemnify Us against all direct, indirect and consequential losses, damages, costs (including legal fees), fines, penalties and the like to which We may become liable in connection with any Services provided to You.  
4.6 Nothing in the Consumer Guarantees Act 1993 will apply where You are acquiring the Services for business purposes.

#### 5. TERMINATION OF SERVICES

- 5.1 We may cancel these Terms of engagement or cancel the Service by giving seven (7) days written notice to You. We shall not be liable for any loss or damage arising from such cancellation including but not limited to tax obligations, tax and Companies Office filing requirements.  
5.2 You may cancel the Services of the contractor by giving seven (7) days notice in writing. You will be liable for any costs incurred by Us up to the date of termination, including any costs associated with termination.

#### 6. ACCEPTANCE

- 6.1 Any subsequent instructions written or otherwise received by Us from You for the supply of additional Services, shall constitute continuing acceptance of these Terms of Engagement.  
6.2 We may change these Terms of Engagement by notice to you in writing, which may be by email.

#### 7. DEFINITIONS

"Us/We" means the "Contractor" as set out above. "You/Your" the person, client, authorised agent or legal entity described in the letter, or stated on the invoice or order form/ quote.

"Services" shall mean all services supplied by Us to You and includes any recommendations & advice.

### Alternate Terms and Conditions for your clients

Sample agreement email

From:

noreply@2shakes.co.nz

Reply to:

To:

<client\_email> , <client\_signatory\_email>

CC:

Subject:

A new message to you from Patel Law & Accounting Systems

Dear <client\_name> ,

Congratulations for signing up with Patel Law & Accounting Systems!

We are delighted to attach here your signed agreement. This agreement outlines the services, T&C and fees we have agreed.

As part of the sign up process any authority request forms we need to perform these agreed services for you have been completed, signed and sent in on your behalf. Details of the organisations where authority has been set up are listed in the attached agreement.

If you would like a copy of the authority paperwork and forms please contact Patel Law & Accounting Systems and we can send you a copy.

You can revoke any authority by contacting the relevant organisation and completing their authority change process.

Thank you for choosing Patel Law & Accounting Systems.

We look forward to working with you.

Yours sincerely,

Vrutika Patel

Patel Law & Accounting Systems

Preview agreement

Previous

SignUp a Client

Mmmm

Agreement

Patel Law & Accounting Systems  
216 Patel Land  
Wellington



Agreement

Parties

This agreement for providing professional services is between

Signing up (you): <client\_name> trading as <client\_trading\_name> (NZBN <client\_nzbn>)

And (we, us): Patel Law & Accounting Systems

Services

- Accounts processing using computerised accounts package
- Bank reconciliations
- Debtor invoices & statements
- Online payments
- GST Returns
- Payroll processing & PAYE
- Withholding Tax deducted from Contractors
- Fringe Benefit Tax
- Management Reports
- Monthly Employer Deduction Schedule
- Annual Accounts to Trial Balance
- ACC levies
- Companies Office returns
- Something Professional

Fees

Our fees for services are \$AMOUNT per Month/Week/Hour excluding GST. We require payment for services as specified in our attached terms and conditions.

I have read and understand and agree with the terms, conditions and statements in this agreement:

Terms & Conditions

The following terms of engagement shall apply to all Services provided by Us to You.

1. SCOPE

1.1 Prior to the commencement of engagement, we will send You a letter recording the scope and cost of the Services You require to be delivered.

1.2 By signing/acknowledging this letter You confirm that You have read and accepted the scope and cost of Services and these Terms of Engagement.

2. FEES, PAYMENT TERMS, INTEREST AND COLLECTION EXPENSES

2.1 We will charge You the agreed hourly rate or contracted rate as stated in the letter plus any associated costs on a weekly basis unless otherwise stated in the letter. Terms of payment are seven (7) days from the date of invoice, unless otherwise stated in the letter.

2.2 If you fail to make a payment by the due date You shall be liable to pay Us:

- (a) Default interest on the amount outstanding calculated at 3.5% per month, and which shall accrue after as well as before judgement.
- (b) All expenses, & administration fees, including collection costs from obtaining the services of a debt collection company and/or legal fees in relation to any overdue amount will be added to Your account.

2.3 These Terms remain in place after termination of Service until all fees are paid.

3. CONFIDENTIALITY AND INFORMATION

3.1 Subject to clause 3.4, we will treat all information made available by You in connection with any engagement, as Strictly Private and Confidential

3.2 Each party will both comply with all applicable provisions of the Privacy Act 1993.

3.3 You permit Us to collect use and retain information concerning You, for the purpose of assessing the Your credit worthiness or to enforce any rights under these terms of engagement.

3.4 You permit Us to disclose information obtained to any person where we are required to do so by New Zealand Law.

3.5 You authorise us to request information from a third party on your behalf provided such information is reasonably required by Us to perform the Services.

4. LIMITATION OF LIABILITY

4.1 You acknowledge that any bookkeeping Services provided by us to you are limited to the collection, classification and summarisation of financial information supplied by You. You will supply complete information promptly at the times agreed so that We can undertake the Services.

4.2 We will not express any opinion on the accuracy of the material we compile or its suitability for purpose. We will not take active steps to identify weaknesses in your internal accounting system, errors, illegal acts or other irregularities (such as non compliance with law or fraud). If we become aware of any irregularities etc we will report them to You.

4.3 You acknowledge that the Services do not include an audit or review of your financial information and statements and accordingly we are not responsible for the accuracy of any material We prepare in reliance of any information provided by You. We are not Chartered Accountants and the use of our services do not constitute the receipt of accounting or taxation advice. If you require accounting, taxation or other financial advice please contact a Chartered Accountant.

4.4 If We are found to be liable to You (whether in contract, tort or otherwise) for any direct loss, damage or liability incurred by You in connection with the Services our total liability for all claims will be limited to [a refund of the amount of fees paid by You to Us in connection with the Services in respect of which the claim has arisen] or \$500.00

4.5 You agree to indemnify Us against all direct, indirect and consequential losses, damages, costs (including legal fees), fines, penalties and the like to which We may become liable in connection with any Services provided to You.

4.6 Nothing in the Consumer Guarantees Act 1993 will apply where You are acquiring the Services for business purposes.

5. TERMINATION OF SERVICES

5.1 We may cancel these Terms of engagement or cancel the Service by giving seven (7) days written notice to You. We shall not be liable for any loss or damage arising from such cancellation including but not limited to tax obligations, tax and Companies Office filing requirements.

5.2 You may cancel the Services of the contractor by giving seven (7) days notice in writing. You will be liable for any costs incurred by Us up to the date of termination, including any costs associated with termination.

6. ACCEPTANCE

6.1 Any subsequent instructions written or otherwise received by Us from You for the supply of additional Services, shall constitute continuing acceptance of these Terms of Engagement.

6.2 We may change these Terms of Engagement by notice to you in writing, which may be by email.

1<sup>st</sup> Page: Client Sign up

- Can manually add a client or search one up
- The layout of Form is pretty bad
- When I tried to proceed it didn't let me because one of the fields was blank. Initially I didn't know which field was blank, but might be good to write a message at the top or be directed to the space that is not filled out correctly.

Agreement details (1/4) [Sign up Client](#) [Agreements](#) [Business Profile](#) [Hi Vrutika](#)

Client Sign Up List

Search NZBN to **automatically add** incorporated entities and their directors

Entity name or NZBN

☒ Include inactive entities in search?

Organisations (Limited companies, Partnerships, Trusts, Charities, etc.)

SmileyInc

Trading name

IRD number

ACC number

Individuals and Sole Traders

Main signatory

Name

Trading name

IRD number

ACC number

This person signs on behalf of all organisations

☐ and signs up as an Individual Client

☐ but does not become an Individual Client

Role

Services and Fees (2/4)

Sign up Client

Agreements

Business Profile

Hi Vrutika

Help

Client Sign Up List

OrganisationsSmileyInc

What services will Patel Law & Accounting Systems provide to the Client?

☒Accounts processing using computerised accounts package

☒Debtor invoices & statements

☒GST Returns

☒Withholding Tax deducted from Contractors

☒Management Reports

☒Annual Accounts to Trial Balance

☒Companies Office returns

☒Bank reconciliations

☒Online payments

☒Payroll processing & PAYE

☒Fringe Benefit Tax

☒Monthly Employer Deduction Schedule

☒ACC levies

☒Something Professional

\$ Fees

B

I

Our fees for services are **\$AMOUNT** per Month/Week/Hour excluding GST. We require payment for services as specified in our attached terms and conditions.

Terms & Conditions

Terms of Engagement between Client and Patel Law & Accounting Systems

Standard Terms and Conditions

B

I

5.2 You may cancel the Services of the contractor by giving seven (7) days notice in writing. You will be liable for any costs incurred by Us up to the date of termination, including any costs associated with termination.

6. ACCEPTANCE

6.1 Any subsequent instructions written or otherwise received by Us from You for the supply of additional Services, shall constitute continuing acceptance of these Terms of Engagement.

6.2 We may change these Terms of Engagement by notice to you in writing, which may be by email.

7. DEFINITIONS

"Us/We" means the "Contractor" as set out above. "You/Your" the person, client , authorised agent or legal entity described in the letter, or stated on the invoice or order form/ quote.

2<sup>nd</sup> Page: Services and Fees

- No save button

Authorities (3/4)

Sign up Client

Agreements

Business Profile

Hi Vrutika

Help

Client Sign Up List

OrganisationsSmileyInc

What authorities will the Client give to Patel Law & Accounting Systems

☒Accident Compensation Corporation

Patel Law & Accounting Systems is authorised by the Client(s) to:Correspondence will be sent to:

☒Access and change information through ACC Online and directly with ACC Staff

☒Access and change information through ACC Staff

☒Access information through ACC Staff

☒Client

☐Patel Law & Accounting Systems

☒Authority Letter (e.g. Insurance)

ClientLetter to Company (required)Details (required)Date of birth

Select ClientSmileyIncAdd an Authority Letter

3<sup>rd</sup> Page: Authorities

- Some fields are already filled in
- When Remove button clicked under authority letter the page refreshes. So theres a little bit of a page jump.

Parties and signatories (4/4)

Sign up ClientAgreementsBusiness ProfileHi VrutikaHelp

Parties and signatories

Parties

Organisational clientsSmileyInc

UsPatel Law & Accounting Systems

Select who signs this agreement

Main signatory

Smiley (signing on behalf of SmileyInc )

Signing here and now via SMS text

Email

Mobile No.

Add Signatory

The agreement will be complete as soon as all Client Signatories have signed.

Back

Download draft PDF


Review Email

Proceed to signing

#### 4<sup>th</sup> Page:

- Cannot remove signatories once you add them
- After email and adequate mobile number details are put in can you then proceed to signing

Patel Law & Accounting Systems  
216 Patel Land  
Wellington



Agreement

Parties

This agreement for providing professional services is between

Signing up (you):SmileyInc

And (we, us):Patel Law & Accounting Systems

Services

- Accounts processing using computerised accounts package
- Bank reconciliations
- Debtor invoices & statements
- Online payments
- GST Returns
- Payroll processing & PAYE
- Withholding Tax deducted from Contractors
- Fringe Benefit Tax
- Management Reports
- Monthly Employer Deduction Schedule
- Annual Accounts to Trial Balance
- ACC levies
- Companies Office returns
- Something Professional

Fees

Our fees for services are \$AMOUNT per Month/Week/Hour excluding GST. We require payment for services as specified in our attached terms and conditions.

Authorities

You authorise Patel Law & Accounting Systems and its employees as follows:

1. ACC for levy purposes for all my associated entities. This authorization allows Patel Law & Accounting Systems to query and change information on my ACC levy account(s) through ACC Online and directly with ACC Staff.

#### Download Draft PDF

- Takes you to an external link



## Authorities

You authorise Patel Law & Accounting Systems and its employees as follows:

1. ACC for levy purposes for all my associated entities. This authorisation allows Patel Law & Accounting Systems to query and change information on my ACC levy account(s) through ACC Online and directly with ACC Staff.

I have read and understand and agree with the terms, conditions and statements in this agreement:

## Terms & Conditions

The following terms of engagement shall apply to all Services provided by Us to You.

### 1. SCOPE:

- 1.1 Prior to the commencement of engagement, we will send You a letter recording the scope and cost of the Services You require to be delivered.
- 1.2 By signing acknowledging this letter You confirm that You have read and accepted the scope and cost of Services and these Terms of Engagement.

### 2. FEES, PAYMENT TERMS, INTEREST AND COLLECTION EXPENSES

- 2.1 We will charge You the agreed hourly rate or contracted rate as stated in the letter plus any associated costs on a weekly basis unless otherwise stated in the letter. Terms of payment are seven (7) days from the date of invoice, unless otherwise stated in the letter.
- 2.2 If you fail to make a payment by the due date You shall be liable to pay Us:
  - (a) Default interest on the amount outstanding calculated at 3.5% per month, and which shall accrue after as well as before judgement.
  - (b) All expenses, & administration fees, including collection costs from obtaining the services of a debt collection company and/or legal fees in relation to any overdue amount will be added to Your account.
- 2.3 These Terms remain in place after termination of Service until all fees are paid.

### 3. CONFIDENTIALITY AND INFORMATION

- 3.1 Subject to clause 3.4, we will treat all information made available by You in connection with any engagement, as Strictly Private and Confidential.
- 3.2 Each party will both comply with all applicable provisions of the Privacy Act 1993.
- 3.3 You permit Us to collect use and retain information concerning You, for the purpose of assessing the Your credit worthiness or to enforce any rights under these terms of engagement.
- 3.4 You permit Us to disclose information obtained to any person where we are required to do so by New Zealand Law.
- 3.5 You authorise us to request information from a third party on your behalf provided such information is reasonably required by Us to perform the Services.

### 4. LIMITATION OF LIABILITY

- 4.1 You acknowledge that any bookkeeping Services provided by us to you are limited to the collection, classification and summarisation of financial information supplied by You. You will supply complete information promptly at the times agreed so that We can undertake the Services.
- 4.2 We will not express any opinion on the accuracy of the material we compile or its suitability for purpose. We will not take active steps to identify weaknesses in your internal accounting system, errors, illegal acts or other irregularities (such as non compliance with law or fraud). If we become aware of any irregularities etc we will report them to You.

## Review Email Button

select who signs this agreement

main signatory  
title (signing on  
signing here and s

other signatory  
title (signing on  
signing here and s

Add Signatory

the agreement w

Shakes Terms of  
copyright © 201  
version: 2017-07-07 14:14:14, version: 2017-07-07 14:14:14

signing

25  
years

Email and attachments: Finalise text and attachments to send to client after they have signed

Subject

A new message to you from [[PRACTICE\_NAME]]

Message

Dear [[CLIENT\_NAME]],

Congratulations for signing up with [[PRACTICE\_NAME]].

We are delighted to attach here your signed agreement. This agreement outlines the services, T&C and fees we have agreed.

As part of the sign up process any authority request forms we need to perform these agreed services for you have been completed, signed and sent in on your behalf. Details of the organisations where authority has been set up are listed in the attached agreement.

If you would like a copy of the authority paperwork and forms please contact [[PRACTICE\_NAME]] and we can send you a copy.

... You can revoke any authorisation, contact the relevant service office and cancelation, these authorisations, services...

Add an Attachment

Choose File No file chosen

Attachment name

Add Attachment

Cancel Save

Review & sign agreement

Sign up Client

Agreements

Business Profile

Hi Vrutika

Help

Agreement and authorities

Parties

Signing up (you):

SmileyInc

IRD number

ACC number

Enter at least one the IRD or ACC numbers for each client.

Please complete required information in any highlighted boxes above before signing. You can optionally complete the other boxes.

And (we, us):

Patel Law & Accounting Systems

Services & rates

We will provide you the following services:

Accounts processing using computerised accounts package

Bank reconciliations

Debtor invoices & statements

Online payments

GST Returns

Payroll processing & PAYE

Withholding Tax deducted from Contractors

Fringe Benefit Tax

Debtor invoices & statements

Online payments

GST Returns

Payroll processing & PAYE

Withholding Tax deducted from Contractors

Fringe Benefit Tax

Management Reports

Monthly Employer Deduction Schedule

Annual Accounts to Trial Balance

ACC levies

Companies Office returns

Something Professional

We will charge the following fees:

Our fees for services are \$AMOUNT per Month/Week/Hour excluding GST. We require payment for services as specified in our attached terms and conditions.

Authorities

Smiley gives Patel Law & Accounting Systems the following authorities on behalf of SmileyInc:

1. ACC for levy purposes for all my associated entities. This authorisation allows Patel Law & Accounting Systems to query and change information on my ACC levy account(s) through ACC Online and directly with ACC Staff. By electronically signing this agreement, I understand that I am also signing an ACC1766 Giving access to your ACC Information form will which will automatically be completed and sent to ACC.

Preview form for SmileyInc

## 5<sup>th</sup> Page: Review and Sign Agreement

- Have different options for the signatories
  - Don't know that the sms code is for
  - Option for the different signatures is good
- particularly cool that it comes up with printed kind of looking signature underneath

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Terms & conditions

[Click here to see the Terms and Conditions for Patel Law & Accounting Systems](#)

Signatories

Name	Status
Smiley	Pending
SmileyInc	Pending
Smiley	Pending

Signatory

SmileySmileyIncSmiley

Name: Smiley

Role: Person

Email: smiley@gmail.com

Mobile phone: 021087349

Edit

SMS code

Send new code

Accept agreement and confirm authorities

☐ On behalf of SmileyInc, I agree to the agreement and any authorisations above, including Patel Law & Accounting Systems's terms and conditions. By electronically signing this agreement, I am also signing any authority forms as previewed above.

☒ I have read and agree to the 2Shakes Terms of Service and Privacy Policy

Signature

Type signature

Vrutika

Vrutika

---

### Side Note:

When enter button is pressed it does some weird things on the pages

- Like when you press enter in service name instead of clicking on the button it takes you to the first page