



Caselle® Software & Services Proposal

City of Craig, CO

December 29, 2021

(Valid for 90 days)

From:

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Caselle® Software & Services Proposal
City of Craig, CO
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Proposal Summary

Total Software License	\$11,000
Total Training	5,625
Total Setup	7,250
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Total Investment	\$23,875
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A deposit of 50% of the total proposal price is required with order. The remaining balance will be due upon completion of training.

Monthly Software Assurance will increase by \$275.

I have read and agree to all terms & conditions proposed herein.

Signature

Printed Name & Title

Date

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Proposal Detail

<i>Caselle® Application Software</i>	License Fees	Training	Setup	Total
Caselle Advantage Budgeting	\$5,000	\$3,375	\$2,750	\$11,125
Reporting	3,000	1,125	2,250	6,375
Publisher	3,000	1,125	2,250	6,375
Grand Total	\$11,000	\$5,625	\$7,250	\$23,875

Note: The training will take place online.

Caselle Advantage Setup

- Gather data from General Ledger and Account Masks to form basis of the hierarchical structure in Caselle Advantage including reporting structure and filter tree.
- Update dataset fields list (columns of data) used for budgeting and reporting inquiries.
- Create transaction drill directly into the general ledger transactions.
- Provide budget entry screen for Next Year Budget and Forecast
- Set triggers between Position Based Budget calculations and Operating Budget salaries and related general ledger accounts to update automatically.
- Setup automated extraction process for employee details from payroll to be presented in position-based budget worksheet.

Installation and Training

- 1 day for installation of the software which will be offsite installation in preparation for training.
- 2 Days of initial training – Preferably at Caselle location in Provo, UT.
- Training can also be online but is not recommended due to the advanced nature of Advantage.
- On-site Training can be requested at \$1,500 per day plus travel expenses.

Reporting

- Format a Corporate Dashboard page to include standard general ledger reports, charts and basic alerts.
- **Note:** Additional dashboard pages can be added and formatted by the customer.

Delivery

- Budget Entry including Position Budget and Reporting is defined in the Advantage scoping document you will receive along with this proposal. Any changes required to the attached scoping document may incur additional costs to this proposal and may be required to be scoped separately.