SaaSTech Servers

INDUSTRY WEBSITE GUIDE
Workshop workbook

DOMAINS / WEBSITES / BRANDED EMAIL

Accountants & Bookkeepers



Build confidence before the first confidential conversation.



Explore a practical example, watch the industry video and download the website planning workbook.

Microsoft 365 for your organization.

Make every page useful.

- Explain your services and who you help
- Show your qualifications and approach
- Make consultation enquiries simple

Register or transfer your domain to SaaSTech Servers.

saastech.net/industry/accounting

Scan for the guide, video and downloadable resources.

SCAN TO EXPLORE

SaaSTech Servers

SERVING CANADIAN BUSINESSES
Since 1999

Everything your business needs to move online.

Your name. Your website. Your business email.



DOMAIN CITY

Make a name.

Find your domain name or bring one you own.

WEBSITE VILLAGE

Build your online home.

Start with Website Builder or explore WordPress.

EMAIL TOWN

Look the part.

Use your business name in your team's email.

Not sure where to start?

Take a walk down Main Street.

Explore industry guides, website ideas and practical steps for your business.

Start at **saastech.net**

SCAN TO EXPLORE

Getting started with SaaSTech Servers

Create your free account before contacting support. Keep the detachable record private.

1 Create or sign in to your account

Use an email you can access and follow the secure account prompts. No purchase is required.

2 Keep your customer number and call-in PIN ready

Support may ask for both during a call you initiated through verified Contact Us.

3 Enable two-step verification

Have your registered phone or authenticator device with you when calling SaaSTech Servers; you may need it to sign in or verify the account yourself.

Create My Account | saastech.net/create-account

Contact Us	Account Learning Centre	Delegate access playlist

On Contact Us, check your language/region and currency settings, then use the local contact number shown there.

The Account Learning Centre covers setup and delegation for Website Builder and other services. Choose Work with delegates.

Cut or tear out the card below before sharing this workbook

PRIVATE account reference and call-in authentication

Organization or name _____

Account sign-in email _____

Customer number _____

Call-in PIN _____

Domain names _____

Reviewed on _____

Update your call-in PIN at pin.saastech.net or in My Account after signing in.

Never share your account password or call-in PIN with someone helping manage your services. Each helper should create their own SaaSTech Servers account and receive only the delegated permissions they need. Review purchase/payment and account-security permissions carefully.

For official support, give the call-in PIN only during a call you initiated through verified Contact Us. Never share passwords, sign-in verification codes or recovery codes.

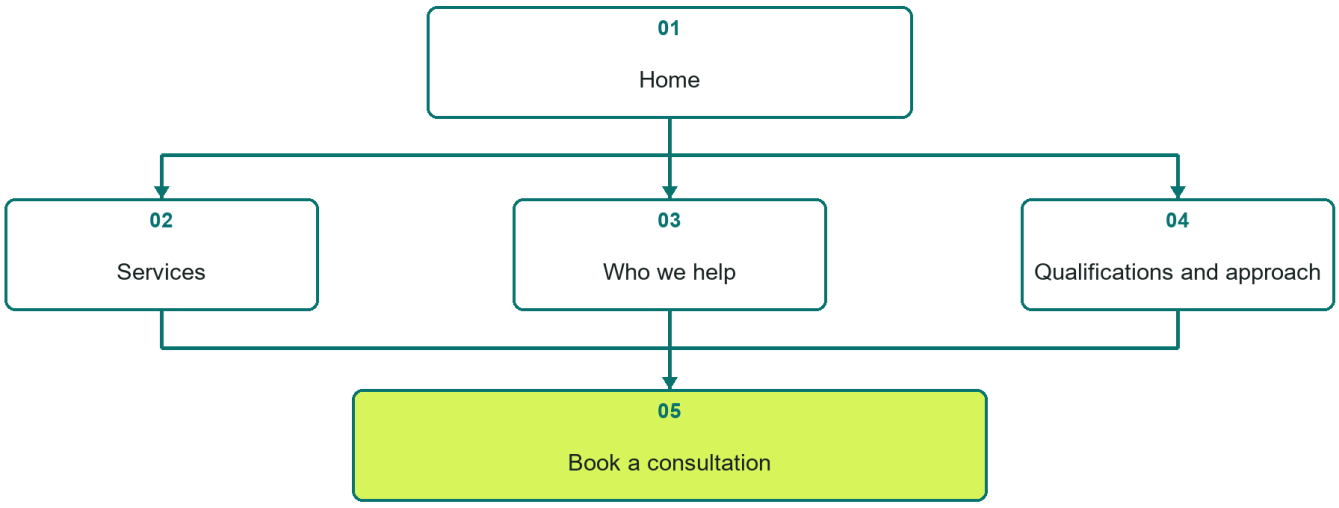
Do not record passwords, verification/recovery codes, security answers or payment details here. Keep this card safe and cut or tear it out before sharing the workbook.

Use a secure password manager for passwords and recovery information.

WEBSITE PLANNING WORKSHOP

Accountants & Bookkeepers Website workbook

Plan a clear website for accountants & bookkeepers. Explore a worked example, shape your own message and prepare to build with SaaSTech Servers.



Your recommended pages at a glance

Inside this workbook

Five page examples • Practical writing exercises • A launch review

Use it in a workshop or at your own pace. Write by hand or complete the response fields in Word. The final page links to Website Builder, plans and account signup.

Example business Prairie Ledger Accounting

ACCOUNTANTS & BOOKKEEPERS

Your website brief

A SaaSTech Servers workshop for accountants & bookkeepers. Plan your website, learn from the Prairie Ledger Accounting example and draft content for your own business.

Each page has a reference sheet followed by a writing sheet. Demo excerpts are labelled separately from new sample wording, which may differ from the screenshot. Click a blank response line to type; longer answers may add pages. Replace fictional details and verify every claim before publishing.

Your business or organization and workshop date

Who should visit your site and what do they need

The main action you want a visitor to take

What you offer and where or how you provide it

Facts photos and permissions to gather before publishing

Workshop rhythm: review the example, write your draft and exchange feedback. Use the final review to choose your next changes. Website Builder and account links are on the last page.

LOOK AND LEARN

Home

The job of this page

Identify the clients served, the main outcome, and the consultation action.



Prairie Ledger Accounting example | Explore SaaSTech Servers Website Builder

Demo text example

Expert Business Accounting Services

Reliable financial management for small businesses and farms

Pause and plan

Could a first-time visitor explain what you do and who it is for after one glance? Choose one main action and the strongest truthful detail that gives them confidence to continue.

1 Home
2 Services
3 Who we help
4 Qualifications and approach
5 Book a consultation

WRITE YOUR PAGE

Home

Write for your visitor. Be specific about what they need to know and what happens next. You can revise the wording after the workshop.

Your page headline

Your opening paragraph

Your offer audience location and most useful supporting details

Button or link wording and where it should lead

Photo idea caption and permission or credit needed

Facts to verify or questions to resolve

1 Home — 2 Services — 3 Who we help — 4 Qualifications and approach — 5 Book a consultation

LOOK AND LEARN

Services

The job of this page

Separate bookkeeping, payroll, tax, reporting, advisory, and other actual offerings.



Prairie Ledger Accounting example | Explore SaaSTech Servers Website Builder

Sample wording to adapt

Accounting support with a clear scope

Discuss bookkeeping, payroll, reporting or advisory needs and the deadlines you are working toward. We will agree responsibilities and the information required before starting. Use the approved secure process for financial documents.

Pause and plan

Who is each option for, what does it include and where are its limits? Describe the information needed to check fit. Make the next step clear without promising an outcome before assessment.

1 Home — 2 Services — 3 Who we help — 4 Qualifications and approach — 5 Book a consultation

WRITE YOUR PAGE

Services

Write for your visitor. Be specific about what they need to know and what happens next. You can revise the wording after the workshop.

Your page headline

Your opening paragraph

Service options who they suit and what each includes

Button or link wording and where it should lead

Photo idea caption and permission or credit needed

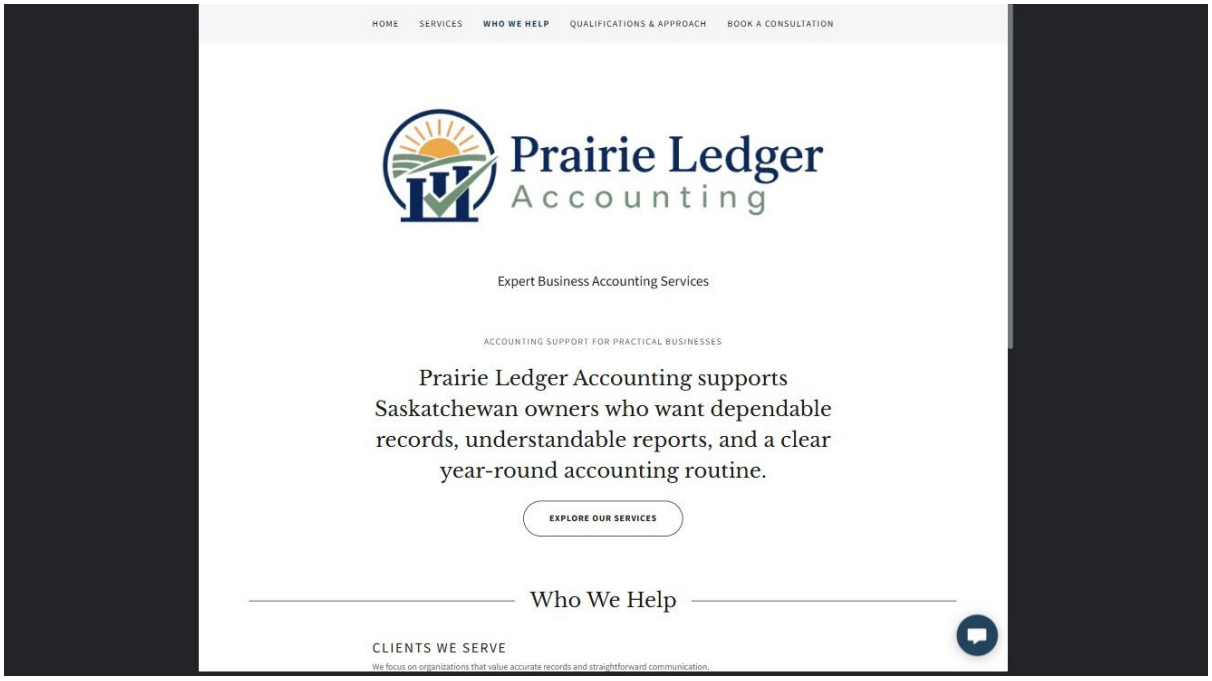
Facts to verify or questions to resolve

LOOK AND LEARN

Who we help

The job of this page

Describe the business sizes or industries that are the best fit.



Prairie Ledger Accounting example | Explore SaaSTech Servers Website Builder

Demo text example

ACCOUNTING SUPPORT FOR PRACTICAL BUSINESSES

Prairie Ledger Accounting supports Saskatchewan owners who want dependable records, understandable reports, and a clear year-round accounting routine.

Pause and plan

What question brings a visitor to this page? List the details they need, the evidence you can provide and the next useful action. Remove content that does not help them decide or proceed.

1 Home — 2 Services — 3 Who we help — 4 Qualifications and approach — 5 Book a consultation

WRITE YOUR PAGE

Who we help

Write for your visitor. Be specific about what they need to know and what happens next. You can revise the wording after the workshop.

Your page headline

Your opening paragraph

Key sections visitor questions and supporting details

Button or link wording and where it should lead

Photo idea caption and permission or credit needed

Facts to verify or questions to resolve

LOOK AND LEARN

Qualifications and approach

The job of this page

Publish verifiable credentials, experience, process, and confidentiality expectations.



Prairie Ledger Accounting example | Explore SaaSTech Servers Website Builder

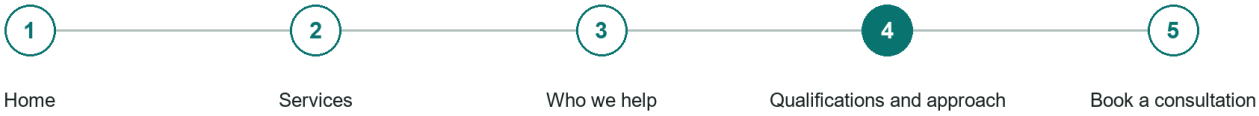
Sample wording to adapt

Know who will handle your work

Ask about verified qualifications, the engagement scope and how questions are handled. Agree the reporting routine and document-sharing process before providing records. Do not assume a service or designation from an example website.

Pause and plan

Which names, roles and qualifications can you verify? What would help a visitor feel comfortable contacting you? Obtain permission for portraits and describe actual experience without unsupported claims.



WRITE YOUR PAGE

Qualifications and approach

Write for your visitor. Be specific about what they need to know and what happens next. You can revise the wording after the workshop.

Your page headline

Your opening paragraph

People roles approach and verified credentials to introduce

Button or link wording and where it should lead

Photo idea caption and permission or credit needed

Facts to verify or questions to resolve

1 Home — 2 Services — 3 Who we help — 4 Qualifications and approach — 5 Book a consultation

LOOK AND LEARN

Book a consultation

The job of this page

Collect only basic contact and fit information; move documents to an approved secure channel.



Prairie Ledger Accounting example | Explore SaaSTech Servers Website Builder

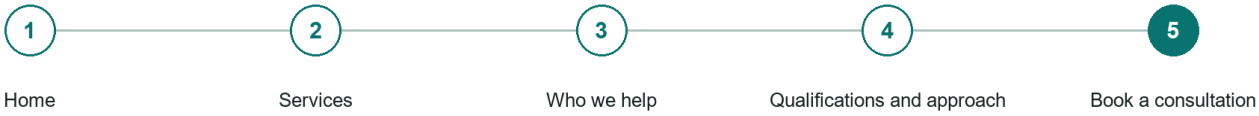
Demo text example

PROTECTING YOUR FINANCIAL INFORMATION

Please do not send tax records, banking details, identification, or financial documents through this public form. We will provide an approved secure process after the introductory conversation.

Pause and plan

What must someone provide, and what happens after they send it? Separate a request from a confirmed booking, order or place. Decide what information should stay out of a public form.



WRITE YOUR PAGE

Book a consultation

Write for your visitor. Be specific about what they need to know and what happens next. You can revise the wording after the workshop.

Your page headline

Your opening paragraph

Information to request and how you will reply or confirm

Button or link wording and where it should lead

Photo idea caption and permission or credit needed

Facts to verify or questions to resolve

WORKSHOP CLOSE

Review and next steps

Ask a partner to read your draft as a first-time visitor. Can they explain what you offer, who it is for and the next step without extra help?

Before you publish

[ ] Every page has a clear purpose and a useful next step.

[ ] Headlines are specific and the wording sounds like your business.

[ ] Names, service areas, prices, dates and policies have been checked.

[ ] Credentials, testimonials and results are genuine and permission-cleared.

[ ] Photos support the text, do not repeat needlessly and have appropriate permissions.

[ ] Forms ask only for necessary information and explain what happens next.

[ ] Links, downloads and the main visitor task work on a phone.

The most useful feedback from your workshop partner

First change to make and who will do it

Information or photographs still needed

Target review date and who will approve the final content

Keep sensitive customer, patient, employee and payment information out of this workbook. Completing it does not publish a website or connect to Website Builder.

BUILD WITH SAASTECH SERVERS

Put your draft into Website Builder

Use the content you have written to build your own site. Keep the accountants & bookkeepers demo as a reference, and replace its company name, images and claims with your verified business information.

Explore the builder

See the editor, compare available plans and decide which features your business needs. Confirm current pricing and terms before purchasing.

Website Builder overview

Create your account

Set up your SaaSTech Servers customer account using your own details. Creating an account is separate from purchasing a Website Builder plan.

Create your SaaSTech Servers account

Choose your plan

Open the secure shop to review the plan, subscription term and final total. Use the account connected to your purchase when you open your service.

View Website Builder plans

Build and check your pages

Add the pages from this workbook. Transfer your approved wording, upload permission-cleared photos and review each page on desktop and mobile before publishing.

Return to the Website Builder guide

Using a printed workbook

Type these short addresses into your browser. The account guide includes the Create My Account button.

www.saastech.net/products/website-builder

www.saastech.net/create-account

This workbook does not create an account, purchase a plan or publish your website. Keep passwords, payment details and confidential customer information out of your draft.