WORKBOOKS CRM PRICING

Effective Nov 2017

Annual pricing per user	CRM **£228** £19 PUPM billed annually	CRM Pro **£360** £30 PUPM billed annually	Business **£504** £42 PUPM billed annually	Business Pro **£624** £52 PUPM billed annually
CORE FUNCTIONALITY	**Different editions may be purchased for different users***			
Contact Management	✓	✓	✓	✓
Sales Team Automation	✓	✓	✓	✓
Marketing Campaign Management	✓	✓	✓	✓
Customer Service Management	✓	✓	✓	✓
Order Processing	✗	✗	✓	✓
Invoicing & Credit Notes	✗	✗	✓	✓
Automation Engine	✓	✓	✓	✓
Customisable Layouts	✓	✓	✓	✓
SUPPORT OPTIONS				
Workbooks Forum Support	✓	✓	✓	✓
Workbooks Phone Email Support	✓	✓	✓	✓
EXTENSIONS	**Extensions must be purchased for all users**			
Multi Company Extension	£48	✓	£48	✓
Multi Currency Extension	£48	✓	£48	✓
Advanced Security Extension	£48	✓	£48	✓
Multi Language Extension	£48	✓	£48	✓
Audit Extension	£48	✓	£48	✓
MODULES	**Modules can be purchased for users who need them**			
Contract Management Module	£48	✓	£48	✓
Workbooks Exchange Server Sync	£48	£48	£48	£48
Workbooks Outlook Connector	£48	£48	£48	£48
Workbooks Mapping Module	£60	£60	£60	£60

The Workbooks service is purchased on a one, two or three year subscription.

***Please note:** It is possible to mix CRM with Business. However, it is not possible to mix 'Core Editions' (Workbooks CRM and Workbooks Business) with 'Pro Editions'. For example, it is not possible to mix Workbooks CRM with Workbooks CRM Pro.

EXTENSIONS	EXTENSIONS MUST BE PURCHASED FOR ALL USERS	PRICE PER USER
Multi Company Extension	Enables you to add multiple 'own organisations'. Own organisations are typically used to support different VAT schemes, important if you invoice in multiple regions.	£48 per annum £4 per month
Multi Currency Extension	Enables you to create transaction documents (e.g. quotations and orders) in multiple currencies and automatically convert the amount into your 'home' currency for reporting.	£48 per annum £4 per month
Advanced Security Extension	This enables you to change the sharing policy so you can restrict access to specific records. This is most commonly used if you want to allow some users to see some records but not all. For example, the UK sales team can see UK Opportunities, but not US Opportunities.	£48 per annum £4 per month
Multi Language Extension	This enables your users to use different languages within the Workbooks environment. Record names, field names, pick list values and other entities in Workbooks are translated in different languages, the language displayed to the user is based on their preference. Workbooks is shipped with English, English American, French, German and Spanish, more languages can be provided on request.	£48 per annum £4 per month
Audit Extension	The Audit extension audits every change to a record including changes to individual fields within a record. This enables you to see which changes a user has made to a record. The Audit module can also be used to track the status of a record as it moves through a life cycle. So you can for example, report on all cases which have been in a specific state for a time period. This is often used to track SLA metrics.	£48 per annum £4 per month
MODULES	**MODULES CAN BE PURCHASED FOR USERS WHO NEED THEM**	**PRICE PER USER**
Contract Management Module	Create contract records and raise cases against specific contracts and contract line items.	£48 per annum £4 per month
Workbooks Exchange Server Sync (WESS)	The Workbooks Exchange Server Sync synchronises emails, meetings, tasks and people between Microsoft Exchange and Workbooks.	£48 per annum £4 per month
Workbooks Outlook Connector (WOC)	A plug-in for Microsoft Outlook that allows you to synchronise contacts and tasks between Workbooks and Outlook and also enables you to share emails from Outlook into Workbooks with a single click.	£48 per annum £4 per month
Workbooks Mapping Module	The Workbooks Mapping Module allows you to plot records from within Workbooks on a map. You can change the view of a Workbooks grid to a map view and use the filtering capabilities to identify records you want to plot.	£60 per annum £5 per month

SUBSCRIPTION ADD-ONS	PRICE
Additional Storage - sold in 5GB increments	£120 per 5GB per annum (£10 per 5GB per month)
Customer Success Plus – 2 days per qtr	£4,800 per annum (£600 per day)
Customer Success Plus – 3 days per qtr	£7,200 per annum (£600 per day)
Customer Success Plus – 4 days per qtr	£9,200 per annum (£575 per day)
Customer Success Plus – 5 days per qtr	£11,500 per annum (£575 per day)
Customer Success Plus – 6 days per qtr	£13,800 per annum (£575 per day)

WORKBOOKS TRAINING COURSES	PRICE
System Administrator Training Course (2 days)	£850 per attendee
Advanced System Administrator Training Course (1 day)	£650 per attendee (£1,250 if purchased with above)
Developer Training Course (1 day)	£850 per attendee
PROFESSIONAL SERVICES	**PRICE**
½ day consultancy	£500 + expenses
1 day consultancy	£850 + expenses
ADVISORY PACKS	**PRICE**
8 points (0.5 days)	£500 + expenses
16 (1 day)	£900 + expenses
32 (2 days)	£1,800 + expenses
48 (3 days)	£2,700 + expenses
64 (4 days)	£3,600 + expenses
80 (5 days)	£4,500 + expenses

WORKBOOKS WEB INSIGHTS PRICING

Workbooks Web Insights is billed annually based on the number of pages viewed on your website per month.

PAGE VIEWS PER MONTH	PRICE PER YEAR
4,167 (50,000 per annum)	£1,200 per annum (£100 per month)
8,333 (100,000 per annum)	£1,800 per annum (£150 per month)
16,667 (200,000 per annum)	£3,000 per annum (£250 per month)
33,333 (400,000 per annum)	£5,400 per annum (£450 per month)
50,000 (600,000 per annum)	£6,600 per annum (£550 per month)
66,667 (800,000 per annum)	£7,200 per annum (£600 per month)
83,333 (1,000,000 per annum)	£7,800 per annum (£650 per month)
166,667 (2,000,000 per annum)	£10,800 per annum (£900 per month)
333,333 (4,000,000 per annum)	£16,800 per annum (£1,400 per month)
500,000 (6,000,000 per annum)	£22,200 per annum (£1,850 per month)
666,667 (8,000,000 per annum)	£27,000 per annum (£2,250 per month)
833,333 (10,000,000 per annum)	£31,200 per annum (£2,600 per month)

GATORMAIL PRICING

GatorMail Licences are sold on an annual basis. If customers exceed their annual allowance, they can upgrade to the next tier.

ANNUAL SENDS	PRICE PER YEAR
30,000 (2,500 per month)	£480 (£40 per month)
60,000 (5,000 per month)	£960 (£80 per month)
150,000 (12,500 per month)	£2,280 (£190 per month)
500,000 (41,667 per month)	£3,000 (£250 per month)
1,000,000 (83,333 per month)	£4,200 (£350 per month)
2,000,000 (166,667 per month)	£4,800 (£400 per month)
3,000,000 (250,000 per month)	£6,000 (£500 per month)
6,000,000 (500,000 per month)	£9,600 (£800 per month)
10,000,000 (833,333 per month)	£15,000 (£1,250 per month)
15,000,000 (1,250,000 per month)	£19,200 (£1,600 per month)
20,000,000 (1,666,667 per month)	£22,800 (£1,900 per month)

OPTIONAL ADD-ONS	PRICE PER YEAR
Advanced Inbox Checker	£600
SendForensics	£600
Advanced Email Workflow (10 active workflows)	£1,200
Multiple Domains (Set-up fee for each additional domain)	£100
Survey Tool (Expected Release Q4 2017)	£600