WORKBOOKS
Packaged Services

ADOBE SIGN INTEGRATION
$1,400 – 1 day consultancy

Leverage the power of Adobe Sign to close sales more quickly and eliminate paperwork.

By integrating Adobe Sign you will be able to send quotes, orders and contracts to customers for electronic signature directly from within Workbooks. Workbooks will track the document processing as it is signed, and will store the final version as an attachment against the transaction document.

What's included

- An initial call with a Workbooks consultant to understand your requirements.
- Set-up the Adobe Sign integration.
- Modify existing Quotes, Orders or Contracts PDF templates to include electronic signature blocks for up to two transaction documents. Note: If you need more than two, additional charges will be applied.
- Remote telephone training session to explain what has been configured and how to use it.

What's not included

- The Adobe Sign license. You will need to purchase this from Adobe directly.
- Any significant changes to your existing PDF documents.

XERO INTEGRATION WITH ZAPIER
$1,400 – 1 day consultancy

Automatically push invoices from Workbooks to Xero, saving you time rekeying the data.

By leveraging the power of Zapier, we can configure Workbooks to automatically push all 'posted' invoices into Xero. The integration will create an invoice in Xero and will map account codes and VAT rates. It will also create new customer accounts in Xero if they don't already exist.

What's included

- Set up Workbooks to support pushing invoices from Zapier to Workbooks.
- Rename tax schemes to match the schemes in Zapier.
- Add custom fields to support accounting codes for products and invoice line items.
- Set up and test the Zapier connection.
- Set up Zaps.
- Set up error reporting.
- Remote telephone training session to explain the functionality and how to identify issues.

What's not included

- The Zapier license ($20 per month paid plan needed).
- Xero license.

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REPORTING WORKSHOP
$2,100 - 1.5 days of consultancy

Exploit the power of Workbooks reports and dashboards and truly track key performance indicators within your organization.

We will run an on-site workshop with you and your team, helping you build reports and dashboards in real-time.

What's included

- An initial remote consultation to understand more about your reporting needs, followed by a consultant reviewing your database to understand your data structures.
- An on-site workshop where a consultant will sit with you and your team, helping you build the reports and dashboards you really need.

What's not included

- Any significant changes to the Workbooks configuration.

WORKBOOKS HELPING HANDS
$2,800 - 2 days consultancy

Make the most of your Workbooks investment. Identify quick wins and accelerate time to value.

We will run an initial remote consultation so we can understand your requirements in more detail, after which a consultant will log in to your database and familiarize themselves with your current configuration.

This will be followed by an on-site workshop where we discuss your requirements and make changes in real-time to your configuration and reporting, with you in attendance.

What's included

- Remote consultation.
- On-site customer workshop and follow-up.
- Simple changes to reporting and configuration.

What's not included

- Any significant changes to the Workbooks configuration or building automations.

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Workbooks.com

ADVISORY PACKS
From $825

Get help with the set-up and deployment of Workbooks. Our experts are on hand to help you get the most from your CRM. Advisory Packs are designed for customers looking for help with smaller projects or enhancements.

What's included
Each pack is worth a number of points that break down into hours, which you can use as and when you need them, for any of the following:
- Implementation advice and guidance.
- Workbooks configuration.
- Data migration.
- Report writing.
- Developing automation scripts.
- Updating/amending templates.
- Importing data.
- Training.

Packages available

8 points (equivalent to 0.5 days)	$825
16 points (1 day)	$1,450
32 points (2 days)	$2,900
48 points (3 days)	$4,350
64 points (4 days)	$5,800
80 points (5 days)	$7,250

CUSTOMER SUCCESS PLUS
From $7,680 per annum

Maximize your return on investment in CRM and accelerate time to value. Keep the CRM momentum within your organization, improve your deployment, continue adding value and drive adoption further.

What's included
Customer Success Plus involves you contracting (annually in advance) for a minimum number of consulting days per quarter, at a significantly lower daily rate.

You get assigned a dedicated consultant who will help you implement a roadmap of improvements to Workbooks, for example: writing reports, training, adopting some new functionality in the product which you just haven't had time to get to grips with, changes to automated scripts and much more...

Packages available

2 days per quarter	$960 per day	($7,680 per annum)
3 days per quarter	$960 per day	($11,520 per annum)
4 days per quarter	$890 per day	($14,240 per annum)
5 days per quarter	$890 per day	($17,800 per annum)
6 days per quarter	$890 per day	($21,360 per annum)

WORKBOOKS
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GDPR READINESS
POA

If you already use Workbooks as the hub for all of your customer centric engagements, why not leverage the power of Workbooks CRM to track GDPR Compliance too?

This packaged service will help you to get up and running with CRM best practices that'll help you manage your GDPR obligations after May 25th 2018.

What's included

- Configuration of your system to help track Suppliers.
- Configuration of your system to help you track Rights & Freedoms requests through to resolution.
- Training of your GDPR team to ensure they know the benefits of using Workbooks CRM for managing GDPR Compliance in these areas:
  - Manage Suppliers within Workbooks using Organizations and Activity records.
  - Create new Cases for GDPR purposes received by Email or Phone.
  - Easily get approval for any GDPR related issues.
  - Manage GDPR Rights & Freedoms Requests from approval through to resolution.
- Reporting and Dashboards to help manage your business' GDPR Obligations and Compliance easily straight from within your CRM.

ABOUT WORKBOOKS

Workbooks delivers cloud-based CRM and Marketing Automation applications to the mid-market, at an affordable price. Workbooks extends beyond sales, marketing and customer support to also include order management and fulfillment, invoicing and supplier management, at a price which is typically 50-70% less than solutions such as Salesforce or Microsoft Dynamics.

Workbooks joins up the entire organization around data and processes, promoting teamwork and collaboration. It provides a single 360 view of customers and the information is accessible anytime, anywhere. Productivity is increased, operations are streamlined, insightful decisions are made and the business is better equipped to differentiate against the competition.

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www.twitter.com/Workbooks

www.facebook.com/WorkbooksCRM/

success-usa@workbooks.com

+1 860 438 6647